

NVivo 8 Readme File

Welcome to NVivo 8 Service Pack 3

This file contains general information about NVivo 8, including system requirements and software features. Refer to the 'Getting Started' guide for more detailed information including steps to help you get up and running with NVivo 8. For comprehensive information about using NVivo 8, go to the 'Help' menu in the software.

Minimum system requirements

- 1.2GHz Pentium III-compatible processor
- At least 512 MB of RAM
- Screen resolution 1024 x 768
- Microsoft Windows 2000 Professional Service Pack 4
- Approximately 1GB of available hard-disk space

Recommended system requirements

- 1.6GHz Pentium 4-compatible processor or faster
- 1GB RAM or more
- Screen resolution 1280 x 1024 or higher
- Microsoft Windows XP Service Pack 2 or later, including Microsoft Windows Vista Service Pack 1
- Approximately 2GB of available hard-disk space
- Internet connection

License key

You can find your license key on your NVivo CD sleeve, or—if you downloaded the product—in the download email communication received from QSR. You need to enter this key during the installation process.

Installing NVivo

You must have administrator permissions for the computer on which you are installing the software.

To install NVivo:

1. Insert the NVivo 8 CD-ROM into your computer or if you downloaded NVivo electronically, locate

and double-click the NVivo8.exe file.

The installation process starts automatically.

2. Follow the prompts to install the application and its required components.

For more information about installing NVivo, refer to the 'Getting Started' guide. You can access this guide from the 'Help' menu in your software or from the QSR website at www.qsrinternational.com

Activating NVivo

After installation, you are prompted to activate your software license. Activation ensures that only valid licenses are used to operate the software. You can activate online over the Internet or by contacting QSR International.

Refer to the 'Getting Started' guide for more information about activating NVivo. You can access this guide from the 'Help' menu in your software or from the QSR website at www.qsrinternational.com

File locations

By default, NVivo files will be installed to these locations (the locations may vary slightly on 64 bit environments):

- The program files will install to C (or system drive):\Program Files\QSR\NVivo 8
- The 'Samples' folder, containing a sample project and related data, will install to:
 - On Microsoft Windows 2000 and XP: C (or system drive):\Documents and Settings\All Users\Shared Documents\NVivo 8 Samples
 - On Microsoft Windows Vista: C (or system drive):\Users\Public\Public Documents\NVivo 8 Samples

Starting NVivo

You can start NVivo by:

- Clicking the Start menu and selecting All Programs > QSR > NVivo 8; or
- Double-clicking the 'QSR NVivo 8' icon on your desktop.

Getting Help

There are a wide range of resources to help you to use NVivo:

- The 'Getting Started' guide will help familiarize you with the NVivo workspace, and guide you through project set up. You can access this guide from the 'Help' menu in your software or from the QSR website at www.qsrinternational.com
- 'NVivo Help' is available from the 'Help' menu in your software, and provides comprehensive information about working with NVivo.
- Tutorials are animated demonstrations that introduce you to the main software features. They can be accessed from the 'Help' menu in your software or the QSR website.

- The QSR website at www.qsrinternational.com provides an extensive range of resources including frequently asked questions and resource articles.
- The QSR forum at forums.qsrinternational.com is a place where you can learn and share useful information and suggestions with other NVivo users.
- One-on-one and group workshops are run by both QSR and independent trainers to introduce you to NVivo. Visit the QSR website for further information.

NVivo 8 features

NVivo 8's features work with documents, audio and visual material, and allow for deep and flexible analysis. NVivo 8 is for everyone—it's the ultimate project partner.

Getting started

- Designed using Microsoft guidelines, NVivo's familiar interface makes it easy to use and teach.
- Rearrange the interface to suit your working style.
- Change the user interface language. NVivo is available in English, Simplified Chinese, Spanish or Japanese—the languages available depend on your license.
- Retrace your steps using NVivo's 'undo' function.
- **New** Get relevant assistance when you need it with context sensitive help.
- **New** Get step-by-step assistance from mini 'show-me' movies within NVivo Help.
- **New** Connect to web based help that includes the latest instructions and product information.
- **New** Print a PDF version of NVivo's Help files, so you can read and work through the steps at the same time.

Set up your project

- Manage a project any way you want—set up classification structures before you start, create them as you go, or jump straight into your information and start working.
- Import documents that are in Microsoft Word (.doc, .docx), rich text (.rtf) or plain text (.txt) format, including documents with embedded tables and images.
- Create your own documents inside NVivo.
- **New** Import and work with documents in Adobe PDF format (.pdf).
- **New** Import and work with video files and media clips in .mpg, .mpeg, .mpe, .wmv, .avi, .mov, .qt or .mov formats.
- **New** Import and work with audio files in .mp3, .wma or .wav formats.
- **New** Import and work with pictures and photos in .bmp, .gif, .jpg, .jpeg, .tif or .tiff formats.
- Combine separate projects or use another project's structure with an inbuilt 'merge' function.
- Work with information in virtually any language.
- Store your project database and research materials as a single file.
- **New** Choose to store large media files separately and link them to your project, ensuring materials are archived together.

Work with your information

Audio and video

- **New** Listen to or watch audio and video files in NVivo— just as you would with a normal media player.
- **New** Review and analyze audio and video files in depth; vary the playback speed, continually loop a section of your file, or rewind or skip sections by a number of seconds.
- **New** Import and link an existing transcript with its corresponding audio or video file. Play the file and watch your transcript scroll by, or click on your transcript to bring up the section of video or audio it relates to.
- **New** Work with or without a transcript—create your own transcript or keywords inside NVivo, or work directly with your audio or video files, if you do not want to create a transcript.

Pictures

- **New** Rotate pictures, adjust brightness and contrast, or zoom in to see more detail.
- **New** Create your own 'logs' or descriptions of your pictures and photos inside Nvivo or import existing picture logs.

Code

- Work through your information and assign it to relevant topics or themes called 'nodes'. This process is called 'coding'.
- View all the information gathered under one theme or 'node' together.
- Use NVivo's autocoding features to deal with structured information like questionnaire responses.
- **New** Avoid spending hours setting up structures for autocoding—NVivo preserves the paragraph styles and formatting used in original Microsoft Word documents and you can use these styles for autocoding. Styles created in non-English versions of Word are also preserved.
- **New** Create your own customized paragraph styles within NVivo— apply these custom paragraph styles to your NVivo documents, and then use them to autocode your documents.
- **New** Add customized fields to your transcripts—for example, use a custom field to record each speaker's name. Then, use NVivo's autocoding tools to create a new node for each speaker and code all of their comments to it with a few simple clicks.

Organize and classify and capture your thoughts

- Group project items of different types together using 'sets'.
- **New** Rearrange the items you've placed into sets; for example, use them to create a virtual album or show a sequence of events.
- Use links to 'glue' or connect items with similar themes together.
- Use 'annotations' to jot down your thoughts, the same as if you were scribbling notes in a margin.
- Create memos to capture detailed observations.

Make sense of your information

- Use 'relationships' to explore evidence about relations between items, processes and people.
- Query your data with a powerful search engine. Save queries, rerun them through new data and track the evolution of results.

- Use 'models' to visually display new ideas, connections and findings. Use a dynamic model to represent your project in real time or use a static model to capture your project at a specific point in time.
- Use a matrix to compare items and identify patterns or themes.
- Use colored bars called coding stripes to see which sections of your documents have been categorized or 'coded' at specific nodes.
- **New** Use coding stripes to see how audio, video and pictures have been 'coded' at specific nodes.
- **New** Use coding stripes to see demographic information such as gender, age or income across your coding.
- **New** Watch your coding stripes update automatically, and in real time, as you code—select to display 'Nodes Recently Coding', 'Nodes Most Coding' or 'Nodes Least Coding', and then watch the stripes update as you complete new coding.

Work effectively in teams

- **New** Identify the specific coding, annotations and links completed by each team member, even after separate projects have been merged together.
- **New** See which team member first created a project item and who last modified it.
- **New** Use coding stripes to view and compare coding by particular users in a project.
- **New** Run queries on the work completed by team members, for example, query how the coding of two or more team members overlaps.
- **New** Use a 'coding comparison' query to show the percentage of coding agreement or disagreement between team members. It provides a measurement for coding reliability called the 'kappa coefficient'.

Share your findings

- Print, export or simply copy and paste conclusions, query results, models and charts into reports or presentations including packages such as Microsoft Excel, Word or PowerPoint.
- **New** View your project from a new angle using charts. Choose from a range of chart styles, including column, pie and bar charts in 2D and 3D formats. There are also specialized chart styles such as heat maps. Charts can be exported as image files or PDF documents.
- **New** Export your information as HTML. Easily navigated, these web pages can be used to share files and findings including audio and video clips, pictures and sections of your documents with others—even if they do not have NVivo installed.

Other enhancements

If you are familiar with NVivo 7, you may also be interested to learn about other enhancements to NVivo 7 functionality.

Sources

- The NVivo 7 'Documents' folder has been renamed 'Internals'. The Internals folder contains documents, pictures, audio and video.

- When viewing sources in List View, you can now choose to view 'details' or 'thumbnails' (small, medium or large).
- You can now import source files from your Windows folders—simply drag and drop the files into your project.

Styles

- NVivo 7 'text styles' have been renamed 'paragraph styles'.
- Paragraph styles are no longer replaced during the import process. Imported documents retain their original paragraph styles and formatting, and these styles can be used for autocoding.

Coding

- The NVivo 7 paragraph coding feature has been renamed 'range coding' and enhanced to work with all source types. Use 'range coding' to quickly code sections of documents, audio or video clips, and pictures.
- When you choose 'undo' after coding at a node, the 'undo' option on the Edit menu now shows the node name, so that you can see which coding action you are undoing.
- When you code at existing nodes, the nodes most recently coded are no longer preselected in the Select Project Items dialog box.

Coding stripes

- When setting coding stripes to show selected items, you can now select any nodes, attribute values or users, even before any coding has started. When you are selecting items, any nodes, attribute values and users which already have coding, are shown in bold font in the Select Project Items dialog box.

Nodes

- Nodes now open in a 'tabbed' Detail View. The Reference tab shows all the references coded at the node. The Summary tab lists all the sources coded at the node. Other tabs display as necessary—for example, the Text tab shows the coded content of any documents, externals or memos coded at the node; and the Video tab shows the coded content of any video clips or transcript entries coded at the node.
- When viewing tree nodes, cases or query results in List View, you now have additional options for collapsing and expanding all (or selected parts) of hierarchical structures.

Context, spread and proximity

- Context, spread and proximity settings now include measures for audio, video and picture sources—for example, when viewing a node, you can choose to spread coding to 30 seconds on either side of a coded section of audio or video.
- You can now use the new 'narrow' and 'broad' context options to quickly specify a small or large measure of context without setting a measure specific to each source type. For example, by default the 'narrow' context will add 5 words to text references, 5 seconds to audio and video references and 5 percent to picture references. You can adjust the settings used for narrow and broad context in the Application Options.
- You can now use the new 'custom context' option to set specific and separate context measures for document, picture, audio and video sources.

Sets

- When viewing sets in List View, you can now choose to view 'details' or 'thumbnails' (small, medium or large).
- When viewing sets in List View, you can use new context (right-click) menu options to add items to the currently open set or create a new set.

See Also links

- You can now view 'See Also' links in a separate pane at the bottom of the Detail View (matching the existing option to view annotations).

Casebook

- When working with cases or attributes in List View, you can now open the casebook using a new context (right-click) menu option.

Queries

- The new coding comparison query replaces NVivo 7's Coding Comparison report.
- When creating compound coding queries, you can now use additional operators ('AND', 'OR', and 'AND NOT').
- The results of word frequency queries can now be displayed as a 'tag cloud'

Print and exporting

- When exporting items, you can now choose to open the exported file on completion of the export process.
- When printing or exporting a case, you can now choose to include the attribute values for the case.

Projects

- You can now backup your project with the new 'copy project' function, which automatically saves any changes to your project before making the copy.
- When importing a project, you can now choose to import selected content and structure from another project—for example, import all sources and coding created by particular users.

Already using QSR software?

NVivo 8 allows you to open and work with projects from previous versions of QSR software: NVivo 7, NVivo 2, NVivo 1, and N6 (NUD*IST 6), N5 (NUD*IST 5) and N4 (NUD*IST 4).

What is in Service Pack 1?

This software includes Service Pack 1 which addresses the following issues:

Installation and activation

5947, 5966, 5999 Improved activation process to prevent unnecessary activations

5781 Clarified error message when attempting to reinstall an expired license

Application

5234 Confirmation message displayed when changing user interface language

5910, 5911 Improved stability when importing projects

5732, 5740 Added support for x64 bit Vista operating system (Windows on Windows)

Opening NVivo 7 projects

4412, 6189 Improved performance when converting NVivo 7 projects to NVivo 8 projects

Sources

2208 Ability to import and export in .docx (Microsoft Office 2007) format

5881, 5307, 6054 Improved importing of PDF sources

2096 Enhanced copy and paste behavior in sources

2142 Ability to change font size using scroll wheel on mouse

2032, 2067, 4621 Improvements to text tables in sources

5066 Improved performance when copying and pasting sources

5848 More stability when viewing sources using mouse scroll wheel

2205, 4583, 5968, 6028, 6035 Improved handling of image file sizes in sources

5946 Improved copy and paste functionality of coded content

6122 Improved undo functionality when modifying and pasting text

5739 Improved selecting and deselecting of content in text sources

Audio and video sources

5896, 5912 Ensures that a specific group of Windows XP and Vista users can now import audio and video files

2543, 5548, 5863, 5899, 5943, 5704 Improved behavior when formatting transcript entries

4766 Progress bar displays when switching from embedded to not embedded media or vice versa

5339 Improved consistency between selected transcript rows and highlight indicator in media timeline

5427 Better playback precision when fast forwarding .wmv media files

5675 Save and undo buttons are enabled when insertion point is in a transcript cell in node Detail View

5929, 5958, 5658, 4770, 5901, 5755 Improved playback functionality for media sources

5728, 5998, 5730 Improved playback functionality of coded media sources in nodes

5983 Improved stability when opening large video sources

5987 Improved behavior of waveform for media sources

5985, 4011 Removed splitter bar as default in transcripts to allow tab control through custom fields

5960, 5961 Improved usability when displaying coded media content in Firefox Internet browser

6090 Updated field name in media source properties for clearer indication when media files are not embedded within the project

Picture sources

5645 Clearer display of overlapping annotations in picture sources

5778, 5757 Correctly display image properties for picture sources

5938 Improved stability when opening picture sources with modified DPI display settings

Charts

5832 Modified 3D chart options persist when chart is undocked

5835 Removed data value if value equals 0 from Grouped Column chart types

6060, 6062 Improved behavior when accessing project items directly from charts

5907, 5976, 6075, 6084, 6086, 6100, 6104, 6061, 4954, 5981, 6111, 6112, 6113, 6140, 6146 Improved display of data in charts

2300, 6047 Two new charts to view attribute values across multiple sources or nodes

6172 Adjusted location of chart options in context menus for consistency

Attribute values

3734 Highlighted attribute values will be updated when attribute values or cases are modified

Coding

5619 Related data is included when copying and pasting context coding

5967 Improved performance when autocoding a large number of document sources

5762 Application option to code whole words now applies to stream source transcripts and picture logs

Coding stripes

3013 Shadow coding stripes shows highlighted coded content when selected and opened

6015 Improved stability of coding density stripe display when coding or uncoding

6118 Improved display of pictures when shadow coding is displayed

Export

5970 Improved stability of screen display during an export operation

5167, 6079 Fixed activation email template when exporting and printing

5924 Improved thumbnail image display of text sources in exported nodes

6148 Improved behavior of page layout when exporting nodes

Find

5287, 6000, 6010 Option available to hide or show the Find bar

5748, 5751, 5763, 5764, 5753, 6179, 6180 Improved stability when executing a Find

Help

5843, 4861, 4881, 5864, 5867, 5876, 5963, 6985 Updated a selection of Help topics for more clarity

5604, 6068 Improved data in Volunteering sample project

Nodes

2912 Text, audio and video tabs in nodes are now ordered as they appear in the project

5766 Page Setup is now based on user's default printer settings when exporting node reference view

5913, 6106 Improved behavior of coded content display in nodes
5914 Improved behavior of coded content of media timeline in nodes
5729 Improved display of coded picture content in nodes
6095 Improved display of coding context for picture regions in undocked nodes

Queries

5364, 4718 Stabilized query results preview display when deleting nodes or viewing transcripts
4324 Better validation measures when building matrix coding queries and defining attribute conditions
4497 Improved performance when exporting coding comparison query to different file formats
5498, 5992, 5993, 5994 Additional functionality to improve word frequency query
5747, 6127, 6156 Improved stability when executing queries
5760 Improved behavior of matrix coding query results
4347, 6155 Improved usability in matrices when filtering cells

Reports

5936, 5814, 5927, 5940, 5919, 5920, 5921 Improved details for reports

Models

5916 Fixed functionality when working with relationship nodes in models

Views

5855, 5856 Improved display when Detail View set at Right
2329, 6030, 6123 Additional functionality in Print Preview and exported List Views
4247, 6020 Provided additional details for annotations and 'See Also' links in Detail View panes for open sources
6078, 5767, 6046, 6021, 1951 The ability to customize List View columns and reset to default settings
6067 Improved sorting by date order in List Views
5741, 5742, 5759 Improved stability when displaying Set items as thumbnails
6115, 6173 Improved display of annotations and 'See Also' links panes

What is in Service Pack 2?

This software includes Service Pack 1 which addresses the following issues:

Application

5858 Added optional user interface language: Simplified Chinese
5859 Added optional user interface language: Spanish
6542 Added optional user interface language: Japanese

Importing projects

6219 Improved project import functionality when importing memos which are both coded to a node and linked to a source

Sources

6220 Improved 'undo' functionality when deleting text containing 'See Also' links, annotations or coding

6232, 6254, 6290 Improved behavior of text tables in documents

6225 Improved stability when using 'Paste As See Also Link' to link text in a media transcript or picture log with selected text in a document source

6205 Improved stability when playing .wmv files in a Windows 2000 environment

6284 Improved stability in List View when deleting a source linked to another open source

Coding

6210, 6228, 6234, 6235, 6253, 6255, 6265, 6275, 6278 Improved coding persistence when modifying source content

6258 Improved coding reference count in copied documents containing overlapping coding

6267 Improved functionality when range coding sources

Nodes

6216 Improved stability docking/undocking node Detail View when the Picture tab is displayed

6268 Improved node print and export when 'Display plain text for nodes' selected in Application Options

What is in Service Pack 3?

This software includes Service Pack 3 which provides the following improvements:

Installation and activation

5116, 5872, 6193, 6386, 6468, 6469, 6815 Improved activation process

Help

6994 On installation, Help now defaults to Online Help rather than Offline Help

5791 Improved behavior and performance of Online Help

6185, 6394 Updated Help index and related topic links

4839, 5878, 5887, 5979, 6124, 6212, 6360 Updated a selection of Help topics for more clarity

Opening projects

6237 Ability to convert MAXQDA 2007 projects to NVivo 8 projects

6238 Ability to convert ATLAS.ti 5.2 and 5.5 projects exported as XML to NVivo 8 projects

Sources

2362 Ability to select print options when printing sources from Print Preview

6025, 6241, 6345, 6355, 6384, 6419, 6420, 6422, 6423 Improved behavior of images pasted into text sources

4630, 5547, 6064, 6071 Improved hyperlink behavior in sources

5593 Improved import of PDF files

6266 Improved behavior when pasting content containing 'See Also' links

6248, 6292, 6409, 6411 Improved stability when inserting page breaks and cutting or pasting text

6368, 6385, 7030 Improved stability of undocked source Detail Views

3843, 6175 Improved performance when saving, closing and deleting sources

5946, 6176 Improved performance when pasting and deleting coded content

Audio and video sources

5897 Ability to automatically 'skip back on play' when transcribing audio and video sources

6299 Ability to preview and selectively map data when importing transcript entries

6239 Ability to import picture logs

6332, 7021, 7033 Improved stability when pasting or uncoding transcript entries

6584 Improved visibility of transcript entries when editing

6975 Improved persistence of transcript entry changes when in transcribe mode

Picture sources

5894 Ability to adjust region shading density in picture sources using a slider bar

Users

4868, 5386 Ability to remove a user from Project Properties and reassign associated data to another user

Charts

6262 Ability to rotate 3D charts using the mouse

6196, 6256, 6259, 6344 Improved display of data in charts

Coding

5955 Ability to uncode selected content from a node via a new menu option 'Uncode Selection at This Node'

5957 Ability to range code multiple sources of the same type at once

3876 Ability to range code the entire image in a picture source

6270, 6271, 6280, 6282, 6289, 6295, 6296, 6298, 6303, 6482 Improved coding persistence when modifying source content

Coding stripes

4328, 4566 Improved usability when selecting coding stripes representing user coding

6588 Improved stability when uncoding from coding stripes representing user coding

6978 Improved behavior when uncoding from coding sub stripes

Find

6069 Ability to expand/collapse all items in a Grouped Find results list

6971 Improved stability of Grouped Find

Nodes

1994 Ability to open a case directly from the casebook

6125 Ability to print preview the Summary tab of a node

6919 Opening a source from a coded passage in a node opens the source at the relevant passage

6933, 6934 Improved export of nodes as web pages

6288, 6305 Improved coding context display

6434 Improved tooltips for thumbnails in text, audio, video and picture node tabs

6772, 6860 Improved stability when opening a casebook

6217 Improved performance when moving, deleting and merging nodes

2741 Additional cell shading options in matrices

6912, 6966 Improved behavior when pasting selected matrix cells

6911 Corrected matrix row sorting behavior in undocked Detail View

Queries

6657 Ability to view word frequency query results as a 'tag cloud'

2743 Text search query results show key word in context (KWIC)

6135 Word frequency query results show key word in context (KWIC)

7023 Corrected highlighting of finds in text search query results

6260 Corrected behavior of matrix coding queries when sets are selected as rows and columns

6982, 6992 Improved notification messages when user removes query criteria from a coding query

6300, 6403, 6619, 6877, 6935, 6953, 6961, 6973 Improved stability of query execution

Reports

6229, 6264, 6819, 6834, 6838 Improved details for reports

6831, 7002 Improved stability of reports

Models

1944 Ability to export models as BMP or SVG files

6366, 6367 Improved behavior of zoomed models

Annotations

6272, 6401 Improved display of annotations when performing queries and 'Go To' searches

6283 Improved behavior of annotations in transcripts

6413 Improved behavior of annotations in nodes in undocked Detail View

See Also Links

6304, 6352 Improved behavior of 'See Also' links in coding context

6342 Improved stability after adding 'See Also' links

6358 Improved stability when merging transcript entries containing 'See Also' links

Views

6143 Ability to view number of selected items in status bar

6896, 6903 Improved menu and toolbar behavior in undocked Detail Views

6313, 6314 List View and toolbar customizations are preserved when upgrading software

6206, 6208, 6910 Improved usability and stability when customizing List Views

6293 Improved behavior of horizontal scroll bar when Detail View is positioned at right

6301 Improved stability when exporting List Views

Known issues in NVivo 8

Please refer to the [QSR website](#) for information and advice on known issues in this software.

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