

# **NVivo Course**

Data Analytics Service

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# 1 Welcome

## 2 Welcome to the NVivo Course

This course is designed to provide you with a **comprehensive introduction to NVivo**, with a specific focus on working with **interview transcripts** for qualitative analysis.

Whether you're a beginner or someone revisiting NVivo after a break, this tutorial walks you through all the essentials, from opening the software to importing and working with your data.

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### 2.1 Who Is This Tutorial For?

- Students or researchers conducting **qualitative research**
- NVivo users working with **interview transcripts, focus groups, or documents**
- Those wanting a **guided, self-paced learning resource**

No prior experience with NVivo is required.

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### 2.2 What Will You Learn?

By the end of this course, you'll know how to:

- Navigate the NVivo 14 interface with confidence
  - Create and manage NVivo projects
  - Create documents directly within NVivo for notes or journaling
  - Prepare and import transcripts for analysis
  - Understand best practices for organising qualitative data
-

## 2.3 What's Covered

This course is divided into the following foundational topics:

- Opening and setting up NVivo
  - Understanding the interface
  - Creating internal documents
  - Importing and preparing transcripts
- 

## 2.4 Who Created This Course?

This tutorial was developed by the **Data Analytics Service** at the **University of Sheffield**.

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## 2.5 How to Use This Tutorial

You can move through the chapters in order or jump to the sections most relevant to your workflow. Each page stands on its own, but they work best as a **step-by-step guide**.

To begin, select a chapter from the sidebar or the **NVivo Basics** section in the table of contents.

---

Let's get started!

## **3 Course Overview**



# 4 NVivo Course: Qualitative Data Analysis with NVivo

## 4.1 Chapters

### 4.1.1 1. Introduction

- What this course is about
- The challenges of qualitative data analysis
- How software can support qualitative research
- Overview of how NVivo supports:
  - Data storage
  - Coding and hierarchical organisation
  - Cases and attributes
  - Memos and annotations
  - Querying and visualisation

### 4.1.2 add setup section?

### 4.1.3 2. Getting Started with NVivo

- Opening NVivo
- Creating a new project
- Understanding sample projects
- Saving and managing your project files

### 4.1.4 3. Help and Support in NVivo

- Using NVivo's built-in Help
- External tutorials and resources
- Where to find community support

#### **4.1.5 4. Navigating the NVivo Workspace**

- Overview of the interface
- Navigation View, List View, Detail View
- Context sensitivity: ribbons and tools
- Tool ribbons and their colour systems

#### **4.1.6 5. Working with Files**

- Creating documents within NVivo
- Importing internal documents
- Supported file types: Word, PDF, Audio, Video, Images, Survey data

#### **4.1.7 6. Making Descriptions on Pictures**

- Describing visual data
- Linking notes to image regions
- Using descriptive metadata for analysis

#### **4.1.8 7. Transcribing Audio and Video Files**

- Transcribing within NVivo
- Working with transcripts only
- Working with media only
- NVivo Transcription Services (if applicable to current version)

#### **4.1.9 8. Notes: Memos and Annotations**

- When to use memos
- Linked vs. unlinked memos
- Annotations: Adding quick comments
- Organising your thoughts and reflective writing

#### **4.1.10 9. Coding: The Core of NVivo**

- Structural coding
  - Classifications, Cases, Autocoding
- Exploratory coding
  - Manual nodes, in-vivo coding, thematic development
- Theoretical coding
  - Node hierarchies, cataloguing, refining codes, team consistency

#### **4.1.11 10. Queries**

- Text searches
- Word frequency
- Coding queries
- Matrix coding
- Crosstabs
- Framework matrices

#### **4.1.12 11. Going Further**

This course is designed as a foundation. To continue building your skills with NVivo, consider:

##### **4.1.12.1 Official NVivo Training**

QSR International offers both synchronous and asynchronous tutorials, including a student-discounted certification path.

<https://www.qsrinternational.com/nvivo-training>

##### **4.1.12.2 Books**

- *Qualitative Data Analysis with NVivo* by Bazeley & Jackson (Sage)
- *The Coding Manual for Qualitative Researchers* by Johnny Saldana
- *Handling Qualitative Data* by Lyn Richards

#### **4.1.12.3 Video Tutorials**

- [QSR International YouTube Channel](#)
- [Graham Gibbs' YouTube](#)

#### **4.1.12.4 CAQDAS Project**

# 5 Installing NVivo

## 5.1 About This Version

The version currently used at the University of Sheffield is **NVivo 14**.

Projects created in NVivo 14 are **not backwards-compatible** with earlier versions.

However, older project files (v12 and earlier) can be safely opened in NVivo 14.

Please make sure you and any collaborators are working on the **same version** to avoid compatibility issues.

---

## 5.2 Accessing NVivo Through the University of Sheffield

To request access to NVivo:

1. Go to <https://www.sheffield.ac.uk/software/>
2. Make sure you're signed in to MUSE with your university credentials.
3. Scroll down to **NVivo** and click on **Request NVivo**.

MS Windows 10	For use on University-managed devices	<a href="#">Request MS Windows 10</a>
MS Windows computer	For a student at the University of Sheffield	<a href="#">Request MS Windows computer</a>
MS Windows library	For a member of the University of Sheffield	<a href="#">Request MS Windows library</a>
MS Windows for Linux (LX) programming	For a current member of staff or student at the University of Sheffield	<a href="#">Request MS Windows for Linux (LX) programming</a>
MS Windows for Matlab	For a current member of staff or student at the University of Sheffield	<a href="#">Request MS Windows for Matlab</a>
NVivo	For a current member of staff or student at the University of Sheffield	<a href="#">Request NVivo</a>
Origin	For a current member of staff or student at the University of Sheffield	<a href="#">Request Origin</a>
SPSS	For a current member of staff or student at the University of Sheffield	<a href="#">Request SPSS</a>
SPSS for Mac	For a current member of staff or student at the University of Sheffield	<a href="#">Request SPSS for Mac</a>
SPSS for Windows	For a current member of staff or student at the University of Sheffield	<a href="#">Request SPSS for Windows</a>
SPSS for Linux	For a current member of staff or student at the University of Sheffield	<a href="#">Request SPSS for Linux</a>
SPSS for Mac	For a current member of staff or student at the University of Sheffield	<a href="#">Request SPSS for Mac</a>
SPSS for Windows	For a current member of staff or student at the University of Sheffield	<a href="#">Request SPSS for Windows</a>
SPSS for Linux	For a current member of staff or student at the University of Sheffield	<a href="#">Request SPSS for Linux</a>

Figure 5.1: Request NVivo through Software Hub

## 5.3 Email Confirmation

You will receive a confirmation email from IT Services after your request has been processed.



Figure 5.2: Email confirmation

## 5.4 Installation Instructions

There are two paths depending on the type of machine you are using.

### 5.4.1 A. University-Managed Devices (e.g. YoYo desktop)

If you are using a University-managed laptop or a desktop on campus:

1. Open the **Software Center** on your device.
2. Search for and select **NVivo 14**.
3. Click **Install**.

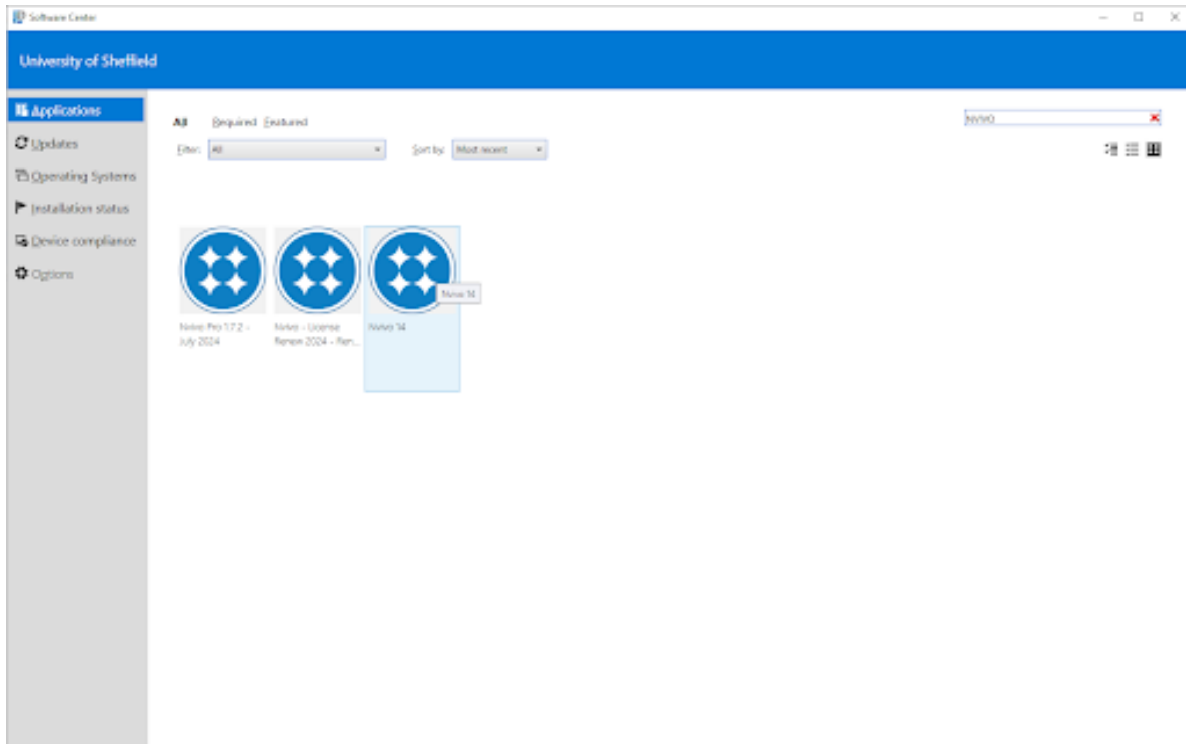


Figure 5.3: Installing from Software Center

### 5.4.2 B. Personal Laptops

If you are using your **own laptop**, follow these steps:

1. Visit <https://lumivero.com/customer-login/>
2. Sign in using your credentials (or create an account).
3. Download the appropriate installer for your system (Windows or Mac).
4. Use the **license key from the university email** during activation.

We cannot guarantee the exact install process for personal machines, so please refer to Lumivero's help pages if needed.

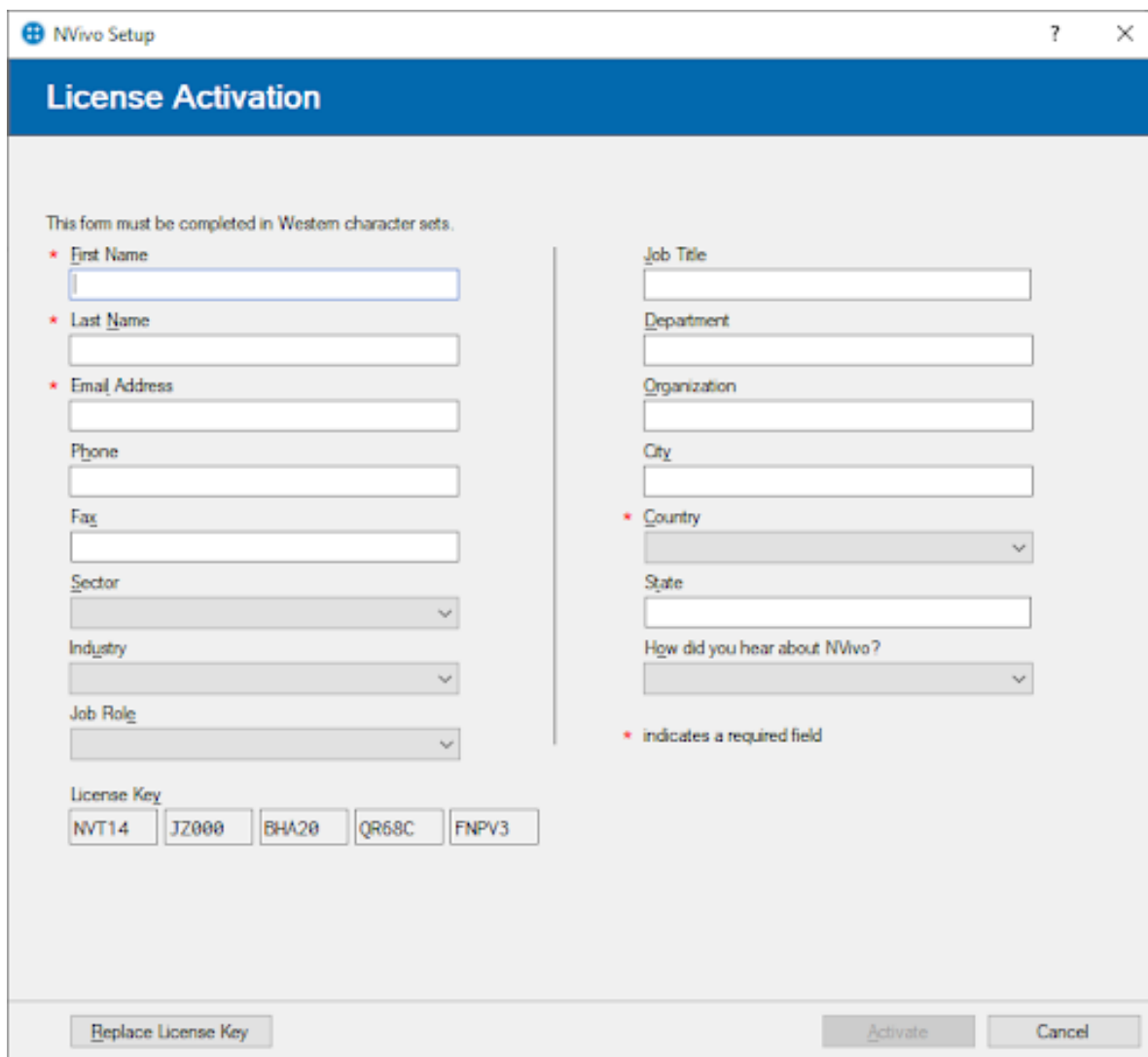
---

## 5.5 Activating NVivo

Once NVivo is installed and you open it for the first time, you'll see a **NVivo Setup** window.

- Fill out the required fields (marked in red)
- Paste in the license key from your confirmation email
- Click **Activate**





The image shows the 'License Activation' window of the NVivo Setup application. The window has a blue title bar with the NVivo logo and the text 'NVivo Setup'. Below the title bar is a blue header with the text 'License Activation'. The main area is light gray and contains a form with two columns of input fields. A note at the top left states: 'This form must be completed in Western character sets.' The left column contains fields for First Name, Last Name, Email Address, Phone, Fax, Sector (dropdown), Industry (dropdown), Job Role (dropdown), and License Key (a row of five buttons: NVT14, JZ000, BHA20, QR68C, FNPV3). The right column contains fields for Job Title, Department, Organization, City, Country (dropdown), State (dropdown), and How did you hear about NVivo? (dropdown). A legend at the bottom right indicates that a red asterisk (\*) denotes a required field. At the bottom of the window are three buttons: 'Replace License Key', 'Activate', and 'Cancel'.

Windows Title Bar: NVivo Setup

## License Activation

This form must be completed in Western character sets.

**Required Fields:**

- \* First Name
- \* Last Name
- \* Email Address
- \* Country

**Other Fields:**

- Phone
- Fax
- Sector (dropdown)
- Industry (dropdown)
- Job Role (dropdown)
- Job Title
- Department
- Organization
- City
- State (dropdown)
- How did you hear about NVivo? (dropdown)

**License Key:**

NVT14 JZ000 BHA20 QR68C FNPV3

\* indicates a required field

Buttons: Replace License Key, Activate, Cancel

Figure 5.4: License activation screen

## 5.6 Final Setup

Once activation is complete, you will be asked to fill in your personal details. Complete the fields and press **OK** to finish setup.

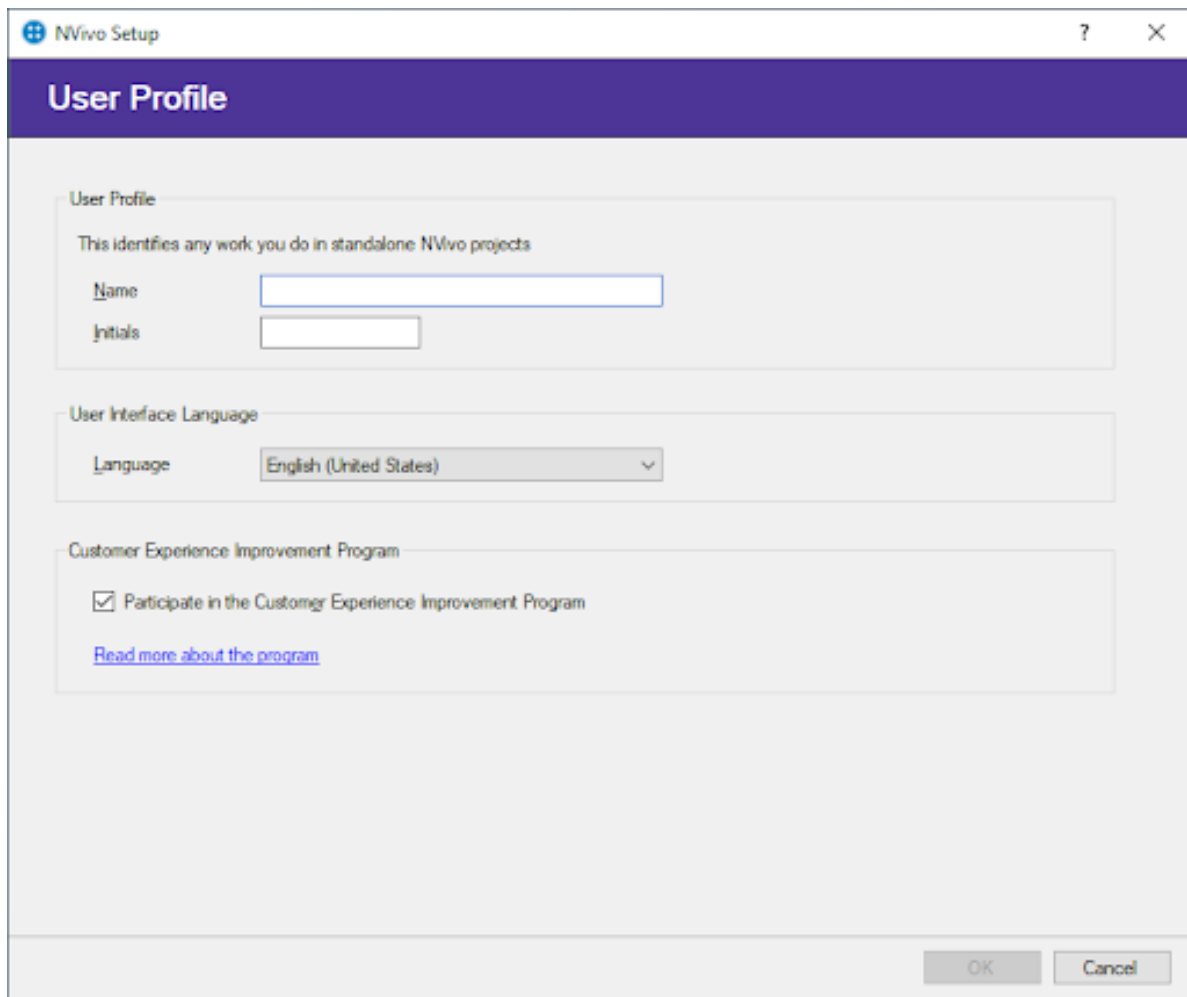


Figure 5.5: Final setup screen

---

You're now ready to start using NVivo

## **Part I**

# **PART 1 NVivo Basics**

## 6 Opening NVivo and Creating a Project

### 6.1 Opening NVivo

To open NVivo on Windows, go to the **Start Menu**, navigate to the **QSR folder**, and select **NVivo 14**. Upon launch, you'll be greeted with a welcome screen.

#### Note

Some options like “Sign In” and “Collaboration Cloud” may not apply to institutional users (e.g., University of Sheffield), and will show a message if not configured.

#### 6.1.1 Useful Areas on the Start Screen

- **Getting Started**

This section includes video tutorials and guides on:

- Preparing transcripts for import
- Formatting survey data for NVivo
- Conducting thematic analysis
- Writing memos or journals

- **Help System**

NVivo uses a **question mark (?)** icon instead of the word “Help”. Look for this icon throughout the software to access help resources.

- **Learn and Connect**

Includes links to NVivo's learning materials and social platforms.

- **Recent Projects**

A quick-access list of projects you've recently worked on.

### 6.2 Creating a New Project

To start working in NVivo, you'll need to create a **project file**. This file will hold all your: - Interview transcripts - Coding - Annotations - Queries - Reports

### 6.2.1 Steps

1. Click the **New Project** button (white button on the left).
2. A dialog box will appear asking you to:
  - **Name** your project
  - **Choose a save location**
  - Optionally, add a **description**

Once saved, your project will open and you can begin importing data or documents.

#### Tip

Use clear, concise project names. For example: `qualitative_study_2025.nvp`

# 7 The NVivo Interface

## 7.1 NVivo Environment Overview

Once you create or open a project in NVivo, you'll see the main workspace — a clean layout divided into useful panes, tabs, and ribbons.

To give you a proper tour, it's easier to use a **sample project** so that the screen contains actual data and features to show.

## 7.2 The Ribbon

The **Ribbon** in NVivo is the toolbar that runs along the top. It contains all major tools and is grouped into several tabs:

### 7.2.1 File (Blue Button)

- Opens the **Project menu**, which allows you to save, close, or copy the project.
- Opens a separate screen (not a ribbon).
- Used occasionally, mostly for file-level operations.

### 7.2.2 Home Tab

- Central hub for common actions:
  - Coding
  - Running queries
  - Viewing data visualizations

### 7.2.3 Import Tab

- Used to bring external content into NVivo:
  - Word, PDF, images, video/audio
  - Survey data (e.g., from Qualtrics)
  - Bibliographic data (EndNote, Mendeley)

### 7.2.4 Create Tab

- Lets you create content **within NVivo**:
  - Documents and memos (basic word processing tools included)
  - Framework matrices
  - Nodes (codes)

#### Tip

You can write directly in NVivo instead of using Word or Google Docs — great for journaling or annotations.

### 7.2.5 Explore Tab

- Access searches and exploration tools.
- Go beyond coding with:
  - Word frequency and text search
  - Cluster analysis
  - Social network analysis

#### Note

NVivo's search and exploration tools have been core to its power since the early **Nud\*IST** days.

### 7.2.6 Share Tab

- Export your work to share with others:
  - Reports as Word or Excel
  - Images of visualizations
  - Codebooks or queries

Note: NVivo doesn't support direct posting to social media or emailing content.

### 7.2.7 Modules Tab

- Integrates with extra NVivo modules:
  - **Transcription service** (automated, paid)
  - **Collaboration Cloud** (not currently supported by all institutions)
  - **Microsoft OneDrive integration**

#### Warning

Always check with your institution about data protection before using cloud-based features like Collaboration Cloud.

## 7.3 Contextual Ribbons

Contextual ribbons appear **based on what you're working on**.

For example, if you're editing a document, you'll see the **Document ribbon** with relevant tools. If you're not in a document, it disappears.

This can be confusing — just remember: **where you click matters**.

## 7.4 Top-Right Utility Icons

At the top-right of the NVivo window, you'll see small icons:

- **Login icon** – Often non-functional in institutional setups
- **Save icon** – Save your current project (like other apps)

---

This completes the visual and functional tour of NVivo's interface.



## 8 Creating a Project in NVivo

### 8.1 About NVivo Projects

In NVivo, everything you work on—transcripts, codes, annotations, memos, and queries—is saved within a **single project file**. Creating a project is the first step before you can begin importing data or doing any analysis.

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### 8.2 Version Compatibility

The University of Sheffield currently uses **NVivo 14**.

Projects created in NVivo 14 are **not backwards-compatible** with earlier versions.

However, older NVivo projects (v12 and earlier) **can be opened** in NVivo 14.

Ensure that everyone you collaborate with is using the **same version** to avoid compatibility issues.

---

### 8.3 Starting a New Project

To begin, open NVivo and click the **New Project** button on the welcome screen.

This opens a setup dialog with several fields to complete.

---

## 8.4 Project Title, File Name, and Save Location

You'll first be prompted to provide a **project title**. This name appears in the NVivo interface.

Then, NVivo will auto-generate a file name (e.g., `My Project.nvp`) and a default save location. You can change these by clicking the **Browse** button:

- **Change the directory** by navigating to your preferred folder
- **Change the file name** directly in the file name field

Example: Instead of `Interviews with Volunteers`, you might save your file as `volunteers.nvp`

Note: Changing the file name does **not** change the project title—these are independent fields.

---

## 8.5 Description and Language

You can also add a short **description** of your project. For example:

“These interviews were conducted in 2024 as part of a qualitative study on student volunteering.”

Then, choose the **Text Content Language** from the dropdown (e.g., **English (UK)**).

---

## 8.6 Autosave and Recovery Settings

After clicking **Next**, you'll see options for how NVivo should handle saving and backups.

- **Autosave** (saves every ~15 minutes automatically)
- **Prompt to Save** at regular intervals (e.g., every 30–60 minutes)

You can change these later in the settings, so don't worry too much about getting it perfect.

Autosave is recommended if you're concerned about crashes or data loss.

---

## 8.7 Finishing Setup

Click **Create Project** to finish the setup.

NVivo may offer to give you a tour of the software. You can skip it or explore it later.

Tip: To avoid seeing the tour again, tick “Do not show tour again” at the bottom-left of the window.

You’re now ready to begin importing your data or creating internal documents in your new NVivo project.

## 9 Creating Documents in NVivo

### 9.1 Why Create Documents in NVivo?

In most cases, you'll import transcripts or notes from external files. But there are a few excellent reasons to create documents directly inside NVivo:

- **Activity Logs:** Jot down what you did in each session for future reference or team communication.
- **Fix Transcripts:** Correct transcription errors *inside NVivo* without re-importing or re-coding.
- **Appendix Material:** Useful for documenting your research process in a structured way.

Example log entries:

16 Aug - Imported volunteer interviews from Melbourne  
19 Aug - First pass of Ken's interview: initial themes  
30 Aug - Ran search for "career", saved query but not results

---

### 9.2 How to Create a Document

There are two main ways:

#### 9.2.1 Method 1: Use the Create Ribbon

1. Go to the **Create** tab in the Ribbon.
2. Click the **Document** button (page icon).
3. The "New Document" dialog appears.

### Method 2: Right-Click in List View

1. Go to **Files** in the Navigation View.

2. Right-click in the **List View** and select:

- **New File > New Document**

This approach is great when the Ribbon isn't visible or responsive.

---

## 9.3 The New Document Dialog

You'll see two fields:

- **Name** – like a filename (e.g., **Activity Diary**)
- **Description** – longer text (e.g., *“Short notes on tasks carried out in NVivo during data analysis.”*)

There's also an **Attribute Values** tab — this is typically **not needed** for journal-like documents.

### Tip

Keep a single document as an internal log to track your project's progress over time.

---

## 9.4 Contextual Behavior

Once you create or open a document:

- The **Ribbon** updates with new tabs:
  - **Document** tab
  - **Edit** tab
- If nothing shows in the **List View**, click **Refresh** or check the filters.

### Warning

Right-click menus and ribbon options depend on *where you last clicked*. If things disappear, check your focus!

# 10 Importing Interview Transcripts

## 10.1 Why Import?

Most researchers transcribe interviews using Word or a transcription service. Rather than copy/paste or retype content into NVivo, you can **import multiple transcripts at once** — clean, efficient, and avoids rework.

---

## 10.2 Recommended Workflow

We recommend a **3-step process**:

### 10.2.1 1. Prepare NVivo to Receive Transcripts

#### 10.2.1.1 Create a Subfolder

- Go to the **Files** section under **Data** in the Navigation View.
- Create a new folder (e.g., **Transcripts**).
- Give it a clear name and description.

Example: > Folder: **Transcripts**

> Description: *“Interviews on volunteering experiences”*

#### 10.2.1.2 Set Up File Classifications (*Optional*)

Useful if you want to attach metadata (e.g., gender, role, location) to each transcript file.

---

## 10.2.2 2. Prepare Your Transcripts

This step makes the import more structured and helps with later analysis.

### 10.2.2.1 Speaker Identifiers

Start each speech turn with a label: - **Int:** Interviewer - **PtA**, **PtB**, etc.: Participants  
- Or use first names (with caution re: bias & anonymity)

```
Int: Can you tell me about your volunteer role?  
Anna: I started volunteering in 2021...
```

### 10.2.2.2 Use Heading Styles

If your interviews follow a structured protocol, use Word's **Heading 1 / 2** styles for questions or sections. This enables **auto-coding** by structure.

### 10.2.2.3 Add Timestamps (for Audio Link)

If syncing to an audio file, insert timestamps like [00:02:15] at the start of each speaker turn. NVivo can use this to sync transcript and audio.

---

## 10.2.3 3. Importing the Documents

1. Navigate to **Files** in NVivo.
2. Click the **Import** tab in the Ribbon.
3. Choose **Documents** and select your transcripts from disk.

NVivo won't know your last used folder — navigate to the correct directory manually.

Imported documents will appear in your project under the selected folder, ready to code, classify, or query.

---

## 10.3 Wrapping Up

Being intentional about how you import and format your transcripts gives you cleaner data and smoother analysis later on.

 Tip

Organize early — future-you will thank you!



## **Part II**

# **PART 8 Notes: Memos and Annotations**

# 11 Creating Notes in NVivo

## 11.1 Why Use Notes in NVivo?

NVivo is more than a place to store interview transcripts and codes—it's also a space to capture your reflections, questions, and insights as you work. Creating **notes, memos, and annotations** helps you document your thinking and track your analysis process.

Notes in NVivo can take different forms: - **Memos**: Formal or structured notes about your data, coding, themes, or methodology - **Annotations**: Quick margin-style notes linked directly to specific text or content

These are essential for qualitative transparency, audit trails, and collaboration.

---

## 11.2 Creating a Memo

To create a standalone memo in NVivo:

1. Go to the **Create** tab on the ribbon.
2. Click **Memo**.
3. A new memo window opens—add a **title, description**, and start typing your content.

You can format text, use headings, or insert links to other items in your project.

Example memo titles: - “Interview Impressions – Participant A” - “Theme: Belonging & Exclusion” - “Codebook Notes – April 2024”

---

## 11.3 Linking a Memo to a Source

You can link a memo to a document or transcript:

- Open the source
- Use the right-hand panel to select **Memo Link**
- Choose an existing memo or create a new one

This helps you keep reflections close to the data they relate to.

---

## 11.4 Creating Annotations

Annotations are like digital margin notes—ideal for quick thoughts or questions as you read or code.

To add an annotation:

1. Highlight the text you want to annotate.
2. Right-click and choose **New Annotation**.
3. Type your comment in the annotation pane.

The annotated text will now show a small highlight and link to your note.

---

## 11.5 Tips for Using Notes Effectively

- Keep a running “Analysis Diary” memo to track what you did and why
  - Use memos to compare cases, codes, or reflect on emerging themes
  - Don’t overthink formatting—memo writing should be flexible and intuitive
  - Use annotations to ask yourself critical questions (“What does this mean?”, “How does this relate to my theme X?”)
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## 11.6 Summary

Memos and annotations are core qualitative tools that help you reflect, record, and think critically about your data. NVivo makes it easy to keep these notes organised and linked to your analysis—all in one place.