

NVIVO Cheat Sheet #1: Creating & Saving an NVIVO Project

Create a Project

- 1) From your desktop, find the NVIVO logo (blue balloon) and double click on it.
- 2) Wait for it to open.
- 3) If it is your first time, you will be prompted for your User Name and initials. Complete these fields. (For user name, use your OtterID and for initials use the first letter of your first name and the first letter of your last name).
- 4) The NVIVO Welcome Dialog will open.
- 5) On the File tab, click under Get Started, click on New Project.
- 6) The New Project dialog box will open.
- 7) Enter a name for the project in the title box. (i.e., Maria NVivo project)
- 8) Enter a description of the project in the Description box. (i.e., Files for 362L)
- 9) Click Ok.
- 10) It will open.

NEXT, Upload the Interviews

- 1) In the List View area on the left, go to Data.
- 2) Under **Data** go to **Files**.
- 3) Put your cursor on **Files** and right click then select **New File → New Document**.
- 4) When prompted, create a name for the new document (“interview 1”) and write a brief description in the field provided in the dialog box. Select **OK**.

Save a Project and Set a Reminder to Save

- 1) On the **File** tab, click Save
- 2) To save the project to a new directory, click on **File → Copy Project**
- 3) Click **Copy to** and use **Browse**

- 4) To set the reminder, go to the File tab again and click on **Options**. Under options, click on **Notifications**.
- 5) Select the **Enable project save reminders every** check box and increase or decrease the value in the minutes box.

Uploading Articles

- 1) Open your Nvivo file.
- 2) Wait for it to open. This may take more than 20 seconds.
- 3) In the List View area on the left, put your cursor on **Data** and right click then select – **New Folder**. When prompted, create a name for this folder such as “Literature”.
- 4) To upload the articles, click the Import tab – **Files**.
- 5) Choose the articles and change the file name to the article title.

Create Annotations

- 1) When you open any pdf file, **PDF** tab will appear, click **PDF** and make sure that **Annotations** under the **View** section is checked.
- 2) Highlight text, right click, choose **New Annotation**. Alternatively, you can hit **Ctrl + Shift + A**.
- 3) Write your notes here.

Reminder:

While annotations are useful for making notes about a particular phrase or marking content for follow-up, memos might be better for capturing your reflective thoughts about an article.

Create Memos

- 1) Put your cursor on an article (under Files – Literature) and right click then choose **Memo Link → Link to New Memo**.
- 2) When prompted, create a name for the new memo (memo on [article name here]). Keep the description field empty. Select **OK**. In this way, your memo is linked to a specific article.

- 3) To open an associated memo, put your cursor on an article (under Files – Literature) and right click then choose **Memo Link → Open Linked Memo.**

Save a Project and Set a Reminder to Save

- 1) On the **File** tab, click Save
- 2) To save the project to a new directory, click on **File → Copy Project**
- 3) Click **Copy to** and use **Browse**

Save a Project to Google Drive

- 1) Go to the Google Drive class folder
- 2) Upload your Nvivo file (whenever you revise it) to the relevant weekly subfolder.