

# Introduction to NVivo: Qualitative Coding for Text Analysis

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Northeastern University  
*NULab for Texts, Maps, and Networks*

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during the presentation!*

# Workshop Agenda

- Qualitative Coding: annotating and highlighting sources
- What is NVivo?
- Important vocabulary and functions
- NVivo demonstration

Slides & handouts at: <https://bit.ly/fa23-singer-nvivo>



# Workshop Objectives

- Understand what qualitative coding is and why it can be useful while doing research
- Understand how to use NVivo as a research tool
- Learn the differences between NVivo file types and why knowing this is important
- Learn important NVivo-specific vocabulary to aid independent research
- Practice qualitative coding with interview transcripts



# Qualitative Coding

Qualitative coding is when you create a list of themes, or a **schema**, that you want to highlight in a primary/secondary source. Then, you go through all your sources and highlight particular moments from the text according to those themes.



# Coding in practice

The screenshot shows the NULab interface. On the left, a dark sidebar contains sections for IMPORT (Data, Files, Area and Township, Interviews, Literature, News Articles, Social Media, Survey, File Classifications, Externals), ORGANIZE (Coding, Cases, Notes, Sets), and EXPLORE (Queries, Visualizations). The main area displays a list of names under the heading 'Barbara'. A specific entry for 'Barbara' is selected, showing her quote: "Just so much clear-cutting. It has stopped lately, but a lot of time if somebody wants to make some land ready to sell, they just cut everything – clear-cut everything. Suddenly, it's supposed to be a more marketable piece of property, which I don't agree with. So loss of habitat for small, like the red foxes and lots of other animals. But there's a tremendous amount of loss of habitat from just all this clearing of land. And when there was a lot it going on, you would see foxes just hit in the road a lot because they didn't – they were just displaced. And they were just getting hit left and right." To the right of the quote is a 'CODE STRIPES' panel with three vertical bars: a purple bar labeled 'Coding Density', a blue bar labeled 'Natural environment', and an orange bar labeled 'Economy' and 'Infrastructure'.

**Barbara**

Just so much clear-cutting. It has stopped lately, but a lot of time if somebody wants to make some land ready to sell, they just cut everything – clear-cut everything. Suddenly, it's supposed to be a more marketable piece of property, which I don't agree with. So loss of habitat for small, like the red foxes and lots of other animals. But there's a tremendous amount of loss of habitat from just all this clearing of land. And when there was a lot it going on, you would see foxes just hit in the road a lot because they didn't – they were just displaced. And they were just getting hit left and right.

**Q.5. Vision for the future of Down East**

**Henry**

*What is your vision of how you would like Down East to be in the future?*

**Barbara**

Maintaining the water quality and environmental protection is critical. And because this is an unzoned place, right now, there's some concern that development happen in a way that still protects the environment water quality. Hopefully development is gonna start to become low-impact development as just a matter of course because it's appealing and there aren't really that many downsides to it. And there's a big upside to it. And I would hope that we could find a way to keep commercial fishing viable because I really think it has to do with also our local food security sort of. We have access to all of this abundance and the people know how to gather the food from the waters here. And then increasing the opportunities for locally grown produce – local diverse offerings. We have some and Bettie has one of the major farms here that produces – that has a produce stand.

I would like to see us use our natural renewable resources here in a way that will keep the local community – maximize the resiliency of the local community. Which means developing solar here and also I think with the wind, finding a way to have decentralized power generating systems so that when the grid goes down, which it does a lot down here, we can have these



# What is NVivo?

NVivo is a **text analysis** and **research organization** software that is available through [Northeastern's Student Hub](#)> Resources> IT Services> Software Downloads.

NVivo provides methods for you to annotate and code documents using user-created tags (codes), summarize and visualize these codes, and organize research materials.

NVivo is particularly helpful for organizing and annotating research materials such as:

- Primary sources: any primary sources you may be analyzing such as a letter, field notes, or a document from an archive
- Secondary sources: scholarly articles you read for the literature review, newspaper articles, book chapters.
- Your own notes about your project (you can even compose in NVivo!)



# NVivo for Annotating & Coding Sources

With NVivo, you can store and organize your **primary** and **secondary** sources together (most file types work, including images).

NVivo also allows you to **annotate** texts and use **qualitative coding** methods to highlight specific texts/images/pieces under themes. Then you can **summarize** and **visualize** these annotations and codes.



# What can NVivo do?

NVivo is designed for qualitative coding research materials, such as survey results, interviews, audio recording, text documents, articles, and other data formats. It also has other functions:

- create projects that store, organize, and code documents/files
- provide a method for you to code your documents with a user-created coding schema (codes)
- query, summarize, organize, and visualize information about your coding
- conduct forms of computational text analysis, like word counts, on the documents, themselves
- conduct social network analysis with social media datasets



# NVivo is NOT crossplatform friendly

The Mac and PC versions of Nvivo—as well as the version numbers—are different and have different file types.

- Mac NVivo projects end in .npvx and can only open that file project type
- Windows NVivo projects end in .npv, but can open both .npv *and* .npvx
- Version numbers (11, 12, 14) also impact which projects can be opened on which platform



# NVivo Vocabulary

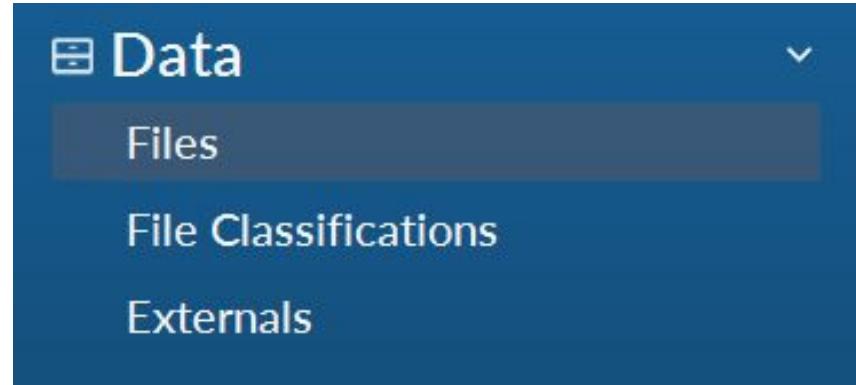
Full definitions available on the handout

- **Data:** your research documents & files
- **Codes:** the ways to annotate the themes/concepts in your research.
- **Nodes:** the themes/concepts that are user-created (NVivo 12 and older only)
- **Relationships:** coding connections between two data items
- **Cases:** units of analysis for your research.
- **Maps:** visualization tool to see connections between the cases and codes
- **Query:** a flexible way to explore and analyze your files, cases, and codes



# Data

The “Data” in NVivo are all the research materials you are using (scholarly articles, transcriptions, newspapers, research notes, etc.).



“Files” will be where you can access all the research materials you have imported into this project.



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# Important Reminders

NVivo can import all types of files, including .docx, .pdf, .doc, .csv, .png, .jpeg, .txt, video/audio files, and more.

You should always **save** your original documents on your local computer or in cloud storage, even if these documents are imported into NVivo. NVivo can store documents, but it is more of an organization and analysis tool, rather than a storage option.

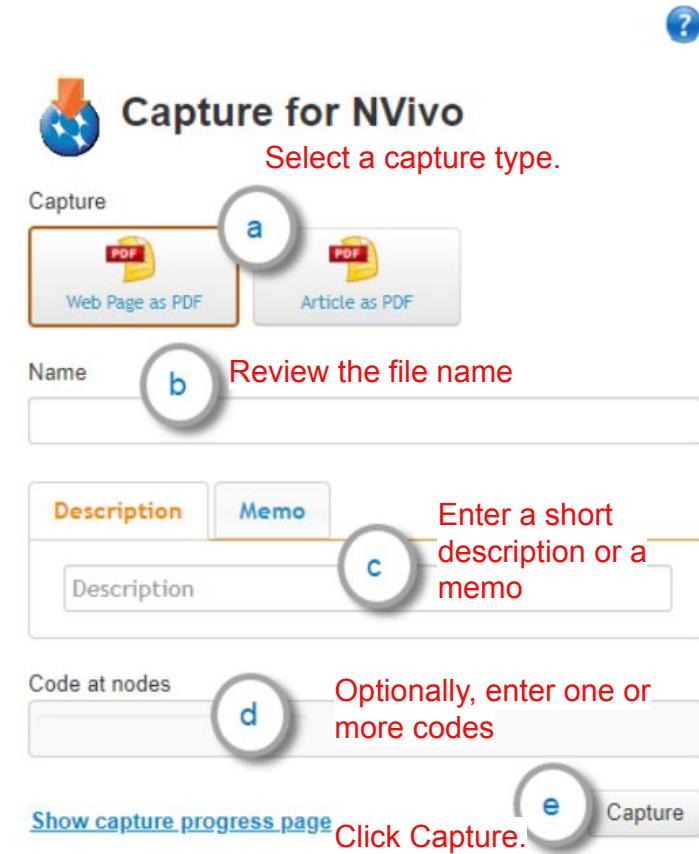


# NCapture

NCapture is a free Chrome extension to capture web pages, online articles, Facebook and Youtube content and add annotations, memos, and codes.

The captured content is saved as an NCapture file (.nvcx) which you can import into your NVivo project.

Please be mindful of obtaining consent for individual information you are capturing.



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# Ethical Considerations

- **Contextual Privacy**
  - When we think about privacy online we want to think of it as contextual. What someone might be comfortable saying in one context might not be something they're okay saying to a researcher.
- **Keeping People Safe**
  - It is risky to publicize the username, profile picture, or exact text of a social media post or profile.
  - To show example posts etc, you can make up your own or heavily redact them.

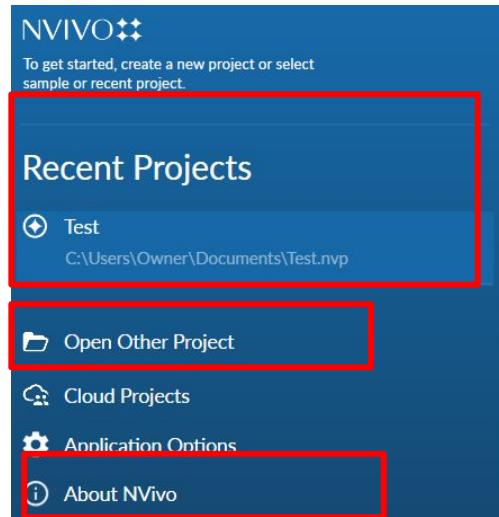


# Anatomy of NVivo: Opening on Windows

The recent projects you opened

Open another project that is not recent

Your version number (you should have version **12 or 14**)



Create a new **project** (stores all your documents, codes, etc)

A screenshot of the NVivo application window. It shows a "New Project" button with a plus sign, which is highlighted with a red box. To the right are two "Sample Project" options: "Multi-method" and "Automated Insights". Below these are sections for "Account" (logged in as) and "Getting Started" (with a "For a quick overview of NVivo click the tutorial below..." message). The entire window is surrounded by a light gray border.

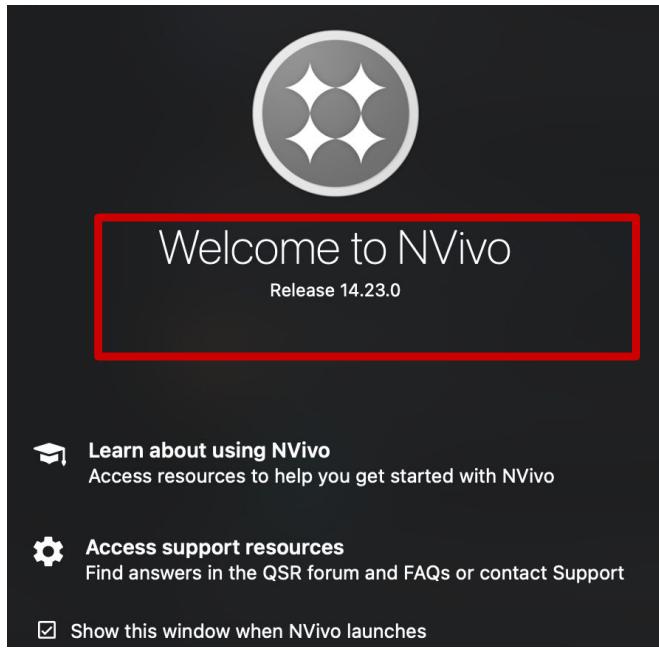


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# Anatomy of NVivo: Opening on Macs

Your version number (you should have version **12 or 14**)



The screenshot shows the NVivo project selection interface. It features a sidebar with "PROJECTS" at the top, followed by a button for "+ Create New Project" (which is highlighted with a red box). Below this are sections for "Sample Project (create a copy)" and "More Sample Projects" (also highlighted with red boxes). The "More Sample Projects" section includes a link to "Browse the range of sample projects...". Under "RECENT", there is a placeholder message: "Recent projects will appear here". At the bottom of the sidebar, there are buttons for "Collaboration Cloud" (highlighted with a red box) and "Open".

Create a new **project** (stores all your documents, codes, etc)

The recent projects you opened

Open another project that is not recent



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# Anatomy of NVivo: Projects on Windows

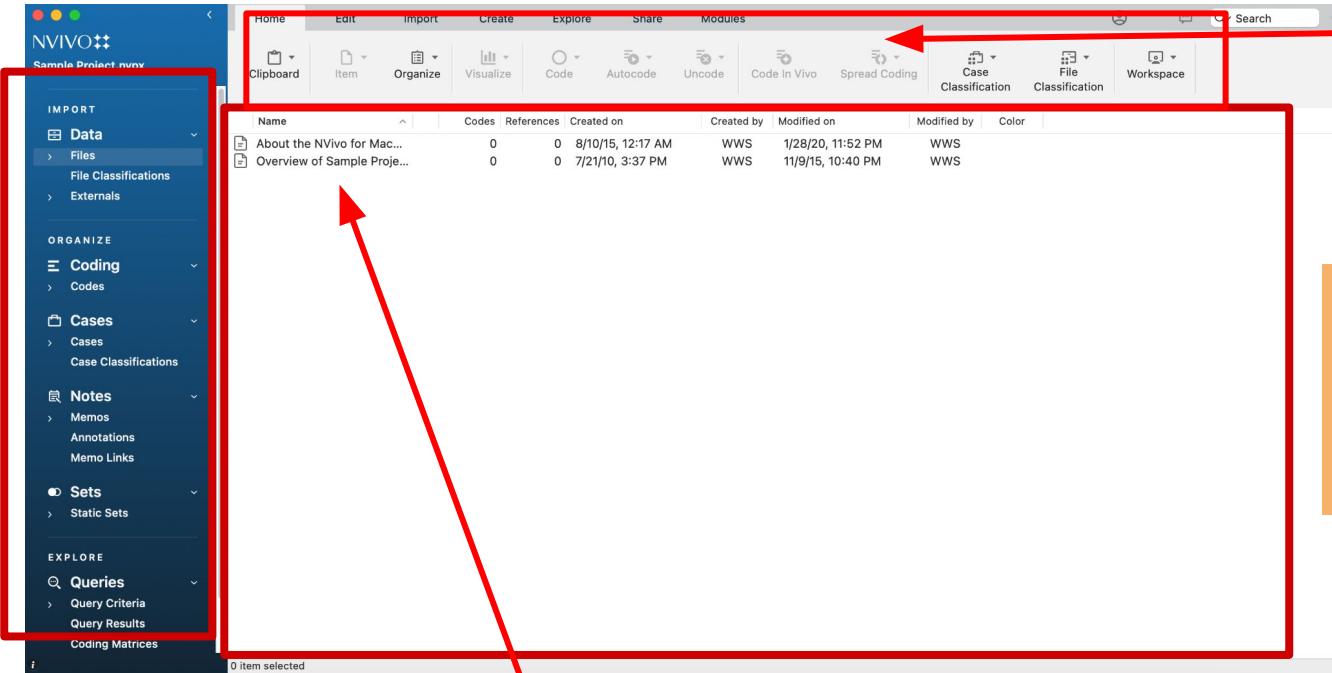
Toolbar to access functions

The screenshot shows the NVivo interface on a Windows system. At the top is a toolbar with various icons for functions like Annotations, Autocode, Chart, and Compare With Cloud. Below the toolbar is a menu bar with File, Home, Import, Create, Explore, Share, Modules, Document, and Help. The main window is divided into several panes. On the left is a sidebar with sections for Quick Access, IMPORT (Data, Files, File Classifications, Externals), ORGANIZE (Coding, Codes, Sentiment, Relationships, Relationship Types), CASES (Cases), NOTES (Notes), SETS (Sets), EXPLORE (Queries, Visualizations, Reports). In the center, there's a list of files under 'FILES' with one item selected: 'The wellbeing project - an introduction'. To the right of the file list is a large document viewer pane titled 'The Wellbeing Project' with sections for 'Background' and 'The project and its data'. The bottom of the interface has status bars for 'In Codes' and 'Code to', and a zoom level of '100%'. A red box highlights the central document viewer area.

List of codes, files, etc.

The window that will open the files, queries, etc. You can annotate documents here.

# Anatomy of NVivo: Projects on Macs



Toolbar to access functions

The window that will open the files, queries, etc. You can annotate documents here.

List of codes, files, etc.



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# Codes

The list of themes or codes you will use to code your files. The “codes” folder will be empty until you add your own! You can add codes and sub-codes.

The screenshot shows a software interface for managing data and codes. On the left, there's a sidebar with 'Data' and 'Coding' sections. Under 'Coding', there are sub-sections for 'Codes', 'Auto codes', 'Melaleuca 2017 survey', 'Melaleuca 2018 survey', 'Sub-Codes', 'Sentiment', 'Relationships', and 'Relationship Types'. The main panel displays a list of codes with their counts:

Code	Count	Sub-Count
mental-emotional wellb	13	54
OWN involvement	19	97
personal-individual facto	1	1
physical health	17	36
social connection	24	232
societal context	0	0
talking about ...	0	0

At the bottom of the main panel, there is a placeholder text: "Drag selection here to code to a new code".



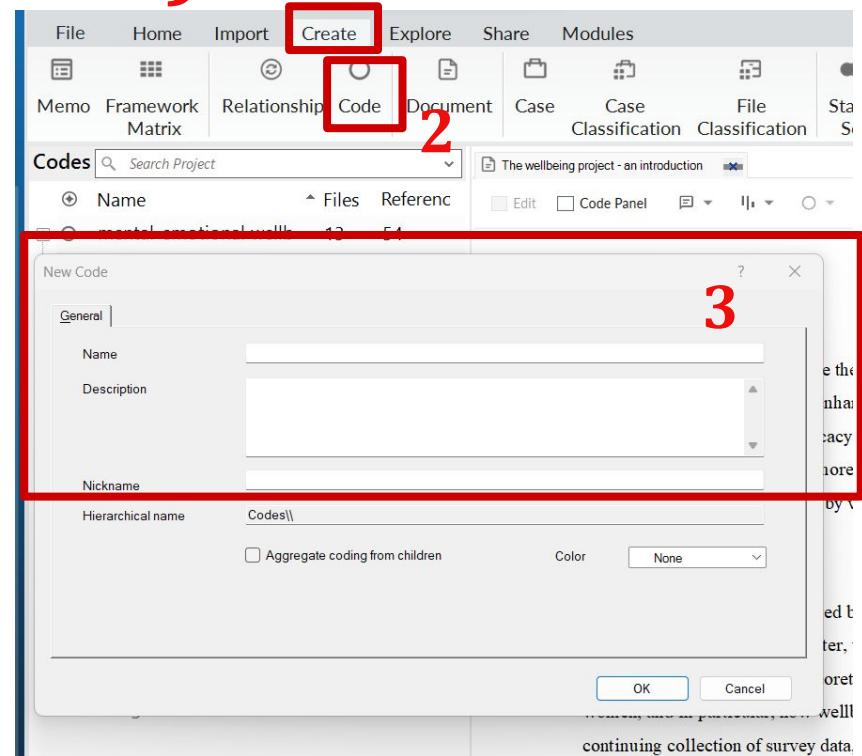
# Qualitative Coding is about *Interpretation and Arguments*

The codes you create are themselves **arguments**; you are choosing what information you value and want to extract from the transcripts



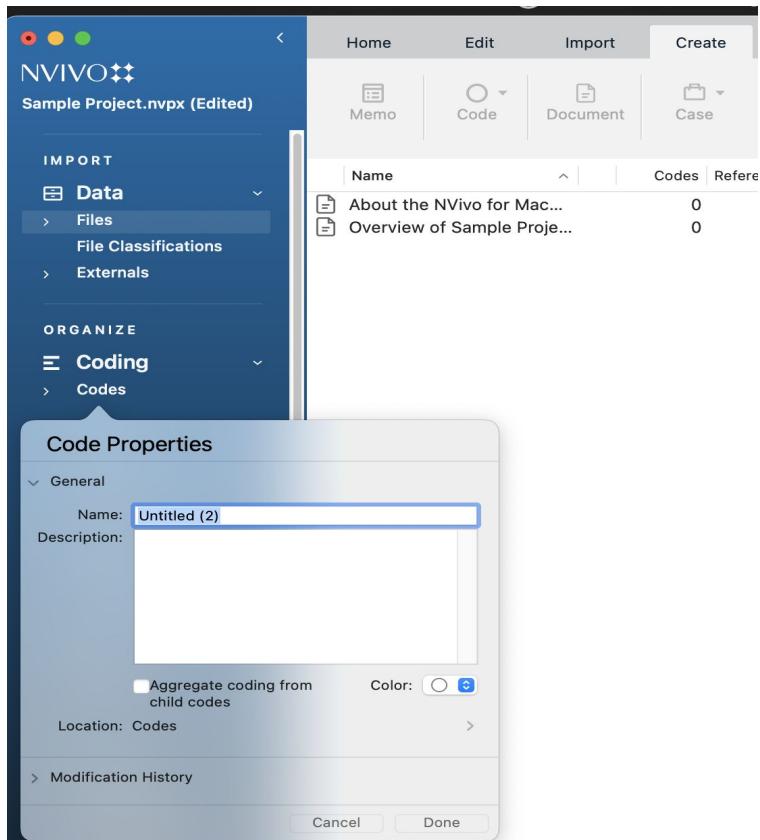
# Creating Codes (Windows)

1. Go to “Create” in the toolbar
2. Click “Code”
3. Your new code will pop up and ask for a name and description
  - a. To add a *subcode*, follow the same steps, but click on the original code where you want to add the subcode



# Creating Codes (Macs)

1. Go to “Create” in the toolbar
2. Click “Code”
3. Your new code will pop up and ask for a name and description
  - a. To add a *subcode*, follow the same steps, but click on the original code where you want to add the subcode



# Coding Files/Documents (Windows)

1. Open the file you would like to annotate.
2. Highlight the text you want to code.
3. Drag and drop the selection onto a code.
4. Alternatively, you can right-click and select “Code.”
5. You can also add new codes/cases as you annotate.

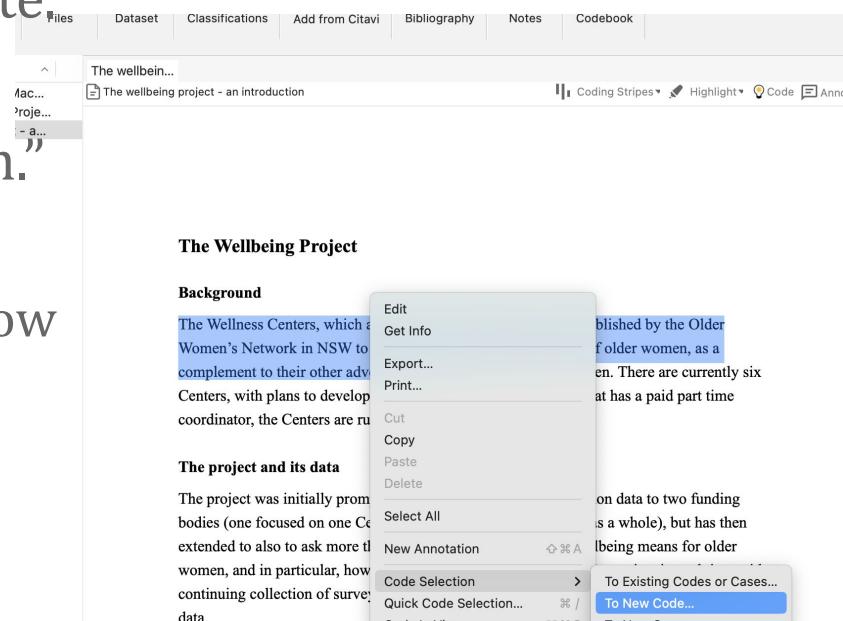
The screenshot shows the NVivo software interface. On the left, the 'Codes' panel is open, displaying a list of categories with their counts of files and references. A red arrow points from the 'Codes' panel towards the context menu. On the right, the main workspace shows a document titled 'The Wellbeing Project - an introduction'. A context menu is open over some text, with the 'Code Selection...' option highlighted. Other options in the menu include 'Code to Recent Codes', 'Code In Vivo', 'Uncode...', 'Uncode from Recent Codes', 'New Annotation', and 'Turn on Edit Mode'.

Name	Files	References
mental-emotional wellb	13	54
OWN involvement	19	97
personal-individual facto	1	1
physical health	17	50
social connection	24	232
societal context	0	0
talking about ...	0	0



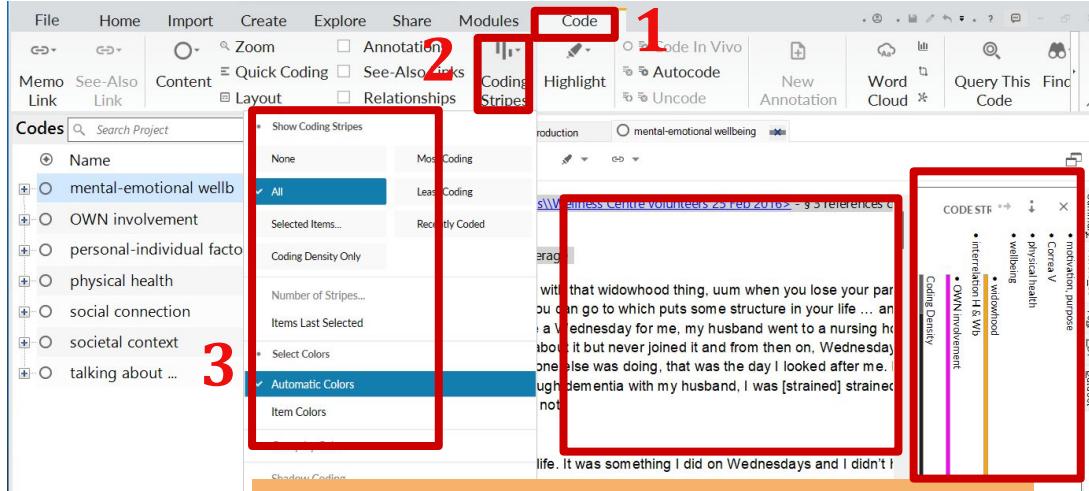
# Coding Files/Documents (Macs)

1. Open the file you would like to annotate
2. Highlight the text you want to code.
3. Control-click and go to “Code Selection.”
4. Click “At Existing Codes or Cases”
  - a. Once you use codes, the codes will show up when you click “Code Selection.”
  - b. You can also add new codes/cases as you annotate.



# View Your Codes (Windows)

1. Go to “Document” in the toolbar
2. Click “Highlight” then “All Coding”
3. Click “Coding Stripes” and “All Coding” to see the code names and where they appear in the document.
  - a. If you have tagged an entire file as a “case,” everything will be highlighted. Choose “Coding for Selected Items” to select which codes you’d like to view.



The document you are coding and annotations

Coding stripes  
(shows what codes  
appear where in  
the doc)

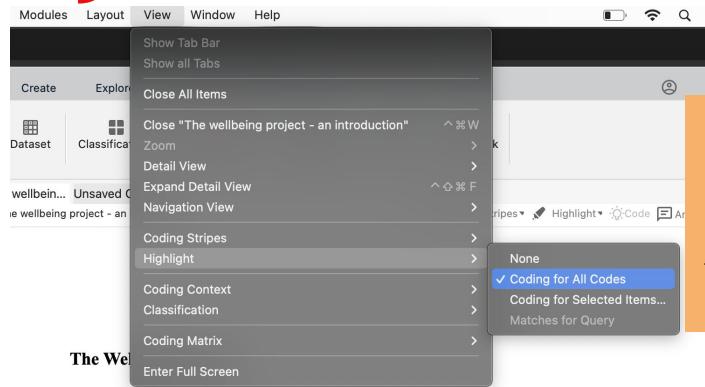


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# View Your Codes (Macs)

1. Go to “View” in the toolbar
2. Click “Highlight” then “Coding for All Codes”
3. Click “Coding Stripes” and “All Coding” to see the code names and where they appear in the document.
  - a. If you have tagged an entire file as a “case,” everything will be highlighted. Choose “Coding for Selected Items” to select the codes you’d like to view.



Coding stripes  
(shows what  
codes appear  
where in the  
doc)

## Background

The Wellness Centers, which are the focus of this study, were established by the Older Women's Network in NSW to enhance the health and wellbeing of older women, as a complement to their other advocacy work on behalf of older women. There are currently six Centers, with plans to develop more. With the exception of one that has a paid part time coordinator, the Centers are run by volunteers.

## The project and its data

The project was initially prompted by the need to provide evaluation data to two funding bodies (one focused on one Center, the other on the organization as a whole), but has then extended to also to ask more theoretical questions about what wellbeing means for older women, and in particular, how wellbeing intersects with other aspects of life. This involves the continuing collection of survey data, and occasionally data.

Your document you are coding  
and annotation (yellow =  
codes, blue = annotations)



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# Annotating Files (Windows)

To annotate (comment), follow the same steps as coding except instead click “New Annotation” after you highlight and right click. Find all your annotations in the “Notes/Annotations” section in the left menu

The screenshot shows the NULab software interface. On the left, there's a sidebar with sections like Quick Access, File Classifications, Externals, Organize, Coding (Codes, Auto codes, Memes, Melaleuca 2017 survey, Melaleuca 2018 survey, Sub-Codes, Sentiment, Relationships, Relationship Types), Cases, Notes (Notes, Memos, Framework Matrices, Annotations, See-Also Links), and a red-highlighted section for Annotations.

In the main area, there's a toolbar with Link, Relationships, Stripes, In Vivo, Unicode, Annotation, Cloud, Explore Diagram, and Document buttons. Below the toolbar is a list of annotations:

File Name	Number
Acacia L	1
Melaleuca 2017 survey	1
Melaleuca 2017 survey	2
Stathi et al AVONet-report	1
Waratah G - Pre	1
Ward et al Well Being in	1

A specific annotation is highlighted with a red box and labeled "List of annotations". The annotation details are shown in a callout box:

L: Particular experience – there's so many capable women in the community, in the society. They are all very, how do you put it, dedicated. Like this **Wellness**, in the committee, people are so dedicated, you know, moneywise as well timewise especially. We are all volunteers, so I really admire women, especially older women, for what they do.  
P: And making use of what they've got  
L: Yes exactly, exactly, really you know. Really I'm happy, you know, about this Wellness. We should really, you know, continue on for the younger women, Yes.

At the bottom, there's a table titled "Annotations" with one item listed:

Item	Content
1	This (and the next) paragraph are referring to the centre rather than the concept

Callouts provide context for these elements:

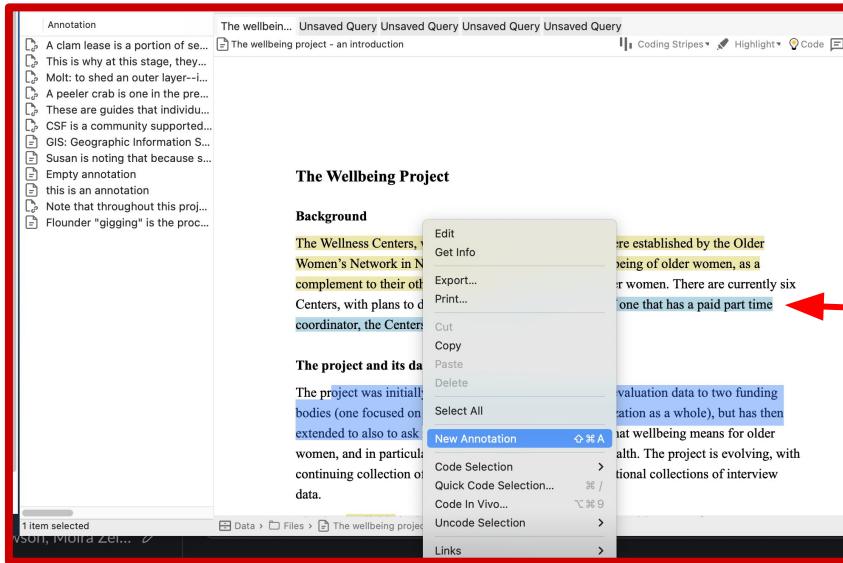
- "Where you can find all your annotations listed" points to the sidebar annotations section.
- "Your annotation" points to the detailed annotation view.
- "The text from the document you highlighted and are annotating" points to the annotated text in the main window.

# Annotating Files (Macs)

To annotate (comment), follow the same steps as coding except instead click “New Annotation” after you highlight and control-click to reach the pop-up shortcut menu.

Find all your annotations in the “Notes/Annotations” section in the left menu

List of annotations



The text from the document you highlighted and are annotating

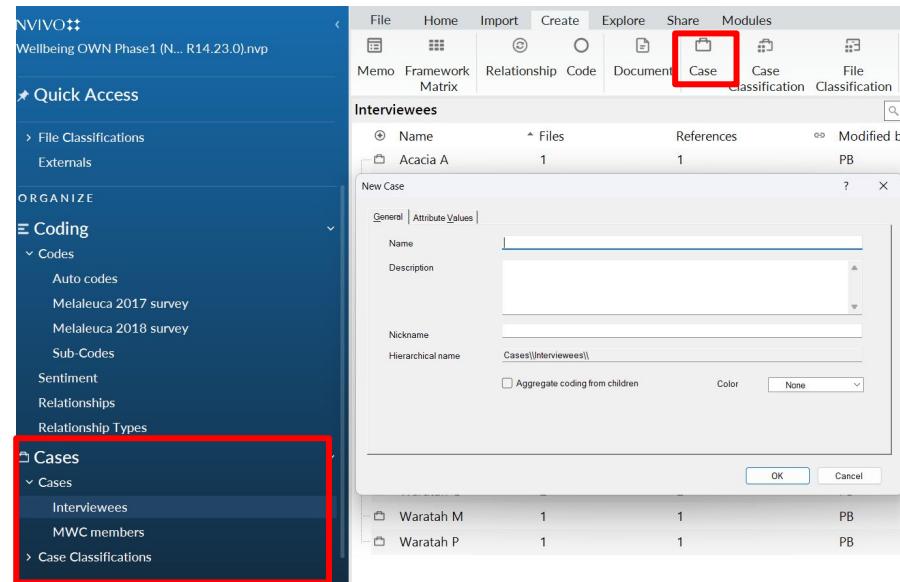


# Cases (Windows)

Cases are the types of research texts in your project and can be organized based on the user's choice. **“They might represent people, places, events, organizations or other entities that you want to analyze and compare.”** For example, if you have several transcripts from different trials, but want to categorize the type of trial for each text, you would use cases to do so.

- [“About Cases”, NVivo](#)

To add a “case” to a file, it’s the same method as adding a code, except you choose the “Cases” folder and the proper case.



# Cases (Macs)

The screenshot shows the NULab interface with a context menu open over a selected text block. The menu includes options like Edit, Get Info, Export..., Print..., Cut, Copy, Paste, Delete, Select All, New Annotation, and several options under the 'To' section: To Existing Codes or Cases..., To New Code..., To New Case..., and To Current Codes.

The main content area displays the "The Wellbeing Project" page. The "Background" section discusses the Wellness Centers, mentioning the Women's Network in NSW. The "The project and its data" section describes the project's initial purpose and its evolution into a continuing collection of survey data.

At the bottom left, there is a navigation bar with icons for Data, Files, and the current document. The title of the document is "The wellbeing project - an introduction".

To add a “case” to a file, it’s the same method as adding a node, except you choose the “Cases” folder and the proper case.

# Querying

Querying, or asking something from your data, in NVivo provides multiple ways to explore both your codes and your text.

- **Word Frequency:** Counts the number of times words (with stopwords removed) appear in one or more files. Stopwords have non-significant meaning and appear frequently, like “the”, “a,” “is,” etc. They can inflate word frequencies without adding meaning, and are typically removed.
- **Coding:** Shows the number of codes, text that was coded, and the files.
- **Crosstab:** cross reference codes and case classifications. For example, you might want to know how often a particular node appears in both scholarly articles and your primary texts.



# Word Frequency Example (Windows)

“Query” can be found in the “Explore” Tab

Alternatively, you can right click on a file and select Query

To query multiple items, select the items you would like to query in the “Selected Items” tab and then click “Run Query”

The screenshot shows the NVivo interface on Windows. The top navigation bar includes File, Home, Import, Create, Explore, Share, and Modules. The 'Explore' tab is selected. Below it, the 'Word Frequency' button is highlighted with a red box. The main workspace displays a project titled 'The wellbeing project - an intr'. On the left, the 'Data' section of the sidebar is expanded, showing options like 'Files', 'File Classifications', and 'Externals'. A context menu is open over a file named 'Wellbeing OWN Phase1 (N... R14.23.0).nvp', with 'Query' selected, which also has a red box around it. The 'Word Frequency Criteria' panel on the right is visible, containing search filters and a 'Run Query' button, both of which are also highlighted with red boxes.



# Word Frequency Example (Mac)

Click the word frequency tab, then select the items you would like to query in the “Selected Items” tab and then click “Run Query.”

The screenshot shows the NULab Word Frequency tool interface. At the top, there are four tabs: "The wellbein...", "Saved Query", "Unsaved Query", and "Unsaved Query". Below the tabs is a search bar with the placeholder "Untitled Query". Underneath the search bar is a section titled "Word Frequency Criteria". It includes a dropdown menu "Search in:" with three options: "Files and Externals" (selected), "Selected Items" (highlighted with a red box), and "Items in Selected Folders". There are also two radio button options: "Exact match only (e.g. "talk")" (selected) and "Include stemmed words (e.g. "talking")". A text input field "With minimum length:" contains the value "3". To the right of these criteria are buttons for "Run Query" (highlighted with a red box) and "Save Criteria...". Further down, a note states "Query results exclude project stop words. Add or remove stop words in project properties." Below this is a table with two tabs: "Summary" (selected) and "Word Cloud". The "Summary" tab displays a list of words with their statistics. The table has columns: Word, Length, Count, and Weighted Percentage. The data is as follows:

Word	Length	Count	Weighted Percentage
older	5	2,874	1.31%
health	6	2,745	1.25%
people	6	2,356	1.08%
care	4	1,746	0.80%
doi	3	1,162	0.53%
physical	8	1,076	0.49%
age	3	1,056	0.48%
ageing	6	1,029	0.47%
activity	8	945	0.43%
http	4	860	0.39%
social	6	853	0.39%
life	4	728	0.33%
well	4	722	0.33%
org	3	700	0.32%
may	3	679	0.31%
...	...	...	...



# Crosstab Example (Windows)

Select the codes you would like to cross reference with the cases or attributes, then click “Run Query.”

The screenshot shows the Crosstab software interface. The 'Crosstab' tab is selected in the top navigation bar. The 'Queries' button in the toolbar is highlighted with a red box. The 'Crosstab Criteria' pane shows 'Crosstab codes against' and 'Codes' selected. The 'Cases' pane shows several interviewees: Acacia A, Acacia B, Acacia L, Acacia V, Correa C, and Correa P. Below the criteria, a table displays the results:

	mental-emotional wellbeing	Total
Acacia A	2	2
Acacia B	0	0
Acacia L	1	1
Acacia V	0	0
Correa C	2	2
Correa P	0	0
Total	5	5

A large orange box labeled 'Your results' covers the bottom right corner of the interface.



# Crosstab Example (Mac)

Hit Explore,  
Queries, then  
Crosstab, and  
Select the codes  
you would like to  
cross reference  
with the cases or  
attributes, then  
click “Run Query.”

The screenshot shows the NULab interface with the following components highlighted:

- Selected codes (click the plus sign):** A red box highlights the "Codes" section in the "Query" panel, which contains four items: Agriculture, Fishing or aquaculture, Jobs and cost of living, and Tourism.
- Selected cases (click the plus sign):** A red box highlights the "Attributes" section in the "Cases" panel, which includes Person, Age Group, and Gender.
- Your results:** A red box highlights the main results table, which displays the count of cases for each combination of gender and selected code. The table is titled "Coding Comparison..." and includes columns for Gender = Female (n=3), Gender = Male (n=2), Gender = Female (n=9), Gender = Male (n=12), and Gender = Female (n=1).

		Gender = Female (n=3)	Gender = Male (n=2)	Gender = Female (n=9)	Gender = Male (n=12)	Gender = Female (n=1)
	Agriculture	0	0	1	1	
	Fishing or aquaculture	3	2	8	12	
	Jobs and cost of living	0	1	2	1	
	Tourism	0	0	1	0	
	<b>Total (Unique)</b>	<b>3</b>	<b>2</b>	<b>11</b>	<b>13</b>	<b>1</b>



# Exploring Codes (Windows)

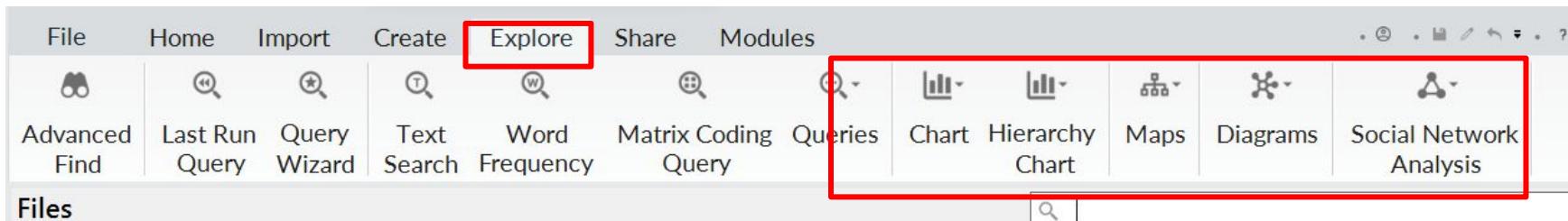
Chart: bar chart of the number of times codes were used in a file

Hierarchy chart: visualizes number of codes used in a file

Explore Diagram: explore the codes used in a file

Comparison Diagram: compare the codes used in multiple files

Social Network Analysis: visualize relationships within networks



# Exploring Codes (Macs)

Comparison diagram example

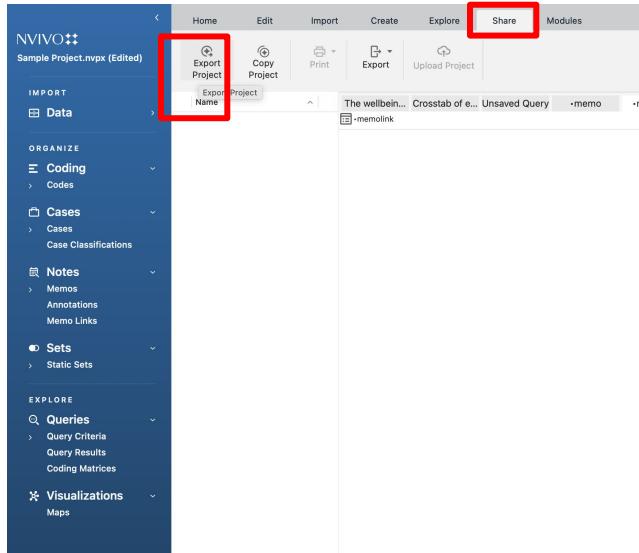
The screenshot shows the NVivo software interface with the 'Explore' tab selected in the top navigation bar. On the left, the project tree displays categories like 'Files', 'CODES', 'CASES', 'NOTES', and 'SEARCH'. The 'Comparison Diagram' view on the right shows a network of nodes and connections. A document icon labeled 'draftDSG' is connected to a central node labeled 'Node One', which is further connected to a sub-node labeled 'Sub Node'. Another document icon labeled 'Gregorio\_UsingNVivoForY...' is also connected to 'Node One'. A third node labeled 'Node Two' is connected to 'Node One'. All connections are labeled 'Codes'.



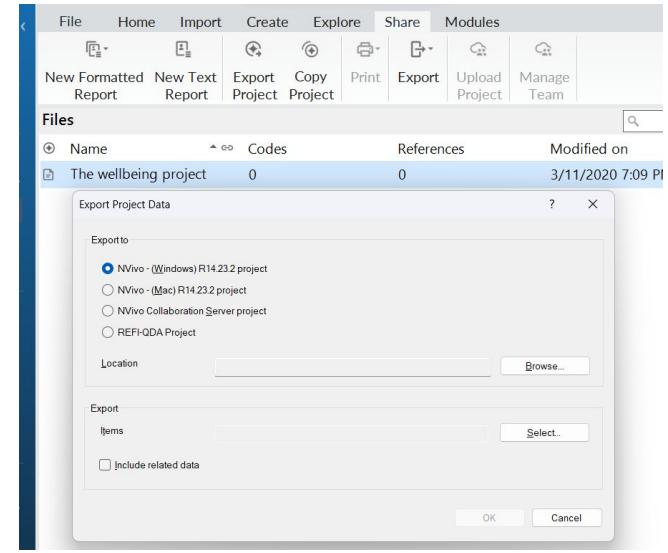
# Export Your Projects

Since there is a cross-platform problem, **save and export your projects as .qdpx files** when submitting assignments so they can be opened on both Macs and Windows!

MACS



WINDOWS

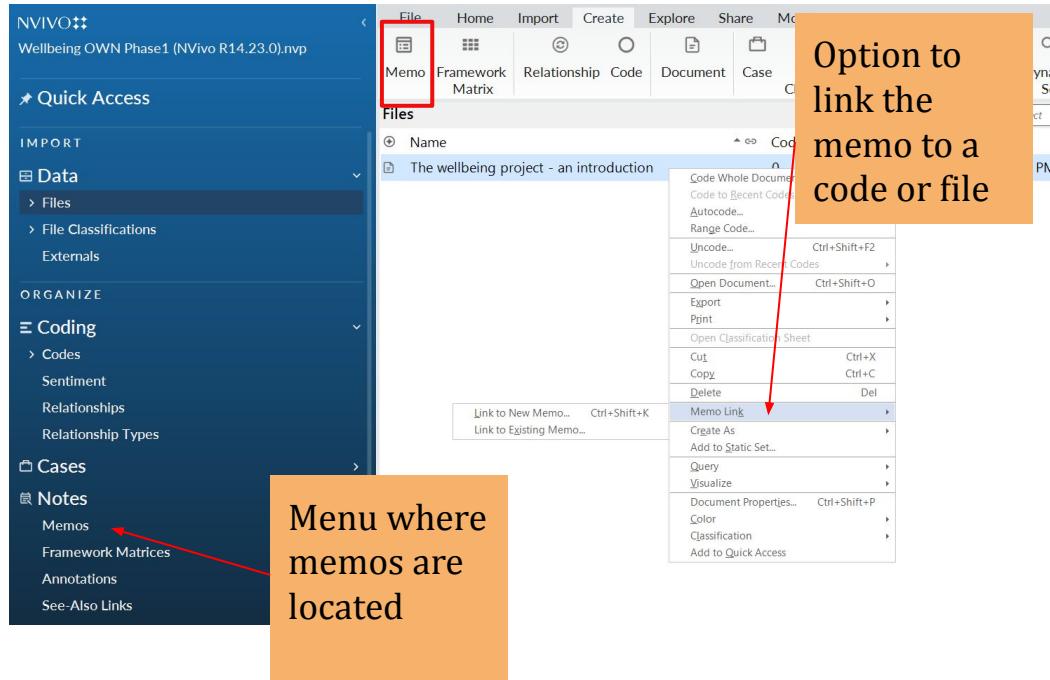


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Feel free to ask questions at any point  
during the presentation!

# Memos (Windows)

- Memos are more extended write-ups of your analytical insights
- They can stand alone, but also be linked
- “Memo link”: linking memo to a particular file, case, or code



# Memo Links (Windows)

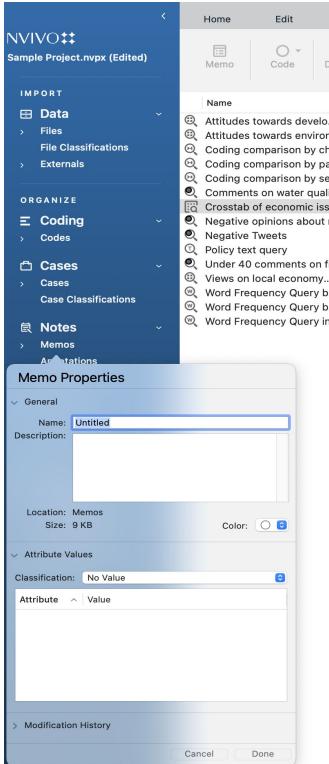
Showing the link between the file and the memo

The screenshot shows the NVivo 14 software interface. A red arrow points from the text "Showing the link between the file and the memo" to the "File" menu bar. The "File" menu is open, displaying various options like "Clipboard", "Item", "Organize", "Query", "Visualize", "Code", and "Autocode". Below the menu is a table titled "Files" with one entry: "The wellbeing project" which has 0 codes and 0 references. A second red arrow points from the text "Accessing the memo from the file" to the "Memo Link" option in the "File" menu's dropdown, which is also highlighted with a blue selection bar. The "Memo Link" option is located next to "Open Linked Memo" and "Delete Memo Link".

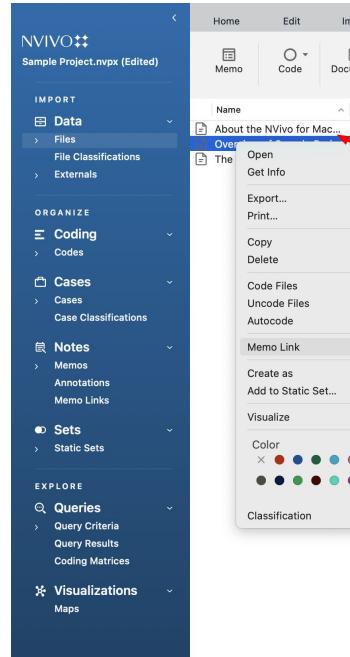
Accessing the memo from the file

# Memos and Memo Links (Macs)

Menu where  
memos are  
located



Navigating  
memo  
creation (hit  
create,then  
memo)



Navigate  
to the file,  
then right  
click and  
hit memo  
link and  
choose a  
new or  
existing  
memo

# Thank you!

If you have any questions, contact DITI at [nulab.info@gmail.com](mailto:nulab.info@gmail.com)

Sign up to meet with the DITI! <https://bit.ly/diti-meeting>

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Slides, handouts, and data available at:

<https://bit.ly/fa23-singer-nvivo>

We'd love your feedback! Please fill out a short survey here:

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