

Merge for NVivo Think First

Consideration: team members

Aligning and merging your NVivo 2 projects using Merge for NVivo

This document tells you
what to expect
when your projects merge.

There are also tips for
preparing your projects for
the best results.

What to expect when merging your projects

The file that results from merging two NVivo 2 projects will include the team members who worked on both projects. If team member names in the master and auxiliary projects are identical, they will be considered to match and will be combined. This combined team member will own all of the documents and nodes that were owned in the master and/or the auxiliary projects.

This applies also to the project administrator. All documents and nodes owned by the administrator in the original NVivo 2 documents will be owned by the 'combined' administrator in the merged output project.

Tips to prepare for the best results

If the same team members are in both projects, and you want each team member to be added to the merged project and to be the owner of any documents or nodes they originally created, simply use identical team member names in the master and auxiliary projects.

Importantly however, if you want to compare a team member's contribution in different projects, you'll need to ensure that the names are different. For example, you may choose to add a number to the person's name in one project.

Consideration: documents and memos

What to expect when merging your projects

The software matches your documents by their **name**, **size** and the **number of components**. Documents in the master and auxiliary project that are identified as having unique names are all added to the merged output project.

The master version will prevail if a matching document is found in the auxiliary project. However, coding references and top-level links from the auxiliary project will be added to this master. However, variations in formatting, annotations, attributes, properties and any in-text links will be lost from the auxiliary project version of the document.

Importantly however, if you have used links in a document, you will find that they alter its size. So this will mean that the documents are unlikely to have been matched and therefore merged originally.

Tips to prepare for the best results

You may wish to merge projects which contain the same documents, but which have different coding and memos added by two different researchers. If so, you will need to avoid altering the documents so that they don't meet the matching criteria.

You may also ensure that a modified document is included within the final output project with all of its changes. To be sure that this occurs, we recommend that you change the document name in one project. (It may just be easiest to add a number to the document name.)

Consideration: nodes and coding

What to expect when merging your projects

Merge for NVivo matches nodes in your project by **title**. Nodes from the master and auxiliary projects that have identical titles, will be considered to match and will be combined. The combined node will contain all coding references in the original nodes, as well as all of the top-level links. It will have the properties and attribute values of the node in the master project.

'Case' nodes and 'tree' nodes are matched by their **full hierarchical title**. For example, nodes in different input projects with the same title "*twenty*" but with full hierarchical titles "*/salary/twenty*" and "*/age/twenty*" will not match and will be considered as distinct nodes.

Tips to prepare for the best results

To ensure that your project's nodes match, and therefore their coding is combined, be sure that they have identical hierarchical titles. We recommend that you plan for this collaboratively at the start of your team's project. Set out guidelines for the nodes whose coding is to be merged to ensure they retain identical titles.

Likewise, to ensure that coding completed in one project will be added to the merged project (without being combined with any other coding), ensure that the relevant nodes have different hierarchical titles. For example, to compare the coding undertaken by two researchers, rearrange the nodes into trees with uniquely titled parents (such as a node for each researcher's name).

Consideration: nodes created for search results

What to expect when merging your projects

Nodes that are created for search results are matched by their **title** and **description**. Therefore their coding will not be combined unless the original searches were identical in terms of operator and scope. This means they will appear as unique nodes in the merged project.

Tips to prepare for the best results

We recommend that you review and delete any unnecessary search results nodes before you merge your projects. This will help to avoid creating a final merged project that contains a large number of nodes that are now irrelevant to your analysis. This will be especially important if you have been using matrices in NVivo 2.

Consideration: attributes

What to expect when merging your projects

Your final merged project will only include attributes that were created within the master project. Any attributes that only existed within the project you imported (the auxiliary project) will not be added to the final merged project.

Tips to prepare for the best results

Does the project you plan to import (the auxiliary project) contain attributes that do not appear in the master project? And would you like these attributes to appear in the final merged project?

If so, create those attributes within the master project before merging. Ensure that they match the attributes in the auxiliary project exactly so that any values are transferred to the new merged project.

If you need to create a large number of new attributes in your master project, we recommend that you use NVivo 2's ability to import attributes and their values in tables. This will save you significant time.

Consideration: sets

What to expect when merging your projects

If sets of documents or nodes match, then they will be combined within the new merged project. If sets do not match, then they will be created as unique sets in the merged project.

Tips to prepare for the best results

Before merging your projects we recommend that you review the sets you've already created – especially working sets. If, for example, you'd like some sets to be combined in your new merged project, amend them as appropriate to ensure this happens.

Consideration: document links and node links

What to expect when merging your projects

Node links and **top level document links** from your imported project (auxiliary project) can appear in the final merged project. This will happen if the items at the end of these links are successfully transferred to the merged project.

Links within documents (called **in-text links** or '**DocLinks**') in the master project, or links within unique documents in your imported project will be transferred to the final merged project. As too will node links.

In the event that a document (including a memo) is duplicated within both projects however, only the **in-text links** that are within the master project document will be included.

Tips to prepare for the best results

We recommend that you avoid using **in-text links** to link to memos. This is because memos will develop differently in two projects, even if they're about the same project item. So while you won't lose your memos because they differ, you will lose all-in text links that are contained in them. The simple rule then, is to only use **top level document links** in any projects you plan to import.

This rule will also apply when using node links to link to references that cite relevant material for example. Any links that are in-text will be lost if the document matches one in the master project.

Consideration: annotations

What to expect when merging your projects

Annotations are like notes scribbled in a margin. In NVivo 2, they are stored as hyperlinks in the text.

Therefore, if an annotation is present in a master project document, or within a unique document in the auxiliary project, it will be transferred into the final merged project. In the event that a document is duplicated within both projects however, only the annotations that are within the master project document will be included.

Tips to prepare for the best results

If you have annotations within the auxiliary version of a matched document, there are some steps you can take to extract them, and therefore preserve them. Produce a report on the relevant document in your imported (auxiliary) project, with all DataLinks as endnotes. Now, you can cut and paste from this report into the annotations in your merged project.

Consideration: links to external items

What to expect when merging your projects

Your NVivo 2 project can contain links to external files stored on your computer. Any external links that are within documents in your master project, or within unique documents in your auxiliary project, will appear in the final merged project.

Please note however, that only the links remain. The external files that they point to, will not typically be copied and merged into your final project.

Tips to prepare for the best results

When moving NVivo 2 projects between computers for merging, consider whether you wish to move external files as well. Only files stored within the 'All Users' folder in your NVivo 2 project will be copied into the new merged project folders. External files held in other locations won't be copied – so you'll need to perform this task separately.

Consideration: models

What to expect when merging your project

Your NVivo 2 models cannot be merged, as the links they typically contain to live data makes this process too complex. Therefore, only those models which are present within the master project will appear in the final merged project.

Tips to prepare for the best results

There is a workaround that will allow you to bring models in your auxiliary project into your final merged project. To do this, save the relevant model to your clipboard and then, using the *paste special* command, paste it into a Microsoft™ Word document. Then make a document in the merged project called “Models from project one” to describe these models, and use links to form connections with the Word documents.

Consideration: properties

What to expect when merging your project

Many project items have user-defined properties such as descriptions and owner. When two items are considered to be a match by Merge for NVivo, only the properties of the item in the master project are utilized.

Tips to prepare for the best results

We recommend that you avoid using properties descriptions to record insights into your project items, as they may be lost. Instead, use memos to record your insights as they will be imported as unique documents.