

# USER GUIDE

## What is Dedoose?

Dedoose is a web-based application that allows you to organize and analyze research data, no matter what form those data take.

Whether your research data are qualitative—text, audio, images, or video, quantitative—spreadsheets, surveys, test scores, ratings or demographics—or a mixture of both, Dedoose’s design is flexible enough for you and your team to apply whatever methodologies you choose. Dedoose supports both qualitative approaches and mixed methods approaches to data interaction and analysis in a secure, collaborative environment.

## Research Made Easy

At Dedoose, we’ve worked hard to make this application (App) intuitive to users. Dedoose is designed to make your life easier, your work more efficient, and your findings more transparent and meaningful, regardless of the size of your project.

Although Dedoose has many advanced features, you will be able to get up and running quickly just by reviewing the Quick Start Guide. There are also Video Guides to help you start building your database and carrying out your analysis as well as live customer support.

We encourage you to read Filtering & Analysis to make sure you get the most out of Dedoose by using Dedoose's interactive visualizations.

## System Requirements / The Dedoose App

### Why use the Dedoose Desktop App?

Dedoose is at its best when your internet connection is strong and your browser, version of Adobe Flash Player, and the system configuration are all in line. The Dedoose Desktop App is an alternative way to access Dedoose servers that circumvent the issues that can arise when using a browser to connect. In

short, when the browser developers update their software, new issues can arise that can impact Dedoose connectivity and performance. Whenever such an issue comes to our attention, we'll address it as quickly as possible. With the Desktop App, we are in full control and whenever we do an update to Dedoose, we update the App so all transitions are as smooth as possible.

### **What devices can use the Dedoose Desktop App?**

Currently, the Dedoose App will run on all Windows, and Apple, and some Linux machines. Note that Dedoose can also run through the Photon browser on iPads and Android tablets.

### **Installing the Dedoose Desktop App**

Here are the steps to begin using the Dedoose Desktop App:

1. Download and install Adobe Air, needed to run the Dedoose Desktop App: <https://get.adobe.com/air/>
2. Download and install Desktop App: <https://app.dedoose.com/App/Air/Dedoose.air>.

### **Using Dedoose on your Mobile Devices**

Native Apps for iPad, Window, and Android devices have now been released.

Alternatively, you can use the Photon Browser (available for a small fee). Here are links to download Photon so you can access Dedoose from your iPad or Android tablet.

\*Photon: <https://play.google.com/store/apps/details?id=com.appsverse.photon&hl=en>

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## Signing Up

It's easy to sign up for an account at Dedoose. Just follow these steps:

1. Click on the red Sign Up button at the top of any page of Dedoose [www.dedoose.com](http://www.dedoose.com)
2. Fill in the 2 required fields on the form (email address and your desired username)
3. There are optional fields for promo codes, referrals and comments
4. When you have completed the form, click Submit.

After completing the form, you will immediately receive your temporary password. You can then log in. Go to the Account Workspace to create a permanent password. You will also receive a confirmation email with additional helpful information.

Your first month on Dedoose is FREE. After that, individual users pay \$12.95/month; groups of 2 to 5 pay \$10.95 per person/per month; and groups of 6 or more pay \$8.95 per person/per month. At the end of your free 30 days, you will be prompted for a payment. You can change your pricing plan at any time via help from us at [support@dedoose.com](mailto:support@dedoose.com) and note that all are eligible for a 10% discount if paying in 6-month increments and 15% if paying annually.

Finally, for individual and small group accounts, charges apply only for monthly cycles when you are actively using your account.

## Logging into Dedoose Projects

To log into Dedoose Projects:

1. Click the Log In tab in the upper right corner of the Dedoose home page
2. Enter your username and password

3. If you want to avoid having to re-enter that information, check the Remember Me box in the lower right corner
4. Click the arrow or hit the hard return key.

When you log in for the first time, you will see your copy of the Demo Project. For more information on the Demo Project, please see the next item.

Returning users will see the Home Dashboard for the project you most recently visited. To access a different project, or to create a new project, click the Projects tab in the Main Menu bar.

## Exploring the Demo Project

As a first-time user, you see the Home Dashboard for your Demo Project when you first log in. Once there, you will see mixed methods data from a study of literacy development. Playing with these data will help you learn your way around Dedoose Workspaces.

Here is an introduction to the project features:

- The Main Menu Bar is at the top right. It allows you to navigate different Workspaces within the same project. **IMPORTANT: Do NOT** click the Back button on your web browser to navigate. Doing so will cause you to exit Dedoose. If you want to move back within Dedoose, use the Back button on the Main Menu Bar.
- The upper left panel contains a summary of your project's attributes and buttons to import and export data. You can also import data to and export data from individual Workspaces by clicking on the Import or Export button at the top of the panel for that Workspace.
- The top of some Workspace panels also features an Edit icon. When you click on Edit some panels will turn orange to remind you to switch out of Edit mode when you are finished editing.
- You can expand individual Workspaces (charts, tables, plots) to full screen by clicking the Expand icon. When you are done, simply close that window by clicking the X to close.
- When you move your cursor over different icons or objects in the Project, Smart Tool Tips will pop up to answer questions you may have.

# Creating a New Project

To create a new Project:

1. Click the Projects button on the far right of the Main Menu Bar
2. You will go to the Projects Workspace where you can click the Create Project button in the lower right hand corner.

\*Name your project, add a description and decide if you need an additional level of security. If you decide to apply the added layer of encryption, be certain to note to your password, because Dedoose cannot help you recover it if forgotten. **NOTE:** Most users do not need this exceptional added level of encryption. \*Once you have created your new Project, the next time you log in Dedoose will load that project instead of the Demo project. If you create additional Projects, you will go to whichever Project you accessed most recently.

**NOTE:** Periodic system maintenance can wipe the memory the system has about the most recent project you were working on and this will cause you to be taken to your first project (often your demo project) rather than the last one you were working with. If that happens, click on the Projects button after logging in and locate the project you wish to access. Click on the Load button next to the Project's name to get to that Project's Home Dashboard.

Buttons at the bottom of the Project menu also allow you to rename, copy, or delete Projects as needed.

## Importing Data

Dedoose makes it easy for you to import existing media files for your qualitative data, regardless of whether they are stored as spreadsheets, text, images, audio, or video.

These data may be field notes, observations, interview or focus-group transcripts, manuscripts, pasted images, audio streams, photographs, video streams, hyperlinks, survey data—anything that you can store as a text, spreadsheet, audio, or video file (.doc, .docx, .rtf, .txt, .pdf, .xls, .xlsx, .csv, .tif, .jpg, .png, .gif, .mp3, .mp4, .wma, and .m4a).

To import your files, start from the Project Workspace dashboard and click the Import Data icon in the upper left panel. You will then see a pop-up menu where you will indicate the type of data you are

importing. Locate the files and submit. Note that you can also import data in many of the other Workspaces.

## Survey Importer

The Dedoose Survey importer is one of our proudest achievements. This will take an existing data set in excel and transfer all the data into Dedoose. While powerful and intuitive, our survey importer works best when you follow the format discussed below.

### *Survey to Dedoose Project Creation*

Creating fully populated Dedoose projects from SurveyMonkey or other data collection service output is an increasingly popular feature in Dedoose. Here's an overview and instructions on how to prepare data from survey responses and open-ended questions stored in an Excel file.

Two main things to note:

1. For any demographic and scale response data, the resulting Dedoose descriptor fields will be identical to what is specified in the column header and the valid values will be whatever data are located in the cells for each case
2. For the qualitative/open-ended narrative data, the content of these cells in each column will be extracted, compiled into a single document for each participant and each response excerpted and tagged with the corresponding column header. So, the column headers for these data will become the automatically generated code system.

To make this process most efficient and the results most useful, here's what is required/recommended:

1. For all columns containing closed-ended (descriptor) data, change all column headers to appropriate labels that make intuitive sense for a descriptor field. For example, with a question like 'Please indicate your age group,' you'll want to change the column header to 'Age Group.' Then if the data are represented by numeric proxies, e.g., 1, 2, and 3, with 1 = 10-25 years, 2 = 26-40 years, 3 = 41-50 years, you'll be happiest in Dedoose if you use the actual values by changing 1s to '10-25 years' the 2s to '26-40 years' and so on. This is a fairly straightforward process with Excel's search-and-replace feature

2. For columns containing qualitative (narrative or open-ended) data you will want to change the header to whatever will be most informative as a code. For example, a header like 'Please describe your experiences with X,' might be shortened to 'X experiences'
3. For columns with continuous numeric data, you will be happiest if, wherever possible, you convert these data to a categorical form. For example, imagine you've collected data from a depression scale where scores can range from 0 to 100. From clinical practice or other guidelines, we may know that scoring between 0 and 50 is considered 'not depressed,' 51-70 = 'minimally depressed,' 71-85 = 'moderately depressed,' and 86+ = 'severely depressed.' Converting these data prior to import will allow you to explore your excerpting and tagging activity as a function of these groupings. Similarly, if you collect age information in a numeric form, it is in your interest to consider how you will be wanting to 'slice up' the qualitative excerpting and tagging activity by creating groups that will make sense given your analytic plans. Keeping in mind that many Dedoose charts and filtering capabilities are based on descriptor data, doing such a conversion puts you in control of the groupings. The Dedoose charting engine will create groupings automatically from continuous numeric data, but the algorithm is arbitrary, so can be of limited utility
4. Save this file to your local computer
5. Create a new project in Dedoose via your 'Projects' workspace
6. Click the 'Import Data' button in the upper left panel in your new project's home dashboard (the panel with the project summary data)
7. Select Import Spreadsheet
8. Locate the Excel file with the project data and 'Submit'
9. Voilà, your project is now all set and ready for more nuanced coding and data analysis.

## Information on Specific Use Cases:

### **\_\_ddqual\_\_ to both force qual fields and to force titles for your docs**

The survey import tool generally does a great job distinguishing close-ended descriptor data from narrative responses. The algorithm for doing so depends on what is found in a column based on the number of unique values (ex. gender would be 'male' or 'female') and the number of characters. Occasionally, you may have a qualitative field that has short responses or similar responses across participants that is misread as a descriptor field instead of an open ended field. For cases just like this, our Tech Team built a way for you to force the system to recognize these fields as qualitative:

1. Open your Excel file

2. Navigate to the columns that you would like to demarcate as qualitative
3. Add "\_ddqual\_" to the front of the column title, without quotation marks and spaces
4. Save the file
5. Import it into Dedoose

NOTE: If you follow these steps for the first column, Dedoose will name each of the documents after the value in the column title.

### **Consolidating columns with the same title in a spreadsheet file:**

Importing your data into Dedoose via a spreadsheet automatically defines descriptor fields, creates descriptors, creates codes, converts any narrative responses to tagged excerpts within a document for each case, and links the document to the appropriate descriptor. The importer does this by checking each column title, examining the data in each column, and then uses this information to parse the data. Should you have column titles that are not unique, the system will automatically consolidate them into the same question.

To learn about our recommendations on how best to prepare your data for import, please see Working with Media section of this user guide.

## **Creating Codes**

You can create or modify codes from a number of places. In the Codes Workspace, any place in Dedoose you see the Codes panel, or when viewing and excerpting media.

To add a new code, click the Edit Codes icon in the Codes panel header, click the plus sign in the panel header, define the code and click Submit. Exit Editing by clicking the slashed circle icon.

To change the structure of the code tree, click the Edit Codes icon in the Codes panel header, then drag and drop one code on another to render it a child code. You can also edit a code by floating over it and clicking the 'edit code' icon that will appear. Change the code level using the available controls and click Submit. Exit Editing by clicking the slashed circle icon.

You can also create codes using the Quick Code widget. When the widget is activated (see the section below, Creating and Tagging Excerpts), type the name of a new code in the search field, hit Enter, and the code is created, added to the tree, and applied to the excerpt you defined.

## **Saving Your Work**



For much of the work you will do in Dedoose, saving is automatic, including uploading media, creating and tagging excerpts, linking media to descriptors... None of these actions require any active 'save' action on your part.

However, there are some places where you will want to be sure to click 'Save' or 'Submit' before moving away from the activity. This includes:

- Importing media files and descriptor data
- Creating or editing codes or the code tree structure (except when creating a code in the Quick Code Widget)
- Adding security groups in the Security Center
- Assigning or changing assignments in the Security Center
- Creating a test in the Training Center
- Creating or editing memos
- Setting start and end markers when synchronizing transcript text to audio or video excerpts.

Note that most of these activities are related to project set-up, so will not be required on a frequent basis.

## Creating and Tagging Excerpts

When viewing a media file, it is simple to create and tag excerpts.

With a document you have two ways to excerpt:

- Highlight a section of text, click the Create Excerpt button at the bottom of the panel to enter editing mode (you'll see the Selection Info panel turn orange), then double click codes or drag and drop them from the tree into the Selection Info panel to apply them.
- Or you can use the Quick Code widget after you've defined the text by clicking the space bar to activate the widget, then double click on a code or highlight it and hit the Enter key to apply the code.

With video or audio, you use the blue brackets on the timeline to mark the excerpt start and end points, click the Create Excerpt button to enter excerpt editing mode, and then double click or drag and drop the codes into the Selection Info panel to apply the code.

## Analyzing Your Data

The Analysis Workspace menu provides access to Dedoose's existing interactive charts, tables, and plots. The different reports and various controls within each provide a variety of ways to visualize, explore, organize, discover, and present your findings.

You can access the Analysis Workspace by clicking the Analyze button on the Main Menu.

Many of these data visualizations populate automatically once your media have been linked to Descriptors and excerpting activity has taken place. Descriptors are sets of information you use to identify and describe the source of your media.

You access the Descriptors Workspace by clicking the Descriptors button on the Main Menu. That is where you can define and create or import your Descriptors. Descriptors are typically the characteristics of your research participants (e.g., ID, gender, experimental group, test score, race, responses to surveys), but can also be characteristics of settings in which observations are made or where participants interact (e.g., stores, schools, neighborhoods, cultures).

For more on using Descriptors, see [Working with Descriptors](#).

## Exporting Your Work

Almost everything you store or create in Dedoose—visuals, sets of excerpts, descriptor data, or your entire project—can be exported to a document, spreadsheet, or other appropriate format.

The Export icon is the same on every panel or workspace where an export is possible.

The easiest way to export is from your project's Home Dashboard. Click the Export Data button in the upper left summary panel and a menu of export options will be presented. From there, you determine whether you want to export all or part of your project and in which format.

For more on exporting from specific Workspaces, see the [Exporting Section](#) in this user guide.

- Research Basics
  - [Qualitative Research](#)
  - [Qualitative Data, Data Processing, and Analysis](#)
  - [Mixed Method Research](#)
  - [Mixed Method Data Analysis](#)

## Qualitative Research

Qualitative research is a family of methods used by researchers in social science, marketing, and other areas of work. These methods are generally intended to gather data that provide rich, in-depth, and contextualized representations of human behavior as it occurs in natural settings. These settings are inherently complex and behavior is driven by a wide range of factors. People naturally live their lives through sets of activities embedded in daily routines - just think about a typical day for yourself, or a typical week. What do you do? Why? People's behavior and thoughts are influenced by many things including culture, value and belief systems, resources, personality characteristics, personal history, emotions, habits, opportunity, and real or imagined constraints. Understanding and recognizing the complexity of the human socio-cultural environment is the key to strong research. In contrast to the goals of quantitative research methods, qualitative methods embrace this complexity and seek answers to the 'why' and 'how' questions as opposed the 'what' and 'how many' questions that quantitative methods address more efficiently.

There are many data collection methods that qualitative researchers use in their work including interviews, focus groups, observation, participant observation, the collection of stories, field notes, site documents, memos, journals, archives, diaries, photography, and videography. These approaches come

from a variety of schools of thought including grounded theory, ethnography, and community participatory research and have grown out of disciplines like anthropology, psychology, sociology, and cultural anthropology. So what kinds of data do qualitative researchers collect and what do they do with these data?

## Qualitative Data, Data Processing, and Analysis

Qualitative data are the words, pictures, audio, and/or video generated by researchers and research participants. Qualitative investigators will often have a particular research focus for their study and so they explore these data with an eye for identifying the key themes/concepts in the data that can provide a deeper understanding of the research problem being investigated. These themes/concepts become the conceptual framework that the researcher will use to organize and, understand what is meaningful in the qualitative data and then communicate the results and findings of their work to their research audience. Particularly early in a project, this framework evolves as the researcher gains a deeper understanding of the data and how the themes and concepts are related to each other and then organized into a code/tag tree. This tree can be thought of as a way the research will be organized and communicated and, often, will include different levels representing greater and lesser levels of specificity -- a hierarchically organized outline with super-ordinate and sub-ordinate levels (or parent and child code/tags). The researcher then examines the data, identifies portions (excerpts/clips) which contain content meaningful to their research focus and research questions, blocks these portions, and then applies any number of appropriate code(s)/tag(s) - a process we refer to as excerpting and tagging. Then all the excerpts and the codes/tags that were applied are analyzed using different visualization tools as the researcher looks to understand the phenomenon of interest and how patterns in the data expose the deeper and more complex meaning as communicated by the research participants.

## Mixed Method Research

Mixed method research seeks to bring qualitative and quantitative approaches together. Most people are familiar with quantitative tests and surveys. These approaches are great for answering the 'what kinds' and 'how many' questions. When this type of information is integrated with the rich and complex data collected via qualitative methods - the 'how' and 'why' information - an entirely new set of questions can be addressed. While there have been debates about the relative value of different methods, William Tronchim (a prominent Cornell University social scientist), '*... [any] kind of polarized debate has*

*become less than productive. And, it obscures the fact that qualitative and quantitative data are intimately related to each other. All quantitative data is based on qualitative judgments; and all qualitative data can be described and manipulated numerically.'* As each type of data provides different representations of the world, we believe their integration widens the range of perspectives that can be explored to finding useful answers to research questions.

## Mixed Method Data Analysis

Once these data are imported, tags and excerpts created and all the connections established, there are a variety of approaches one can take to include both qualitative and quantitative data in 'query' or analysis tasks. That is what may be learned from a purely qualitative approach can be divided based on the characteristics of research participants or settings. Such division can expose important differences in the patterns within the qualitative data as a function of descriptive characteristics.

As an example, say we collected data from parents about reading activities at home after their children were exposed to a new teaching method at school. At first glance, we see that the stories are generally positive. However, we might have a notion that the effects of the program may be different depending on things related to the child and home environment. So, we next divide these stories up as a function of child gender (male and female) and mother work status (unemployed, part time, and full time) resulting in six piles of stories instead of just one. From there, we might be able to see that stories in one pile are very positive, two piles are somewhat positive, two piles are neutral, and the remaining stories are quite negative. Knowing how we divided the piles up can then tell us much more about the relationship between this new teaching method and home events, for example, where is it working best, where it makes little difference, where it works poorly, AND much more about why and how when we look into what is communicated in the stories. This seems like a simple concept, yet without a well-planned research design and data preparation, these more complex and important questions cannot easily be identified or addressed. Moreover, manipulating these kinds of data can be very difficult. This is precisely why Dedoose was designed--so that researchers can easily integrate these data and patterns can be quickly identified. It is easy to dig beneath the surface of the patterns to understand the 'how' and 'why' that explains the 'what' and 'how many' questions.

A second and extremely useful approach to blending qualitative and quantitative data is by the use of code weighting or rating systems. As a simple illustration, let's take 'cost' as a code that would be used

to tag content in peoples' qualitative reporting of their car purchasing thought process. Say we then ask people about the things they consider when making a decision about purchasing a car. Many people in our study might mention 'cost' as a factor in that decision process. However, some may talk about cost as very important and others less so - instead mentioning 'style' as relatively more important. Using a code weight/rating along with this code opens up a variety of additional analyses that would not be otherwise possible. So imagine that we develop a 10-point rating scale that we use to index how important 'cost' is when we used the code to tag 'cost' comments. If we then divided up the different cars that were being considered, we might see that some cars got an average of 3 and some an average of 9. This information could be displayed in a simple bar chart with a bar for each car and then the size of the bar indicating average 'Cost' importance.

But the picture and the story can really change if you start breaking these ratings down by descriptor variables like gender or family income:

Now imagine you are trying to develop an advertising campaign for one of these cars. This simple example shows that whether you choose to emphasize value can depend on a variety of factors related to the customer you are targeting. Further, the words you choose to use when messaging about 'cost' can also vary by these same factors. So, you'd want to look not just at whether value is important to your target customer, but how they talk and think about 'cost.' This is where it all comes together and where Dedoose features are designed to help researchers quickly visualize, understand, and dig into the underlying nuances of these questions. Dedoose features help tie these data together, allowing you to generate charts based on descriptors and code weights/ratings, and, with a simple click on a bar or cell of a table, you can pull up all the stories that sit beneath the surface. You can quickly export the visualizations from anywhere inside of Dedoose along with all the underlying qualitative data and you are ready to drop the visuals into reports and presentations and report on the rich underlying qualitative findings.

This car purchase decision process is a very simple example of how valuable the Dedoose code weight system can be. It is also important to appreciate that these code weight/rating systems can be developed for any concept/theme where a distribution can be represented on a numerical dimension. These

distributions can be used to represent relative importance, quality, centrality, 'sentiment,' strength, reliability... Making use of this Dedoose feature essentially allows you to introduce an entirely new dimension to a project database. As another example, in our Dedoose demo project, where we interviewed mothers with children in Head Start programs about the home literacy environment, we used 'quality' ratings alongside the excerpts we tagged with the 'Reading by Mother' code. As we looked at all the stories mom's told us about reading to their young children, we could see variation in what we interpreted as quality. Rating these stories on a 1 - 5 scale that indexed quality allowed us explore an entirely unique dimension in our data. Others in intervention work have indexed dimensions of 'reliability' or 'consistency' as mapped to what patients might communicate about following a diet or medication regime. That is, many may talk about following a doctor's instructions, but how closely they follow these directions can vary. From there, we can devise interventions or communication strategies to more closely address the specific changes and, hopefully, encourage more successful outcomes. How useful these weights/ratings can be is only limited by the extent of your imagination, creativity, and flexibility in thinking about your qualitative data and how you develop and use your code system.

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  - [Importing and Creating Media Files](#)
  - [Working with Images and PDFs](#)
  - [Sorting and Filtering Your Media](#)
  - [Working with Text Documents](#)
  - [Working with Audio and Video Files](#)
  - [Linking Media Files to Descriptors](#)

## Importing and Creating Media Files

The Media Workspace is where your media files are stored and you can find features to sort and manage these data.

Importing media files: You can import media in three ways:

1. Click the Add Media button in the upper-right corner of the Media Workspace
2. Click the Add Media button in the upper-right corner of the Media panel on your project's Home Dashboard
3. Click the Import Data button in the upper left panel of the project's Home Dashboard.

Once you are presented with the import menu:

1. Select the type of media file you wish to import: text, audio, image, video or PDF
2. Locate the file(s) on your local computer (note that text documents can be imported as a single file or in a group, but audio and video files are best be imported individually)
3. Click Open.

If you select a single text file, you will be taken directly to that file in document view within Dedoose.



If you select multiple text files, you will see a Success pop-up that indicates your documents have been uploaded.

For audio and video files, you will see a progress bar and then get a pop-up after the import indicating that the file has been added and is being processing in the background. You can continue to work elsewhere in Dedoose while this occurs, and when the file finishes processing, you will get a pop-up notifying you that it has completed. Finally, please keep in mind that the process of video files can take some time depending on the queue on our servers for processing these routines.

NOTE: It is important to be certain that your media are complete and any sensitive identifying information has been removed or changed before importing them to Dedoose. Within Dedoose, it is possible to unlock a document for editing, however this requires that all excerpts, coding activity, and linked memos that you have already applied will be deleted. (Dedoose is currently working on implementing the capability to edit documents while retaining previous work.)

TIP: When naming documents, it can be useful to implement a systematic and informative convention throughout your project. For example, the title '*435MFGModerate*' *could be such a convention that represents cases with ID(number)Gender(Male or Female) Type(Focus Group, Interview, Observation)Socio-Economic Status(Low, Moderate, High)*

TIP: When first uploading documents, it is often most efficient to immediately establish link(s) to descriptors, if appropriate, so these important relationships are not neglected. However, this may not always be possible if descriptor data have not yet been created. In any case, these links can be established or changed at any time by click the 'Descriptors' button (see below).

## Adding Text Documents Manually

To manually add a document to Dedoose:

1. Click the 'Add Media' button in the upper-right corner of the Media Workspace or in the Media panel on your project Home Dashboard, or click the 'Import Data' button in the top left panel of the Home Dashboard
2. Click 'Create a Blank Document'
3. Type or copy and paste the text into the 'Content' field

4. Provide a title, and if you wish, a brief description of the document (these can always be added or changed at a later point)
5. Click 'Submit' and the document will then be presented in document view and is ready excerpting and coding and linking to descriptors (if necessary).

## Working with Images and PDFs

### *Working with Images*

- **Open an image** by selecting it from the 'Media' list on the Home Dashboard or in the 'Media' Workspace
- **Using the slider** you can modify the size of the image for efficient excerpting
- **Adjust image display characteristics** by clicking the painter's palette icon in the image header to open the controls pop-up, making desired changes, and closing palette
- **Renaming:** An image's title will be displayed in the upper left corner of the viewer panel. The 'edit' image button (cog icon) can be found in the upper right side of the viewing panel. Clicking this button presents a pop-up to allow you to rename the image by editing the title and clicking 'Submit'
- **Deleting** an image can also be done when in image edit mode by clicking the 'Delete Image' button in the lower left corner of the pop-up and then clicking 'Yes' to confirm.

### *Working with PDFs*

Coding PDFs is essentially the same as coding other documents, just with the added feature of being able to code either as text or as an image.

The first thing you may notice when you open a PDF in Dedoose is the added functions at the top of the document. There is a page selector, buttons for moving forward or back a page, the selection mode, and, on the far right, a zoom bar. The page selector helps you jump to a page within the document. Type the page number you wish to see in the box and hit enter and you'll be taken directly to that page. Alternatively, you can move either one page forward or back with the arrow buttons.

#### **To code text in a PDF:**

1. Make sure the selection mode is set to 'text.'
2. Using your cursor, highlight a segment of text you wish to code.
3. You can either use the quick code widget by hitting the space bar or simply double click on the code in your code tree to create the excerpt and apply the tag.

#### **To code regions in a PDF:**

1. Make sure the selection mode is set to 'image.'
2. Using your cursor, highlight a portion of the image you wish to code.
3. You can then either use the quick code widget by hitting the space bar or simply double click on the code in your code tree to apply.

**To use the zoom bar:**

1. Click on the slider.
2. Adjust until the image is displayed at the desired size.

## Sorting and Filtering Your Media

The Media Workspace has features for sorting your media files, customizing column views, and filtering by sub-group using Boolean operators. Using these features can be a quick way to locate or review sets of media files in your project.

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For example, looking at the Demo Project, if you wanted to find the set of files from families with full-time working fathers who showed increases in the quality of reading by the home's primary caretaker, you would follow these steps:

1. Click the Uncheck All button in the Columns panel. (Note that only 20 columns can be viewed at a time.)
2. Open the Field folder in the columns panel
3. Click the check boxes for “PC reading change group” and “Father work status” and you'll see the folders for these fields appear in the Filtering panel
4. Open these folders in the Filtering panel and click the “Positive Change” and “Full Time” check boxes to filter your media files to just this subset.

Filters can be cleared by clicking the Clear Filters button at the bottom of the panel.

We call this tool our SuperMegaGrid and you'll see these filtering features in some other Dedoose Workspaces and in the Data Selector.

How to Edit a Document

*Example of the document Search function*

# Working with Text Documents

## *Document Viewer*

The Document Viewer allows you to browse the text, create and code excerpts, search for text or character location, and manage all aspects of the document.

In the Settings panel in the document viewer, located in the upper left, there are a few functions to control how your work is presented.

1. **Line #'s** controls whether display of line numbers along the left side in the document is presented. Line numbers can help keep things organized, make it easier to remember where work has started or stopped, and help locate specific text within a document
2. **Memos** controls whether a display of linked memo icons along the right edge of the document will be in view
3. **RTL** (right to left) allows for treating right to left languages in a natural way—as opposed to the default display of text in Dedoose in an English language manner (left to right)
4. **Font Size** allows you to control the character size of the text within your documents. Some monitors are easier to read than others and this control helps make it possible to view any document on any screen
5. **Color Scheme** will allow you to change what colors are present in your excerpting and, perhaps, what meaning you have assigned to them. By default, Dedoose will automatically cycle through a set of colors as you create excerpts. However, you can choose colors to correspond with particular codes or set the system to display certain colors for certain users. This is just one more feature to help keep things displayed in a way that's most meaningful to you.

Information on document creation date, creator, and number of excerpts is noted in document header along with buttons to create and link memos to the document and create and/or link descriptors.

## *Renaming, Deleting, Editing, Cloning, and Describing Documents*

A document's title will be displayed in the upper left corner of the viewer panel. The 'edit' document button (cog icon) can be found in the upper right side of the viewing panel. Clicking this button presents a pop-up to allow for document property controls, including:

- **Renaming** - to rename the document, simply edit the title and click 'Submit'
- **Describing** - edit or add the document description and save by clicking 'Submit'
- **Deleting** - clicking the 'Delete Document' button to remove the document from your project...and, yes, you will get a warning to confirm
- **Editing** - while documents in Dedoose can be edited - **CAUTION! Unlocking a document for editing requires the deletion of all excerpting, coding, and memoing activity in the document and this cannot be undone.** Click the 'Unlock Document' button and confirm that you wish to unlock

and that you understand the requirements. You can edit the document as needed, save your changes, and then 'Save and Lock' to ready the document for viewing and excerpting

- **Cloning** - a document can be copied so that all the excerpt and codes are copied along with it. This is a useful feature for comparing coding decisions across team members. To do so, excerpt a document with no coding. Clone document for each team member and re-title each accordingly. Each team member can then apply codes independently for later comparison.

### *Text Searching*

The magnifying glass icon in the upper right corner of the document panel provides access to your search tools. To search for a keyword or text string, enter the text and click 'Submit' Dedoose highlight all words with that string and allows you to move among the 'hits' using the 'Back' and 'Next' buttons. These following screenshot shows the search tool icon and pop-up. In this example we searched for 'reading' and the results show that there were 21 matches and each match highlighted in pink so you can easily move through your document to locate this text in context and conduct any appropriate excerpting, coding, and memoing. The search tool pop-up is a movable panel (just drag and drop the panel header), and also allows for searching by character position and line number.

Note: Currently, text searching can only take place WITHIN a single document. Functionality for cross-document searching will be added in the near future.

## **Working with Audio and Video Files**

### *Audio and Video File Viewing and Listening*

The audio and video viewer allows you to watch and/or listen to your media, create and code excerpts, create transcripts, and manage all aspects of the file.

### *Screenshot of the Video Viewer*

The audio viewer looks the same as the video viewer above except a sound wave will be shown in the primary viewing area. There are a variety of controls for how you can view and work with both your audio and video files.

- Play and pause the file in the viewing panel (shown above)

- View the media in a larger panel by clicking the 'Media View' button if you are working in transcript mode
- Zoom in and out on the timeline with the slider in the lower left.

The viewing panel will also have the name of the video along with a button to create and link excerpts, memos, and descriptors. You can also view the number of memos and descriptors that are currently linked to the file (shown in the screenshot above).

### ***Renaming, Deleting, and Describing Audio and Video Files***

When viewing an audio or video file, the name of the file appears in the upper left corner of the viewing panel and the edit button (cog icon) will be found in the upper right. Clicking this button presents a pop-up where you can control the media properties, including:

- **Renaming** - to rename the file, simply edit the title and click 'Submit'
- **Describing** - edit the file description and save by clicking 'Submit'
- **Deleting Media** - click the 'Delete Media' button to remove the file from your project, and yes, you will get a warning to confirm
- **Deleting Transcript** - click the 'Delete Transcript' button to remove the transcript from your file, and yes, you will also get a warning to confirm.

### ***Importing Transcripts of Audio Stream***

To import a transcript into Dedoose:

1. Go to the Media Workspace
2. Open the audio or video file you wish to work with
3. Enter the transcript view by clicking the transcript view button
4. Click the 'Import' button in the upper right corner of the transcript panel
5. Click 'Yes' when you get a warning that importing a transcript will erase any current transcript
6. Locate and choose the file you wish to import
7. Click 'Open'
8. **Click 'Save'** button in the lower right corner of the transcript panel...this is one of the few places in Dedoose where you have to actively save.

## **Adding Transcripts Manually**

To add a transcript manually into Dedoose:

1. Go to the Media Workspace
2. Open the audio or video file you wish to work with
3. Enter the transcript view workspace by clicking the transcript view button
4. In the transcript panel, type the transcription
5. When finished, **make sure to hit the 'Save'** button in the lower right corner of the transcript panel.

## ***Editing Transcripts***

Audio stream transcripts in Dedoose live within an active editor. To edit a transcript in Dedoose:

1. Go to the Media Workspace
2. Open the audio or video file you wish to work with
3. Enter the transcript view workspace by clicking the transcript view button
4. Edit the transcript as needed
5. **Click the 'Save' button.**

## ***Synchronizing Video/Audio Excerpts to a Transcription***

To synchronize video/audio excerpts to transcribed text:

1. Go to the Media Workspace
2. Open the audio or video file you wish to work with
3. Enter the transcript view workspace by clicking the transcript view button
4. Enter editing mode for a specific excerpt by clicking the bar in the timeline defining its boundaries
5. Click the 'Set Start' button in the lower left corner of the transcript view
6. Click into the transcript where the associated text begins
7. Click the 'Set End' button in the lower left corner of the transcript view
8. Click into the transcript where the associated text ends
9. **Click the 'Save' button** in the lower right corner of the transcript

10. **Voilà!** Now when you hit the excerpt in a search or filter, you'll have both the clip and the text in the resulting 'hit.'

Finally, note that the transcript editor is always active for modification. The 'End' marker will automatically adjust as any editing within the boundaries of an already synchronized portion of text takes place.

## Linking Media Files to Descriptors

Upon creating or importing a media file to Dedoose, note that it is not yet linked to any descriptors. This is indicated through the red-colored 'Descriptor: 0' button in the upper-right corner of the media viewer.

To create the relationship between the media file and associated descriptor data, click this red Descriptor button to open the linking pop-up. Clicking the 'Link' button for the appropriate descriptor establishes this relationship. In the example below, the document has been linked to the descriptor with ID = '7.05' As an alternative, you can also click the 'Create and Link Descriptor' button in the lower right corner of the pop-up if the data for the particular case has not yet been added to the descriptor set.

### Note:

- Only one descriptor from each descriptor set can be linked to a particular media file. However, one descriptor can be linked to any number of media files where, for example, you interview a particular person multiple times in the course of a study
- Descriptors can be linked and unlinked to media files at any time. It is suggested, however, that this relationship be established when submitting media files to the system or as soon as possible when data are available in the system, as many Dedoose analysis features draw upon these relationships.

- Working with Descriptors
  - [Descriptor Sets and Fields](#)
  - [Dynamic Descriptor Fields](#)

## Descriptor Sets and Fields

### *Descriptor Sets*



A descriptor set is a collection of information that describes the source of your data (e.g., research participants, families, schools, other settings, etc.) at a particular level of analysis.

Clicking on the 'Add' button in the 'Descriptor Sets' panel header will prompt you to provide a title for the new descriptor set to be added to the project or you can simply begin by using the default set in every project. Clicking the Cog Wheel icon to the right of the Descriptor Set name toggle editing mode, allowing you to rename or delete Descriptor Sets.

### *Using Multiple Descriptor Sets*

The use of multiple descriptor sets is ideal for studies focused on questions that look across different levels of analysis. For example, if a study is comparing student outcomes across different school districts there might be three levels of data: 1) the district, 2) the schools within each district, and 3) the students within each school. Commonly, different sets of descriptor fields/variables would be collected to distinguish the cases at each level (i.e., district level fields might include average family annual income, square miles of capture area, percent rural versus urban neighborhoods; school level fields might include size of student population, student-teacher ratio, percent of children on free lunch program; and student level fields might include age, gender, grade level, size of family, language spoken at home, and standardized-test scores).

Further, imagine the study's qualitative data come from interviews with parents about the home educational environment. Under these circumstances, each interview could be linked to three descriptors: the one specific to their child, one for their child's school, and one for their school district. Dedoose allows exploration of qualitative data and coding activity across multiple descriptors. Thus, in a study like this, variations in the qualitative data and coding activity could be explored as a function of district, school, or student fields and combinations of fields across these levels.

### *Descriptor Fields*

Descriptor fields can take one of four types:

- Text (or string)—a set of alphanumeric characters
- Number
- Date/Time
- Option List (or categorical)—a custom list of values defined by the user.

**Tip: Option List** descriptor fields have a special role in Dedoose. As you will learn in the sections on data analysis, one of Dedoose's most powerful analytic and presentation features is the charting engine. This feature allows for the generation and interaction with dynamic 'Live' or 'Hot' charts of your excerpting, coding, and code weighting activity. These visuals help you discover and explore patterns in your data and then allow you to drill beneath the pattern to explore the underlying meanings in the qualitative content. Thus, while the Dedoose auto-grouper will create classes for charting based on of number, date/time, and (occasionally) text fields, controlling these groupings based on your understanding of your data gives you maximum control over the nature of the distinctions between groups represented in the visuals.

Accordingly, we strongly recommend as much use of option list descriptor fields as possible. Categorical data (e.g., sex, race, language spoken, age group, income group, education level ...) are naturally represented by option list fields. However, other variables not thought to be categorical can also be represented to take advantage of the option list features. For example, responses to numerical scales can be grouped into discrete categories (e.g., high, medium, low; 1, 2, 3, 4, 5, 6, 7, 8; less than 1, 1-1.9, 2-2.9, 3-3.9, 4-4.9, 5 or greater; present/absent).

**Tip: continuous variables** created and analyzed in statistical software can be meaningfully converted to categorical forms in order to be represented in Dedoose as the recommended Option List type fields. An examination of a continuous variable's distribution within the sample population will provide important insight into how many and by what criteria these data could be meaningfully represented in a categorical form. With this information, a simple recoding prepares these data for import to Dedoose as an option list descriptor field. In short, when you define an option list field, you are deciding how you wish to slice up the data as presented in the Dedoose data visualizations.

### ***Manually Adding/Modifying Descriptor Fields***

Clicking the 'Add' icon in the 'Set Fields' panel header will allow you to define a new descriptor field in the currently selected set. Also, these data can be imported directly from an Excel file (see below)—eliminating the need to define the fields manually within Dedoose.

In this example, a new field, 'Population Density,' is being created with a particular description, type, and values - here, an 'Option List' type, in which a categorical variable is being defined with three possible values: Low, Moderate, and High.

### **Multiple choice questions:**

At the moment, descriptor fields can only have a single option selected. The best way to account for being able to select more than one option in a field is to create a descriptor field for each option.

Here is an example: You can create 3 different option list descriptors;

1. Is the sky cloudy? (Y/N)
2. Is the sky blue? (Y/N)
3. Is the sky beautiful? (Y/N)

Instead of:

What is the sky? (Select all that apply)

- a) The sky is cloudy
- b) The sky is blue
- c) The sky is beautiful

To do this,

1. Add a descriptor field in Dedoose for each option with the values Y and N
2. Export the descriptors
3. Open in Excel and add the data for each of the new descriptor fields
4. Import the descriptors back into Dedoose

### ***Manually Adding/Modifying Descriptor Data***

Clicking the 'Add' icon in the 'Descriptors In Set' panel header will allow you to create a new descriptor with the associated fields defined in the selected descriptor set. Similarly, clicking on a particular descriptor row will bring up that descriptor with the same view for modification. The example below, show the descriptor editing view as well as the documents to which this descriptor has been linked. Again, as with descriptor fields, these data can easily be imported from an existing Excel file.

### ***Importing Descriptor Field Definitions and Data***

As many researchers organize and manage their quantitative and categorical data in spreadsheet or statistical software, importing descriptor fields and data is a quick and easy way to get these data into a

Dedoose project. There are approaches to carrying out this import. While the first allows less control over all details, note that it is often sufficient and effective.

- A single step import, simply selecting and importing the spreadsheet after clicking 'Import Data' on the project Home Dashboard
- Two-steps where you must prepare spreadsheets for first importing descriptor field definitions in the Descriptor Workspace and then importing the data to the 'Descriptors In Set' panel.

### *Importing Descriptor Field Definitions*

Full sets of descriptor field definitions can be imported directly to Dedoose from an Excel file, Open XML—Excel 2007/2010—format (.xlsx) or Excel format (.xls), thus avoiding the need to manually type or re-enter information that already may have been created elsewhere. To accomplish this task, the imported data file MUST be structured with the following format:

- Descriptor Name
- Memo
- Descriptor Field Type (Text, Number, Date/Time, or Option List) - notes that we highly recommend the use of 'Option List' type fields as these allow for the broadest and most flexible use of the analytic visualizations.
- Option List Data (if applicable).

### *Example of Format and Column Headers for Importing Descriptor Field Definitions*

NOTE that 'List' type fields include the specific values defined as 'valid' for the particular field/variable.

After creating the descriptor field definition file to import click the 'Import Fields' icon at the top of the 'Set Fields' panel in the Descriptor Workspace and then follow the prompts to:

- Locate the file with the information you wish to import
- Select 'Open' the file to upload the information to Dedoose
- Review the information to be imported

- Check the 'Dynamic' check-box for any option list field that you wish to define as dynamic (see below for more on Dynamic descriptor fields)
- Select 'Submit' to upload and save the information in Dedoose.

### *Example of Descriptor Field Importing Review*

#### *Importing Descriptor Data*

To import Descriptor data to Dedoose (after descriptor fields have been imported or defined in Dedoose) from an Excel file (.xls or .xlsx), you must create an Excel file with:

- Column headers corresponding identically to the Descriptor fields that you have created in your Dedoose project - **Tip:** the easiest way to assure the accuracy of your data file is to use the 'transpose' command in Excel, which is found in the 'Paste Special' menu:
  - Copy the variable name column in your field definition file
  - Choose the upper left cell in your descriptor data file
  - Click 'Paste Special' from the Excel menu
  - Choose the 'Transpose' option and
  - Paste
- Add the records of descriptor data you wish to import.

### *Example of Excel file format for Importing Descriptor Data*

After you have created this file:

- Save the file on your local machine
- Click the 'Import Descriptor Data' button at the top of the 'Descriptors in Set' panel in the Descriptors Workspace
- Follow the prompts to locate and select the file on your local computer
- Review the data to be imported
- Click 'Submit' to upload and add the data to your Dedoose project

### *Example of Descriptor Data Importing Review*

In this example, we see the Dedoose import review includes a number of errors. The report indicates the location of the error, the data point in question, and the nature of the error. For example, row 21/column 4 contained 'not a valid option' because 'Bilingual' is not an option in the field 'Reading Language.' Similarly, the titles 'name', 'dob', and 'child sex' do not match exactly to the descriptor fields that were imported and will therefore not be found. This is why the column 'Child Gender' has no data. While you can continue to import these data by clicking 'Submit,' errant data can lead to results that exclude these data. While missing data is less of a problem than invalid data, each user must decide how to proceed based on the information Dedoose provides in the error report. Invalid or missing data points will both be considered 'missing' by the Dedoose import engine.

### ***Updating or Adding to Descriptor Fields and Data***

When new cases, 'Descriptors,' are added to a study or new data, 'Fields,' are collected for existing participants these data can also be imported to a Dedoose project.

Importing new field definitions is accomplished exactly as importing an original set of fields. See the 'Importing Descriptor Field Definitions' section above for step-by-step instructions on how to prepare and import these definitions from an Excel file.

### **Importing new or updated descriptor data takes place in three steps:**

1. If expanding the set of fields for existing descriptors, first import or manually add the new descriptor fields to the project
2. Export the existing descriptor data
3. Open the exported Excel file and then add the new data to the file which can include both new records (rows) and new variables (columns). **Note:** The exported file will contain a new column, titled 'DedooseID.' These data must not be disturbed in order to update any existing descriptors and maintain the links to any associated documents. This column should be left empty for any new records added to the file
4. Re-import the descriptors to the project by following the same steps as outlined above in the 'Importing Descriptor Data' section and follow the system prompts to update these data.

### **Auto-linking Descriptors**

Auto-linking Descriptors is one of our newest time saving functions. The basic idea is to match the file names of your documents with a descriptor set field, and auto-link functionality takes care of the rest.

So, now you don't need to manually link descriptors to documents one at a time. There is some careful preparation that needs to take place, as the titles need to match the descriptor set field exactly. Let's assume you have an excel file containing all your descriptor data. If so, you are almost there and here's how to proceed:

1. Create a new column with the column header 'Title'
2. Match the titles of your documents to the rest of your descriptor data and enter the titles in the appropriate row in the new column
3. Import the spreadsheet into Dedoose
4. In the Descriptor Workspace, find and click the 'Auto Link' button at the bottom of the panel
5. Select the title set field and click 'Continue'

Once complete the system will present any errors that occurred and all your documents that have matching titles should be linked to the appropriate descriptor data.

## Dynamic Descriptor Fields

Dynamic descriptor fields are a special type of field available in Dedoose. Dynamic descriptor fields are designed primarily to help you map and explore change over time when you collect qualitative data at multiple time points. The specific values for dynamic descriptor fields are set at the time a static descriptor is linked to a media item.

To illustrate when a dynamic descriptor might be used, imagine you are doing an 18-month study on elementary school student reading skills and will interview the students at three time points. Some of the descriptor data for each participant will be the same at all time-points, but some will change—for example, student gender, ethnicity, and family Socio-Economic Status Group (SES) might stay the same over the course of the project, but the time of measurement (e.g., Time 1, Time 2, Time 3) or classroom grade (e.g., 3rd, 4th, 5th) might change. If you make time of measurement or class grade dynamic fields, you will be prompted to set the value (e.g., baseline, time 1, time 2) when linking the qualitative document to a descriptor. Subsequently, your excerpting and coding activity for those qualitative documents will be linked to the specific time point. With data like these, Dedoose allows you to explore change over the three time-points and there are a set of graphs built into Dedoose to facilitate exposing patterns of change and drilling into the meaning of the patterns that emerge.

To define and apply dynamic descriptors:

1. Define the descriptor field as an option list type and check the 'Dynamic Field' check-box on the bottom. For example: a field called 'Phase' with valid values 'Time 1,' 'Time 2,' and 'Time 3.'
2. Click 'Submit'
3. Each time a new media item is linked to a static descriptor in the same set, the user will be prompted to set the value for the 'Phase' field.

Dynamic descriptor fields perform in identical ways as static fields in Dedoose analytics and filtering, so when put to use you are set to explore chronological or other 'dynamic' changes.

- Coding & Excerpting
  - [The Code Tree](#)
  - [The Quick Code Widget](#)
  - [Importing and Exporting Codes/Tags](#)
  - [Excerpting, Coding, and Weighting Text](#)
  - [Excerpting, Coding, and Weighting Audio and Video](#)
  - [Excerpting, Coding, and Weighting Images and PDFs](#)
  - [Code Weighting/Rating](#)
  - [Excerpt Reviewing, Additional Coding/Tagging](#)

## Coding & Excerpting

### Code Tree Editing

The Dedoose Code Tree is flexible, dynamic, and rich with features. Thoughtful use of code definition and weighting systems and the structure of the code tree will be central to the value of



your work. Note that we use the terms 'code' and 'tag' interchangeably in Dedoose. While codes and tags may be understood to represent different things, their functionality in Dedoose is identical. Code specific editing controls appear when floating the cursor over an existing code and clicking the 'edit code' icon.

Above the Code Tree on the right are four buttons that will help you arrange and control how codes function as you work. The first button going left to right will be a magnifying glass that will search the code tree for a keyword. Second is the settings panel where you will find these functions.

- **Activate or deactivate the 'upcoding' feature** which, when activated, serves to automatically apply any super-ordinate codes when applying a child or other subordinate code. Read more about 'upcoding' a little further in this section.
- **Sort** the code tree alphabetically
- **Code Counts** will toggle whether you can see the raw code counts in the code tree
- **Color Scheme** will toggle whether the system chooses the color associated with your codes or you use your own custom color scheme

The third button is the Actions Panel.

- **Collapse/Expand** will either drop down each child code for display, or collapse them back up so only the parent codes are displayed
- **Retroactive Uppcode** will apply the parent codes over any already applied child codes
- **Reorder Codes** will open a window allowing you to move your codes up or down, so you can arrange them as you wish
- **Import Codes** will prompt you to select a file to import
- **Export Codes** will prompt you for a file format to download your code tree into

The fourth and final button is for adding a new code. When adding a new code to the tree, you are presented with the ability to provide a title, descriptor, and activate (and set parameters for) a code rating/weighting dimension. Note that all of this information will show up as a smart-tip when floating over the code, so is a good place to note any tips or reminders on how to use the code.

### ***Editing an Existing Code***

When in code tree editing mode, you can float over an existing code to view options to link a memo, edit the code, or add a root code. When editing the code you will see options to edit the initial information provided when creating the code as well as buttons to:

- **Delete** the code

- **Merge** the code with another code (which will lead to recoding any excerpts with the primary code selected and then removing the code itself from the tree)
- **'Re-Parent'** the code if it is currently subordinate to another code in the tree
- **'Make Root'** which will move the code from any subordinate position to a root level.

**Finally:** Be sure you are aware of the **'Quick Code Widget'** and you can learn more about it in this section of the User Guide.

### **Custom Colors**

When creating a new code, you have the option of choosing a custom color. By default, the system chooses the colors for you as you work. However, for our users that are more visually inclined and like to keep things arranged in a particular way you may want to control the colors and which codes are associated with which colors. You will need to set the color scheme for your codes to 'custom' from the settings panel in the code tree. You will also want to be careful to choose colors for each code, as the default color is black and having a dozen codes all show up black can be a bit obscuring.

### **Editing Excerpt Length:**

Excerpts within audio, video, images and PDF files are editable by adjusting the boundaries whenever selected, however text excerpts are changed with a different set of steps:

1. Open a document
2. Click the bracket to the left of the excerpt to reactivate 'excerpt edit' mode
3. Right click where you would like the excerpt to start or end
4. Click Set Excerpt Start or Set Excerpt End

### **Code Weight Auto-applying:**

Applying codes with code weights to a number in documents will automatically apply that number as the code weight if it is within the range defined by the code weight minimum and maximum values you defined.

1. Open a document
2. Highlight a number in a text or PDF file (123, .20, 1.2 million, etc will work)
3. Apply a code with weighting enabled
4. Inspect the Selection Info box on the top right, the number will be automatically applied

### **Upcoding:**

Automatic upcoding applies the parent of any child code at the time the child code is applied to an excerpt. By default, this is deactivated and applying a child code to an excerpt will only apply that specific code.

1. Click the Home tab
2. Go to the Code Pane on the left
3. Click the Show Settings Panel button
4. Toggle “Automatic Upcoding” to On

### **Retroactive Upcoding:**

Retroactive upcoding checks every excerpt in a project and applies parent codes to excerpts that have a child code applied, but not the parent code. Note that anytime you decided to use this feature, you might want to first make a copy of the project as a back up in case the result of the procedure is not what you expected or desired.

1. Click the Home tab
2. Go to the Code Panel on the bottom left
3. Click the Show Actions Panel button
4. Click Retroactive Upcode button
5. Read and click Submit if you agree

### **Coding blind:**

Coding blind allows you to code without having your coding influenced by other users as you will filter out any work contributed by others from your view:

1. Click the Data Set tab
2. Click Users
3. Click Deactivate All
4. Click once on your username
5. Exit the Data Set tab

**NOTE:** While this allows you to code independently, please note that this cannot be used to automatically calculate inter-rater reliability in Dedoose. For more information on IRR, check out the Training Center.

**Finally:** Be sure you are aware of the '**Quick Code Widget**' and you can learn more about it in this section of the User Guide.

*Code/Tag Tree Panel: Edit Mode* This example shows a hierarchical code/tag system with details about one highlighted tag, 'Reading by Mother.' Using the framework of family relations, the 'Reading by Mother' parent (or root) codes has two subordinate levels—(1) the children codes: Duration, Frequency, and Routine and (2) the grandchildren codes subordinate to Routine: Bedtime Routine, Morning Routine and Other Routine.

## The Quick Code Widget

The fastest way to create codes and code excerpts is with the Quick Code Widget. This feature allows the use of keyboard shortcuts to maximize efficiency when coding text documents. Here are the steps to use this awesome feature:

1. **Highlight the text** you would like to code
2. **Hit your keyboard space bar** to open the Quick Code Widget
3. **To apply an existing code** either: a. Type code name or scroll to an existing code with your arrow keys and with code highlighted **hit your Enter key** or b. **double click on the code** to create excerpt and apply the code
4. **To create and apply a new code:** Type the name of the new code in the search field and hit your Enter key to add the code to the tree, create the excerpt, add apply the code to the excerpt

When you apply a code with the Quick Code Widget: once the first code is applied, the 'Selection Info' panel in the upper right corner will change to orange to indicate you are in excerpt editing mode and where information about the excerpt will appear.

### *Codes with Shared Subtext*

If you have multiple codes that appear with the same subtext, typing into the search field may leave you with both so you can use the arrow keys to scroll down the list of codes and hit 'Enter' to apply the highlighted code of choice.

### *Adding a New Code with Existing Subtext*

To add and apply a new code that's title exists within the subtext of existing codes (ex. 'reading duration' and 'reading frequency' exist as codes and you wish to create new code called 'reading'), type the name of the new code and use the command 'Shift' + 'Enter' to create the new code and apply it to

the excerpt (where clicking 'Enter' alone will serve to apply whichever existing code that is highlighted after you've typed the name of the new code).

**Finally**, note that the Quick Code Widget is a **movable and sizable panel**. Leaving the panel open means it does not need to be reactivated for each excerpt or document you are coding.

## Importing and Exporting Codes/Tags

Code/Tag systems can be imported and exported to and from MS Excel (and other formats) and exported to MS Word with the option to also export all coded excerpts. This feature can be helpful in the preparing of reports and for sharing code systems from one project to another.

- **To Export Codes** - click the 'Export Codes' button in the code panel header, select the desired format and whether to include coded excerpts, and click 'Submit.'
- **To Import Codes** -enter code tree editing mode, click the 'Import Codes' button, locate the file you wish to import, and click 'Submit.'

**Exporting codes to a Word** format also allows you to include all excerpts associated with each code, so is a quick way to export all project excerpts organized by the code tree.

Note that you can also import and export codes with the 'Import Data' button and 'Export Data' buttons on the Home Dashboard.

Here is an example of what the code system looks like in Excel:

## Excerpting, Coding, and Weighting Text

### *Quick Code Widget*

The fastest way to create and code excerpts is with the Quick Code Widget. This features allows the use of keyboard shortcuts to maximize efficiency when coding text documents. To learn more please see the Quick Code Widget section of this user guide.

### *Excerpting and Coding Text Documents Manually*

Excerpting and coding can also be done through a multi-step process. This is the best option if: you wish to create excerpts prior to developing your code system, if you are looking to build a hierarchical

structure to your tree as you move through the excerpting process, or if you wish to take advantage of the document cloning feature.

### *Document Viewing and Excerpt Creation*

- **Open a text document** by selecting it from the 'Media' list on the Home Dashboard or the 'Media' Workspace
- Use your cursor to **highlight/block the desired section of text** (see Text Searching in the Working with Documents section above for details on how the search tool can assist in locating meaningful content)
- Click the '**Create Excerpt**' button at the bottom of the document panel OR right click on your mouse over the region and select 'Add Codes' from the context menu that pops up
- Upon creating a new excerpt (see illustration above)
- The system will enter excerpt editing mode
- The selected section will be **highlighted** in a bolder green color
- A **bracket** will appear in the margin defining the excerpt boundaries
- Colors on other excerpts will be faded
- The 'Selection Info' panel header will change from blue to orange as an indicator you are in editing mode
- **Codes** can be applied by double-clicking a code in the 'Codes' panel or by dragging and dropping a code into the 'Selection Info' panel
- **Code weights/ratings** can be set after the code is applied (if applicable)
- **Codes can be deleted** from the excerpt by clicking the 'X' next to the code in the 'Selection Info' panel
- **Excerpts can be deleted** by clicking the 'X' next to the Excerpt icon in the 'Selection Info' panel
- **You can re-enter excerpt editing mode** by clicking the bracket in the margin that defines the boundaries of the excerpt
- Click anywhere in the document to exit editing mode.

*\_TIP: Code weighting\_* can be activated for use at any time. It is often the case that a meaningful code weighting system will not emerge until the nuances of meaning in the data become clearer to the research team. That is, while scalable distributions of a code may emerge when sufficient data has been examined, a useful and precise weighting scale definition and application criteria often only follows a

certain amount of preliminary data exploration. Accordingly, it is often preferable to begin the coding of excerpts either without defining a code-weight system or by simply accepting a weight default value. Following adequate data analysis and weight scale definition, the weighting scale can be meaningfully defined and the user can then return to previously coded excerpts to set the weight according to the newly defined system.

## Excerpting, Coding, and Weighting Audio and Video

### *Screenshot of Video Viewer*

The process for creating and coding excerpts on audio or video streams is similar to text except you will see either a sound wave or video in the media viewer.

- **Open an audio or video file** by selecting it from the 'Media' list on the Home Dashboard or the 'Media' Workspace
- **Move along the timeline** by letting the stream play or by clicking at a particular location on the timeline to jump to that time point
- The vertical pink bar is the **play head**
- You can **Pause** the playback at any time with pause button
- Adjust the blue brackets to **define the clip on the stream you wish to define as an excerpt**
- Click the '**Excerpt**' icon in the lower right corner of the viewer
- Upon creating a new excerpt
- The system will enter excerpt editing mode similar to when excerpting text
- The selected section will show a **highlighted** line along the timeline where the excerpt was created
- The '**Selection Info**' panel header will change from blue to orange as an indicator you are in editing mode
- **Codes** can be applied by double-clicking a code in the 'Codes' panel or by dragging and dropping a code into the 'Selection Info' panel
- **Code weights/ratings** can be set after the code is applied (if applicable)
- **Codes can be deleted** from the excerpt by clicking the 'X' next to the code in the 'Selection Info' panel
- **Excerpts can be deleted** by clicking the 'X' next to the Excerpt icon in the 'Selection Info' panel
- **You can re-enter excerpt editing mode** by clicking the line that defines the location of an excerpt

- Clicking anywhere on the time line to exit excerpt editing mode.

### **Keyboard Shortcuts**

Keyboarding has been enabled for some of the most frequent audio and video excerpting activities: - Ctrl + P to toggle play/pause - Ctrl + Q to create an excerpt - Ctrl + + or Ctrl + - to move back and forward in the media player - Ctrl + Alt + +/- to move back and forward in larger increments - Ctrl + left or right arrow to move to the previous or next excerpt

## **Excerpting, Coding, and Weighting Images and PDFs**

The process for creating and coding excerpts in images or PDFs that are being treated as images is similar to working with other tools to grab regions or create shapes.

### *Working with Images*

- **Open an image** by selecting it from the 'Media' list on the Home Dashboard or in the 'Media' Workspace
- **Using the slider** you can modify the size of the image for efficient excerpting
- **Adjust image display characteristics** by clicking the painter's palette icon in the image header to open the controls pop-up, making desired changes, and closing palette
- **Create excerpts** by clicking into the image and dragging your cursor to create and excerpt the desired region. The system will automatically enter excerpt editing mode similar to when excerpting text and the '**Selection Info**' panel header will change from blue to orange as an indicator you are in editing mode
- **Codes** can be applied by double-clicking a code in the 'Codes' panel or by dragging and dropping a code into the 'Selection Info' panel
- **Code weights/ratings** can be set after the code is applied (if applicable)
- **Re-enter editing mode** by clicking on an excerpt or by clicking one of the brackets on the margins that define the excerpt region
- **Excerpt size and location can be changed** when in editing mode by dragging the lower-right corner of an excerpt to change size of region or clicking on the excerpt and dragging to a new location
- **Memos can be attached** to excerpts by clicking the memo icon in the excerpt when in editing mode



- **Codes can be deleted** from the excerpt by clicking the 'X' next to the code in the 'Selection Info' panel
- **Excerpts can be deleted** by clicking the 'X' next to the Excerpt icon in the 'Selection Info' panel or on the 'X' icon in the excerpt itself
- **Exit excerpt editing mode** by clicking elsewhere on the image.

### ***Working with PDFs***

Coding PDFs is essentially the same as coding other documents, just with the added feature of being able to code either as text or as an image.

The first thing you may notice when you open a PDF in Dedoose is the added functions at the top of the document. There is a page selector, buttons for moving forward or back a page, the selection mode, and, on the far right, a zoom bar.

The page selector helps you jump to a page within the document. Type the page number you wish to see in the box and hit enter and you'll be taken directly to that page.

Alternatively, you can move either one page forward or back with the arrow buttons.

When coding text, make sure the selection mode is set to 'text.'

1. Using your cursor, highlight a segment of text you wish to code
2. You can either use the quick code widget by hitting the space bar or simply double click on the code in your code tree to create the excerpt and apply the tag.

When coding as an image, make sure the selection mode is set to 'image.'

1. Using your cursor, highlight a portion of the image you wish to code
2. You can then either use the quick code widget by hitting the space bar or simply double click on the code in your code tree to apply.

To use the zoom bar, click on the slider and adjust until the image is displayed at the desired size.

## **Code Weighting/Rating**

Code weights or ratings can be defined and applied to indicate anything that can be represented on a numerical dimension including quality, sentiment, importance or any other dimension that can help distinguish variation in content where the same code has been applied to sets of excerpts. Dedoose also has a variety of charts that draw directly on these dimensions to expose patterns in both the excerpt content and the investigator determined 'quality,' 'sentiment,' 'importance,' or anything that you've decided to index across a code weight/rating system. To learn how to define code weights/ratings, see the Code Tree section of this user guide.

Incorporating code weights/ratings in your project allows you to bring an entirely independent dimension to your database. For example, say we are interviewing parents about what it looks like when they read to their preschool aged child. We might also ask parents to report on a 5-point scale (1 = poor to 5 = excellent) for the quality of their reading. However, parents only know how they read and maybe how a few other people read...and self-reports are subject to a social desirability influence where research shows people tend to over report on positive characteristics or behaviors and under report on negative. As investigators, however, we see all excerpts where parents talk about reading to their child. This perspective lets us see the full range of what reading looks like in the entire research sample and allows us to lay out all the excerpts across a rating scale that we use to index 'quality' of reading. Here are a few things to keep in mind as you consider using this feature:

- Only some codes will lend themselves to such a scaling, but many do, especially if you use your imagination
- These scales are customized depending on how finely you wish to index the coded content—use three points to index 'high,' 'medium,' or 'low' 'quality' or fifty points to lay out 'quality' across a much broader range
- It is often the case that code weight/rating systems are not defined or put into place until you have become very familiar with your data—maybe at the beginning you think you'll have a ten point scale, but in the end you find three points is sufficient and all you can reliably distinguish in the real data
- When these systems are in place, there are new sets of patterns to discover and explore and lots of great 'mixed methods' analysis you can do...and could never do without them.

## **Excerpt Reviewing, Additional Coding/Tagging**

Excerpts can be retrieved, reviewed, recoded, and exported from many places in Dedoose. These locations include the Excerpt Workspace and the chart selection reviewers that pop-up to show all the active excerpts ('Hits') after filtering or drilling-down to the sets of excerpts sitting behind any of the charts, tables, and plots—see the section on analysis for more on how clicking on portions of charts, tables, and plots, pulls up the excerpts represented in the visualizations.

*Excerpt Workspace:*

In the Excerpt workspace, users can sort and filter sets of excerpts to narrow the focus of an investigation and then review individual excerpts via the SuperMegaGrid. For example, in the following Excerpt Workspace screenshot, excerpts have been filtered to those which meet the following criteria: 'Not Working' or 'Part Time' working fathers, of 'Hispanic' origin, and with 'Female' children and then sorted by code (as indicated by the arrow in the 'Codes Short' column). This was accomplished by the following steps:

1. Click 'Uncheck All' in the 'Columns' panel to clear the columns in view—this step just helps for clarity
2. In the 'Columns' panel, select the column 'Codes Short'
3. Open the 'Fields' folder in the 'Columns' panel and select 'Father work status,' 'Ethnicity,' and 'Child Gender'—and you will then see folders appear in the 'Filtering' panel and columns will come into view
4. Open the appropriate folders in the 'Filtering' panel and select 'Not Working' and 'Part Time' for father work status, 'Hispanic' for ethnicity, and 'Female' for child gender.
5. Sort by 'Codes Short' by clicking the column header and, voilà!
6. The only excerpts that remain active are those that meet the criteria you set and the subset can now be viewed or selected and exported
7. Finally, one can see that floating over an excerpt will bring up a truncated view of the content and any codes that were applied.

Filtering excerpts in this manner can be very convenient when searching for specific sub-sets of excerpts to explore or export across a larger number of criteria.

The next screenshot shows an excerpt that had been opened for full review (by clicking on the excerpt in a reviewer or list). This view allows you to:

- Modify the codes applied to the excerpt—remove or add codes/tags—and/or modify the assigned weights/ratings
- Delete the excerpt, by clicking 'Delete Excerpt' in the footer

- Review the excerpt in the context of its source document by clicking the 'View in Context' button at the bottom of the panel
- Scroll forward or backward in the current list of excerpts using the 'Previous' or 'Next' buttons
- Close the excerpt to return to the list by clicking the 'Close' button.

### *Excerpt Review, Recode, and Export after Filtering*

As has been introduced earlier (and also discussed in the Filtering and Analysis section), reviewing and exporting filtered excerpts is an intuitive and transparent process in Dedoose. The following screenshot shows part of the Dedoose Home Dashboard where one of the basic charts in Dedoose are shown with the information that appears when floating over one of the bars. Here we see the relative frequency the 'Reading by Mother' code was used across 'Mother work status' groups. The smart tip shows the metrics on the highlighted bar (Part Time working Mothers) with reference to all excerpts with the same code.

Clicking on this bar, activates a pop-up Chart Selection Reviewer containing the set of excerpts sitting behind (and represented by) the bar in this chart. The following screen shot shows this list and a pop-up containing the text of the first excerpt which has been highlighted by floating the cursor over the excerpt.

From this listing, excerpts can be quickly:

- Reviewed in truncated form for quick scanning
- Opened for full review, recoding, or weight/rating adjustment by clicking on any of the excerpts listed
- Viewed in the context of their source document and/or
- Exported—clicking the 'Export Excerpts' button presents you with a pop-up with set of options to specify the format (i.e., .xls, .xlsx, .doc, or .txt) and information to be exported along with the excerpt (see next screen shot). Once the specifications have been set, click 'Export' and follow the prompts to provide a location and title to download the file to your local computer in your format of choice.

- Memos
  - [Memos](#)

## Memos

The use of memos is an important part of many methodological traditions and educational and teamwork practices. For example, they are key to best practices in grounded theory in the tracking of design and analytical thinking during a project. Memos can be very useful to support a rigorous code system development process in collaborative qualitative and/or mixed method research. Further, memos can be used to communicate to students or research team members over the course of a class or research project. The memo system in Dedoose, fully revamped in late 2014, is designed to be as flexible as possible to allow for any researcher, team, or instructor to make use of the system in efficient and effective ways. Memos in Dedoose are organized in a custom, user-defined, group structure depending on a project's specific needs. Memos can be free floating, not linked to any items in a project database, or linked to any number of items. Being able to build groups for memos gives the researcher the freedom to organize memos in any number of ways. Finally, Dedoose memos can be easily exported to Word or Excel format files for local use in manuscript preparation, fodder for team discussion, data sharing, and report generation.

Examples of how one can use the Dedoose memo system include:

1. Free floating memos, stored in an 'analytical thinking' group, created over the course of a project from a more reflective, grounded theory perspective. Such memos might include thoughts about observations within the data and the types of codes needed to sufficiently frame the analysis at different stages of the project. These memos can be exported later and organized by date to see

how the framing and understanding of data has evolved. Also, these, or any, memos may be linked to exemplar data in the project for further contextualization of the memo content upon review.

2. Free floating memos created in an 'assignments' group created by an instructor or team leader to communicate particular tasks for others linked to the project. Ex. a 'Week One' memo with content like, 'here's what I'd like you to be doing this week.' These memos can be viewed by students or team members so they know what is expected of them in a particular time period.
3. Mapping project activity memos in a 'project path' group also created over the course of a project to document milestones—essentially documenting the 'conversation' among team members as thinking evolves over the course of a project. In this group, team members might write memos related to: proposed or actual code tree restructuring with content about the rationale for and changes made to a code system/tree, perhaps reconfiguring into a hierarchical structure, at a particular point in time; proposals for new codes; and/or recommendations for revision to code application criteria. Again, any memo can be linked to associated content and when exported the linked content can be included so the team has all the information necessary to discuss the theoretical meaning and value of making changes in the context of real data toward a more accurate representation of the data.

### *The Memos Workspace Pop-Up*

The Memos Workspace is a movable and sizable pop-up in Dedoose. As seen in the left panel in the above snapshot, the workspace includes fields for filtering by memo title, content, date of creation, groups, and/or linked items. This example shows the memo filtered to just those in the 'Reflection Memos' group. From this view memos can be created, opened, edited, added or removed from groups, imported, and deleted. Further, when one or more memos is selected, context menus for exporting, adding to new groups, and saving as documents to be treated as media in the project for excerpting and tagging will appear above the selected memos (as shown in the next screen shot).

*Finally, it is important to note that the Memo Workspace and memos can be left open when working on other aspects of a database and, if needed, resized or minimized to allow for easier viewing and navigating in other Workspaces.*

### *Creating a New Memo*

Memos can be created within the Memos Workspace or created and linked directly to any object in Dedoose. To create a new memo in the Memos Workspace:

1. Go to the Memos Workspace by clicking the Memos tab in the main menu bar
2. Click 'Create New' in the upper right section of the Memos pop-up
3. Enter a title and the text for the memo
4. Add the memo to one or more existing groups by clicking the Memo Groups search field and selecting groups, or
5. Create a new group for the memo by typing a title for the new group in the Memo Groups search field
6. When ready, click the 'Save' button on the bottom right of the pop-up
7. Continue to edit or add the memo to groups and, when finished, click 'Save' and then close the memo.

**Note** that new memo groups can only be created when creating a new memo or editing a memo. Once the group is created, it can be used to link or remove other memos.

### *Linking Memos to Database Objects*

While it is not necessary to link a memo to an object in Dedoose, it is often desirable and this can be done from the Memos Workspace or when working with the object in question.

To link a new or existing memo in the Memos Workspace:

1. Go to the Memos Workspace by clicking the Memos tab in the main menu bar
2. Create a new memo (and click 'Save' to prep for linking) or open an existing memo
3. Click the 'Memo Links' button on the bottom of the pop up
4. Search for the object you would like to link. This can be a code, excerpt, media file, or descriptor. Note that the search field can be used as a filter and, by clicking the 'magnifying glass' icon in the search field, you can also limit the types of items displayed
5. Select any items you wish to link
6. Click 'Save'
7. Close the memo.

To link a new or existing memo directly to an object:

1. Open up the 'Memos' button or icon associated with the object you wish to link
2. Upon clicking the memo button or icon you are presented with a memo pop-up with options to create a new memo for linking or to link an existing memo. Here is an example of selecting 'Create New Memo,' selecting the 'Coding Memos' group for storage and providing a title and content:
3. **Click Save** to link memo and you can then link additional new or existing memos to the object or exit the routine:
4. Finally, again, the memo, or other newly linked memos, can be left open, resized, minimized, and/or moved if you wish to add content as you carry out further excerpting activities.

### *Exporting Memos*

**To export any or all of your memos:**

1. Open the Memos Workspace by clicking the Memos tab in the main menu bar
2. Filter as desired and manually select memos to export or click the 'Select All' option
3. Click 'Export,' select the appropriate format, provide a description (if desired), and select any additional information you wish to include in export (note that while excerpt text, codes, and descriptor content will be included, only media titles will be present in export):
4. Click 'Submit'
5. Click 'Ok' when download is ready
6. Choose the location where you wish to save the file on your computer and, if needed, change the file name
7. Click 'Save'
8. Click 'Ok' when download is complete.

### *Importing Memos*

The memo importing feature allows users to share memos and associated content from one Dedoose project to another. To import memos:



1. Go to the Memos Workspace by clicking the Memos tab in the main menu bar
2. Click the 'Import' button on the upper right portion of the pop-up
3. Select a XML file that was produced when exporting memos from another project to a XML format
4. Click 'Open' to complete import.

### ***Tile or Grid Viewing***

In the Memo Workspace, you have the option to view memos in a tile format (the default) or a grid format. You can toggle these views by clicking the 'Switch to Tile (or Grid) View' option in the upper right corner of the pop-up.

### ***Sorting Memos***

When in the Memos Workspace you can use the 'Sort By:' drop down menu items to sort your memos by Date Created, User, or Title Creation Date. When in Grid View, you can also sort by any of the columns by simply clicking the column header.

### ***Editing and Deleting Memos and Memo Groups***

**To edit memo text, title, or groups a memo belongs to:**

1. Open the memo you wish to edit by clicking on it in the Memo Workspace or when accessing memos linked to objects
2. Edit the text, the title, or the groups to which a memo belongs to by adding new groups or removing by clicking the 'x' next to an existing group
3. Click 'Save'
4. Close the memo when finished.

**To delete a memo:**

1. Open the memo you wish to delete by clicking on it in the Memo Workspace or when access memos linked to objects
2. Click the 'Delete' icon in the lower right corner of the memo view

3. Click 'Yes' to confirm delete and memo will be deleted.

#### **To edit or delete a memo group:**

1. Open the Memos Workspace by clicking the Memos tab in the main menu bar
2. Click on the edit icon next to the group you wish to edit or delete—the snapshot below shows your memo group editing options
3. Edit the group title and click the save icon, click the 'X' icon next to the group title to delete the group, or click the cancel icon if you change your mind and you've completed making the desired changes.

#### **To add multiple memos to the same Memo Group:**

1. Open the Memos Workspace by clicking the Memos tab in the main menu bar
2. Select any memos you wish to add to a group as a batch
3. Click the 'Add to Memo Groups' icon that appears above the memos panel
4. You can add a new group by typing it into the search field and clicking 'Add New Group' or you can select an existing group
5. Check the boxes next to the group(s) to which you want to add the memos
6. Click 'Save' (Below is the 'Add to Memo Groups' pop-up).

#### **Saving a Memo as a Project Document for Excerpting and Tagging**

To save memos as project media files so you can excerpt and tag content:

1. Enter the Memos Workspace by clicking the Memos tab in the main menu bar
2. Select the memos you wish to save as media files
3. Click the 'Create Document Copy' icon that appears above the memo panel
4. Click 'Ok' to the alert that the documents have been created
5. Close the Memos Workspace and you will find the new documents among your media files.

- Analysis and Filtering
  - [Analysis Workspace Features](#)
  - [Analysis Charts, Tables, and Plots](#)
  - [Normalization](#)
  - [Data Filtering](#)
- Exporting
- Collaboration & Security
- Inter-Rater Reliability
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- Appendix

## Analysis Workspace Features

Access the Analyze Workspace by clicking the ‘Analyze’ button on the Dedoose main menu bar:

The Analyze Workspace offers a number of chart ‘sets’ based on the various aspects of a project database. The sets are organized in a folder system so it is easy to find the charts, tables, or plots you are looking for depending on the immediate needs of your work. Here’s an example of the charts in the ‘Mixed Methods’ set.

### *Dedoose Analyze Workspace Mixed Methods Chart Menu*

It is also worth noting that a number of the charts, tables, and plots will appear in multiple sets within the ‘Chart Selector’ depending on the aspects of the database being represented in the visual. For example, the ‘Excerpts Per Document’ chart will appear in both the ‘Document Charts’ and ‘Excerpts Charts’ folders.

## Analysis Charts, Tables, and Plots

The Dedoose Analyze Workspace offers a wide variety of data visualizations. These visualizations can be used to examine the general nature of your data, understand how the code system has been applied to the qualitative content, and expose patterns of variation in the qualitative data and coding activity across sub-groups. The visuals can be exported to facilitate the presentation of research findings, and as filters or windows to drill deeper into findings. These charts, tables, and plots are designed to be as informative, intuitive, and transparent as possible. They can be used in numerous combinations and be

flexibly adapted to address particular research questions. Finally, most visuals have a variety of options that will be found in upper right corner of display, so look for icons to swap display format, expand view, export, include sub-code count ...

## **TRANSPARENCY?**

Fundamental to all aspects of the Dedoose design is transparency. Our goal is to ensure that all users can quickly learn to navigate smoothly throughout Dedoose and easily access the features, input data, manipulation, and analysis tasks. Noteworthy is that in the Analysis Center and throughout Dedoose, **every bar, slice of pie, bubble, and cell in a table is 'HOT,' i.e. dynamically linked to the underlying qualitative data.** One click on the aspect of the visual will pull up the associated qualitative content being represented by the bar/slice/bubble/cell. From there you can explore further to more deeply understand the nature of the qualitative content or export for use in a manuscript or presentation preparation.

### *Chart Expansion and Export*

Throughout Dedoose, there are two common controls in the panel header for exporting and viewing the chart in full screen:

- Clicking the 'Full Screen' button expands the chart for easier viewing
- Clicking the 'Export' button prepares a MS Excel file with the bar charts, tables, or plots and activates prompts to download and save the file on your local computer - just follow the prompts and you've got an Excel version of the chart and all underlying data for further analysis or presentation.

### *Introduction to Dedoose Charts, Tables, and Plots*

Again, while a number of the data visualizations will appear in multiple sets within the 'Chart Selector,' we introduce the key types here before moving on to a more detailed description of what can be found within each of the charts/tables/plots.

### *Frequency Charts*

The charts in this screen shot represent the relative number of excerpts that have been created within each media file. As a reminder, each bar in this display is 'hot' and a simple click will immediately pull up and present the underlying excerpts to facilitate interpretation of the graphical image.

*Example: Excerpt Count x Media Chart*

**Frequency Tables** This next screen shot is an example of one of the many Dedoose frequency tables. This table presents the frequency with which each code (columns) has been applied to an excerpt in each media file (rows).

*Example: Code Application Chart*

Tables like these are useful in visualizing how a code system has been applied across media files/data. While it may seem easy to recall the pattern in coded content by case, remembering interview #1 after working with interviews #2 to #10 is very difficult. Moreover, team members cannot be familiar with the work done by others. Emerging patterns in how a code system has been applied can play an important role in data analysis and interpretation. It is under these circumstances where presentations of data as in this Code by Document table can be illuminating. Remember, clicking a cell in the table will pull up the underlying content for further consideration and the totals row and column allow for pulling up batches of excerpts by media or code. Also, note that frequency is mapped to the color spectrum—reds being more frequent and blues less—so your eye will quickly move to where the action is taking place. Patterns here can help see how the conceptual framework you have represented in your code/tag system has been applied to (or mapped onto) your source data.

**Descriptor Ratios**

Descriptor ratio charts present the relative numbers of each sub-group for each of a project's list-type (categorical) descriptor fields. These visualizations facilitate an understanding of variation within a project sample and can serve as filters or windows on the data provided by a particular sub-group for segmentation or sub-group specific analysis.

*Example: Descriptor Ratios Chart*

**Code Application by Descriptor Charts**

The Code Application by Descriptor field charts (including the dynamic descriptors which are designed to support analysis of change over time in your qualitative data) have a number of options and can be

some of the most useful visualizations for analysis, interpretation, and communication/presentation of research findings. Essentially, these charts represent the number of excerpts that have been associated with a particular code separately for each sub-group within a descriptor field. In the example below we see charts for each code showing the relative number of excerpts tagged with the specific code separately for sub-groups based on the 'Mother Primary Language' descriptor field groups: 'Bilingual,' 'English,' and 'Spanish.'

The drop-down menu allows for an immediate reconfiguration of the charts by selecting any of the list-type or grouped number or date/time descriptor fields in the project.

*Example: Codes x Descriptor Chart*

Other important controls for these charts can be found in the panel sub-header showing radio buttons next to the drop-down menu to switch the chart from relative excerpt count to average weights applied (where used) together with check boxes for 'Hit/Miss,' 'Sub-code Count,' 'Normalize,' and '%.' By default, the 'Normalize' and '%' boxes are checked.

- **Hit/Miss** option (which defaults to 'off') toggles the chart to a display representing the *number of cases* in each sub-group with one or more excerpts tagged with the particular code
- **Sub-code Count** option (which defaults to 'off') essentially serves to 'collapse up the code tree,' thus including excerpts tagged with all root codes AND subordinate codes (child, grandchild, ...) in the visual. For example, if the Parent-Child code had child codes associated with it in the tree, all excerpts coded with Parent-Child Talking OR any of the child codes would be included in the chart for the Parent-Child Talking code
- **Normalization** option (defaults to 'on') adjusts each bar based on the relative number of cases in each sub-group (see below for the normalization procedure). Simply, a graphical representation for code application frequency by sub-group is relatively meaningless if there are unequal numbers of individual cases across each sub-group. For example, in this study, the 'Spanish' group for 'Mother Primary Language' is disproportionately large (representing 64% of the total sample). Turning off the normalization adjustment results in a possibly misleading visualization. Below is the same chart as above with normalization turned off:

*Example: Codes x Descriptor Chart with Normalization Off*

This 'non-normalized' chart, as compared to the original, appears to suggest a markedly high frequency of 'Letter Recognition' coded excerpts for the Spanish group. Hence, normalized charts provide a more unbiased perspective of the underlying data

- The '%' check box converts the chart from a raw count presentation to a percentage basis presentation, as shown in the following snapshot of the same chart with the percentage view deactivated:

*Example: Codes x Descriptor Chart Raw Counts*

### ***Descriptor by Descriptor by Code Application/Weight Charts***

The Descriptor by Descriptor by Code Application/Weight chart has many options for drilling even deeper into variations across population subgroups. These 'nested' or 'cross-tab' display charts allow for examination of the qualitative data and coding/weighting activity based on two descriptor fields. The example below shows the average weight assigned to excerpts coded with 'Reading by Mother' across 'Mother Primary Language' within 'Mother Work Status' subgroups. These charts can expose variation in value, sentiment, importance, quality, etc. (anything you have used the weighting system to represent) across various levels in the overall population. In the example, we see an interesting interaction pattern with variations in the levels of primary caretaker reading quality as a function of mother language and work status (i.e., excerpts were rated generally higher for not working moms who are bilingual or English speaking but full or part-time working moms who speak Spanish).

*Example: Descriptor x Descriptor x Code Weight Chart*

### ***Code Weight Frequency by Descriptor Field***

The Code Weight Frequency by Descriptor Field Chart allows for a focus on the code weight distribution across descriptor field categories. The following example is based on the 'Reading by Mother' code and the 'General Home Language' descriptor field. The resulting chart shows clusters of excerpts tagged with 'Reading by Mother' across the weight scale and broken out by the home language descriptor field sub-groups. These displays can help communicate complex patterns and provide easy access to subsets of excerpts meeting specific sub-group and weight level criteria.

*Example: Code Weight Frequency x Descriptor Field Chart*

The Code Weight Frequency by Descriptor Field charts is a prime example of how mixed methods can expose important patterns in research data. Well-designed code weight systems are ‘grounded’ in the underlying qualitative data—they are based on investigator defined variation within the sample population. When such systems are clearly defined and reliably applied, they:

- Help generate clear illustrations of how coded qualitative content is distributed across the weighting system
- Represent quantitative distributions of cases within the sample population across code applications, i.e., defining and exposing patterns of specific code application across the sample—providing both numerical information on cases based on the code’s content and a ‘grounded’ appreciation for each level of the weight system
- Expose descriptor sub-group variation in the weighting assigned to each code application
- Provide numerical representations of qualitative content that can be exported for use in other quantitative analysis.

### ***Code Weight by Descriptor Bubble Plots***

The Code Weight by Descriptor Bubble Plots allow a four-dimensional exploration and presentation of project data. These plots are based on the average weights associated with the selected codes across the selected descriptor field sub-groups.

#### ***Example: Code Average Weight x Descriptor Field Bubble Plot***

In the above example, from a study on the hotel characteristics reported as desirable across age and income level, the bubbles represent different income groups. The size of the bubbles represents the average code weight associated with application of the ‘Intimacy’ code, which has been applied when intimacy was mentioned as a desirable characteristic and a weighing to indicate the reported level of importance. The X and Y axes show the average weights associated with the application of ‘Sophistication’ and ‘Cost’ codes respectively. The highlighted bubble indicates that respondents reporting more than \$250,000 in annual income report relatively low importance for ‘Cost,’ moderate importance for ‘Sophistication,’ and high importance of ‘Intimacy’ as compared to the other income level groups when making hotel decisions.



Wherever code weight/rating systems are used alongside code application activity (e.g. to index variation in importance, strength, sentiment, value, quality...), these plots can quickly expose complex multi-dimensional relations between variables across sub-groups. Finally, these plots are easily modified through the drop-down menus, communicate tremendous amounts of information and can be used to access the excerpts represented by a particular bubble or as filters for further analysis.

### ***Code Frequency by Descriptor Bubble Plots***

The Code Frequency by Descriptor Bubble Plots allow for a four-dimensional exploration and presentation of project data based on the frequency with which particular codes were applied to excerpts across the selected descriptor field sub-groups.

#### ***Example: Code Frequency by Descriptor Bubble Plot***

In the above example, from a study on the hotel characteristics reported as desirable across age and income level, the bubbles represent different annual income groups. The size of the bubbles represents the frequency with which the 'Cost' code was applied to excerpts within each sub-group. The X and Y axes represent the frequency with which the 'Luxury' and 'Warmth' codes were applied respectively. The highlighted bubble indicates that in comparison to other income groups, respondents reporting annual income of greater than \$250K discuss issues of Luxury and Cost in hotel evaluations relatively more frequently and issues of Warmth relatively less frequently.

As with the code weight by descriptor bubble plots, these visuals can quickly expose complex multi-dimensional relations between variables across sub-groups and provide quick access to the underlying qualitative content.

You can also view our [blog post](#) on this type of chart.

### ***Code Co-Occurrence Matrix***

The Code Co-Occurrence Table provides information about how the code/tag system was used across all project excerpts. This symmetric, code by code, matrix present the frequencies for which all code pairings were applied to the same excerpt and, by default, overlapping excerpts. Such a display can expose both expected and unexpected patterns in which two codes were (or were not) used together. These patterns illuminate how concepts related to the research questions and represented by the code

system are combined in the natural schema (i.e., cognitive frameworks that help organize and interpret information) activated by study participants as they report on the topic represented by project codes.

What does it tell us about our data, research questions, and how respondents naturally connect the concepts we are examining when we discover that codes 'A' and 'B' co-occur at relatively low rates compared to codes 'A' and 'C'? Dedoose facilitates the process of addressing questions like these quickly and with a variety of attributes to suit the needs of different researcher preferences. It is also important to note that when including counts for overlapping excerpts, the cell values represent 'hits' for excerpts coded with both the associated codes AND excerpt with one of the codes that overlaps with an excerpt coded with other code. This feature can be deactivated by clearing the 'Include Overlapping Excerpts' box in the upper right corner of the panel.

#### *Example: Code Co-Occurrence Matrix*

For example, the highlighted cell in the table above indicates that 16 excerpts or overlapping excerpts were coded with both the 'Reading by Others' and 'Letter Recognition' codes. This pairing's relatively high frequency indicates that as participants are thinking and reporting on one of the concepts, they often discuss thoughts about the other. Such a combination suggests that an overarching schema which includes both concepts are being activated as participants formulate their responses. Drilling down to the underlying qualitative data (by clicking the cell and reviewing the excerpts) provides a deeper understanding of participant reports and the naturally occurring patterns in their thought processes.

Observation of patterns in how the code system was applied can illuminate a wide variety of connections within (a) the nature of the conceptual framework represented by your code/tag system and how it was applied and (b) the nature of the data themselves. Patterns like these are often unlikely to be noticed or understood in the midst of coding activity. Yet in the analysis stage, these patterns can be extremely valuable in discovering and understanding how respondents naturally discuss these concepts in combination and how researchers will discuss these organizing principles as they understand and present their findings.

#### *Code Weight Statistics Tables*

The Code Weight Statistics Tables offer another means of examining and understanding coding activity in the project. These tables display basic counts and, where appropriate, statistics of how the weights for each code were distributed across code applications. The application count cells are also great shortcuts

for activating a code-specific filter or pulling up all excerpts associated with the code for further exploration.

*Example: Code Weight Statistics Chart*

### ***Descriptor Field by Descriptor Field***

The Descriptor Field by Descriptor Field chart is essentially a cross-tab analysis of the relative frequency of members in each sub-group plotted for two descriptor fields—one nested within the other. For example, in the screen shot below, you see ‘Father Work Status’ graphed against ‘PC Reading Change Group.’ The result of the analysis is Chi-square = 3.79 with 4 degrees of freedom—not a statistically significant relationship. This non-parametric statistical analysis is commonly reported in the description of a research project participant population and in discovering how the population may have interacting characteristics that should be identified and considered in the interpretation of study results.

*Example: Descriptor Field by Descriptor Field Chart*

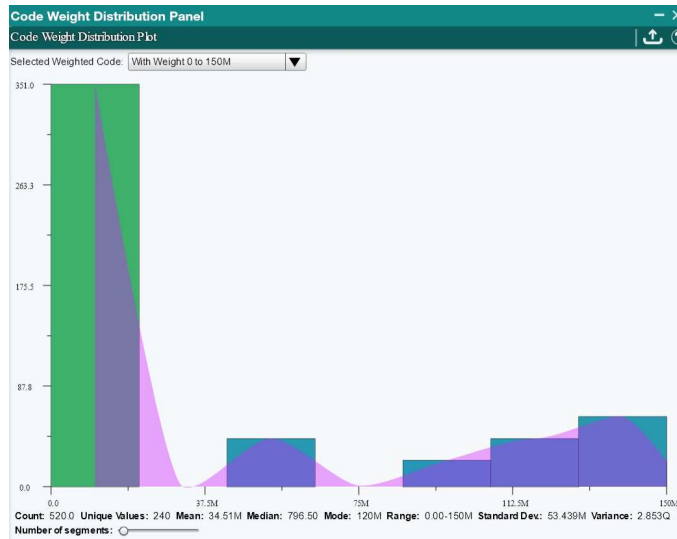
### **Code Weight Distribution Plot:**

The Dedoose code weight/rating distribution plot offers both a visual representation of how excerpts have been distributed across the defined dimension and access to sub-sets of excerpts via clicking on a particular segment. Continuous numbers like these are typically described by the frequency of data points along the distribution and by characteristics representing central tendency and dispersion including:

- a. The number of cases (n)
- b. Mean or average value
- c. Median (the value that marks the point where 50% of cases fall above and below)
- d. Mode (the value that appears most often)
- e. Minimum value
- f. Maximum value
- g. Range of values
- h. Standard deviation and
- i. Variance.

Examining this information can help you understand (and report on) how you’ve used the weight/rating system across the coded excerpts. You can control the number of segments using the slider provided in the Dedoose pop-up and then explore the excerpts within each cluster by simple clicking on a segment to pull up the associated excerpts.

In the example below from a sample Dedoose code, we see a plot that ranges from 0 to 150 million with 5 segments grouping subsets of values along the range and measures of central tendency and dispersion provided along the bottom of the pop-up.



There are two ways to activate the Code Weight Distribution Panel in Dedoose. First is via the Codes panel.

1. From the Codes panel, click the 'edit' code icon that appears when floating over a code and
2. Click the 'Distribution Plot' button in the 'Edit Code' pop-up.

Note that the 'Distribution Plot' button will only appear for codes with the weight/rating system activated and you can also identify codes with weights/ratings activate by the dark outline surrounding their colored marker in the Codes panel.

The second way to activate the pop-up is via the Analysis Workspace:

1. Click the 'Analyze' tab in the Main Menu Bar
2. Click the 'Code Charts' '+' sign to open the Code Charts folder
3. Select 'Code Weight Distribution Plot' and you are on your way.

## Normalization

The normalization function, an option in a variety of Dedoose frequency charts, operates by assigning a weight of '1' to the class with the largest number of members (basis class) and then assigns weights to the other classes as a function of the numeric relation between the number of members in the class to that of the number of members in the 'basis' class. These weights are then used to adjust the number of raw counts to accomplish ratio equivalence across class for visualization and the weighted percentage is calculated based on these adjusted counts.

For example, if we are interested in the relative percentage of times people of different color eyes blink in one minute, we calculate as follows:

## Data Filtering

Dedoose offers a variety of approaches to filtering your data. Most users analytical needs, much or all of the time, will be fully served by simply using the auto-generated and interactive data visualizations available in the Dedoose Analyze Workspace. The visuals make it easy to discover and explore patterns in their data and then drill in to better understand the rich qualitative stories that live beneath the surface. However, for those wishing to focus their analysis on particular subsets of data without distraction from other aspects of the database, Dedoose offers powerful database-wide filtering capabilities.

### **Or vs And filtering:**

Filtering can include two basic operators in Dedoose: 'or' and 'and' filter operations.

An 'Or' relationship filter is used when you would like to cast a wider net that might include a few targets subsets. As a simple example, consider the data that are active by default...everything or the full data set view. If you want to narrow to excerpts tagged with one or more of some subset of codes you can do the following:

1. Click the Data Set tab
2. Click Codes tab
3. Click Filter None
4. Check the Codes of interested
5. Exit the Data Selector
6. Click the Excerpts tab
7. You will see the set of excerpts that have the first code applied OR the second code OR the third OR...

An 'and' relationship usually defines more narrow data sets. For example, say you'd like to see what Spanish AND female participants contributed to your data set. In this case, the 'AND' relationship is between the female AND Spanish speaking descriptor options. Here's one way to do this:

1. Click the Excerpts tab
2. Go to the Columns section on the top left
3. Open the Fields folder

4. Check the Gender and Language fields
5. Go to the Filters section on the bottom left
6. Open the folders that appear for the fields you selected
7. Check Female in the Gender folder
8. Check Spanish in the Language folder

The excerpts that remain active will be only those which were provided by females who reported speaking Spanish.

### **Filtering via Chart Selection Reviewer**

There are several approaches to activating filters in Dedoose. The simplest approach is to filter via the chart selection reviewer activated following a click on some aspect of an analytic visualization. For example, the following series of snapshots illustrates the process.

1. Pulling up all excerpts for families reporting having male children by clicking the 'Male' portion of the descriptor ratio pie chart in the Analyze Workspace:
2. Clicking 'Make Active Set' in the Chart Selection Reviewer activates a filter so all subsequent analysis will only be focused on excerpts from families reporting having male children. The following snapshot shows the impact of this filter: **a.** The only active data in the codes by descriptor bar chart **b.** The 'Data Set' icon in the main menu bar is shaded red as an indicator a filter is active **c.** A 'funnel' icon appears in the chart header which serves as a toggle to view all data or just filtered data when a filter is active

The same visual after clicking funnel icon to toggle filter to 'off' position

When any filter is active, all subsequent analysis is focused only on the data meeting the filter criteria. Thus, with this approach the three buttons referencing 'Active Set' at the bottom of the Chart Selection Reviewer pop-up allow for filtering the entire database based on the sub-set of data represented in the list. Beyond simply activating a filter as in the example, one can also add or remove other subsets to/from the active filter by using the 'Add to/Remove from Active Set' buttons.

### **Excerpt Workspace Filtering:**

The Excerpts Workspace allows for more complex filtering options than is available anywhere in Dedoose as you can filter down to specific excerpts in addition to the categories into which they fall. It is

worth noting the difference between filtering in the Excerpts Workspace and the Data Set Workspace. In the Excerpts Workspace, filtering can be done with one or a series of 'and' operations in an iterative way (which then lets you add 'or' operations to the overall filter being created). This means that: a. once each round of filtering is established the only data displayed will meet all the filter criteria; and b. adding additional 'and' operations allows for the inclusion of 'or' operations. That is, for example, 'males and high income' OR 'males and moderate income.' Unlike the Data Set tab, which can only filter with a single 'and/or' operation. This means that any given piece of data you wish to include in the overall filter only needs to meet one of the rounds of filtering to build the final result.

1. Click the Excerpts tab
2. Go to the Columns section on the top left
3. Open the Codes and Fields section
4. Select the field or code you are interested in filtering by
5. Go to the Filters section on the bottom left
6. Open the field or code folder you are interested in
7. Click True or select the category you are interested in
8. Click Select All
9. Click Make Set
10. Your set is created

To add additional filters:

1. Click the Show All Items button on the top right
2. Apply any other filters
3. Click Select All
4. Click Add to Set
5. Click the Show Only Active Items button

### **Filtering from the Analyze Workspace:**

In addition to providing various counts and visual displays of distributions for your data set, the Analyze workspace creates sets of excerpts that can be very difficult to define manually. For example, excerpts that overlap with the excerpts of a specific code. Luckily, you can create data sets from these as well!

1. Click the Analyze tab
2. Open the chart you are interested in
3. Click on the part of the chart you are interested in
4. The Chart Selection Review will appear
5. Click one of the buttons on the bottom right:
  - Make Active Set - This clears any current data set and sets the code's excerpts as the current data set.
  - Add To Active Set - This adds the excerpts to the current data set.
  - Remove From Active Set - This removes the excerpts from the current data set.

## Code Tree Filtering:

Filtering codes via the code list allows you to select individual codes and remove them, add them or set them as active data sets in Dedoose. Normally, filtering via the Codes section of the Data Set tab is sufficient as it removes the other codes from view, however if you are interested in how the auxiliary codes overlap with a set of codes you select, this is the way to go.

1. Click the Home tab or go to any workspace where you see the code list.
2. Go to the code list.
3. Hover over a code you are interested in filtering by or filtering out.
4. Click the quotation icon that appears.
5. Click one of the buttons on the bottom right:
  - Make Active Set - This clears any current data set and sets the code's excerpts as the current data set.
  - Add To Active Set - This adds the excerpts to the current data set.
  - Remove From Active Set - This removes the excerpts from the current data set.

## Filtering via the Data Set Workspace

Though filtering via the chart, table, and plot shortcuts will serve many needs, the Dedoose Data Set Workspace serves those requiring a more complex database query and for those wishing to save filters for later use. The snapshot below shows the 'Data Selector' pop-up activated by clicking the Data Set Workspace icon.

In the Data Set Workspace filter can be defined based on any object in the database including descriptors, media, users, and codes. Two important things to keep in mind when creating filters are:

1. Excerpts are the focus of all filtering, so remembering that the ultimate goal is to narrow to a subset of excerpts meeting particular criteria will help in creating clear and useful filters
2. When a filter has been activated, it will remain in place until it is changed or deactivated by clicking the 'Clear Current Set' button in the Data Set Workspace or by exiting the Dedoose application.

## Defining a Filter

So, what constitutes a complex query? Again, filtering in Dedoose can include criteria from descriptors, media, users, and/or codes and the sole focus is on the activation or deactivation of excerpts. Many users



are familiar with the use of Boolean operators in defining a database query. Here we will work through an example in our sample data to illustrate how to define and activate a more complex query in Dedoose. Let's imagine we wish to narrow our active set to only those excerpts meeting the following criteria:

1. Coded with 'Reading by Mother' AND/OR 'Reading by Others'
2. From families who report General home language = Bilingual OR Spanish
3. Families who report Father's work status = Full-time OR Part-time AND
4. Families who report Ethnicity = Hispanic.

Setting up this somewhat complex query is relatively transparent when working in the Dedoose Select Data Workspace and, while there are different approaches to setting up the same query, it is most straightforward by making basic use of the SuperMegaGrid features to isolate and activate the data of interest.

***Note:** For clarity, when working in the SuperMegaGrid we recommend clearing all columns except those of interest prior to filtering and you will see folders for each appear in the 'Filtering' panel AND 'Deactivate All' for a more forward approach to setting criteria for those excerpts you intend to activate.*

Here are the steps:

1. Enter the Dedoose 'Data Set' workspace by clicking the binocular icon in the Dedoose Main Menu Bar
2. Click the 'Codes' tab, click 'Filter None' to clear all and then select only 'Reading by Mother' and 'Reading by Others'
3. Click the 'Media' tab and here's where we take advantage of the SuperMegaGrid
4. Click 'Uncheck All' in the Columns panel and then select Father work status, Ethnicity, and General Home Language since these are the field relevant to the filter we wish to create
5. Click 'Deactivate All' to 'turn off' all data from all media
6. In the 'Filters' panel, open each folder and select those values you wish to include—in our example: 'Part-time' or 'Full-time' working fathers, 'Hispanic' families, and 'Spanish' or 'Bilingual' Home Language families to filter down to the media that meet these criteria

7. Click 'Activate All' to 'turn on' all excerpts that meet these criteria and the filter has been created...see snapshot below
8. Once activated, you can click the 'Dataset' tab to see the results of the filter a. View the excerpts b. Open the excerpts for full view c. Modify coding on excerpts when open and d. Save the current filter criteria in your Saved Data Sets library for later use—by highlighting and loading from the library
9. Close the pop-up and all subsequent analysis will be only on this subset of data—INCLUDING WHICH EXCERPTS WILL BE IN VIEW WITHIN DOCUMENTS
10. Closing Dedoose or returning to the Data Selector's Dataset tab and clicking the 'Clear Current Set' button will serve to clear the filter.

The following screen shots show a basic code by descriptor chart with the filtering active:

...and toggled to the full data set:

### ***Saving a Database Filter***

Regardless of the complexity of activated filters, users and research teams may want to save and re-load database filters (queries) that have been defined for particular purposes.

Saving an active filter that may be useful in the future for review or as new data are added to the database, also takes place in the Data Selector workspace. To save a filter—WHEN THE FILTER IS ACTIVE:

1. Click the 'Dataset' tab
2. Click the 'Save Current Set' in the left side panel
3. Provide a title and description of the filter and click 'Submit' to save.

### ***Re-Loading a Saved Filter***

Re-loading a saved filter (or database query) is a simple procedure in Dedoose and is achieved via the Data Selector workspace. To re-load a filter:

1. Click the 'Data Set' tab
2. Locate and highlight the desired filtered data set in the bottom panel
3. Click the 'Load' button at the bottom of the panel to activate.

### *Deactivating/Clearing Filters*

Filters are deactivated by either exiting the Dedoose App or:

1. Returning to the Data Selector
2. Clicking the 'Data Sets' tab
3. Clicking the 'Clear Current Set' button in the left side panel.

### **Searching across documents and excerpts:**

Searching across document and excerpts allows you to pull up a list of items that have a specific text string to filter for items with term or phrase of interest.

For document content searching:

1. Click the Media tab
2. Click Search documents...
3. Type your text string of interest
4. Hit Enter

For document title searching:

1. Click the Media tab
2. Click the Title Filter bar
3. Type your text string of interest

For excerpt searching:

1. Click the Excerpts tab
2. Click Searching excerpts...
3. Type your text string of interest
4. Hit Enter

- Exporting
  - [Exporting](#)

## Exporting

Virtually everything in Dedoose can be exported to an appropriate format depending on what you intend to do with the exported information. This includes visuals, sets of text excerpts, descriptor data, code system, and your entire project.

The 'Export' button will always look the same in any panel or workspace where an export is available.

The most straightforward way to export entire aspects of your database is initiated from your project Home Dashboard. Clicking the 'Export Data' button in the upper left panel will present this menu of options:

Clicking on any of your options will take you into the same export routine, in most cases, as presented when you click export from any of the specific workspaces—described below.

### Exporting Codes

Anywhere the 'Codes' panel is present you can export your code tree and, if desired, all associated excerpts. Here are the steps:

1. Click the 'Export Codes' button in the panel header
2. Select your desired export format and, if you select Word, you will have the option to include all tagged excerpts listed beneath each code in the export
3. Click 'Submit'
4. Click 'OK' when the 'Download Ready' prompt is presented
5. Select the location on your computer where you wish to save the file and, if you wish, change the export file name
6. Click 'Save'
7. Click 'OK,' the download is complete and you are on your way.

### Exporting Descriptor Fields and Descriptors

All descriptor set information can be exported from the Descriptors Workspace. Remember that a descriptor set has two components: descriptor fields and descriptors (the data themselves).

To export descriptor fields:

1. Enter the Descriptors Workspace
2. Click the 'Export Fields' icon in the 'Set Fields' panel header
3. Select the type of file you would like to export
4. Click 'Submit'
5. Wait for the 'Download Ready' prompt and click 'OK'
6. Choose a desired file name and location on your computer where you wish to save the file
7. Click 'Save'
8. Wait for the 'Download Complete' prompt and click 'OK'.

There are 2 places you can export descriptor data: from the Home Dashboard as described above and from the Descriptor Workspace. From the Home Dashboard, select 'Export Descriptors' after clicking the 'Export Data' button and from the Descriptors Workspace click the 'Export Descriptor Data,' button in the Descriptors In Set' panel header and then:

1. Choose which type of file you wish to export
2. Click 'Submit'
3. Wait for the 'Download Ready' prompt and click 'OK'
4. Choose a desired file name and location on your computer where you wish to save the file
5. Click 'Save'
6. Wait for the 'Download Complete' prompt and click 'OK'.

### **Exporting Media Lists and Full Document Text**

To export a **list of the Media files** along with any associated descriptor data and code application information:

1. Enter the Media Workspace
2. Click the 'Export Media' button in the 'Media' panel header
3. Wait for the 'Export Ready' prompt and click 'OK'
4. Wait for the 'Download Ready' prompt and click 'OK'
5. Choose a desired filename and location on your computer where you wish to save the file

6. Click 'Save'
7. Wait for the 'Download Complete' prompt and click 'OK'.

To export **the full text from a document** with excerpt and code application information within the document:

1. Open up the media file
2. Click the 'Export Document' button in header when in Document View
3. Choose the desired export format and, if you select Word, you can choose the option to include all excerpts highlighted in the export
4. Click 'Submit'
5. Wait for the 'Download Ready' prompt and click 'OK'
6. Choose a desired file name and location on your computer where you wish to save the file
7. Wait for the 'Download Complete' prompt and click 'OK.'

### **Exporting Excerpts**

Exporting all your excerpts can be accomplished in a few ways depending on whether you wish to export all excerpts from a project or only a selected subset.

To export all project excerpts from the Excerpts Workspace (which follows the same routine after selecting 'Excerpt Excerpts' when using the 'Export Data' menu from the Home Dashboard):

1. Enter the Excerpts Workspace
2. Click 'Select All' in the lower portion of the 'Active Excerpts' panel
3. Click the 'Export Excerpts' button in the upper right corner of the panel header
4. Uncheck any information you wish to exclude from the export...Note that leaving all default options will essentially export all project information
5. Choose the desired excerpt text length and export type
6. Click 'Export'
7. Wait for the 'Download Ready' prompt and click 'OK'
8. Choose a desired file name and location on your computer where you wish to save the file
9. Click 'Save'
10. Wait for the 'Download Complete' prompt and click 'OK.'

To export a subset of excerpts from the Excerpts Workspace, you can manually select excerpts or select a desired subset using the filtering capabilities and then follow the same routine as above. Further, to export excerpts after clicking an aspect of a Dedoose data visualization (ex. a bar in one of the charts or cell in a table) you simply click the 'Export Excerpts' button in the lower left corner of the Chart Selection Reviewer and follow the same routine as above. See below for the Chart Selection Reviewer activated by clicking the 'Male' bar in the Codes x Descriptor chart for the 'Reading by Mother' code:

### **Exporting Memos**

To export all or some of your memos:

1. Open the Memos Workspace by clicking the Memos tab in the main menu bar
2. Either click the 'Select All' option or click on the checkbox for each memo you wish to export
3. Click 'Export' and select the format and any additional information you wish to include
4. Hit 'Submit.' Choose where on your computer you wish to save the exported file and hit 'Save.'

If you wish to export all memos within a specific group or groups, first make sure to select the checkboxes for those groups using the options on the left of the Memos pop-up.

### **Exporting Projects**

To export a full project for local storage:

1. Click the 'Export Data' button on the Home Dashboard
2. Select 'Export Project'
3. Enter an email address where you wish to receive a download link (we'll use "NewUser@Dedoose.com" in this Example)
4. Enter a password that will be required to later access the project (we'll use "welcome" in this example)
5. Click 'Submit'
6. Click 'OK' to the alert that the project export process has begun
7. Wait to receive a message from Dedoose that your file is ready for download
8. Use the link in the message to download the zip file and you are set.

Note that this project export results in a password protected and encrypted zip file with all project data. This file can later be imported to a new Dedoose project. This file is not intended to be opened outside of Dedoose, but rather to be used to import the data or shared with another user into Dedoose if desired. If you wish to work with the data outside of Dedoose, please export the specific aspects of your project database as described above.

### **Exporting Data Visualizations**

All charts, tables, and plots, except for the 3D Code Cloud, can be exported from Dedoose. This can be done from any workspace where a chart is visible. To do so, simply:

1. Click the 'Export' button next to or in the panel header of any visual
2. Choose the desired format
3. Click 'Submit'
4. Choose the desired location for saving on your local computer and, if you wish, edit the file name
5. Click 'Save.'

- Collaboration & Security
  - [User Management and Collaboration](#)
  - [Security Workspace and Teamwork](#)
  - [Access Groups](#)
  - [Project Specific Encryption](#)



# User Management and Collaboration

## User Creation

While anyone can independently create a Dedoose user account, individuals responsible for account payment also have the ability to create Dedoose accounts on behalf of others.

*To set up a new user account without automatically linking to a project:*

1. Click 'Add User' in the Accounts Workspace
2. Enter the new user's information including a username and password
3. Click 'Submit'
4. Clicking 'Submit' will result in:
  1. An automated email message being sent to the specified address with the selected username and password as well as instructions on how to log into Dedoose, change their password, ...
  2. The user being added to your Dedoose payment account, so, upon refresh, you will see them listed in the 'Account Users' panel in your Dedoose Account Workspace.

*To set up a new user account and add them to a particular project:*

1. Make sure that you are in the project in which you wish to add the new user
2. Add any new security group you may need for new project users
3. Click 'Add User' in the project's Security Center
4. Select the security group in which the new user should be linked (see below)
5. Enter the new user's email address
6. Upon clicking 'Submit,' Dedoose will search for an existing user with the specified email address

**If no match is found**, options to 'Invite User' or 'Create User' will be presented - Selecting '**Invite User**' will result in an invitation being sent to the email address with a prompt for the individual to independently establish a Dedoose account. Once this is done, the user will be available for linking to the project. In this case, the new user will be responsible for payment - Selecting '**Create User**' will allow the project administrator to set up a new Dedoose account and an email will be then be sent to

the address provided with a Dedoose username and temporary password. In this case, the project administrator will be responsible for account payment.

**If a match is found**, Dedoose will present the option to 'Invite User' to join the project. Upon clicking 'Yes,' an email message will be sent to the invited user with information about user sending the invitation and the name of the project. This invited user will have the option to accept the invitation and, if accepted, will then appear in the Security Center of the project under the security group that was selected.

Once all appropriate routines have been completed, all users are active and ready to access Dedoose and any projects to which they have been linked.

## **Accounts Workspace**

### **Changing Passwords**

For security reasons, you will never see a user's password in the Dedoose environment. Passwords must be a minimum of seven characters, are case sensitive, and it is recommended that passwords are complex (e.g., include combinations of letters, numbers, and special characters) and changed on a periodic basis.

Changing passwords is achieved through the Account Workspace. To change your password, enter your Account Workspace, click the 'Change Password' button in the 'User Information' panel, enter the required information, and click 'Submit.'

### **Viewing Account Users Storage Information**

The amount of text, audio, and video data that you have in your account projects can be viewed through the Accounts Workspace by clicking the 'Storage Metrics' button in the lower portion of the Account Information panel. The pop-up will show you how much storage for each type of media by user. This information can also be exported by clicking the 'Export' button on the Account User Storage Metrics pop-up.

### **Projects Report**

Clicking the 'Projects Report' button in the lower portion of the Account Information panel will generate a report of all projects associated with the account including each project's creator, users, and the security groups to which each user is assigned.

### **Viewing User Project Access Information**

The particular project a user on your billing account has access to, can be viewed by highlighting the user and clicking the 'User Project Access' button in the lower portion of the Account Information panel. The pop-up will show you the title of each project to which the user is linked and information on the particular security group to which they were assigned.

### **Viewing Users' Project**

To view all the projects that have been created by all users linked to your account, simply click the 'Account Projects' button in the lower portion of the Account Information panel. This list can also be exported by clicking the 'Export' button on the 'Accounts Projects pop-up.

### **Making Payments**

To make a payment, click the 'Make Payment' button in the lower portion of the Account Information panel. You will be prompted to input your billing information and specify the amount you want to purchase. Simply input your information and click 'Submit.' If you believe the rate you are being charged is incorrect, contact our support team for assistance.

### **Getting Receipts**

An automatically generated receipt can be received by clicking the 'Get Receipt' button on the bottom of the Account Information panel. The pop-up will list all payments that have been submitted to the account. Select a payment, provide an email address to receive the receipt, and click 'Send Receipt for Selected Payment.' If you need a more detailed receipt, please contact our support team at [support@dedoose.com](mailto:support@dedoose.com).

### **Viewing and Modifying User Information**

Account administrators can view and modify information about users linked to their billing account. To do so, highlight a particular user in the 'Account Users' panel and click 'Edit User.' An 'Edit User' pop-up will appear and information can be viewed, modified, and saved and the user's account can be enabled or disabled.

# Security Workspace and Teamwork

## Security Workspace and Working with Team Members

One of Dedoose's strengths is the possibility for multiple members of a research team to work simultaneously, in real-time, from any Internet connected device. While we are all about collaboration, we also believe in maximizing data protection. User access and the privileges assigned to each user regarding their ability to work with project data is all managed through the Dedoose project's Security Center. Note that these are project specific settings and providing access privileges to a user on one of your projects has no impact on other projects on which you or they may be working.

The Security Workspace can be used by project administrators to set up new Dedoose user accounts to be linked to a project and control user privileges through the activation of access groups and then the assignment of project users to appropriate groups. The Security Workspace can be accessed by clicking the Security Tab in the Dedoose Main Menu Bar.

### *Example Approaches to Security System Organization - Simple or Complex?*

There are basically two approaches to security settings all controlled by the project manager/administrator.

1. Simple or Flat Security - in this approach, all project users have equal and full authority over the project database and all Dedoose features. This approach would be most appropriate for projects with one or very few users with all users sharing equally in the responsibility for all aspects of the project data
2. Complex Security - in this approach, multiple groups are added to the project security center and users are assigned to groups depending on their role. One example might include four main groups:
  - Full Access - project leaders with prime responsibility and authority for administering all access to the project structure and users. This group would be the only one to maintain full access and the ability to set-up and modify all aspects of the project and database
  - Project Wide Assistant - users added to this group will have create, edit, and delete privileges for all aspects of the database, but no access to the security center. This group

would usually consist of one or two higher-ranking project coordinators who are responsible for other user management and productivity

- Standard Assistants - these users would be responsible for adding documents and excerpts to the database. Members of this group would typically report to Project-Wide Assistants
- Viewers and Guests - these users would be strictly limited to viewing only particular aspects of the project data. For these users, more sensitive or private information could be kept from view during their limited exploration of the project data.

### *Providing Project Access*

There are a variety of situations where you may want to provide someone with access to a particular project. You may be working on a team, or want to give your professor access so they can view your work. Whatever your reason, adding someone to a project is simple (see the User Management and Collaboration section of this user guide for step-by-step guidance).

### *Integrated Chat System*

To facilitate collaboration, Dedoose includes an integrated chat system and ability to synchronize the project data at any time. In the Dedoose header, you'll find icons that let you see how many other users are logged on to the project, if there are any messages waiting for you to view (the call-out icon will glow red), and access to the chat system (just click on the message icon). Here's what the chat system looks like when open:

**The 'Reload' icon** in the upper right corner of the Dedoose App is important if you want to ensure that your view of the project is fully up-to-date. For example, if you and a colleague are excerpting and coding the same document at the same time, you won't see each other's work until it has been submitted and you're refreshed your view of the document. So if something important has changed on your side, you can send your colleagues a chat message, then when everyone click the reload data icon, your project reloads and you can be confident you are all looking at the same data at that moment.

## **Access Groups**

Dedoose access groups vary based on the privileges given to users assigned to the group. For example, being assigned to the 'Standard Assistant' group would allow a user to add documents, create and code

excerpts, link to descriptors, and analyze project data. However, users in this group cannot modify the code tree or descriptor data, they cannot access the Security Center, and they cannot modify or delete data they did not create themselves. The primary purpose for setting up access groups is to protect the project database while still allowing users to carry out the tasks for which they are responsible.

When a project is established, one group, Full Access, is created and the project created is assigned as the initial project member. Members of the Full Access group are the only project users with the authority to modify security settings. Project managers/administrators can also add other groups to the project. As new users are added, the project manager/administrator assigns each to the appropriate group depending on the user's role. Whenever necessary, 'Full Access' groups users can create new groups or make modifications to group membership.

### ***Predefined Dedoose Access Groups***

Each Dedoose access group is distinguished by the privilege settings for all aspects of a project database (Codes/Tags, Media Files, Excerpts, Descriptor Fields, Descriptors, and Security). These privilege settings include:

- None
- Viewer - view all work
- Isolated User - ability to create items but only view own work
- Group User - ability to view all group items and create, edit, delete own work within group
- Group Manager - ability to view, create, edit, and delete all work within group
- Restricted User - ability to view all and create all, no edit privileges, and delete privileges for self-created items
- Project User - ability to create and edit all work
- Project Manager - ability to create, edit, and delete all work

Eighteen general access groups and two small-group access groups are predefined in Dedoose to cover the needs of virtually all project and classroom or workshop applications. When setting up the project and assigning users, Dedoose project managers/administrators can choose to add any number of the available access groups depending on the needs of the project.

### ***General Access Groups***

The eighteen general access groups available for use in Dedoose include:

1. **Full Access** - Complete create, edit, and delete privileges for all aspects of database and full access to security center control (ability to add users, edit all user information, create access groups, assign users to groups). Appropriate for project administrators/managers only
2. **Project-Wide Assistant** - Complete create, edit, and delete privileges for all aspects of database. Security Center access is limited to modifying own user account (change user information and password). Appropriate for a trusted project director/coordinator
3. **Project-Wide Assistant with Limited Excerpts** - This group allows users to carry out most activities in the project. The only restrictions are that they cannot access the Security Center, modify or delete media they did not create, AND they can only see and work with excerpts that they created. Security center access is limited to modifying own user information (change user information and password). Appropriate for a trusted project director/coordinator
4. **Project-Wide Assistant with Isolated Excerpt Access** - This group allows users to carry out most activities in the project. The only restrictions are that they cannot access the Security Center, modify or delete media they did not create, AND they can only see and work with excerpts that they created
5. **Project-Wide Assistant with Restricted Media and Excerpts** - Complete create, edit, and delete privileges for codes, and descriptors and descriptor fields. Can view all media and excerpts, but can only edit and delete their own. Security center access is limited to modifying own user account (change user information and password). Appropriate for a trusted director/coordinator
6. **Project Manager with Restricted Excerpts** - Ability to create, edit, and delete media, codes, descriptors, and descriptor fields. Can only edit and delete self-created excerpts. No access to the Security Center<sup>16</sup>.
7. **Super Duper Assistant** - Ability to view all codes, descriptor fields and descriptors, create media and excerpts, code, modify and delete excerpts, and delete media files that they have created. No access to Security Center
8. **Super Assistant** - Ability to view all codes, descriptor fields and descriptors, create media and excerpts, and code, modify, and delete excerpts that they created. No access to security center.
9. **Standard Assistant with Code Tree Privileges** - Complete create, edit, and delete privileges for the code tree. Restricted access to media files and excerpts, allowing them to only edit and delete

them if self-created. Only view access for both descriptor fields and descriptors. No access to the Security Center

10. **Standard Assistant with Full Document and Descriptor Privileges** – Complete create, edit, and delete privileges for media, descriptors, and descriptor fields. View only access for codes and can only edit and delete self-created excerpts. No access to Security Center
11. **Standard Assistant with Descriptor Privileges** - Ability to view all codes, create media and excerpts, and code and delete excerpts that they created. Can also view, edit, and delete descriptors and descriptor fields. No access to Security Center
12. **Standard Assistant** - Ability to view all codes, descriptor fields, and descriptors, create media and excerpts, and code and delete excerpts that they have created. No access to Security Center
13. **Restricted User** - Ability to view all data in database, but no ability to create, edit, or delete any data. No access to Security Center
14. **Restricted Excerpts for Coding** - Complete create, edit, and delete codes, and descriptors and descriptor field privileges, but can only edit and delete excerpts that are self-created. No access to Security Center
15. **Restricted Excerpts for Coding with only Code Tree Viewing** - Ability to view codes, descriptors, and descriptor fields. Can also add media and excerpts, but only edit or delete ones that they have created. No access to Security Center
16. **Guest Access** - Ability to view all data, excluding Security Center information. No privileges to create, edit, or delete any data
17. **Anonymous Viewer** - Ability to explore and view project data, but no privileges for descriptor sets, fields, and data. No access to Security Center
18. **No Access** - No view, create, edit, or delete privileges. Appropriate for maintaining a user's link to project but removing all access privileges for a period of time. Note that removing a user entirely also removes the reference for any objects they created. Accordingly, this group can be useful if an individual leaves a project, but you wish to maintain ability to identify the work they contributed.

### ***Small-Group Access Settings***

Small-group access settings are generally applied in classroom or workshop settings where particular aspects of the database are shared across the small-groups, but each small group is limited in other ways to creating and modifying only work within the small group. For example, students may be organized as



small teams to contribute to an overall class project, but are limited to viewing or modifying data created by members of their own group.

The two small-group access settings available in Dedoose are:

1. **Restricted Small Group** - View only privileges for Codes/Tags and Descriptor Fields. Ability to view all resources, excerpts, and descriptor data created by members of group. Ability to edit, and delete data created by self only. No access to security center. Appropriate for education settings where small groups share codes/tags and descriptor fields, enter other data as a group, but only have edit or delete privileges for data created by self. The instructor or other supervising individual(s) would be responsible for creating the code/tag tree and defining descriptor fields for shared use. Further, the instructor or supervisor would have project-wide privileges for monitoring and manipulating data created by any user linked to the project
2. **United Small Group** - View only privileges for Codes/Tags and Descriptor Fields. Ability to view, create, edit, and delete all work created by members of group. No access to Security Center. Appropriate for education settings where small groups share codes/tags and descriptor fields project wide, but share within group for all other create, edit, and delete privileges. The instructor or other supervising individual(s) would be responsible for creating the code/tag tree and defining descriptor fields for shared use. Further, the instructor or supervisor would have project-wide privileges for monitoring and manipulating data created by any user linked to the project.

## Project Specific Encryption

### Project Specific Encryption Option

Data security is always paramount to Dedoose. Dedoose employs the highest levels of data encryption available for a web application in all data storage, back up, and transmission. However, encryption keys are stored in Dedoose and this allows us to assist users in project recovery and offer other project specific supports when needed. Essentially, this means, that while under all circumstances data are extremely safe, the technical and support leaders at Dedoose can access your project if the project owner/creator authorizes us to do so.

That said, for some users – particularly those working in healthcare or other areas where the data privacy requirements imposed by organization, institution, or funding agency policies are exceptional – additional measures must be employed.

*This is where the project specific encryption feature comes in.*

Dedoose is still a fully cloud-based solution, but this feature adds another layer of encryption for deeper data privacy where extraordinary sensitivities exist. When using this feature, you will hold an additional encryption key and you will need to enter your private key in order to view your project. This gives you exclusive control over who can view your project under any circumstances and all beyond the other Security Center settings you may have in place.

**Cost:** There is no additional charge for this premium feature and it can be easily activated when creating a new Dedoose project.

**IMPORTANT:** Please be aware that ONLY the project creator and persons they have given access will have the key to decrypt project data when this feature is activated.

**THUS, THERE IS NO WAY FOR US AT DEDOOSE/SCRC TO ASSIST IN DECRYPTING OR RECOVERING PROJECT DATA IF THE KEY IS LOST.**

- Inter-Rater Reliability
  - [Training Center](#)
  - [Creating a Training Center Test](#)
  - [Taking a Test](#)
  - [Coding Blind to Other Users](#)
  - [Document Cloning](#)

## Training Center

The Dedoose Training Center is a unique feature designed to assist research teams in building and maintaining inter-rater reliability for both code (the application of codes to excerpts) and code weighting/rating (the application of specified weighting/rating scales associated with code application). Training sessions ('tests') are specified based on the coding and rating of an 'expert' coder/rater. Creating a training session is as simple as selecting the codes to be included in the 'test,' the selection of previously coded/rated excerpts to comprise the test, and then specifying a name and description for the test. 'Trainees' access the session and are prompted to apply codes or weights to the set of excerpts making up the session. During the exercise, the trainee is blind to the work that was done by the expert. Upon session completion, results present Cohen's Kappa coefficient for code application and Pearson's correlation coefficient for code weighting/ratings overall and for each individual code as indexes of the inter-rater reliability as well as details of where the 'trainee' and 'expert' agreed or disagreed.

## Creating a Training Center Test

Instructions on creating tests greet you when first accessing the Training Center Workspace. To create a new test:

1. Click the 'Create New Test' button in the lower right corner of the workspace
2. Select either 'Code Application' or 'Code Weighting' (the process is identical for setting up tests and our illustration here will focus on code application tests) and click 'Next'
3. Select the codes to be included in the test and click 'Next' - three codes will be used for this example: Reading by Primary Caretaker, Reading by Others, and Letter Recognition.
4. After clicking 'Next' in step 3, you are then presented with the SuperMegaGrid and prompted to select the excerpts to include in the test. Note that the columns for the codes included in the test are included with 'true' or 'false' in each row as a cue to locate those excerpts that may be most appropriate for the test. From this view one can filter to particular sets and select the excerpts most useful in the training. After selecting the desired excerpts, click 'Next'.
5. Provide a title and description for the test, click 'Save,' and setup is complete.

**Tip:** It is often most useful to focus the analysis of inter-rater reliability on those codes which are most important to the research questions, that are used on a relative frequent basis, and that are associated with a well-documented set of application criteria (the rules for when the code is most appropriately [or not] applied to a particular excerpt). In the Dedoose Training Center, Cohen's Kappa is calculated on an 'event' basis, each excerpt being an event and each code either applied or not applied to the excerpt. Thus, if there are many events for which a particular code is not applied (and not appropriate for) there will be frequent agreements between the 'expert' and the 'trainee' in not applying the code which can disproportionately (and misleadingly) inflate the resulting Cohen's Kappa coefficient.

## Taking a Test

Once a test is saved to the training center test library, a trainee can take the test by clicking the particular test in the list and then clicking the 'Take this test' button in the lower right corner of the pop-up.

### Taking a Code Application Training Test

In a code application test, the trainee is presented with the each excerpt and the codes designated for the test and then expected to apply the appropriate code(s) to each excerpt. They can move back and

forth through the test using the 'Back' and 'Next' buttons until they are finished. Here's a screenshot of a test excerpt before any codes have been applied:

Upon completion the result of the test are presented, including a Pooled Cohen's Kappa coefficient and Cohen's Kappa for each of the codes included in the test, along with documentation and citations for interpreting and reporting these inter-rater reliability results in manuscripts and reports.

Further, by clicking the 'View Code Applications' button, teams can review, excerpt by excerpt, how the 'expert' and 'trainee's' code applications corresponded. This information is invaluable in developing and documenting code application criteria and in building and maintaining desirable levels of inter-rater reliability across team members.

### **Taking a Code Weighting/Rating Test**

As described above, setting up a code weighting/rating test is identical to that of a code application test, though when selecting the codes to include, only those with code weighting activated will be available. Again, once a test is saved to the training center test library, a trainee can take the test by clicking the particular test in the list and then clicking the 'Take this test' button in the lower right corner of the pop-up.

In a code weighting/rating test, the trainee is presented with the each excerpt and all codes that were applied by the 'expert' and then expected to adjust the weight on each code to the appropriate level for each excerpt. They can move back and forth through the test using the 'Back' and 'Next' buttons until they are finished.

Here's a screen shot of a test excerpt before any weights have been set, those shown are the default value:

Upon completion the result of the test are presented, including: - An overall (average) Pearson's correlation coefficient. - Pearson's  $r$  for each of the codes included in the test. - Relative difference metrics for each code. - Documentation and a link to a table of critical values for determining the statistical significance of the result and reporting in articles and reports. Finally, as with the code application test, clicking the 'View Code Applications' button, teams can review, excerpt by excerpt,

how the 'expert' and 'trainee's' weighting corresponded and can be discussed among the team, toward developing the criteria for and establishing consistency in the code weighting/rating process.

## Coding Blind to Other Users

At times you may want to work on the same document as someone else, but don't want to be influenced by excerpting and coding decisions of others on your team. Or perhaps you want to build your code tree in a collaborative way in context before using the Training Center to more formally test for inter-rater reliability (for more information, see the section on the Training Center). Whatever the reason, here are the steps to what we call 'coding blind.' Basically, you are simply turning off the work of others (or removing from view) before you begin your work.

1. Enter the Data Set Workspace by clicking the Data Set button in the Main Menu Bar.
2. Click the 'Users' tab
3. Click 'Deactivate All'
4. Click on the username for whose work you wish to view--this will reactivate that person's work
5. Click the main 'Dataset' tab to check the impact of the filter
6. The 'Current Data Set' panel on the left side will show you the amount of information that is currently active. The numbers will show you the specifics of how many descriptors, resources, users, codes, and ultimately, excerpts that remain active
7. Close the Data Selector pop-up.

### ***To save this (or any) filter:***

1. Re-enter the Data Set Workspace and while the filter is still active
2. Click the 'Data Set' tab
3. Click 'Save Current Set' in the left panel
4. Provide a filter a title and, if you wish, enter a description (usually a good idea)
5. Hit 'Submit' and the filter will be saved in the library at the bottom of the popup.

### ***To reactivate a saved filter:***

1. Re-enter the Data Set Workspace
2. Click the 'Data Set' tab

3. Click on the filter you wish to load in the bottom panel
4. Click 'Load' in the lower right corner
5. Click 'OK'
6. Close the Data Selector pop-up.

***To deactivate a filter:***

1. Re-enter the Data Set Workspace
2. Click the 'Data Sets' tab
3. Click 'Clear Current Set' in the left side panel.

**Note:** that closing Dedoose will also serve to clear any active filters.

## Document Cloning

Beyond the Dedoose Training Center and coding blind strategy, taking advantage of our document cloning feature is one more way you can work with your team toward building inter-rater reliability.

Keep in mind that creating and tagging excerpts involves two important steps:

1. Deciding where an excerpt starts and ends
2. Deciding which codes should be applied.

There are times when teams want to focus only on the code application decisions. So, Dedoose allows for cloning documents with all excerpts in place. This feature was designed for teams wishing to compare coding decisions on a more 'apples to apples' basis. Here's how it works:

1. One team member is responsible for creating all excerpts within a document and does so without applying any codes
2. Enter Document edit mode by clicking the 'Edit Media' icon in the document view header
3. Click the option to 'Clone Document' in the lower portion of the pop-up
4. Click 'Yes' to confirm
5. Click 'Ok' to acknowledge your understanding that the cloned copy will load
6. Click the 'Edit Media' icon a 2nd time

7. Provide new title for the copy (we recommend an informative naming convention, ex. Document 1 title *team user 1 name, Document 1 title* team user 2 name, ...)
8. Repeat the cloning, renaming process so each team member has a copy
9. Each team member then applies codes to the excerpts in their own copy
10. The results can be exported or compared across documents with multiple computers
11. Kappa can also be calculated outside of Dedoose.

This approach has the advantage of direct comparison of coding decision within the context of a document's content.



- Working with Projects
  - [Working with Projects](#)
  - [Project Merging](#)
  - [Project Migration/Creation from Existing Data Sets](#)

## Working with Projects

### Project Workspace

The Project Workspace allows users with appropriate access privileges to: - **Switch the active project** - when logging into Dedoose, by default, you will be entering the most recently accessed project.

However, note that periodic system maintenance will cause you to be instead taken to your first project (most commonly your demo project). Should this occur, simply enter your Project Workspace to load the project you wish to access - **Add new projects** by clicking either the button in the upper right corner of the panel or the 'Create Project' button in the lower right corner - **Delete, Copy, or Rename** a selected project

The Projects Workspace can be accessed by clicking the Projects tab in the Main Menu Bar.

**Note:** Renaming, Copying, and Deleting a project can only be done if you are the project creator.

## Project Merging

### Project Merging

There are two ways to merge projects. 1. You can export one project, and then import that file into the other project 2. You can have our staff help assist with the task.

Project merging in Dedoose is designed to be as clean and clear as possible and typically requires some 'tidying' following the merge. When projects are merged:

- **Documents** are compared for both title and content. If found to be identical, only one copy will be retained in the merged project, if not, both documents will be retained
- **Excerpts** are compared across identical documents for character start and end position. If found to be identical, only one excerpt will be retained with coding from both projects, if not, two, possibly overlapping, excerpts will be retained
- **Descriptors** from both projects will be retained as unique descriptor sets in the merged project and will remain linked, if appropriate, to their associated documents
- **Codes** from both projects will be retained - even if titled similarly. Duplicate or similar codes can be easily merged in the newly merged project to consolidate the excerpting and coding activity

**Note:** Only the project administrator will have access to the newly merged project. Other users can be linked subsequently through the procedures described elsewhere in this guide.

## Project Migration/Creation from Existing Data Sets

A service provided by our system administration staff, **at no cost**, is the migration of data and entire projects from other products like QSR NVivo, Atlas.ti, MaxQDA, HyperResearch, Saturate, and Excel and, using our survey importer, you can create projects from data collected via tools like SurveyMonkey, Zoomerang, QuestionPro, Qualtrics, and SurveyGizmo. In all cases, the results are fully populated Dedoose projects ready for further interaction and data analysis.

NOTE: We fully believe in data transparency and portability, and all data in a Dedoose project can be exported at any time into common file formats.

### *Migrating from Atlas.ti*

1. Create a new folder on your computer to store the bundle file and all source documents
2. Open the Tools menu in Atlas.ti
3. Select 'Copy Bundle'
4. Select 'Create Bundle' and make sure that all documents are included in the bundle
5. Click 'Create Bundle'

6. Save the 'Bundle' in the folder created in step #1 along with copies of all your original source documents
7. Zip everything up (select the folder, right click, and click 'Send To --> Compressed Archive' to create a single zip file with all of the data compressed)
8. Send the zip file to [support@dedoose.com](mailto:support@dedoose.com) along with your Dedoose username and a title for your new project and we'll take it from there.

### *Migrating from NVivo Windows Version*

1. Create a new folder to hold all the exported data and source files
2. Create two sub-folders in the folder created in step #1 and title 'ExportedCodes' and 'Transcripts'
3. From NVivo you need to export each set of 'quotations' for each code/node into this 'ExportedCodes' folder specifying the **.html export format** and **PLEASE MAKE SURE TO INCLUDE PARAGRAPH NUMBERS!**
4. Gather and paste copies of all the original source documents/transcripts into the Transcripts folder created in step #2
5. Select both sub-folders, right click, click 'Send To --> Compressed Archive to create a single zip file with all the data compressed
6. Send the zip file to [support@dedoose.com](mailto:support@dedoose.com) along with your username and a title for your new project and our team will complete the migration.

### *Migrating from NVivo Mac Version*

1. Create a new folder to hold all the exported data and source files
2. Create two sub-folders in the folder created in step #1 and title 'ExportedCodes' and 'Transcripts'
3. From NVivo you need to export each set of 'quotations' for each code/node into this 'ExportedCodes' folder specifying the **text document export format** and **PLEASE MAKE SURE TO INCLUDE PARAGRAPH NUMBERS!**
4. Gather and paste copies of all the original source documents/transcripts into the Transcripts folder created in step #2
5. Select both sub-folders, right click, click 'Send To --> Compressed Archive to create a single zip file with all the data compressed

6. Send the zip file to [support@dedoose.com](mailto:support@dedoose.com) along with your username and a title for your new project and our team will complete the migration.

### *Migrating from MAXQDA 11*

7. Create a new folder on your desktop to store the export file.
8. From the MAXQDA Home Screen, in the Code System Window, double-click the root node labeled "Code System".
9. Click the green "Excel" Button.
10. Save the Excel file to the folder we created in step #1.
11. Highlight the Excel file (by default titled "MAXQDA12 Coded Segments"), right click > 'Send to' > Compressed (zipped Folder).
12. Send the final zip file to [support@dedoose.com](mailto:support@dedoose.com) along with your username and a title for your new project and our team will take care of the rest.

### *Migrating from MAXQDA 11*

1. Create a new folder on your computer to store what we will need in two export routines in MAXQDA
2. From the MAXQDA 'Project' menu, choose 'Export' > 'Project Properties as Excel File' and save the result in the new folder you created in step #1
3. Repeat step #2, except 'Export' > 'Project Properties as XML File' and save the result in the new folder you created in step #1
4. Highlight the Excel file and the sub-folder –likely with the title of your MAXQDA project on it - right click > 'Send to' > Compressed (zipped Folder)
5. Select all folders, right click, and click 'Send-To --> Compressed Archive' to create a single zip file with all of the data compressed
6. Send the final zip file to [support@dedoose.com](mailto:support@dedoose.com) along with your username and a title for your new project and our team will take it to the finish line.

### *Migrating from HyperResearch*

In HyperRESEARCH:

1. Make sure all cases and codes are filtered
2. *Cases Menu > Filter Cases > All Cases*
3. *Codes Menu > Filter Codes > All Codes*
4. Go to Reports Menu
5. Click 'New Report'
6. Select the following:
  1. 'Text' as Sources to Include
  2. All Hyperlinks (Case Name, Code Name, Code Type, Code Reference, Source Name)
  3. Code Frequency
  4. Source Material
  5. Annotations
  6. List of All Cases
  7. List of All Codes
  8. List of All Sources
7. Sort Report by Case Name
8. Choose Display on Multiple Pages for 'Pagination'
9. Click 'Export Text'
10. Send us the file to [support@dedoose.com](mailto:support@dedoose.com) along with copies of all source documents and we'll look forward to working with you.

### ***Importing Excerpts from Excel or other Quantitative Software***

If you have already created excerpts in an Excel spreadsheet, we've got an importer that will move you smoothly into Dedoose.

1. Save the spreadsheet so that each row in the file has:
  1. The source document name in the first column
  2. The username of the excerpt creator in the second column (or this can be left blank)
  3. The excerpt text in the third column
  4. And all assigned codes (separated by a comma) in the fourth column
2. Save the file in a folder on your computer that also contains all your source documents
3. Select the folder, right click, and click 'Send-To --> Compressed Archive' to create a single zip file with all of the data compressed

4. Send us the file to [support@dedoose.com](mailto:support@dedoose.com) along with copies of all source documents, your Dedoose username, and a title for your new project and we'll take it from there.

- Appendix
  - [Citing Dedoose](#)

## Citing Dedoose

Here is how to cite Dedoose in any manuscript, proposal, report, presentation or anywhere else it is appropriate to cite the tools you've used:

Dedoose Version ***7.0.23***, web application for managing, analyzing, and presenting qualitative and mixed method research data (***2016***). Los Angeles, CA: SocioCultural Research Consultants,

LLC [www.dedoose.com](http://www.dedoose.com).

**NOTE:** the **version number and year** in the example above is shown in bold and italicized text as a reminder to please use the most updated version and year at the time of your publication. The version number is noted in the URL when you log into Dedoose and use the year for which you have needed the citation.

Finally, we always love to receive copies of anything you produce with a Dedoose citation so we can highlight your work on our website or other social media.