



## NVivo

Lumivero

Available to purchase until 30/06/2027

Analyse data, discover patterns, identify themes, glean insight and draw meaningful conclusions.

## Key Facts

**New NVivo now available - see Product Information tab**

### Benefits

- Heavily discounted pricing for the academic community
- Fixed pricing for 3 or 5 years (depending on term you choose)
- Price banding based on combined student and staff FTE numbers
- Site licence
- Free major software upgrades at the time they are released
- Service packs are available free of charge to all NVivo users, and can be downloaded from the Lumivero website.

### Important dates

**Agreement Start:** 1 July 2022

**Agreement End:** 30 June 2027

**Subsequent invoice date:** annually three months in advance of the anniversary of licence start date

### Licence Type

Site Licence

### Commitment Period

Institutions will be committed to the licence for a three or five year period.

### Trial

You can test the latest version of NVivo with a free trial. This is fully functional software that can be used for a 14 day period. Download it from the [Lumivero website](#).

### Eligible Institutions

Higher and Further Education, Research Councils, Associated Sites, Charities in the United Kingdom and Third Level Institutions in Ireland

### Background Information

This Agreement has been negotiated by Chest in response to a need within the Education community. It is now in its fourth five-year term

# Product Information

## Supplier Details

**Licensor:** Lumivero, 1331 17th Street, Suite 404, Denver, CO 80202

## Product Description

Lumivero is the new name for the strategic partnership that saw the combination of QSR International, Palisade and Addinsoft in October 2022. More information on this can be viewed [here](#).

### Product versions and upgrading to NVivo Plus

#### March 2020 version

In March 2020 Lumivero launched the successor to NVivo 12. Due to the connotations with the number '13', they chose to not give this new version a number, but it is colloquially referred to as 'R1', '13' or even '20'. One of the new features this version brought was moving certain functions into the cloud; as a consequence, Lumivero asked institutions to sign **a declaration** that ensures they can use the new features whilst Lumivero protected and reassured them from a compliance, security, GDPR and data protection perspective. Once institutions had submitted the new declaration, Lumivero provided the new licence keys.

#### NVivo 14

Fast forward to March 2023, and Lumivero launched **NVivo 14**. This builds on the previous version; the declaration detailed above is still required if sites have not completed it / moved to the March 2020 version.

Another change is that, with the launch of '14', a 'Pro' version is no longer available, meaning only sites licensing NVivo Plus can move to 14 (for a few years the only place NVivo Pro has been available globally has been via Chest, we pushed for it to be maintained as long as possible. If you don't want '14', you are welcome to remain on Pro, but if you want '14' you have to move to 'Plus' (see below for details of the advantages Plus brings). There are four possible scenarios associated with upgrading:

- 1. You are currently on the version launched in 2020, and have a Plus licence.** If this is the case, Lumivero will send out your '14' licence keys imminently, you do not need to take any action
- 2. You are on the version launched in 2020, and have a Pro licence.** In this case, you would need to upgrade to NVivo Plus in order to receive '14'. Do so by placing a new order for NVivo Plus, ticking the box in the order process marked 'Upgrading from Pro to Plus'. If your licence has renewed since June 2022 (i.e. this Agreement), all prices are visible on the 'Products and Pricing' tab of this Agreement, the difference is never more than £1300 per full year. If you took your licence out through the '2017-2022 NVivo Chest Agreement', pricing would be worked out based on the prices valid at the time, please ask us for a quote. Pricing through to your next licence anniversary would be pro-rated; you would then be invoiced for a Plus licence for the remainder of your term
- 3. You are on NVivo 12, and have a Plus licence.** You'd need to sign and return the above declaration, at which stage Lumivero would send out your '14' licence keys as soon as possible.
- 4. You are on NVivo 12, and have a Pro licence.** You'd need to sign and return the above declaration, and then upgrade to Plus (see point 2 above)

## NVivo

NVivo is software that supports qualitative and mixed methods research. It lets you collect, organise and analyse content from text, images, video, audio, emails, spreadsheets, online surveys, web and social media data in virtually any language. The Lumivero NVivo Chest Agreement offers two elements, NVivo and NVivo Collaboration Server (previously known as NVivo Server and NVivo for Teams).

**New to NVivo? Visit the [NVivo Customer Success Centre](#) - there's something for everyone. And [Research Ready](#) helps all users get their research prepared to prevent issues with importing and coding once in NVivo**

There are two levels of NVivo available, Pro and Plus.

**NVivo Pro** supports the widest range of data sources. Ask complex questions of your data with advanced data management, query and visualisation tools.

**NVivo Plus** offers all the functionality of NVivo Pro for Windows plus:

- Automatically create social network visualisations from social media data or your own project data
- Autocoding by themes and sentiment

This latter functionality is extremely important. It doesn't replace the researcher but it gives automated insights and can significantly speed up the process of coding by giving a starting point to the researcher's own investigations as well as provide a useful tool for eradicating unconscious bias.

**Please note** the latest version of NVivo, Version 14, only offers Plus.

## Version Differences

There are some key differences between '14' and the previous version. UI, appearance, functionality, etc are all identical but:

1. Citavi integration. For those users using Citavi there is a direct integration button built within NVivo so that Literature Reviews can be done much faster and more effectively.
2. Significantly improved Collaboration Cloud functionality allowing Mac and Windows interoperability (currently the project owner must upload the initial project from Windows, not Mac but then Windows and Mac users can collaborate on a common project) and also delivering REAL-TIME collaboration

This latter functionality is the big difference. Collaboration Cloud with the previous version is based on batch upload/download/merge. With Version 14 the initial project is uploaded, collaborators are invited and then clone a copy of the central project. They can work offline but as long as they are online, or as soon as they re-connect, all of their changes are merged with the central project allowing full real-time functionality. All users can see all changes pretty much as soon as they are made.

Visit [NVivo Products](#) for more information on NVivo Pro, NVivo Plus.

## NVivo Collaboration Server

NVivo Collaboration Server can now be found in the 'NVivo Collaboration' Agreement.

## Some further information on NVivo

**Q:** Why do we have to complete the form to get the latest keys?

**A:** The form is really about enabling the new version of NVivo. Collaboration Cloud requires the new version so it's a pre-requisite in that regard. People can still use 12 but 12 doesn't support the Collaboration Cloud. Also worth noting is that once you've saved a project from the new version it will no longer be possible to open it in 12. The new version will open projects from all old versions but not vice-versa.

**Q:** How about home users?

**A:** In terms of home users, Lumivero now have multiple deployment models so that you have a bit of choice as to the best way to do it. Details can be found [here](#).

**Q:** Will we still be ok to use the older versions under the licence agreement, as well as the newer version?

**A:** there's no problem with still using the older versions. However, Lumivero have ceased support of 10 and 11. On that basis it is probably time to encourage users away from older versions. Users don't lose anything by moving and the projects will all get updated automatically to the latest version with no data loss when they make the move. Obviously all development resources are now dedicated to the new version and so there will be no improvements in 11 or 12 and in order to use Collaboration Cloud you need to be on the latest

**Q:** Where and when may data be moved and/or hosted elsewhere?

**A:** NVivo is all kept on the device – it never goes into the Cloud. The only data that goes into the Cloud from NVivo itself is the logon details for the portal – email and name. Collaboration Cloud and Transcription services are both cloud-based. For this data, hosting is on Microsoft Azure servers that sit within the EEA (Netherlands). The failover that's in place through Microsoft's hosting is based in Ireland. No data would leave the EEA. It is GDPR compliant and a secure encrypted environment.

**Q:** Do I get one key for Windows and another for Mac?

**A:** The Windows key activates the Mac version. The Mac key doesn't activate the Windows version. So Lumivero only issue the one (Windows) license key for Chest accounts since they can activate both with it.

**Q:** How about overseas researchers?

**A:** If you have a need to support researchers outside of UK&I then please contact Simon Taylor at Lumivero ([staylor@lumivero.com](mailto:staylor@lumivero.com)) for details and options. Essentially however, it's not about where the software is, it is about where the users are, so remotely accessing the

software from overseas is included in this.

**Q:** Is there a download link for the installer that we can apply to the version on our network?

**A:** The version that you can download from is always the latest release (requires log in to the portal)

**Q:** Can we install NVivo in an Azure Virtual Desktop environment within one of our organisation's Azure subscriptions?

**A:** As long as the restrictions on territory – i.e. users must be UK-based – then there's no problem from a licensing point of view with using Azure Virtualised Desktops. Worth noting that NVivo is not directly supported in that environment however: there's no reason why it shouldn't work but given how active NVivo is at accessing it's back-end data there may be performance issues. Lumivero would suggest some User Acceptance Testing be carried out first

**Q:** What's the situation regarding the hosting?

**A:** The hosting is provided via Microsoft Azure with servers in the Netherlands and backup servers in Ireland so all EEA and all GDPR compliant

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## Service and Support

### Trials

You can test the latest version of NVivo with a free trial. This is fully functional software that can be used for a 14 day period. Download it from the [Lumivero website](#).

### Product Documentation

- - A wide range of materials to assist Network Administrators and users can be found at the [Technical Resource Centre](#).
  - Tutorials are animated demonstrations that show users how to create and set up a project. They're built into the software and can be accessed from the Help menu or from the [Lumivero website](#).
  - The software's 'Help' section contains an overview of the Lumivero product and detailed step-by-step 'how to' instructions for working with the software. Again, this information can be accessed from the Help menu in the software.
  - Communicate with other NVivo software users in [Lumivero's Forum](#).
  - Answers to some FAQs can be found [here](#).
  - Refer to the Lumivero website to contact

### Training and Training Materials

Lumivero can put organisations in touch with an expert team of trainers and consultants to help users get the most out of their Lumivero software. A range of services can be provided, from one-on-one consulting to group workshops on site. These services are not included in the Chest agreement and are provided for an additional fee. Contact Lumivero directly via for further information and pricing.

### Technical Support

Support will be provided by Lumivero via a single named contact and two named deputies for each product licensed. Lumivero support can be contacted at:

[Online Support page](#)

[Contact Lumivero Support regarding a technical issue](#)

### Supplier Web Address

[NVivo - Lumivero](#)

### System releases, new versions and functionality

From time to time, Lumivero will release service packs for its software to address issues or provide minor enhancements. These service packs

are available free of charge to all NVivo users, and can be downloaded from the Lumivero website.

### Major Software Releases

An important benefit of the Chest Agreement is that you receive free major software upgrades at the time they are released. So while your NVivo Agreement is current for example, you'll receive every major version of NVivo that is released

## Platforms

NVivo is developed for use on Windows and Mac operating systems.

## Method of delivery of product

Licence keys will be sent to the named Admin Contact at the Licensed Site by Lumivero after the completed order form has been submitted, processed and forwarded to Lumivero, or your nominated reseller.

In following years Lumivero will send licence keys to the named contact within 2 weeks of the anniversary date of the licence. If you have not received your licence keys within this time, please contact **Chest Help** or your dedicated Account Director at Lumivero Simon Taylor, at [staylor@lumivero.com](mailto:staylor@lumivero.com) 01925 358101

If for any reason any of the contacts as detailed on the Lumivero NVivo Chest Agreement Order Form change, please inform **Chest Help**.

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## Useful resources

### Training Videos

Lumivero offer a range of self-paced learning videos that are used as part of their 'Getting Started with NVivo' training course. Given this training is sold on request, we've been requested not to put the link up on these webpages, but Lumivero are happy for us to share it with anyone who asks for it. So if you want to see them for yourselves, please email [help@chest.ac.uk](mailto:help@chest.ac.uk)

Universities must ensure that it is only sent to staff members and/or students who request it directly, and that it's not for sending on to others, nor can the link be published anywhere.

### NVivo Brochure

Click on the below image to see **NVivo's latest brochure**



## Price Banding

Price Banding for Lumivero NVivo as determined by Chest and Lumivero using institution banding by sector, and by combined academic staff and student FTE count as in this table.

HE and Irish sites have been placed in bands, you can find your band effective July 2023 here - [Site Banding](#). Other sites, or sites requiring the old banding list, should contact [Chest help](#).

### Banding Model Change

For the period 1 July 2022 to 30 June 2023, any renewing institution may renew on the same band as their previous licence.

**However, from 1 July 2023 onwards, sites whose licences come to an end (i.e. after three or five years) must renew on the correct band for their latest HESA-based FTE numbers. The banding via the above link is the latest figures. This information will be updated annually.**

The institution will then remain on that price band for the term of their licence (three or five years) unless their combined FTE figure changes sufficiently that they would move by two bands or more, either up or down.

So for example, as of May 2023 a university has a current combined FTE count of 6400. On renewal in July 2023 they would renew as a band B site. However, in May 2024 that university merges with another university, taking their FTE to 9400. That is only one band different, so they would stay as a 'B' until the end of their full term. If they then opened a new faculty in May 2025, adding another 800 FTE, that'd take them to 10200 FTE, so they would have to move from Band 'B' to Band 'D' on their next licence anniversary. Any questions about this please contact Chest Help.

| Sector                    | Band | FTE Count       |
|---------------------------|------|-----------------|
| HE Institutions in the UK | A    | Up to 5,000     |
|                           | B    | 5,001 - 6,500   |
|                           | C    | 6,501 - 10,000  |
|                           | D    | 10,001 - 18,000 |
|                           | E    | 18,001 or more  |

|   |   |                 |
|---|---|-----------------|
| FE Institutions in UK                   | F | Up to 2,999     |
|   | G | 3,000 - 6,499   |
|   | H | 6,500 - 9,999   |
|   | I | 10,000 or more  |
| Institutions in the Republic of Ireland | J | Up to 3,000     |
|   | K | 3,001 - 6,500   |
|   | L | 6,501 - 10,000  |
|   | M | 10,001 - 18,000 |
|   | N | 18,001 or more  |
| Not-for-profit organisations            | P | Up to 2,999     |
|   | Q | 3,000 - 6,499   |
|   | R | 6,500 - 9,999   |
|   | S | 10,000 or more  |

## Terms and Conditions

**Licensor:** Lumivero, 1331 17th Street, Suite 404, Denver, CO 80202.

**The Chest Order, together with the Licence Terms and Conditions, and any exceptions listed below, create a legally binding contract between your institution, organisation or company and the Licensor. Therefore please read the terms and conditions carefully and only submit a Chest Order if its terms and conditions are acceptable to your institution, organisation or company and you have the authority to make the financial commitment shown.**

### Licence Type

This Site licence is subject to the terms and conditions for the **Standard Chest Licence for Software (June 2011)**. There are some specific rules that apply to the use of Software outside the territory of the United Kingdom and the Republic of Ireland which are detailed at the bottom of this page.

Copying of the Software is allowed in accordance with the terms and conditions for the Standard Chest Licence for Software.

### Payment Terms

Jisc will invoice Licensed Institutions for the initial fee on receipt of a completed order. Sites will then be invoiced annually three months in advance of the anniversary of their licence start date until the end of their chosen Commitment Period.

You are advised that because of the requirement for Jisc to collect monies due before the anniversary date two charges may initially fall into one academic accounting year.

**Chest is an Enterprise of Jisc. All Purchase orders must be made out to Jisc Services Ltd, 4 Portwall Lane, Bristol, BS1 6NB to cover all charges plus VAT.**

All terms contained in a PO are expressly rejected and do not form part of the Licence or vary the Licence terms in any way.

Payments are due within thirty days of invoice date; recipients of late payments are entitled to interest in accordance with **UK statutory provisions**.

### Termination Clauses

At the end of the Period of Agreement, if there is no new Agreement between Lumivero and Chest or a new Agreement directly between the Licensed Site and Lumivero, then Licensed Sites are required to remove all copies of Lumivero Products from their systems - including personal machines which have been loaded with a copy of the software - at the expiry of their Licence (Commitment) Period.

## Location and Use Permissions

The product(s) may be used by any Authorised User of the Licensee for Educational Purposes which includes the administration and management of the licensee's educational and research operations. These permissions are described in the terms and conditions for the Standard Chest Licence for Software.

|                               |     |
|-------------------------------|-----|
| Students                      | Yes |
| Academic Staff                | Yes |
| Non-Academic Staff            | Yes |
| Administration and management | Yes |
| Staff home use rights         | Yes |
| Student home use rights       | Yes |
| Installation on Hosted Server | Yes |

## Personal Licences

Only site licences are available under this agreement. If you would like to purchase a personal licence for NVivo then we recommend that you refer to the Lumivero website or contact Lumivero directly via email at [staylor@lumivero.com](mailto:staylor@lumivero.com)

## Exceptions to the Terms and Conditions

### Use of Software outside the territory of the United Kingdom and the Republic of Ireland

The use of Software outside the territory of the United Kingdom and the Republic of Ireland (the Territory) by your Authorised Users temporarily working outside the Territory is allowed **provided the Software is only installed on the Authorised Users' personally-owned computers or on computers provided to them by you**. Your Authorised Users are responsible for preventing third-party use whilst they are outside the Territory and for ensuring that Software is not loaded onto any other machine whilst they are outside the Territory. They must also still conform to the terms, conditions and restrictions on use stipulated in this Licence Agreement.

Staff and students at legal entities that are 100% owned by you, including overseas locations (that is, outside the Territory), **must be included in the total of your staff and student FTE count** when determining your charge band (see the first table displayed at 5 above). Where a legal entity that is 100% owned by you, and is included in the total of your staff and student FTE count when determining your charge band, and is outside the Territory (that is, outside the UK and the Republic of Ireland), then the nation state where that legal entity is located shall be included in the definition of "the Territory".

The Licensor and you both acknowledge that Authorised Users making use of Software outside the Territory **may do so for a period of up to three months**. Use of Software outside the Territory for any longer period is not allowed, save but by **specific written authorisation** from the Supplier\*. Such authorisation may be by letter, fax, email or similar method of electronic communication and shall be communicated to an applicant Authorised User by the Licensor direct. Jisc shall be sent a copy of the relevant authorising communication by the Licensor.

*\*This applies to Authorised Users travelling overseas for periods of longer than three months. Where the user is permanently based overseas and not part of any of the above categories, they will require a separate licence. Contact [help@chest.ac.uk](mailto:help@chest.ac.uk) for further information or clarification.*

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Commercial in confidence

Operating address: Chest (a Jisc Enterprise), 4 Portwall Lane, Bristol. BS1 6NB email:[help@chest.ac.uk](mailto:help@chest.ac.uk) tel:0300 121 0878  
Jisc (Registered Office), 4 Portwall Lane , Bristol, BS1 6NB | Charity No. 1149740 | Company No. 5747339