



Australian  
National  
University

# Digital literacy training

---

## **Introduction to NVivo14**

Project Set-Up & Coding  
2024



---

# Table of Contents

---

<b>Introduction to NVivo: Project Set-Up &amp; Coding .....</b>	<b>1</b>
Opening NVivo and Multi-Method Sample Project.....	1
Compatibility with other versions of NVivo .....	1
Mac vs PC Versions of NVivo .....	1
Recommended Steps in Setting up an NVivo Project .....	3
The NVivo Workspace .....	4
<b>FIRST STEPS: Define Cases &amp; Data Files, Create Classifications, Attributes and Relationships.....</b>	<b>5</b>
What are Cases? .....	5
What are Classifications?.....	5
What are Attributes & Values? .....	5
Creating Classifications and Associated Attributes.....	6
<b>FILE AND CASES AREAS Importing Files.....</b>	<b>7</b>
Importing Data Files into the NVivo Project.....	7
Creating Cases.....	8
When Importing Data Files .....	8
After Importing Data Files .....	8
Manually Coding to Cases.....	8
Applying Classifications & Associated Attributes.....	9
Importing Classification Sheets .....	9
Adding External Data Sources .....	10
Importing Social Media and Web Pages with NCapture .....	10
Web Pages .....	10
Twitter.....	11
YouTube.....	11
<b>CODES AREA Create Codes .....</b>	<b>11</b>
What is a Code?.....	11
Sentiment Codes.....	12
Other Contextual Codes .....	12
Opening a Code to View All the References Coded to It .....	13
Reference Tab Information .....	13
Creating Parent Codes .....	13
Creating Child Codes .....	14
Merging Codes.....	14
Aggregation.....	14
Changing Code Information .....	14
Creating Folders for Codes.....	15
Using Mind Maps to Create Codes.....	15
<b>Coding Your Data.....</b>	<b>16</b>
What is Coding Context? .....	16
What is "Coding-On"? .....	16
How to Code a Section of Text to a Code.....	16
How to See What Has Been Coded within a File.....	17
Highlight .....	17
Coding Stripes .....	18
Coding Audio and Video Data Files.....	18
Coding & Annotating Pictures .....	18
Uncoding Within Codes and Data Files.....	19
<b>[OPTIONAL] Creating Transcripts.....</b>	<b>19</b>
Transcribe Mode.....	19
Normal Mode .....	20
Dividing Media .....	20
Importing Transcripts .....	20



## Introduction to NVivo: Project Set-Up & Coding

---

*Lumivero's* NVivo software can do a phenomenal number of things to help you analyse your qualitative data. It can also help you analyse a large variety of data types: text, audio, video and pictures. This course will show you how to use the **essential tools** available in NVivo for qualitative data analysis in an academic context. For further information about NVivo's full capabilities, please refer to the **NVivo 14 help** website:

PC: [help-nv.qsrinternational.com/14/win/Content/welcome.htm](http://help-nv.qsrinternational.com/14/win/Content/welcome.htm)

Mac: [help-nv.qsrinternational.com/14/mac/Content/welcome.htm](http://help-nv.qsrinternational.com/14/mac/Content/welcome.htm)

This session will cover:

- Recommended **steps** in setting up a Research Project in NVivo.
- How to set-up **Case Classifications, Attributions & Values** to use as break-down variables (a.k.a. independent variables) for future analysis.
- How to set-up **Data File Classifications, Attributions & Values** to use for bibliographies and refining searches and analyses.
- How to create, view and organise coding schemes in the **Codes** area.
- How to **Import Data Files**.
- How to create **Cases** and apply **Attribute** values.
- How to **manually code** and **uncode** text, sound, picture, and video.

### Opening NVivo and Multi-Method Sample Project

When you **open NVivo** for the first time, it will ask you to create a **User ID**: enter your name and initials (must be unique to the Project). This is very important when you're collaborating with others. You also have the option to log in to your account, but this is not necessary unless you have bought some of the extra products available.

At the top of the **Start Screen** there is an option to open a **New Project** or a **Sample Project**. For this course we will primarily be working with the **Multi-Method Sample Project** as it has the broadest range of data types to explore. It is a two-year study (2008-2009) documenting community perceptions of development and land-use change on coastal communities in the Down East area of Carteret County, North Carolina, USA.

The **Automated Insights Sample Project** provides an example of NVivo's Automatic Coding functions, and there are 3 others that can be downloaded from the NVivo website: **Literature Review, Mixed Methods** and **Survey** designs.

### Compatibility with other versions of NVivo

**If you are collaborating with others on the same NVivo Project, you must use the same version of NVivo** (e.g., NVivo 14). Projects created in older versions of NVivo can be opened in newer versions. However, they will need to be **converted** to the newer format in order to do so. Once this new converted file is saved, it cannot be opened in older versions of NVivo again.

### Mac vs PC Versions of NVivo

**You can work on the same project on different operating systems (PC and Mac)** although it's not recommended. It involves a lot of extra steps, compromises and careful attention to version control (i.e., which is the newer version of the Project and does it contain all the changes made in previous versions?). All you need to do is convert your Windows Project to a Mac format and vice-versa when transferring Project data between computers.

---

**NOTE: Mac versions of NVivo do not have the same capabilities as Windows versions** (e.g., you cannot Create Cases at import on Macs) and there are features in Windows versions that are not supported in Mac (see below). When converting a Windows project to Mac, **these features are not deleted, they are just hidden.**

These features are:

- Compound and group queries
- See-also links (if you edit a file with hidden see-also links in NVivo Mac the links are deleted)
- Annotations in audios, videos, pictures and datasets
- Dynamic sets
- Framework matrices
- Sentiment coding
- Relationship coding
- Social network analysis
- Cluster analysis
- Project maps
- Reports

**TIP: If you use a Mac but also need to use these features,** create a Windows copy as described below, use a PC to do what you need to, then export or move the resulting data to retain easy access to information from the hidden features in the Mac version. For example, Export a picture of the **Cluster Analysis** to a picture file, or **Framework Matrix** to a spreadsheet file. Any Codes you create using **Sentiment Coding** can be copied and pasted into another folder in the Codes area, which can be seen in Mac.

- **How to convert from Mac to Windows:** On the **Share** menu tab, click on **Copy Project** then under **Copy to** choose your conversion format (Windows or Mac) and **Location** to save the new file. Then click **OK**.

**These course notes apply specifically to the PC version of NVivo,** so if you are working on a Mac and have trouble finding what you need please refer to the online NVivo 14 Help for Mac:

[help-nv.qsrinternational.com/14/mac/Content/welcome.htm](http://help-nv.qsrinternational.com/14/mac/Content/welcome.htm)

## Recommended Steps in Setting up an NVivo Project

It may seem counterintuitive, but setting up an NVivo Project is more efficient if you create your research project variables BEFORE importing any data (**PLEASE NOTE:** this only applies for Windows versions of NVivo).

### The recommended steps are as follows:

1. Identify what your **Cases** will be (your units of measurement, such as people/ reports/ organisations). Then set up your **Case Classifications, Attributes** and **Values** (e.g., "independent" or grouping variables) for later analytical comparisons in the **Cases Area** (e.g., age groups, gender, states/territories).
2. Set up your **Data File Classifications, Attributes** and **Values** in NVivo to keep track of bibliographical information and help refine future analyses (e.g., analyse survey data separately from interview data) in the **Data File Area**.
3. Import the **Data** you need to analyse in NVivo in the **Data Files** folder and create **Cases** and assign **Classifications** simultaneously upon import. **Please note** that this is not an option in Mac versions, **Cases** must be created manually for each file after import.
4. Any peripheral information you wish to have easy access to but are not necessary for analysis can be imported as **Links** in the **Externals** folder (e.g., emails, articles, websites, YouTube videos). Doing this also provides you with a **New Document** (that can be analysed in NVivo) in which to type up your notes for each linked file.
5. Open the **Data** and **Case Classification Sheet(s)** and assign **Attribute** values to your **Data Files** and **Cases**. You can also import this information from a spreadsheet if you have a key variable, such as ID, with which to match Value information to Cases.
6. Create **Contextual Codes** if needed (e.g., a Code each survey question) using **Autocode**.
7. Set up your **Research/Thematic Variables** in the **Coding** Area in the **Codes** folder, and other Contextual Codes (e.g., Attitude: positive, negative, neutral).
8. (Optional) Prepare your project for **collaboration**, in **Sets** and/or **Memos**.

### Recommended preparation of text documents:

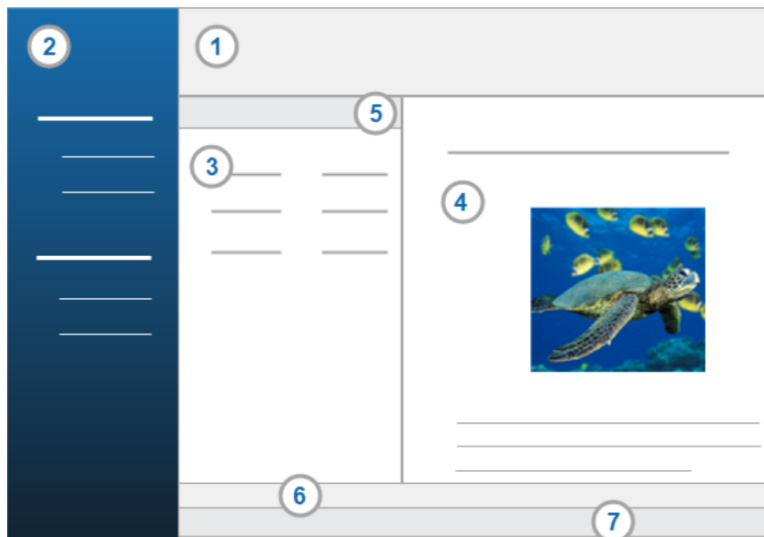
If you will be analysing text documents, try to organise them as follows to make creating **Cases** easier later on:

- each **Case** in a **separate file**, or
- use **Heading Styles in Word** to help you identify the **Cases** within your document, and use the **Autocode** function to create cases automatically.

It is also handy to use **Heading Styles in Word** to help you identify discrete sections of a document, such as the questions or areas of questioning responded to in an interview. This allows you to **Autocode** and analyse your data question by question, rather than person by person, which is often more efficient.


## The NVivo Workspace

The **Navigation View** is where you can easily navigate the different Areas of your NVivo Project. When you click on an **Area** in the Navigation Pane, a list of folders in that Area appears at the top of the pane. When you click on a folder, the list of items it contains is presented in a window to the left called the **List View**. When you open an item in the List View, its content appears in the **Detail View**. The **Ribbon** contains commands in tabs. The **Find Bar** is a shortcut to search for items your Project. The **Quick Coding Toolbar** has shortcuts for coding your data. The **Status Bar** provides information for the Project Item you have open.



1. Ribbon
2. Navigation View
3. List View
4. Detail View
5. Find Bar
6. Quick Coding Bar
7. Status Bar

**Note:** Throughout using NVivo you'll find that your best-friend is **Right-Clicking** with your mouse in the relevant area (or **CTRL left click** on Mac, or **double-finger-tap** on trackpads). This gives you a context-dependent short-cut menu with all the appropriate options for the space/object clicked. This way you don't have to remember which menu tab has the function you need.

**Tip:** The **Navigation View** can be hidden to make more room on the screen by clicking the tiny arrow symbol at the top right-hand side of the View. To bring it back, click on the NVivo symbol .



## FIRST STEPS: Define Cases & Data Files, Create Classifications, Attributes and Relationships

Defining the higher-order information about your **Data Files** and **Cases**. By defining the Case and File classifications, as well as their attributes and values FIRST, you are able to classify your data DURING the import process (in PC versions only). This saves you a lot of time, particularly because it has the added benefit of ensuring you plan your project thoroughly before you start coding.

### What are Cases?

Technically, **Cases** are the *units of measurement* for your research. They can be individual people/focus groups/articles/etc. in your project design. For example, if you want to be able to say: "N number of *People* said Y", then *People* will be your **Cases**. You can have multiple types of **Cases** if you have more than one unit of measurement (e.g., a **Case** type for *Person* and a **Case** type for *Focus Group*).

In order to help NVivo identify individual **Cases** for analysis, you need to create a **Case Code** for each one and code all information relating to that case to it. This can be done either automatically upon import, or manually like most coding. **Case Codes** also allow you to see all the content relating to each case (e.g., everything person A said) when you open them. Cases are filed as **special types of Codes** in the **Cases** folder in the **Cases Area**. **Please note** that **Case Codes** also qualify as **general Codes** (like *Themes* and *Sentiments*) when calculating the number of Codes associated with your data (e.g., Barbara's interview has 43 Codes associated with it, and the Case Code *Barbara* is one of them despite not being a *thematic* one).

### What are Classifications?

There are two types of **Classifications** you need to create in your project:

- **File Classifications** – for each type of **Data File** in your project (e.g., *Interview*, *Article* or *Web Page*). You will often only have one type of data file. Sometimes File Classifications are not even necessary, as they are only really useful for searches within NVivo.
- **Case Classifications** – for each type of **Case** in your project (e.g., *Person*, *Focus Group*, *Policy*). You will often only have one type of Case. Case Classifications **are necessary** unless you are not interested in enumerating your data or analysing it at different levels (e.g., comparing age groups or summarising what a particular group says).

### What are Attributes & Values?

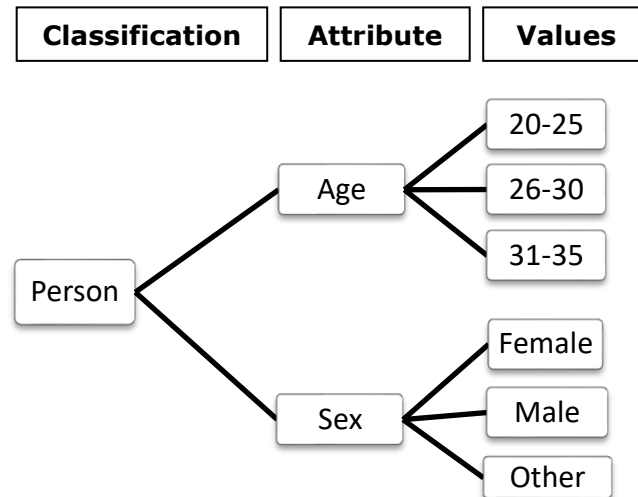
For each **Classification** you will usually need to create a set of unique, mutually exclusive Attributes:

- **File Attributes** – the relevant details about your data and other files that you need to keep track of (e.g., bibliographical information, interview details such as time place and interviewer). **Note:** can import bibliographical information from referencing programs such as EndNote.
- **Case Attributes** - the relevant breakdown variables (a.k.a. **independent variables**) you will need for analysis. E.g., if you believe that there will be differences due to the states/territories in which the *Cases* live, then state/territory should be an *Attribute* of the *Classification* for *Person*.

Within each Attribute you will usually define a set of possible **Values** to use for analysis (e.g., within *Sex* the options are *Male*, *Female*, *Other*). This allows you to choose values from a drop-down menu rather than having to type in all your data.

**Note:** Attributes must be mutually exclusive because you cannot select more than one Attribute Value per Case or Data File. For example, if you have a Case Attribute for *Fishing* with values for *Commercial* and *Recreational*, if a Case fits into both categories you cannot tick both boxes. In this instance you have to create an Attribute for *Commercial Fishing* and another for *Recreational Fishing* with values of *Yes* and *No*. It is also possible to create one **Fishing** Attribute with the options: *Recreational Only*, *Commercial Only*, *Both*, and *Neither*. However, this makes it difficult to analyse all *Recreational* Fishers together for example.

Below is an example of a **Case Classification** for *Person* with *Age*, *Sex* and *Occupation* **Attributes**. This will allow for comparison of the themes that emerge in your data between 3 age groups and sexes.



## Creating Classifications and Associated Attributes

You set up **Case Classifications** in the **Cases area**, and **File Classifications** in the **Data Area**. The process is identical so we will look at how to create Case Classifications only here.

Example: Create a Case Classification and Attributes for *Philosopher*.

On the **Home** tab, click on the drop-down menu for **Case Classification** (or you can right-click on the Case Classifications folder in the Cases area on the Navigation Pane). Create a **new Case Classification** called "*Philosopher*" and give it an (optional) description. This will create the classification only, and then you can add its **Attributes** next. Click on the *Philosopher* Attribute and on the **Home** tab click on **Case Classification** again then select **New Attribute** (you can also do this by right-clicking on the icon for *Philosopher* and selecting **New Attribute**). Give it a name and (optional) description, such as *School of Thought* on the **General** tab. Select its value **Type** from the drop-down menu below (here **text**). On the **Values** tab, you can set up the different schools for the attribute: click **Add** and enter a new value in the row that appears (e.g., *Existentialism*) assign a description and/or colour if you wish, then click **Add** again to add the others. Then click **OK** when you've finished.

**Note:** if you accidentally created a blank row in this list of Attributes **it will not let you click OK and continue** so you have to delete it.

**Deleting and reordering Attributes:** Click on the blank grey box on the left-hand side of the row you want to remove or delete to select it. Then then click on the appropriate button below (remove, move up or move down). There is also a **Sort** function (alpha-numeric).

## FILE AND CASES AREAS

### Importing Files

This is where you'll store all of your qualitative data files for analysis (e.g., interviews, surveys results). There are 3 **Data Area** folders:

- **Files:** All the data files you want to analyse in NVivo should be stored here, in the Project itself.
- **Externals:** You can create links here to websites (e.g., YouTube, Wikipedia pages) and your own files stored elsewhere on the same computer outside of the NVivo Project. It automatically creates a text file associated with the link, in which you can write notes or memos about it. These are codable in NVivo and can be very useful for **Literature Reviews** (e.g., code your journal article notes in NVivo to make compiling them easier for write-up).

**HANDY HINT:** NVivo analyses data files quicker and more easily with less data to search through in a Project. You can save links to the material not needed for analysis in the **Externals** folder OR if you want to use NVivo for your **literature review**, create a separate Project for that. Your Codes can easily be imported into new Projects (covered in *NVivo Advanced* course) so you can have the same coding scheme for both.

You can see the data files already imported into the Project by clicking on the **File** folder and the list of files will be displayed on the right in the **List View** windowpane. To see the actual data within the file, double-click on the file and it will open up in a new windowpane called the **Detail View** on the right-hand side of the screen.

New folders can be created within the Data Area by right-clicking on the **File** folder, selecting **New Folder** and giving it a name (e.g., "Test Folder") and (optional) description. You can also create new Internal Documents by right-clicking in the **List View** and selecting **New Internal** and new **Document** (new audio and video files will still need to be imported). Give it a name and (optional) description.

### Importing Data Files into the NVivo Project

You can import data files in the following formats in **NVivo**. They are grouped together into 3 categories of options:

- **Files:** text, audio, video, picture.
- **Survey (spreadsheets):** Excel, \*.txt, \*.csv, Qualtrics, Survey Monkey
- **NCapture:** You can use the **NCapture extension** for Chrome and Internet Explorer v.11 to take data from webpages and social media feeds as PDF files. You can also download Tweets from **X** (formerly known as Twitter) as spreadsheets for analysis (with or without ReTweets).
- **Notes & Email:** Import text files as Memos instead of files, Evernote, OneNote and Outlook files.
- **Classifications:** Import Classification, Attributes and Values from Excel or SPSS.
- **Bibliography:** Citavi, Mendeley, EndNote, Zotero and RefWorks files.

**HANDY HINT:** You can select multiple files and import them into NVivo at the same time (although datasets must be imported one-by-one). However, you will need to define the file properties after import, and NVivo will use the file name as the name of the Data File/Case (this can be changed later).

## Creating Cases

When each data file represents one Case in your project, you can automatically create a **Case** for it during import (PC versions only) and NVivo will code all of the text etc. in the file as belonging to that Case. For **Mac users**, you will need to create Cases for each file after import.

If you have **more than one case in one file**, you will need to use another method to code the relevant information to a **Case**. The easiest way is to identify content relating to each case using **Heading Styles** in a **Word** document transcription template (or retrospectively in NVivo), and then using the **Autocode** function in NVivo to automatically code that information for you (see *Autocoding* in the *Creating Codes* section). Otherwise, you will need to manually code all the data manually.

### When Importing Data Files

Example: Importing a \*.doc file belonging to one **Case**

In **Navigation View**, click the name of the **File folder** in which you want to import the data file (e.g., **Internals**). On the **Import** tab, click the icon for the type of data you want to import (e.g., *Items*). Select the file you want to import, then **OK**. If this file belongs to one Case (e.g., *Tony*), tick the box to **Create a Case for each imported file** and you can also select the radio button to **Add to an existing classification** to classify all the documents appropriately. Then click **Import**.

To assign **File Classifications** to the imported file(s), select the files you want to classify and right-click on the selection. Choose **Classification** and select the appropriate File Classification from the list. You can also create **Cases** from the files here and assign **Case Classifications** at the same time if you haven't done this during import.

**HANDY HINT:** Audio, Video, Dataset and PDF files need to be edited before import. It's also good idea to spellcheck documents before importing also, although there is a spellchecking function in NVivo.

### After Importing Data Files

Example: Creating Cases for multiple imported files which belong to one **Case** each

In **Navigation View**, go to the **File folder** containing the documents that you want to create cases for. Select all the appropriate files which ideally belong to the same **Case Classification** (e.g., *Person*). Right-click on the selection, and choose **Create As**, then **Create as Cases**. Select where you want to save them (usually the higher-order Cases Folder). In the drop-down menu below, choose which Case Classification to add them to (e.g., *Person*), then click **OK**.

### Manually Coding to Cases

You can create Cases before or during the coding process. To create a new Case BEFORE coding, in the **Navigation View** select the **Cases folder** in the **Cases Area**. Then you can either go to the **Create Menu** tab and select **Case**, or right-click in a blank space of the List View pane and select **New Case**. Provide the new case with a Name and description (optional), then click on the **Attribute Values** tab. Select the appropriate **Case Classification** (e.g., *Person*). You can assign all the appropriate **Attributes** in the area below now, or it may be easier to do that from the **Classification Sheet** later. Then click **OK**. You need to "Code" all the data relating to that **Case** manually (see next paragraph).

To create a new Case DURING coding, open a data file and use the mouse (by clicking and dragging) to select the first section of content that belongs to one case. Right-click on that selection and choose **Code Selection**. Then click on the **Cases** folder. In the right-hand windowpane, select **Create New: Top-Level Case** and it will create a new Case "folder" for the Case. Give it a name (e.g., *Interviewee 1*) then click the big blue button that says **Code**

**Selection to Interviewee 1.** You will then need to assign a **Case Classification** to that new case, as described next.

## Applying Classifications & Associated Attributes

When you have imported your Data Files and Cases in the Project you need to associate them with their relevant **File and Case Classifications** then assign **Attribute** values. If you haven't already assigned a **Classification** to your Cases during import, do this by selecting one or more **Cases**, right-click on the selection and go to the **Classification** section of the menu and choose the appropriate one (e.g., *Person* or *Journal Article*). Once the Files/Cases have been classified, they will then be available for classification in the **Classification Sheet** which is found in the **Classifications** Area of the Navigation View.

Find the relevant **Classification** (e.g., *Person*) and double-click on it to open the **Classification Sheet** (or right-click on the Classification and select **Open Classification Sheet**). This will produce a new tab with a spreadsheet in the **Detail View**. The columns represent each **Attribute** and rows represent each Data File/Case. Select the appropriate Attribute values in each column for every Data File/Case in each row (either using drop-down lists or typing them in).

**HANDY HINT:** If you need to apply the same value to multiple consecutive Cases in the Classification Sheet, you can copy a cell with the relevant value and paste that value to multiple cells after selecting them using the **shift + arrow** keys or **ctrl + click** for non-contiguous items (**Note:** you cannot do this on Macs).

## Importing Classification Sheets

The following information applies for both Importing File and Case Classifications. I will only describe the importation of Case Classifications here. You can perform this process before or after creating Cases in your project, you just need to ensure any existing Cases have the **exact same name** (identical sentence case etc.) as the Cases in the ID column of the imported Classification Sheet. Then NVivo will apply the attributes and values to the appropriate Cases automatically.

In your **spreadsheet** file, make sure the **first row** (and only the first) of the worksheet contains the Attribute names (e.g., Sex, Age) and the following rows only contain the data you wish to import (no annotations etc.). The first column should contain the identifier for each Case (e.g., ID number/Name). **Case Codes** will be created for each value in this column if they don't exist already or the information will be matched to existing Cases. **Attributes** will be created and named after each remaining column heading and the **Value** options will be based on the values entered in each column.

In NVivo, on the **Import** tab, click on **Classifications** and select **Import Classification Sheet** for Excel or \*.txt or \*.csv files (or right-click in the List View of the Case Classifications folder and select Import Classification Sheet). **Note:** You can import SPSS \*.sav files but there is no import wizard for those, so consider exporting your SPSS file to \*.xlsx or \*.csv and import that instead. Click **Browse** to select the file then click **Next**. Select the **Classification Type** (e.g., **Case Classification**). If this is the first time you're importing information for Attributes, make sure the **Create New Attributes** box is ticked (and/or you can update existing ones by adding new information, or replace attribute values if you need to correct information). Then click **Next**.

If you want to create a **Case** (or add information to existing ones) for each row of data, represent the Cases as either:

- **Names** if you have only one type of Case for free-standing Cases.
- **Hierarchical Names** if you have more than one type of Case. This will create Cases as lower-order Cases nested under a higher-order Parent Case to distinguish them from other types of Cases.

Tick **Create new cases if they do not exist** already and click **Next**. Select how you have represented **Unassigned** and **Not Applicable** values in your spreadsheet from the dropdown menus (e.g., *(None)* for **Unassigned** and *N/A* for **Not Applicable**). If you have date data, specify how it was entered into the spreadsheet so that NVivo can recognise it. Then click **Finish**. The Classification will appear in the **Case Classifications** area.

## Adding External Data Sources

When you have large files, such as audio and video, it's usually a good idea to add them to the project as an **External Data Source** rather than import them as part of the project. This reduces the sizes of the Project file and saves on computing power when running analyses. Creating externals for journal articles in a **Literature Review** is often a good idea, so that NVivo can help you compile *your own summary* notes on each in a meaningful way, rather than compiling multiple disparate snippets of text from the original articles (see *NVivo Advanced* course notes).

**Please note** that you will not be able to use NVivo to code or search the content of external sources of data, only the notes or comments you linked to them.

In the **Files** area click on the **Externals** folder, right-click in the blank space in the **List View** and select **New External**. Enter a name (best to use the name of the file for ease of reference later) and optional description on the **General** tab. On the **External** tab choose the **External Type** (e.g., File Link) then click the **Browse** button to find the file. You can give it an optional location description and select the **Contents** Type from the drop-down menu.

**Please note** that the file MUST go where the NVivo Project goes and never be filed elsewhere, or the link will break.

On the **Attributes Values** tab select a **Classification Type** if appropriate (e.g., *Reference*) and assign its relevant **Attributes**. Then click **OK**. A new blank NVivo document will be created and automatically open with the same name as the file. It will be in edit mode, and you can enter your notes or other content related to the external file which can be coded later on. If you want to open the actual external file from within NVivo to see it, right-click on the external data source and select **Open External File**. It will open it in the appropriate default application. If you want to open the NVivo notes file associated with the external only, select **Open External** instead.

## Importing Social Media and Web Pages with NCapture

There is an add-on for **Internet Explorer v.11** and **Google Chrome** web browsers called **NCapture** for NVivo. It automatically converts web pages to pdf and **X Tweets** (formerly known as Twitter) into spreadsheet tables ready for analysis. Please note: Facebook no longer permits their data to be captured in spreadsheets.

### Web Pages

Example: Capturing and importing a Wikipedia Page in Google Chrome.

To save pages as pdf and import them into NVivo, go to the relevant webpage in **Google Chrome** or **Internet Explorer** (e.g., a Wikipedia Page) select **NCapture** by clicking on the icon in the menu area of your web browser and click **Web Page as PDF** as the data source type (or **Article as PDF** if you only want to save the text of the article. Please note: sometimes the text you see on a webpage is actually an *image* of text, and as such cannot be found in searches). Change the **name** if you wish and (optional) enter a **description** and linked memo. You can also ask it to code the source at import by adding terms to the **Code at Codes** box. Then click **Capture**.

In NVivo, click on the Data folder in which you wish to import the data. On the **Import** menu tab, click **NCapture**. Select the appropriate option (*All captures not previously imported, All or Selected*). If your file is not already visible in the box below, click the **Browse** button and find the file you wish to import. Then click **Import**.

## Twitter

If you are on a **Twitter Feed** page, you can use **NCapture** to save the tweets as a spreadsheet (dataset) or the page as a web page. Follow the same procedure above and select the appropriate option **Tweets as Dataset** either including or excluding ReTweets, or **Web Page as PDF**. You can merge social media datasets into one table for ease of analysis (takes note of where the files came from as Codes). Tick the Merge matching social media datasets (including previously imported) check box, and any matching Facebook datasets are merged together (if they contain wall posts for the same User, Page, or Group).

## YouTube

You can capture the **Video only, Video and Comments** or the **Web Page as PDF**. When you use NCapture to capture video in YouTube, it creates a video source file which is essentially a shortcut link to the video in YouTube (essentially an **External Source**) which can be played within NVivo. Please note: if the video is removed from YouTube, you will not be able to play it. If you also capture the YouTube comments this creates a dataset within NVivo as an Internal data file which can be analysed separate to the video file.

## CODES AREA

### Create Codes

---

This Area contains all the information relating to the coding you have conducted to analyse and summarise your qualitative data. It has folders for:

- **Codes:** Codes (which were previously called "Nodes" in NVivo) are essentially folders containing everything you have assigned to each code in your coding scheme (text, audio, video etc.).
- **Relationships:** A way to record the relationships you note between Project items (e.g., *Daniel **is married to** Maria*) for a rudimentary Social Network Analysis, or to collate evidence for relationships between Codes (e.g., *Real Estate Development **impacts** Water Quality*).
- **Relationship Types:** This is where you set up the types of relationships you want to note and apply to NVivo project items (e.g., ***is married to, grew up in***).

## What is a Code?

When you conduct qualitative data analysis, you will have a coding scheme to help organise your data into research themes. For each code in your scheme, you need to create a "Code" in NVivo, and also Codes for contextual information like sentiment. These are NVivo project items (like folders) that **collate the selected pieces of text, audio and video data that you code as evidence for and against the Themes you look for and discover in your data**. For example, all the text/audio/video in the *Sample Project* which refers to infrastructure has been **selected and coded to a Code** called "*Infrastructure*". When you open the "*Infrastructure*" Code, you will see a summary of all the data that was coded to it in the **Detail View** on the right-hand side. Each section of text, audio, and video is called a **Reference**.

Codes can be:

- **Free** - stand-alone topics/themes (e.g., *Balance*).
- **Tree** - hierarchical grouping of Codes indicated by a +/- symbol on the left-hand side of the Code icon to expand and collapse the tree. The higher-order Code is termed the "**Parent**" and a lower-order Code "**Child**" (e.g., *Economy* is a Parent Code and *Agriculture*, *Tourism* etc. are its Children).

#### HANDY HINTS:

1. Consider **setting-up Codes before coding your data**; this will help to ensure coding doesn't go beyond the scope of your project. They can always be changed, merged, added to and reorganised as you go along. You can also use the **Mind Map** feature in NVivo to create your initial Code structure [*more on this later*].
2. **Try to restrict Tree Codes to the "Child" level**, and don't go beyond to "Grandchildren" or "Great-grandchildren" unless you absolutely have to. It makes analysis simpler and limits your Codes to only the essential ones to help you summarise and analyse.
3. **Never duplicate Codes** – there is no need to, as segments of data files can be coded to multiple Codes and you can analyse them separately or the overlap between them also.
4. You can **import Codes from another NVivo Project** (e.g., from a Literature Review) if you want to reuse the same/similar coding scheme.

When you look at your Codes in the **List View**, it also provides a summary information about each:

- **Files:** the number of Data files that have content coded at that Node.
- **References:** the number of sections of text audio and video etc. coded to that Node.

And other potentially useful information.

## Sentiment Codes

Your **Thematic Codes** are essentially the ones in your Coding Scheme. **Sentiment Codes** are useful for keeping track of the sentiment underlying the text: whether an attitude, feeling, opinion or judgment expressed was positive, negative, neutral or mixed. You can even note the implied sentiment from body language in video data.

NVivo now has a feature which it tries to identify and **Autocode Sentiment** for you. **I do not recommend its use for academic research**, as it is unreliable and identifies a lot of "false positive" results. There is also a great risk of "false negatives": sentiment that was not captured in the Autocode at all. If you do choose to use it, you will need to read through the results to verify the validity of the coding and make the appropriate changes.

**Sentiment Autocode** results are saved in the **Sentiment** folder in the Codes area. You can also code to these if you wish, but it only has *Positive* or *Negative* sentiments with 2 options for strength of sentiment: *Very* or *Moderate*. Please note: you cannot add to these options or change them. It's therefore **best to create your own sentiment Codes** in the Code area.

## Other Contextual Codes

You should also consider creating **Contextual Codes** can help make coding and analysis of those Codes easier. Such as a **Code** to collate all responses to *Question 1* in an interview, or Discussion around Topic A in a Focus Group. That way you can code your data by responses to each question, rather than interview by interview. This has the advantage of limiting the number of themes you will be looking for in the data to a **smaller, relevant subset**, rather than keeping an eye out for all of themes in the entire coding scheme. As a consequence, you will be more vigilant in identifying these themes also.



## Opening a Code to View All the References Coded to It

The **List View** the **Codes Area** provides information regarding the number of **Files** that are coded at the Code (e.g., how many text, audio and video files), as well as the number of **References** (separate sections of text, audio and video). You can see the actual content of the Code by double-clicking on the row (e.g., *Infrastructure*) or right-click on the row and select **Open Code**. The content is displayed the **Detail View**. Here you will find **vertical tabs** on the far right-hand side for:

- **Summary** - the files in which the references are coded and how many.
- **Reference** - the textual data coded with hyperlinks to the original Data file, as well as "coverage" details (see below) and reference numbers.
- Other tabs with thumbnail links which compile information from **Text / PDF / Picture / Audio** etc. files separately.

### Warnings:

1. If the Code is a **Parent** and has **Aggregation** turned on [*more on this later*], then coding at any of its **Child Codes** is included in what you see when you open the Code and is also included when calculating number of **references, percent coverage**, etc.
2. If you code **2 sentences next to each other separately**, you **MUST** include the space between them, otherwise this is counted as **2 references**.
3. If **2 people code the same sentence** this is also counted as **2 references** (e.g., the *Balance* Code has 12 separate references, but the count is 16 due to double-coding 4 of them: note: "*References 1-2*" in the headers).

## Reference Tab Information

- **Header:** Name of the File coded with a blue hyperlink to that file, number of references in it coded at the Code and percent of coverage (see explanation below).
- **References:** Number of times the reference was coded at the Code (>1 if multiple users coded the same section of text).
- **Coverage:** The percentage of the file coded to this Code: e.g., X% of the characters/seconds in the File coded at this Code (i.e., 4.77% of letters, spaces, and punctuation marks in *Barbara's* interview transcript were coded to *Balance*).

**Number of References** and **Coverage are problematic metrics**. They are rarely if ever a good statistics to use as an indication of the importance/salience of a theme, because there **meanings are not clear-cut** which means these calculations are examples of **false precision** (e.g., there is often no meaningful difference between 10% and 20% coverage, or 10 vs 20 references).

For example: In terms of **coverage**, John's interview has 10% coded to X, and Jane's has 30%. Was X more important to Jane? Jane was a person of few words, said little overall and only one sentence related to X. Whereas John was generally more talkative and repeated himself a lot and spoke on the same point about X three different times.

In terms of **Number of References**, John made the same one point 3 times – it was arguably an indication that it was important to him. But it might have been just as important to Jane, but she was less verbose and mentioned it only one time.

## Creating Parent Codes

You can create Codes prior to coding if you wish; it isn't necessary, but it does help to ensure coding doesn't go beyond the scope of your project. In the **Codes** area of the **Navigation View**, click on the **Codes** folder. Right-click in the **Detail View** and select **New Code**. Type in the code's label (e.g., *Schools of Thought*) and add a description (**recommended** as this text will be added to the "Codebook" that you can export later). Another method to create **Codes** is to click on the **Create** tab, then click **Code**. You can also use the **Mind Map** function to create multiple hierarchical Codes (more on this later).

**HANDY HINT:** It's good practice to clearly define what a code means, provide examples and any "rules" for applying it to the data. Add this to the **description** of the Code in NVivo to ensure reliability and validity of your coding scheme. All descriptions can be exported as a "**Codebook**" when you have finished coding to create a clear record of what the code means and how it should be applied in practice. This can be used for coding reliability checks and be included in reports, so that readers can assess the meaning and validity of the code.

**If you want to order your Codes** in a different way (NVivo's default is alphanumeric), use a numbering system (e.g., *1 Attitude, 2. Economy*).

## Creating Child Codes

Right-click on the **Code** you want to turn into a "Parent" (e.g., the *Schools of Thought*) and select **New Code**. Give the new Code a name (e.g., *Rationalism*), add a description, then click **OK**. You can also do this by selecting the **Parent Code** and on the **Create** tab, click on **Code**. If you want to turn a **free Code** into a **Child Code**, you can right-click to cut and paste it into the intended **Parent Code** and selecting **Merge into New Child Code**, or by clicking the **free Code's** icon and dragging it into the **Parent Code**.

If you decide you've made a mistake, you can make the **Child Code a free Code again** by cutting and pasting the **Code** icon to the blank space at the bottom of the Codes list (or by clicking and dragging it to the higher-order **Codes** folder in the **Codes** area).

## Merging Codes

You can also **merge** similar Codes together so that everything that was coded at one Code will become coded to the Code it is merged with. Select and cut the **Code** you want to merge into another "**Target Code**" (e.g., in the *Economy Code* cut *Fishing Industry Decline*) then right-click on the **Target Code** (e.g., *Fishing or Aquaculture*) and select **Merge into Selected Code**. Select the appropriate option(s) provided (e.g., **Merge Child Codes** as well) then click **OK**.

## Aggregation

It's a good idea to consider if and when you want to aggregate the coding in your Child Codes with that of the Parent Code for analysis. Right-click on the **Parent Code** (e.g., *Economy*) then select **Aggregate Coding from Children** to either tick or untick the **Aggregate** box. If aggregation is turned on (ticked), then all the Child-specific coding (e.g., *Ecosystem Services, Environmental Change, etc.*) will also be included in the Parent Code's coding (e.g., *Natural Environment*) during analysis and its number of references and files.

**Warning:** If you want to **include the coding from and Grandchild Codes etc.**, you MUST turn aggregation on for ALL the Parent Codes in the hierarchy. E.g., if you want the Parent Code *Economy* to include coding from its Child Codes (*Agriculture, Fishing or Aquaculture etc.*) and its Grandchildren (*Fishing Industry Decline*) and its Great-grandchildren (*Due to cost of living etc.*), aggregation MUST be turned on for all the Parents in the hierarchy relationship (*Economy, Fishing or aquaculture, and Fishing industry decline*).

## Changing Code Information

If you need to change the name of a Code, simply click on the name of the Code a 2<sup>nd</sup> time and you can change the text. You can also change the name and anything else about the Code (e.g., the description) by right-clicking on it and selecting **Code Properties**.

## Creating Folders for Codes

You can create folders to organise your Codes in some meaningful way (e.g., create a folder to store your survey question Codes). Right-click on the **Codes** folder to create a new one within it (e.g., *Context Codes*). You can further organise Codes by clicking their Code icons and drag them in and out of folders (e.g., drag *Attitude* into the *Context Codes* folder).

## Using Mind Maps to Create Codes

NVivo **Mind Maps** help you to create a diagram of your coding scheme and its hierarchical structure. As an added bonus, you can also convert the mind map "ideas" into actual Codes in the Codes area with the click of a button.

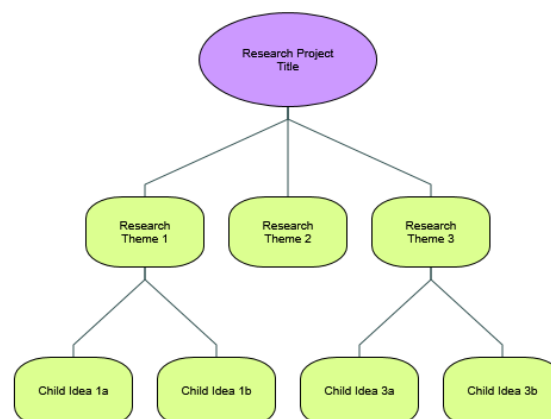
On the **Explore** tab click **Maps** and select **Mind Map**. Enter a name for the map in the **Name** box, and an (optional) **Description**, then click **OK**. An initial shape is already prepared for you to enter a label for the main idea of the map (e.g., *Research Project Title*). The Child ideas from this main shape will essentially be the Parent Codes of your coding scheme (otherwise you need to have one map for each Parent Code which is inefficient).

If you want to add a "Child" idea (e.g., a shape connected to the main idea) click on the shape and on the **Mind Map Tools** tab, click on **Child idea** (alternatively right-click on the shape and select **Child idea** from the menu). Then give it a label (e.g., *Theme 1*). If you need to relabel it, just double-click on the word to edit. You can add a **Sibling idea** (a shape at the same level in the hierarchy) in the same way.

If you want to create an unconnected shape that will become a free Code in your Codes folder, click **Floating idea** on the **Mind Maps Tools** tab. **Note:** you will not be able to add Siblings or Children to the shape.

You can change the colour of a shape by clicking on it and changing the colour from the **Fill** drop-down menu on the **Mind Maps Tools** tab. You can also change the layout, size, and text formatting on this tab. When you're happy with your Coding structure, select **Create as Codes or Cases** from the **Mind Maps Tools** tab, click on the Codes folder and then **OK**. They will then appear in the **Code** folder of the **Codes** area.

**Note:** When your Codes are created, I recommend removing the required "*Project Title*" Code by first making the Parent Codes (which will appear as Children under your title) true Parents. To do this, cut and paste them to the blank space in the list. Then you can remove the superfluous *Project Title* Code when it is free of dependents.



## Coding Your Data

### What is Coding Context?

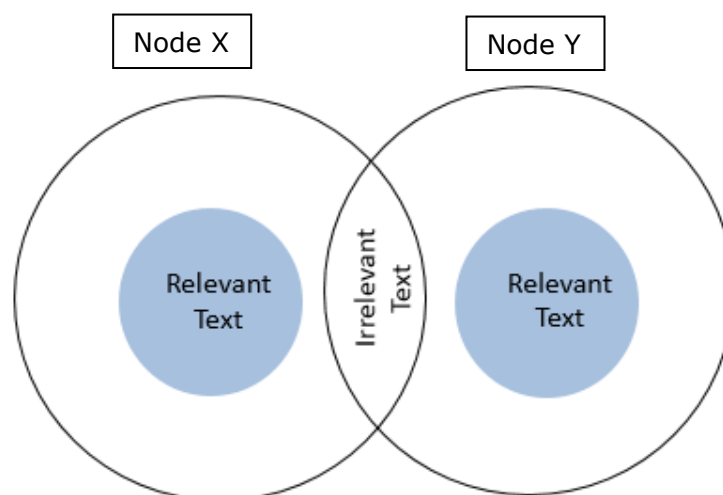
When you begin to code your data it's important to consider **how much information to include in your Codes**: individual words, partial/whole sentences, paragraphs or even the whole document. Ideally you should code as much content needed to understand why it was coded in that way.

For example:

*"I find television very educating. Every time somebody turns on the set, I go into the other room and read a book."* – Groucho Marx

If you select and code ONLY the first sentence of this quote to the Code **TV is NOT Educational**, you might later think that the coding was inappropriate, because when you open the Code to review it, only that sentence would appear. Therefore, when coding it is important that you include an appropriate amount of context in order to justify why you coded it the way you did – not only to yourself, but to anyone else who might review your analysis.

On the other hand, **including irrelevant information** in the context of your Code can be problematic for analysis. Particularly if you want to identify overlapping content between Codes and quantify your qualitative data. In the example below, each Code contains a substantial amount of irrelevant text, and there is a spurious relationship between them because only the irrelevant coding overlaps.



### What is "Coding-On"?

Often one sentence will be a relevant reference for more than one Code. Coding-on refers to coding the same content at a second, third or fourth Code etc. (this is done in the same way as regular manual coding). **This is why you never need to have duplicate Codes.**

### How to Code a Section of Text to a Code

#### **Method 1: Manual coding.**

Open a document from the **Data** area and **Files** folder of the **Navigation View**. Click and drag your mouse to highlight the section of text that you would like to code under one or more Codes. Right-click on the selection and choose **Code Selection** from the menu. Then choose one or more of the existing **Codes** in the list: to select more than one hold down the **control key and click** on the **Codes**. Then click the big blue **Code selection to...** button to confirm coding. There is also an option to **Code to Recent Codes**, which provides a shortened list to select from, and you can code to **Cases**, **Sentiment** and **Relationships** too.

If you need to create a **new Code**, select the higher-order Codes folder (or a Parent Code you want to create a Child for), click the **Top-Level Code** (or **Child Code**) icon in the **Create New area** at the top right of the new window. This will add a new blank Code to the list, which you can rename and select. **Please Note:** you cannot do this if you have already selected a **Code** or Codes to code the selection to. If this is the case, unselect them, create your new code, then reselect all the appropriate ones to code to.

### **Method 2: Drag and Drop Coding.**

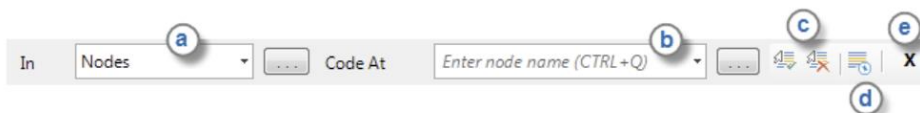
If you have your Codes displayed in the **List View** next to the **Detail View** of your file/document, you can select the content you want to code then **drag and drop** the selection to the Code itself. The selection will still be active in the text, so you can drag it to multiple Codes consecutively.

### **Method 3: Quick Coding Bar** (see illustration below).

At the bottom of the window, there is a short-cut bar for coding. Select what you want to code, then choose where you want to code it in the **In** drop-down menu (**a**) (**Codes, Cases** or **Relationships**). You can then click on the box with the ellipsis (...) next to this menu and select the appropriate **Codes** from the list.

If you are already in the process of coding to particular **Codes**, you can select recent Codes from the 2<sup>nd</sup> **Code At** drop-down menu (**b**). Then select the appropriate **Code** from the list. If you want to choose more than one, click on the ellipsis (...) next to this menu and tick all the appropriate **Code** boxes.

If you want to create a **new Code**, type in the name for that Code in the **Code At** box. Then click on the **Icon** for **Code at Current Code** to code it.



There are also icons for **Uncode at Selected Code** (**c**) and to make a Code from the selected text (a.k.a. **Code In Vivo**) (**d**) which automatically chooses the highlight text as the Code's name (up to 256 characters) and adds the text to that Code as well.

## **How to See What Has Been Coded within a File**

### **Highlight**

There are 2 options for **seeing what has been coded**. The first is the **Highlight** method, which is useful for keeping track of where you are up to when coding. It doesn't tell you *how* it's been coded. Open a **Data** file (or **Case**) and the **Document** (or **Case**) menu tab will automatically become available. Click on the **Highlight** drop-down menu and select the appropriate option:

- **All Codes** (less useful) will highlight everything that is coded to a Code in yellow (including **Case** Codes, so everything will be yellow).
- **Selected Items** (more useful) will highlight the coding for a more limited range of Codes which you choose from the menu. Relevant ones to the file will be in **bold** type, and you need to expand Parent Nodes to see relevant Child Nodes too. To reset these choices at any time, select **Modify Selected Items** from the **Highlight** drop-down menu.

## Coding Stripes

The second option not only **shows you what has been coded but how it's been coded** at multiple Codes. On the **Document** (or **Case**) menu tab click on the **Coding Stripes** drop-down menu and select the appropriate option (e.g., **Selected Items**). Colour-coded stripes will appear in another window on the right-hand side of the screen; one for each relevant Code in the document. These tell you how the sections have been coded and the coding density at each part of the document. When you click on one of these stripes it will highlight the coded text for that Code in the whole document as you scroll through (e.g., *Real Estate Development*). You can right-click on a strip to hide it from the list. To unhide a strip, select **Modify Selected Items** from the **Coding Strip** drop-down menu and re-tick the appropriate Codes. Be careful NOT to uncode the section this way, because it will uncode the entire document from that Code, not just the section of text that you can see, using coding stripes.

## Coding Audio and Video Data Files

You can code audio and video Data files in two ways: by selecting the text in the written transcript, just as you would for normal text documents, or by selecting sections of the media file via the timeline.

Example: Code the audio data file for the Interview *Helen*.

Open the audio file for *Helen* in the *Interviews* folder. If you want to code using the timeline, click and drag on the timeline to select the portion of timespan you want to code (e.g., 0 to 30 seconds). Right-click on the selection and choose **Code** (or you can click code on the **Audio Tools** tab). Choose the Code(s) you want to code the section at, alternatively click **New Code** if you need to create a new one.

If you have a transcript as well, the portion of the transcript which is coded in the timeline is indirectly coded also (but the transcript will not be shown in the Code when you open it). When you open the Codes, you will see a link to the section of audio and its related transcript on the **Audio** tab. To listen to the section of audio coded to the Code, in the **Audio/Video** menu tab, just click the **Play/Pause** button. If more than one section of text has been coded, right click on that section and choose **Play/Pause** from the menu.

**Extra Information on Working with Audio & Video:** You **do not need to transcribe in order to code** Audio and Video files. However, remember that NVivo cannot search audio and video content when conducting Word and Text Search Queries. In addition, it becomes more difficult to verify the accuracy of your coding (i.e., it can take much more time to listen to the media file than skim the transcript).

## Coding & Annotating Pictures

Coding pictures it is similar to tagging people on social media. Sometimes you may have to use this method when coding PDFs if they haven't been through optical character recognition (OCR), which means that the text cannot be recognised as text, so selection is limited to the area it occupies in the document.

Example: Coding a boat in the picture file *Competing Water Uses*.

You can code pictures in three different ways: by selecting a region of the picture, coding text in the **Content** column of the picture log (if you have one) or by coding the entire picture file in one go. Again, coding the log is identical to coding normal text data. If you want to code the whole picture to a Code, right-click on the file itself and select **Code**.

Open a picture file (e.g., *Competing water uses* in the *Area and Township* folder) and the **Picture Tools** tab will become available. If you want to code only a section of a picture (e.g., identify one boat in a photo), click and drag to choose the section you want to code. On the **Picture Tools** tab under click **Code** (or right-click on the selection and choose Code).

PDF documents can also be coded as though they were pictures (e.g., areas of the document rather than words in the document). Right-click in the **Detail View** and select **Section Mode** then **Region** instead of **Text**.

Example: Creating a Picture Log.

Open the Picture File and on the **Picture menu** tab, select **Edit**. Click and drag to select a region of the image, and on the **Edit menu** tab choose **Insert Row**. It's like inserting a row in a transcript, but it's attached to the coordinates you have selected. The coordinates appear in the **Region** column, and you can describe it in the **Content** column.

## Uncoding Within Codes and Data Files

If you make a mistake when coding, or if there are references found in Codes or the results of Queries that do not really fit in with the theme behind the Codes, you can always uncode that section of text/picture/video/audio. Highlight the reference section to be uncoded, right-click on the selection and choose **Uncode**. All the Codes that this section of text is coded at will be in black text and you can tick all the Code boxes you wish to uncode the text at. If you are uncoding from *within* an open Code, any only wish to uncode it from that Code, all you need to do is click the icon for **Uncode from this Code** on the **Code Tools** tab (or right-click on the selection and choose it from the menu).

As mentioned previously, you can also uncode **ALL** the references in one data file at a Code using the **Coding Stripes**, by right-clicking on the coding stripe for the appropriate **Code** and selecting **Uncode** (use with extreme caution).

**HANDY HINT:** Uncoding is easiest to do when you are reviewing the coding you have done within a Code, because you can select **Uncode at this Code** rather than having to constantly look for the relevant one in the list.

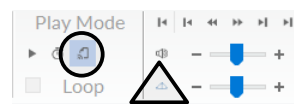
## [OPTIONAL] Creating Transcripts

You can create transcripts in 3 ways: **Transcribe Mode**, **Normal Mode** and by **dividing** the media into sections.

### Transcribe Mode

Example: Transcribing the audio file for *Helen*.

By using the **Transcribe Mode**, you can play, pause, forward or rewind as you transcribe, and each time press stop, NVivo creates a new transcript row and timestamp. Open the file and on the **Audio/Video menu** tab click the **Edit** icon at the top right of the menu. On the **Edit menu** tab in the **Play Mode** area, click the **Transcribe** icon (circled below). To slow down or speed up the recording, click and drag the indicator for **Play Speed** (in the triangle below). You can also adjust the volume using the indicator with the speaker symbol.



Click **Play/Pause** to begin playing the Data file and transcribing. As soon as you do this a new transcript entry will be added. Enter your text in the **Content** column (you can pause, rewind and skip back while transcribing at any time). Click **Stop** when you have completed a transcription entry. This will add the end time to the **Timespan** field. When you press **Play/Pause** again a new transcription row will appear with a new starting timestamp. Continue playing and stopping in this way until you have finished transcribing. Then turn off **Transcribe Mode** on the **Media** tab and under **Play Mode** click **Normal**.

## Normal Mode

Normal Mode allows you to select a section of the timeline to create a row in the Transcript. Click **Edit** on the **Audio/Video menu** tab, then on the **Edit menu** tab select **Normal** by clicking the play button icon in the **Play Mode** area. Click and drag on the timeline to select the timespan you want to transcribe. On the **Edit menu** tab, click the **Insert Row** icon and select **Insert Row**. This will produce a new row in the transcript with the start and end times you selected. You can also add a new entry without a timestamp this way (e.g., to make general comments) simply by typing in the next entry box.

## Dividing Media

You can divide the media into sections by adding multiple transcript entries of equal duration. E.g., divide a 30min video into 2min sections then comment on dialogue/events in each. Click **Edit** and choose the **Normal** mode again (see above). On the **Edit menu** tab, click the drop-down menu for **Insert Row** and select **Insert Rows**. In the **Add Transcript Rows of Duration** field enter the duration of each entry (e.g., 2:00 to create entries of 2mins duration). In the **From Start Time** field, enter the start time for the entries (e.g., 00:00:00). In the **To End Time** field, enter the end time for the final entry (this will be pre-populated with the actual end time of the audio file, but you can change this). Click **OK**.

## Importing Transcripts

If you want to import Transcripts the files must be in one of the following formats: \*.txt, \*.csv, \*.tsv, \*.rtf, \*.doc or \*.docx. They need to be formatted in one of the following ways:

- Paragraphs (not lines) that start with valid timestamps: 0:02 Text...
- Paragraphs without timestamps.
- A table with a timestamp column, an optional speaker's name column and a text column, and the first row contains Headers.
- Tab- or comma-separated text, and the first row contains Headers:  
0:02 Text  
0:02,Text

To import the transcript for a video or audio file, open the relevant file you want to add a transcript to, then click on the **Edit** icon. On the **Edit** tab, click on **Import Rows to Import Transcript Entries**. In the **Import from** box, click on **Browse** and select your file. If your transcript is in the form of a table AND the first column has an ID for the speaker (which matches with Cases in your Project), select **File includes identifier column** box. If your transcript is in a Word table, \*.csv or \*.tsv file with **one row per line**: Select **File includes header row** if it has one. In the **Transcript Field Mappings** select the fields you want to import. You MUST include a field for **Timespan** and another for **Content**. You can select **Fill Down** to if you want blank cells to be populated by the preceding cell (e.g., if the Speaker Name is left blank until it changes).