

QDA Miner

Addendum v2.0

QDA Miner is an easy-to-use qualitative analysis software for coding, annotating, retrieving and reviewing coded data and documents such as open-ended responses, customer comments, legal documents and technical reports. The program can manage complex projects involving documents and metadata such as numerical and categorical information. It offers a unique integration with advanced text mining, quantitative content analysis (WordStat) and statistical analysis (Simstat) tools, providing easy combination and integration of qualitative and quantitative methods.

The version 2.0 introduces important new features such as:

- A fully hierarchical codebook system;
- The ability to save and reuse complex text search and coding retrieval strategies;
- New coding revision tools (code splitting, category merging, code search and replace);
- New visualization tools for coding frequencies, occurrences and coverage;
- A much easier project creation and document conversion routine;
- Exportation of query results and tagged documents to XML;
- Numerous other improvements.

The following document provides a description of the new features introduced in version 2.0. Existing features that were significantly modified in this version have also been added to this document.

Creating a New Project

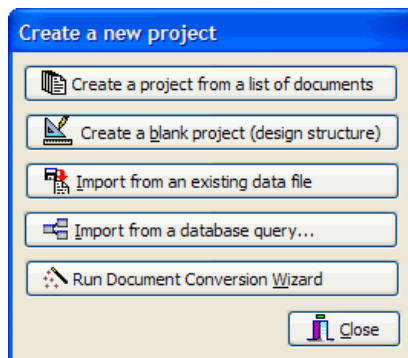
There are four ways of creating a QDA Miner project: (1) You can create a simple project by importing one or several documents; (2) you can create a new project from scratch by creating a project structure and then manually entering data and documents; (3) you can import existing data and documents stored in another file format such as Excel, MS Access, dBase, Paradox, etc.; or (4) you can also use the **Document Conversion Wizard** utility program to import several documents at once, perform some transformation and data extraction, and store them in a new project.

Creating an Project from a List of Documents

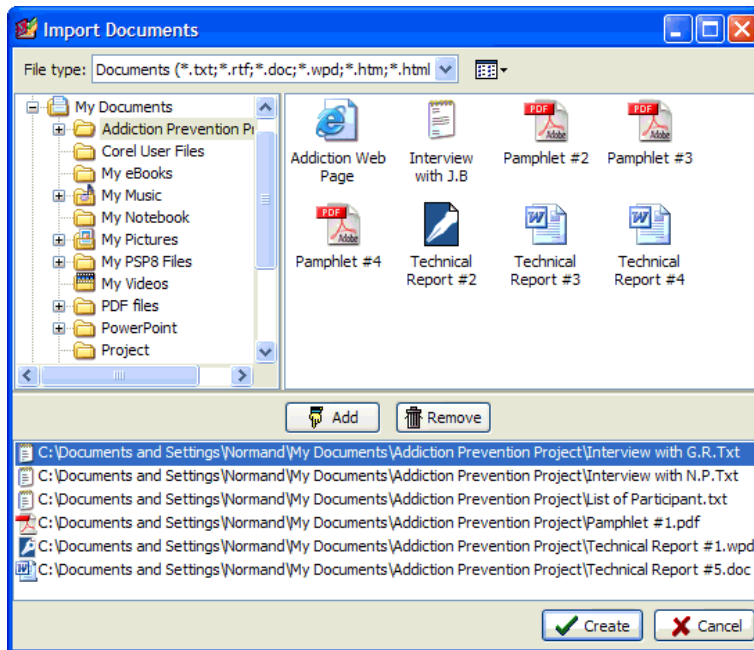
The easiest method to create a new project and start doing analysis in QDA Miner is by specifying a list of existing documents and importing them into a new project. Using this method creates a simple project with two variables: A DOCUMENT variable containing the imported documents, and a categorical variable containing the original name of the files from which the documents originated. Imported documents are stored in different cases so, if 10 documents have been imported, the file will have 10 cases with two variables each. To split long documents into several ones or extract numerical, categorical, or textual information from those documents and store them into additional variables, use the Document Conversion Wizard.


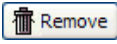
To create a new project using this method

- Select the NEW command from the PROJECT menu. This command calls up a dialog box similar to the one below.



- Click on the **Create a project from a list of documents** button. A dialog box similar to the one below will appear:

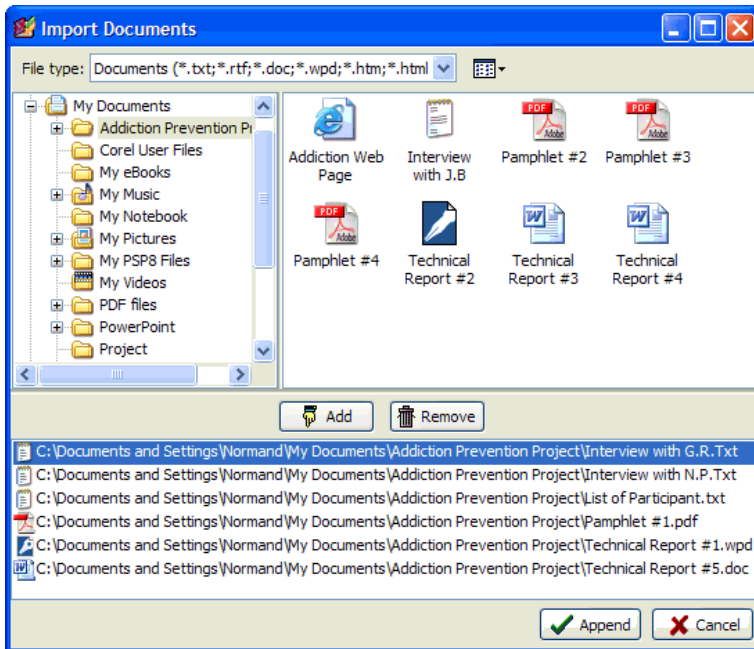




- Click on a folder in the folders list on the upper left section of the dialog box to display its contents. If you want to see the contents of a drive, go to the folders list, click on **My Computer**, and then double-click on a drive.
- In the upper right section of the dialog box, QDA Miner displays all supported document file formats that may be imported, such as MS Word, WordPerfect, RTF, PDF documents, plain text files or HTML. To display only documents of a specific type, set the **File Type** list box to the desired file format.
- Click on the file you would like to import. To select multiple files, hold down the **CTRL** key while clicking on the other files.
- Click on the  **Add** button to add those documents to the list of documents to import, located at the bottom of this dialog box. You may also drag the files from the top right section to this list.
- To remove a file from the list of documents to import, select that file name and click on the  **Remove** button.
- Once all files have been selected, click on the **CREATE** button. You will be asked to specify the name of the project that you want to create. If a project with an identical name already exists, you will be asked to confirm that you wish to overwrite the previous version of the project.

QDA Miner closes this dialog box, imports all the specified files into a new project and then brings you back to the main window.

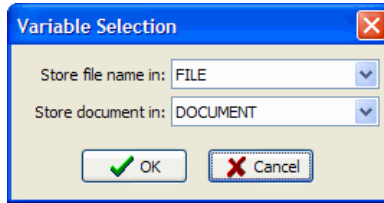
Appending New Documents

To append documents and store them in new cases, select the APPEND DOCUMENTS command from the CASES menu. A dialog box similar to the one below will appear:



- Click on a folder in the folders list on the upper left section of the dialog box to display its contents. If you want to see the contents of a drive, go to the folders list, click on **My Computer**, and then double-click on a drive.
- In the upper right section of the dialog box, QDA Miner displays all supported document file formats that may be imported, such as MS Word, WordPerfect, RTF, PDF documents, plain text files or HTML. To display only documents of a specific type, set the **File Type** list box to the desired file format.
- Click on the file you would like to import. To select multiple files, hold down the **CTRL** key while clicking on the other files.
- Click on the  **Add** button to add those documents to the list of documents to import, located at the bottom of this dialog box. You may also drag the files from the top right section to this list.
- To remove a file from the list of documents to import, select that file name and click on the  **Remove** button.

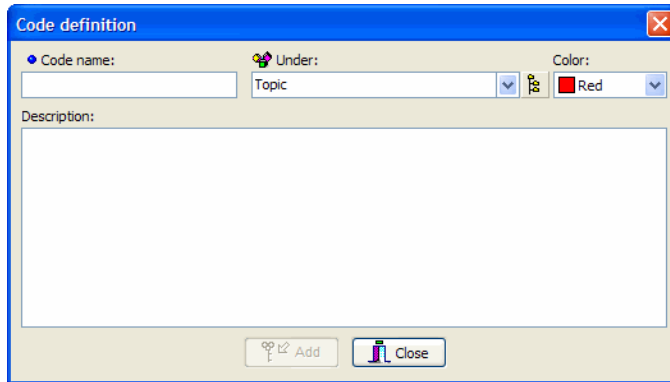
- Once all files have been selected, click on the **Append** button. If the project contains more than one categorical or document variable, a dialog box similar to this one will appear:



- Select the categorical variable in which the file name will be stored. Set this list box to <none> to prevent the program from storing this information in the project.
- Select the document variable where the imported documents should be stored.
- Click on the **OK** button.

Adding a Code

To add a new code to the existing codebook, select the ADD command from the CODES menu. The following dialog box will appear:



When you create a new code, you must (I) specify a unique name and (ii) select a category.

The **UNDER** list box allows you to select the category under which this code will be stored. This control can be used both as an edit box to create a new category and as a list box from which you can select an existing category.

If you want to add the new code to an existing category, select the category name from the list of available categories by clicking on the down arrow key to the right of the list box and by selecting the category name.

To add the new code under a new category, simply enter the name of the new category. By default, the new category is listed at the top level of the codebook. To create a subcategory underneath another one, type its full path separating each level by a backslash. For example, typing `Topics\Economy` will create a subcategory Economy under the Topics main category. If this top-level category does not exist, the program will create both this category and its subcategory and then add the specified code into this subcategory. To store a new subcategory into an existing path, one may also type this new category name and then click on the **Top** button, which will display the tree view of the codebook categories. From that, select the parent category under which this new category will be stored. Selecting any existing category from this tree view automatically inserts the full path before the new category name in the edit box.

The maximum number of levels a codebook can contain is set to 4 by default for every new project. Since the last level can only contain codes, the actual maximum level of a subcategory is equal to this maximum minus 1. To increase or decrease the maximum number of levels allowed in a project codebook, run the **PROPERTIES** command from the **PROJECT** menu, and set the **Maximum Levels in the Codebook** option to a number between 2 and 8.

When a code is assigned to a text segment, a bracket appears in the **MARGIN** of the document to indicate the beginning and end of the code along with the code name. The **COLOR** option can be used to select the color of this bracket and of its associated label.

The **DESCRIPTION** option allows you to enter a definition or a detailed description of the code. You can use this section to specify coding instructions for the coders, along with examples or non-examples, and related codes that may be used in place of or in conjunction with this code.

Moving Codes

Codes and categories in the codebook may be freely moved in the codebook using one of the following methods:

To move a code using drag & drop:

- Click on the code that you want to move, holding down your mouse button.
- Drag the code to its new location and release the mouse button. The dragged item is inserted in the target position depends on the exact position where you drop it.
 - If the item is dropped on a category name, it will be stored as the last item under this category.
 - Dropping a code over another code name inserts the dropped item before the target code.

To move a code to another category:

- Select the code that you want to move, then select the EDIT command from the CODES menu.
- In the Under list box, select the category name to which you want to move this code by clicking on the down arrow key to the right of the list box and selecting the category name.
- Click on the OK button to confirm this move.

To move a category and its items using drag & drop:

- Click on the category that you want to move, holding down your mouse button.
- Drag the category to its new location and release the mouse button. If the item is dropped on another category name, it will be inserted before the target category. If it is dropped over a code, the item will become a subcategory of this code category.

QDA Miner will not allow a category to be dropped in a location underneath it. It will also forbid dropping a category at a location if the number of levels resulting from such a move exceeds the highest level allowed for this project codebook.

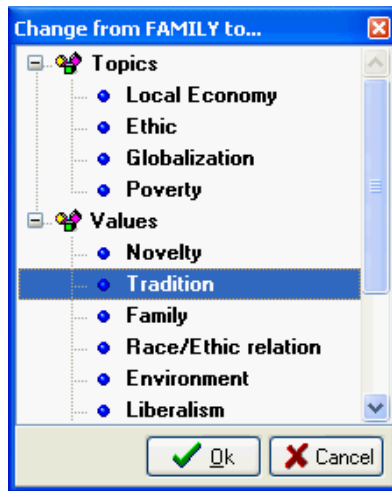
To increase or decrease the maximum number of levels allowed in a project codebook, run the PROPERTIES command from the PROJECT menu, and set the **Maximum Levels in the Codebook** option to a number between 2 and 8.

Merging Codes

During the analysis process, you may choose to merge several codes together. QDA Miner offers you the possibility of merging a single code into another or of merging all codes in a single category into one code. When merging a code into another one, QDA Miner removes the first code from the codebook and automatically recodes all text segments tagged with the first code by giving them a new code. For example, if you decide to merge the code FAMILY into TRADITION, QDA Miner will delete FAMILY from the codebook. It will then search for all documents in the project for text segments that have already been tagged with the FAMILY code and change the assigned code to TRADITION. When merging all codes of one category, the program removes all those codes, transforms the category into a new code, and then automatically recodes all text segments tagged with any of the deleted ones by this new code. If a segment has been tagged using two or more of the merged codes or when two of those coded segments overlap each other, the coded segments are automatically consolidated so that only one tag is attached to the text segments.

To merge a code into another one:

- In the CODES window, select the code you want to eliminate.
- Select the MERGE INTO command from the CODES menu. The following dialog box will appear:



- Select which code you want to attach to text segments already assigned to the code you have decided to delete.
- Click the **OK** button to proceed.

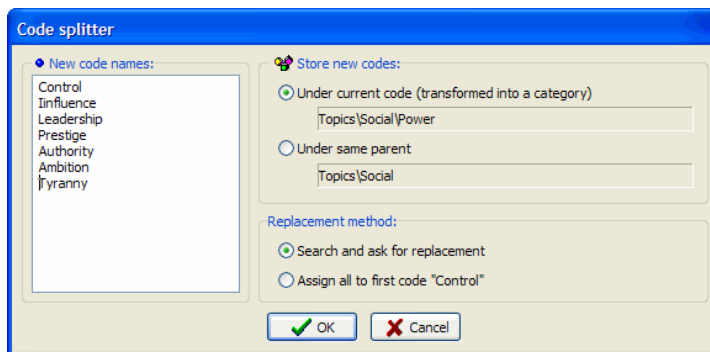
Splitting a Code

Sometimes, one may feel the need to refine a code that has been created at an early stage of analysis in order to make an important distinction one didn't initially consider or to introduce some nuance that would allow a finer-grained analysis. Frequency analysis of codings may also reveal that a code definition is too broad and occurs too often to be of any value for the interpretation of the data. The splitting code function of QDA Miner can be used to solve this. The procedure allows one to subcategorize a code into several other codes in a single step that involves:

1. The transformation of the initial code into a category.
2. The creation of the codes underneath this category
3. The assignment of all existing text segments associated with the initial code to either one of these new codes.

To split a code into several ones:

- In the CODES window, select the code you want to split.
- Select the SPLIT CODE command from the CODES menu. A dialog box similar to the one below will appear:



- In the **New Code Names** edit box, enter the name of all the new codes into which the initial code could be recoded, one code name per line.
- In the **Store New Codes** section of the dialog box, specify where those new codes will be stored. By default, the initial code is transformed into a category, and the new codes are stored under this newly created category. This can be achieved by selecting the **Under Current Code** radio button. One may instead wish to store all new codes in the same location as the initial code by selecting the **Under Same Parent** radio button. Please note that when the code to be split is at the deepest level allowed by the project setting, only this second option will be allowed. In that case, to make sure all new items will be grouped under a new category, one can either move the code to a higher level of the hierarchy prior to the execution of this split command (see Moving Codes, page 10), or increase the maximum number of levels allowed in this project codebook.

- Next, select which replacement method will be used to replace all coded segments currently tagged with the initial code. Two options are available: (1) The program can search among all documents for any coded segment with the split code, display it and, for each coded segment that is found, ask the user to choose among all the new codes the one that should be attached to this segment; or (2) Choose to immediately replace all coded segments with the first code specified in the list of new codes. The user may return later to the coded segments associated with this first code in order to review those and, if needed, modify the code associated with those segments.
- Click on **OK** to proceed to the splitting of the code.

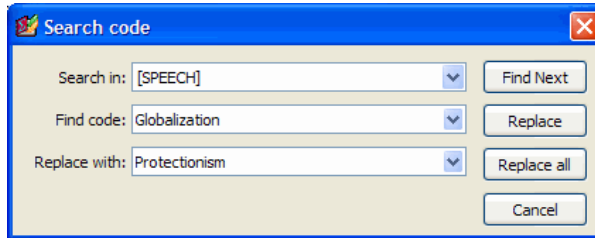
If the **Search and Ask for Replacement** option was selected, the program will search among all documents and all cases for text segments that have been tagged with the initial code that has just been split. It will stop at the first occurrence, highlight the text segment, and display a dialog box similar to the one below.



In the **Replace With** list box, select the code that is appropriate to this text segment and click on the **Replace** button. The program will then search for the next occurrence and stop again, allowing one to select another code and assign it to this other text segment. The program proceeds this way until all text segments associated with the initial code have been assigned a new code. However, one may choose to stop this interactive search-and-replace procedure by choosing a code and clicking on the **Replace All** button, instructing the program to replace the initial code for all remaining text segments with a new code. The user may then return later to the coded segments associated with this code to review those and, if needed, modify the code associated with those segments, either individually by selecting their code marks and using the RECODE INTO command, or globally using the SEARCH & REPLACE command from the CODE menu (see Searching and Replacing Codes, page 13).

Searching and Replacing Codes

The SEARCH & REPLACE command from the CODES menu may be used to interactively review codes assigned to text segments and, if needed, replace them with another code. When this command is executed a dialog box similar to the one below will appear:



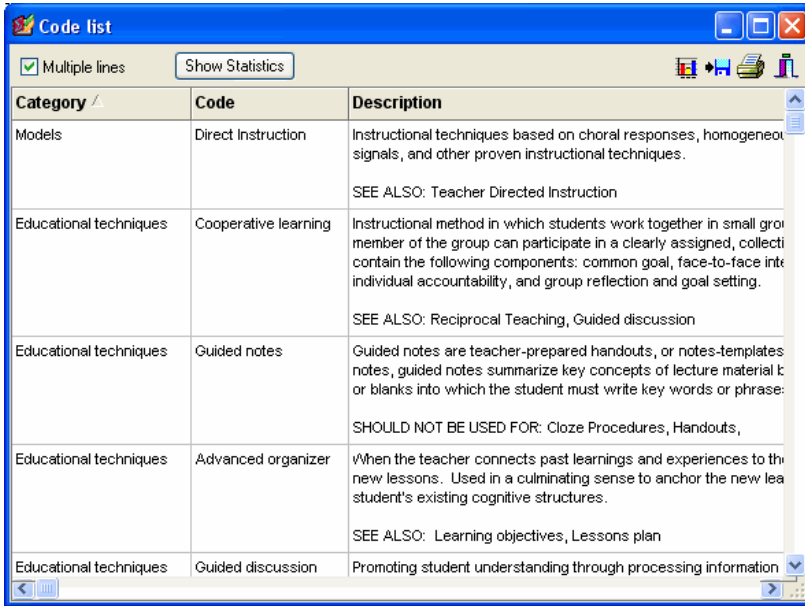
The **Search In** option allows you to specify which document variables to search. If the current project contains more than one document variable, you will have a choice of selecting either one or a combination of them. By default, all document variables are selected. To restrict the analysis to only a few of them, click on the down arrow key at the right of the list box. You will be presented with a list of all available document variables. Select the variables on which you want the search to be performed.

The **Find Code** option allows you to choose which code you want to find. In the **Replace With** list box, select the replacement code.

To replace all instances of the code at once, click on **Replace All**. Or, to replace one instance at a time, click on **Find Next**, and then click **Replace**.

Coding Frequencies


You can use the CODING FREQUENCIES command from the ANALYSIS menu to obtain a list of all codes in the current codebook along with their description and the category to which they belong. This dialog box may also be used to obtain various statistics for each code such as their frequency, the number of cases in which they are found, and the total number of words in the associated text segments. Selecting this command displays a dialog box similar to the one below:




To spread long descriptions over more than one line, select the **Multiple lines** option.

Clicking on the **Show Statistics** button adds six columns to the right side of the table containing summary statistics on code usage:

Count	Number of times this code has been used.
Cases	Number of cases in which this code appears.
Nb Words	Total number of words in all text segments associated with this code.
% Count	Percentage of coding associated with this code.
% Cases	Percentage of cases containing this code.
% Words	Percentage of words tagged with this code.


When statistics are shown in the table, the  button allows one to produce bar charts or pie charts to visually display the distribution of specific codes. To produce such charts:


- Set the Sort By option to the order you want the values to be shown graphically.
- Select the rows you would like to plot (multiple but separate rows can be selected by clicking on the desired rows while holding down the CTRL key)
- Click on the  button.

For further information see the Bar chart and Pie Chart section below.

To remove these six columns, click on the **Hide Statistics** button.


To sort this list of hits in ascending order on any column values, simply click on a given column header. Clicking on the same column header a second time sorts the rows in descending order.

The list of codes may be saved to disk in Excel, plain ASCII, text delimited, HTML or XML format by clicking on the  button.

You may also print this list by clicking on the  button.

Bar chart and Pie Chart

QDA Miner allows one to produce bar charts or pie charts to visually display the distribution of specific codes. To produce such charts:

- Run the CODING FREQUENCIES command from the ANALYSIS menu.
- Click on the **Show Statistics** button.
- Sort the table to the desired graphic order of the values.
- Select the rows you would like to plot (multiple but separate rows can be selected by clicking while holding down the CTRL key)
- Click on the  button.

Three types of charts may be used to depict the distribution of keywords or content categories:



The vertical bar chart is the default chart used to display absolute or relative frequencies of keywords or content categories.



The horizontal bar chart displays the same information as the vertical one but is especially useful when the number of keywords is high and their labels cannot be displayed entirely on the bottom axis.



The pie chart is useful to display the relative frequency of each keyword and compare individual values to other values and to the whole. Numerical values displayed in pie charts are always expressed in percentages of either the total frequency or case occurrences.

The **Plot** option allows one to select the values that will be used as the scale for the length of bars in bar charts or as the percentage base for pie charts. For bar charts the options are:








FREQUENCY	Number of occurrences of the code
NB CASES	Number of cases where this code appears
NB WORDS	Total number of words associated with this code
% CODES	Percentage of codes associated with this code
% CASES	Percentage of cases where this keyword appears
% WORDS	Percentage of words associated with this code

For pie charts, three options are available to specify how percentages will be computed:


FREQUENCY	Number of occurrences of the code
NB CASES	Number of cases where this code appears
NB WORDS	Total number of words associated with this code


The **View Others** option displays an additional bar or slice representing all items in the frequency table that have not been selected.

The following table provides a short description of available buttons and controls:

Controls	Description
	Press this button to retrieve a chart previously saved on disk.
	Press this button to save a chart on disk. Charts are saved in a proprietary format and may be edited and customized using the Chart Editor.
	Pressing this button allows you to print a copy of the displayed chart.
	Click on this button to turn on/off the 3D perspective for the current chart.
	This button allows you to edit various features of the chart such as the left and bottom axis, the chart and axis titles, the location of the legend, etc.
	This button is used to create a copy of the chart to the clipboard. When this button is clicked, a pop-up menu appears allowing you to select whether the chart should be copied as a bitmap or as a metafile.
	Pressing this button closes the chart dialog and returns to QDA Miner's Code Frequency dialog.

Customizing bar charts and pie charts

Clicking on the  button on the chart dialog gives access to a dialog to customize the appearance of bar charts and line charts. The options available in this dialog represent only a small portion of all settings available.

To further customize the chart, modify data points, value labels, or series order, click on the  button located on the right side of the dialog.

LEFT OR BOTTOM AXIS

Minimum / Maximum - QDA Miner automatically adjusts the vertical axis scale to fit the range of values plotted against it. To manually set these values, type the desired minimum and maximum.

Increment Increasing or decreasing this value affects the distance between numbers as well as tick marks. Horizontal grid lines are also affected by modification of this value. **Horizontal Grid**

This option turns horizontal grid lines on and off. Grid lines extend from each tick mark on an axis to the opposite side of the graph. To increase or decrease the number of grid lines or the distance between those lines, change the Increment value of the axis. A list box also allows a choice among five different line styles to draw those grid lines.

LEGEND

Location - This option positions the legend. Legends may be placed at Top, Left, Right and Bottom side of the chart.

From top - When the legend is displayed on the left or the right side of the chart, this option specifies the legend's top position in percent of total chart height.

From left - When the legend is displayed on the top or the bottom chart, this option specifies the legend's top position in percent of total chart width.

TITLES

Proper titles and axis labels are of utmost importance when describing the information displayed in a chart. By default, QDA Miner uses variable names and labels as well as other predefined settings to provide such descriptions.

The title page allows one to modify the top title, as well as the labels on the left, bottom and right axis. To edit the title, select the proper radio button. Enter several lines of text for each title by pressing the **ENTER** key at the end of a line before entering the next line.

The Font button on the right side of the edit box allows to change the font size or style of the related title.

3D VIEW

Orthogonal - Turning this option off disables the free elevation and rotation of the 3D chart.

Zoom - This option zooms the whole chart. Expressed as a percentage, increasing the value positively will bring the chart towards the viewer, increasing the overall chart size as the Zoom value increases.

3D Percent - The 3D Percent property indicates the size ratio between chart dimensions and chart depth by specifying a percent number from 1 to 100.

Perspective - Use this property with Orthogonal unchecked to modify the 3D perspective of the Chart. Larger values add more depth perspective.

Bar shadow - Enabling this option dark shades to the sides of 3D bars. Turning it off will color the sides of the bar the same as the front.

Bar width - This option determines the percent of total bar width used. Setting this value to 100 makes joined bars.



Bar depth - Use this property to limit the depth that each bar series uses. By default, bars will take up the part proportional to the number of bar series in the chart so that the back of a bar will join the front of the bar immediately behind it. To insert a gap between series of bars, decrease this value.

Pie depth - Use this property to change the thickness of the pie chart.


Saving and Retrieving Queries

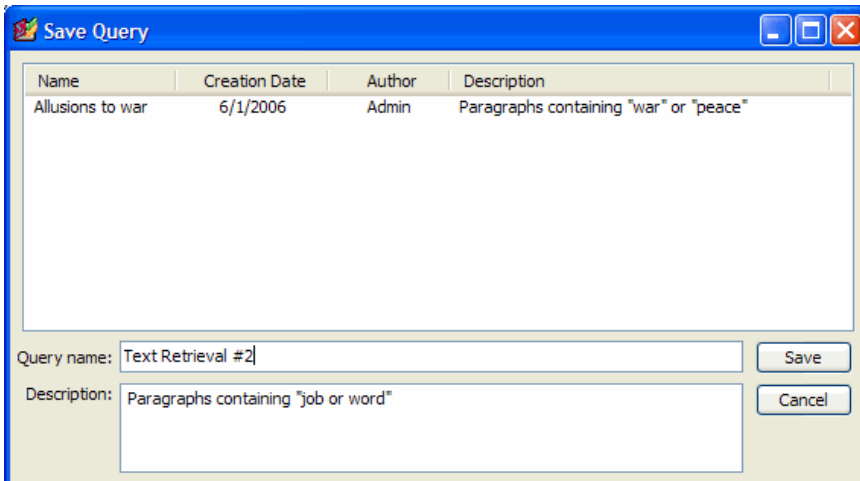
QDA Miner provides different types of queries that enable you to find specific text patterns, to select subsets of cases, and to explore the relationships among codes and between those codes and case properties. The program allows you to save with the project different kinds of queries and analysis options and retrieve them later. QDA Miner provides savings and retrievals for the following functions:

- Text Retrieval
- Section Retrieval
- Keyword Retrieval
- Coding Retrieval
- Coding Co-occurrences
- Coding Sequences
- Inter-coders Agreement
- Case Filtering

Dialog boxes associated with each of these query types have two buttons: The  button is used to save the current question options with the project, while the  button is used to retrieve previously saved queries.

To Save a Query

- Set the various options on the dialog box.
- Click on the  button. A dialog box similar to the one below will appear:



Name	Creation Date	Author	Description
Allusions to war	6/1/2006	Admin	Paragraphs containing "war" or "peace"


Query name: Text Retrieval #2

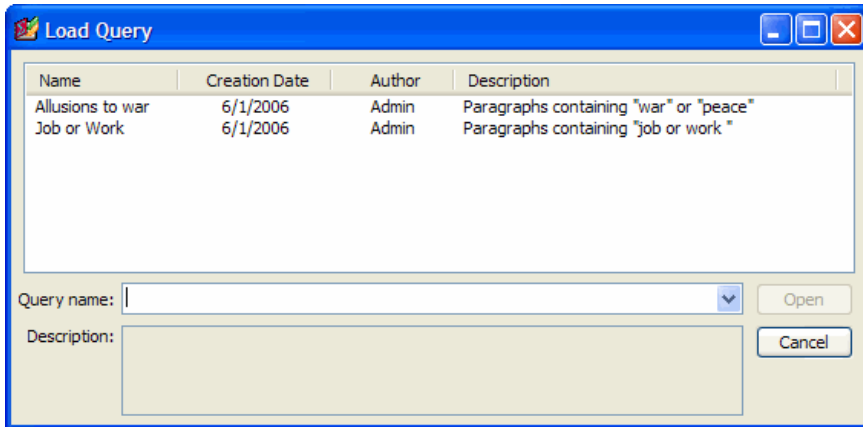
Description: Paragraphs containing "job or word"

Save Cancel

- The program automatically provides a generic query name and a description. Edit this name and description and click on the SAVE button to store this query with the project. If a query with an identical name already exists, you will be asked to confirm that you wish to overwrite it.

To Retrieve a Previously Saved Query

- Open the dialog box associated with the task you want to perform.
- Click on the  button. A dialog box similar to the one below will appear:



Please note that if no query of this type has been previously saved, this option will be disabled.

- From the list of previously saved queries, you can select the query you want to retrieve, either by double-clicking on its line, or click on it once and then clicking on the Open button. You may also type its name in the Query Name edit box or select it from a drop-down list and then click on the **Open** button to open it.

To delete queries

- From the **Save Query** or **Load Query** dialog box, select the query you would like to delete.
- Click on the **Del** keyboard key or right-click to display a pop-up menu and choose the **Delete** command.

To rename a query

- From the **Save Query** or **Load Query** dialog box, select the query you would like to rename.
- Right-click to display a pop-up menu and choose the **Rename** command.

- Enter the new name and click on **OK**.

To change the description of a query

- From the **Save Query** or **Load Query** dialog box, select the query with the description you would like to modify.
- Right-click to display a pop-up menu and choose the **Edit Description** command.
- Change the description text and click on **OK**.

Miscellaneous changes

Exportation of QDA Miner projects to XML

An entire QDA Miner project, including tagged documents, may now be exported to XML. To export a project to an XML file

- Select the EXPORT | PROJECT FILE command sequence from the PROJECT menu.
- Set the **Save As Type** drop-down list to XML.
- Enter a valid filename.
- Click on the SAVE button.

Exportation of tabular results to XML

Most output tables created by QDA Miner may be exported to disk in various file formats including Excel, HTML, MS Word and delimited ASCII files. Version 2.0 includes the ability to store a table in XML format, allowing one to further process it with many other application.

Analysing coded segments with WordStat

When the **Assigned Codes or Category** option is enabled, a temporary file is created containing all text segments associated with the selected codes along with a categorical variable to represent the code name. Version 2.0 introduced a new **Include category for remaining text** option, that allows one to add to this temporary file any remaining text segments not associated with any one of those codes, allowing one to compare text associated to specific codes with all remaining text.

Select all or clear all items in a check list box

When selecting codes or document variables from check list box, one can now select or clear all items using the following method:

- Right-click on the check list box to display a pop-up menu.
- Choose **Select All** to fill the list with all the items.
- Choose **Clear All** to empty the list.

New option for 3D Concept maps and Correspondence plots



Clicking this button draws anchor lines from the floor to the data point to better locate data points in all 3 dimensions.