

# Supplement 4: How NVivo Handles Items During a Project Merge

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In Chapter 11 on teamwork, we provide additional details about to how manage the copies of the Project and the examination of coding across team members. You might also combine two copies of your own Project, although this is less common. In this supplement, we provide you with a table on how items are identified as “duplicates” in multiple Projects, because your goal is usually to combined duplicates (e.g., Nodes, Files, etc.) into a single item in the new Project. We also provide additional detail on how items on how NVivo handles duplicates once they are identified.

**Table S4.1 How NVivo identifies duplicates across different copies of a Project**

| <b>Project items</b>       | <b>Are duplicates when both items...</b>   |
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| Files, Externals and Memos | Have the same name, folder location and text content.  |
| PDF Files                  | Have the same name, folder location and both contain the same PDF content.   |
| Dataset Files (Surveys)    | Have the same name and folder location, and have the same fields (columns), number of rows and the same text content in codable fields. Differences in column order are ignored. |

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| Picture Files                       | Have the same name, folder location and the same picture.<br>Differences in picture logs, image rotation, brightness and contrast are ignored.      |
| Audio and video Files               | Have the same name, folder location and both contain either a matching media item, or no media item at all. Differences in transcripts are ignored. |
| Framework matrices                  | Have the same name, folder location and contain the same row and column Nodes. Differences in row header Attributes are ignored.                    |
| Summaries                           | Have the same row and column Nodes.   |
| Memo Links                          | Link the same Memo to the same source item.   |
| See Also Links                      | Link the same Project item content to the same destination.   |
| Annotations                         | Have the same text and are linked to the same Project item content.   |
| Nodes                               | Have the same name and hierarchical location.   |
| Cases                               | Have the same name and hierarchical location.   |
| Relationships                       | Have the same name, must connect the same project items, and have the same direction.   |
| Relationship types                  | Have the same name and direction.   |
| Queries, Query Results and Matrices | Have the same name, folder location and modification date.  |

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| File classifications       | Have the same bibliographical ID. If the bibliographical ID is blank, then they are duplicates if they have the same name.                                  |
| File Attributes and Values | Have the same bibliographical ID and same data type. If the bibliographical ID is blank, then they are duplicates if they have the same name and data type. |
| Case Classifications       | Have the same name.   |
| Case Attributes and Values | Have the same attribute name, same data type and the same attribute value name.   |
| Maps                       | Have the same name, location and modification date.   |
| User-defined folders       | Have the same name and location.  |
| Sets and Search folders    | Have the same name.   |
| Reports and Extracts       | Have the same name, location and content (for example, fields, sort order, grouping and layout).  |

**Table S4.2 How NVivo handles duplicate items during import**

| Duplicate item | Difference   | Rules applied   |
|----------------|--------------|---|
| Folders        | Folder items | Any unique folder items from the imported Project are added to the folder in your open Project. |

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| Sets                 | Set members                         | Any unique set members from the imported Project are added to the set in your open Project.  |
| Files                | Linked memos                        | The Memos from the imported item are appended to the linked Memos in the open Project.   |
| Files                | Colour or description               | If Files in your project have a colour and description, these properties are retained, otherwise the colour and description from the imported Project are assigned to the Files.   |
| Files                | Classification and attribute values | If the File in your Project has been classified, the Classification is retained, otherwise the Classification (and Attribute Values) from the imported Project are assigned to the File.<br>If the File has the same Classification, then Attribute Values from the imported Project will replace any 'Unassigned' Values in your Project. |
| Datasets and surveys | File shortcuts                      | The shortcuts in your Project are retained.  |
| Audio or video Files | Transcript entries                  | Transcript entries are considered duplicates when both the timespan and text in the Content field is matched. Any unique transcript entries in the imported Project are added to the matching File in your Project.  |

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|                    |                       | <p>If a duplicate transcript entry has different text within a custom transcript field (and the field exists in both Projects), any unique custom field content is appended to the content of the matching field. For example, if the custom field <i>Speaker</i> has the Value “<i>Anne</i>” in the imported Project, but has the value “<i>Kate</i>” in your project, then after import, your project will have the value <i>Anne, Kate</i>.</p> <p>If an imported Project contains uniquely-named custom transcript fields, these custom fields are added to your Project (until you reach the limit of 10 custom transcript fields). The Values of the custom fields are added to matching transcript entries.</p> |
| Picture Files      | Log entries           | Any unique log entries in the imported Project are added to the matching File in the open Project.   |
| Framework matrices | Row header attributes | The Framework Matrix in your Project is retained.  |
| Summaries          | Text content          | The summary from the imported Project is appended to the summary in the open Project.  |
| Nodes              | Coding references     | The References from the imported Node are combined with the References in your Project.  |

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| Nodes           | Colour or description               | If Node in your Project has a colour and description, these properties are retained, otherwise the colour and description from the imported Project are assigned to the Node.  |
| Nodes           | Aggregation                         | The aggregation setting in your Project is retained.   |
| Cases           | References                          | The References from the imported Case are combined with the case's References in your Project.   |
| Cases           | Colour or description               | If Cases in your Project have a colour and description, these properties are retained, otherwise the colour and description from the imported Project are assigned to the Case.  |
| Cases           | Aggregation                         | The Aggregation setting in your Project is retained.   |
| Cases           | Classification and Attribute Values | If Cases in your Project have been classified, the Classification is retained, otherwise the Classification (and Attribute Values) from the imported Project are assigned to the Case.<br>If the Case has the same Classification, then Attribute Values from the imported Project will replace any “Unassigned” Values in your Project. |
| Classifications | Attributes                          | Any unique Attributes and Attribute Values are added to the Classification in your Project.  |

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|  |  | <p>If an Attribute Value in your Project has a colour and description, these properties are retained, otherwise the colour and description from the Attribute Value in the imported Project are assigned to the Attribute Value.</p> |
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