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ATLAS.ti 7
What's New

ATLAS.ti 7 What's New – For Version 6 Users

Revision 189

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Objectives

This document is intended specifically for users who already have experience using the previous version, ATLAS.ti 6, and who are making the switch to the latest generation, in this case V7.

> If you are entirely new to ATLAS.ti—be it that you have just downloaded the trial version or acquired a license and are now eager to take your very first steps with the program—you can safely ignore this document. Instead, we recommend that you give the *ATLAS.ti 7 Quick Tour* (available from the Help menu in the program itself) your undivided attention. It has been designed to assist new users by carefully explaining all basic operations and underlying concepts. No previous knowledge is required.

For version 7, we have carefully reviewed every single aspect of previous incarnations of ATLAS.ti and, in close consultation with our users, have added new features and made changes and improvements to existing ones.

While the basic operations of ATLAS.ti (segmenting, coding, etc.) have not changed, there are a few areas in which existing users will need to adjust their work habits. Luckily, whatever modifications there are, as you will quickly come to see, make working with the program even smoother, easier, faster, safer, and more productive. Work flows have been streamlined, powerful (and in some cases, completely innovative) new features added, and the overall experience significantly improved.

Areas that have seen the most significant changes are: Document management, multi-document view, multimedia handling, network views, output/export/reporting, and, to correspond with the above, the main user interface.

We will look at these changes in this document with the intention of making your transition from ATLAS.ti 6 to version 7 as smooth and efficient as possible.

Conventions In This Document

Notes:

This paragraph contains a general note that may be of interest or worth remembering.

Tip/Recommendation:

This paragraph contains a tip or recommendation, i.e., something we advise you to make a practice in your work.

Caution:

This paragraph contains a warning or caution, i.e., something you should avoid doing or be aware of consequences beyond the action itself.

Instruction:

This paragraph contains an instruction, i.e., something you should follow along and/or execute in the program.

Additional resources/suggested further reading:

Additional information about this topic is available elsewhere, usually online from our web site or some other place on the Web.

The New Sample Project

To get acquainted with ATLAS.ti 7 quickly, you will be working with a sample project that we have already created for you to experiment with.

> The sample project has already been copied to your computer during program installation. You'll find it under the Help Menu. It is also available online for download at http://www.atlasti.com/samples.html

When searching for suitable example data for this Quick Tour, we happened upon an article on the topic of children and happiness, written by Nattavudh Powdthavee in the journal The Psychologist[1]. Nattavudh reports on a number of academic studies that repeatedly found a negative correlation between having children and the parents' levels of happiness, life satisfaction, marital satisfaction and mental well-being. These are on the one hand provocative findings if you are a parent yourself; on the other hand they add fuel to the fire for people who have decided purposefully against parenthood ("I knew it all along.").

In any case, no matter on which side of the issue you stand, the article and the various reactions to it (in the form of blog discussions) promised to be interesting material for a sample. It will let you code the various blog posts and offers a variety of opportunities to try out many of the powerful analytic functions ATLAS.ti brings to the task.

In addition to the journal article itself, two comments from bloggers and two blog discussions are included. The sample also contains a short video that lets you explore how ATLASti 7 handles video data. The video is associated with a "transcript" to demonstrate the synchronized document feature. The images in the sample project were created as snapshots from the video file.

Now let's get started.

When you start ATLAS.ti 7, you will see the new logo:

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[1] Powdthavee, N. (2009). *Think having children will make you happy? Think again, suggests Nattavudh Powdthavee – you're experiencing a focusing illusion*, V 22 (4), 308-311.

Figure 1: Starting ATLAS.ti Version 7

To load the sample project, go to the **HELP** menu and select **QUICKTOUR / LOAD "CHILDREN & HAPPINESS STAGE II".** Behind this link, there is a copy bundle file that gets silently unpacked when you select it. In order to not unnecessarily duplicate files, the stage II bundle does only contain files not included in the stage I bundle. Therefore, if you have not yet unpacked the stage I bundle, you will be asked whether to load the files from the stage I bundle as well.

Next, let's take a look at the new elements of the ATLAS.ti user interface.

The V7 Interface

At first cursory glance, the HU editor may appear to look nearly the same as in V6. But looks are sometimes deceiving; there are quite a few substantial as well as a great many subtle changes. They all have been designed with a more organic work flow and further increased functionality in mind.

Upon closer examination, the yellow bar below the list fields, the "plus" sign on the right hand side, and the three triangles on the left hand side are likely to catch your attention. Humble as they seem, they already indicate some of the major innovations of ATLAS.ti, its powerful Navigation Pane, and the unique Multi-Document View (more below).

Even if you are used to using ATLAS.ti "blind," you may want to give some attention to a gentle reorganization of its menu structure: For example, the former "File" menu is now called the "Project" menu, and you find a new "Analysis" menu item where all analysis options are assembled. Detailed information on menu changes is provided in the section "Reorganization of Menu Items" starting on page 17.
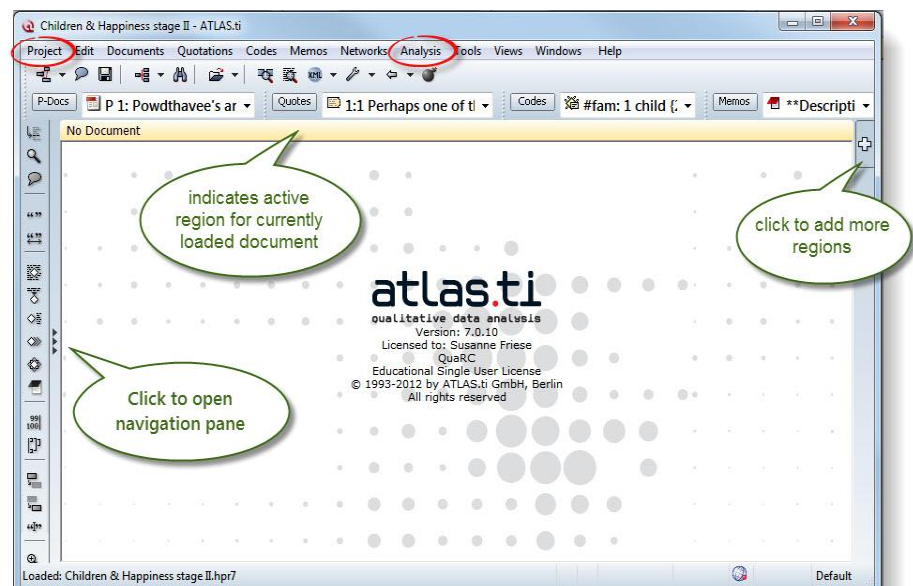

Figure 2: New interface elements

Let's look at some of the central features in more detail.

Working With The Navigation Pane

Open the navigation pane at the left hand side of the editor:

Figure 3: Accessing the navigation pane
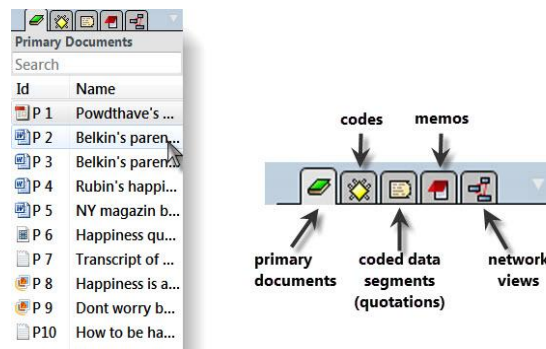
Figure 4: Working with the navigation pane

Double-click on a document entry to load it into the first document region.

Use the search field to search for a specific item. This is especially useful if you work with lots of documents or have a long list of codes or other objects.

Switch to **View mode** by right clicking on an object in the list to see preview images for each document. This provides a good overview if you work with different media types and is especially helpful when analyzing lots of image data (see Figure 5). The View mode is available for primary documents and for network views.

Figure 5: View preview images for your documents in the navigation pane

Viewing Your Files – The New Primary Document Manager

As in version 6, you can open the list of documents in the *Primary Document Manager*. The manager now contains a number of additional options:

Figure 6: The new managers
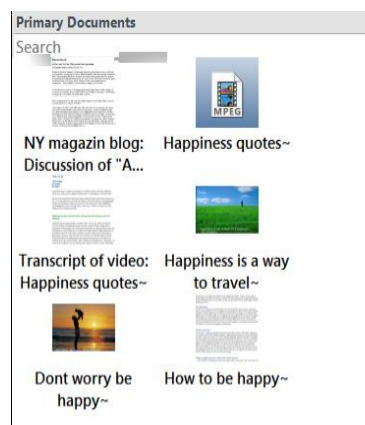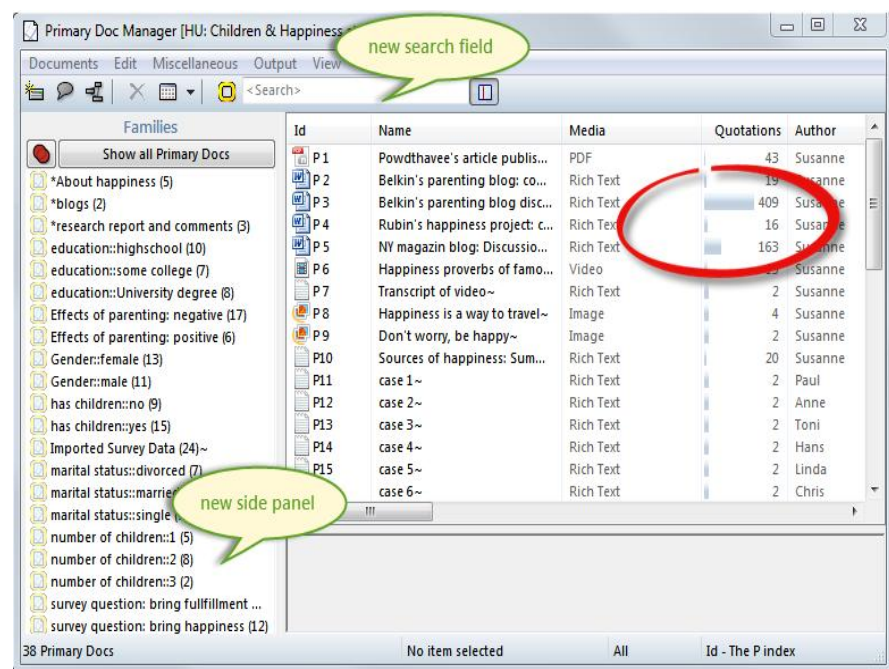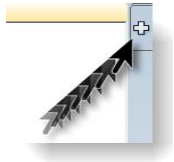
If you double-click on a document, it will be loaded into the active region. You can also drag and drop documents from here onto the region buttons (see left) to load it into a new region. Or click on the region button first to open a new region and then drag a document in the empty region pane.

Other new features are the search field and the frequency bars for number quotations pr document.

On the left hand side, you see an optional side panel that shows the existing document families. If you click on a family, the list only shows the documents of that family. Note that the family is displayed in bold characters. This, however, is only a local filter, it does not affect other windows or areas of your HU. Click on Sнow all Primary Docs to view the full lists of documents again.

It is also possible to set a global filter in the side panel and to create families and super families right where you need them in the PDocs Manager. You will get to love this new functionality of the manager's side panel as it makes the work flow so much easier.

As this new functionality is also available in all other managers, this is discussed in more detail in the section "Added Functionality In Managers " on page 61.

Let's explore the View options a bit further.

You can activate or deactivate the side panel: View / Show Side Panel.

As already shown for the navigation pane, you can also view your documents as tiles: View / Tiles. The standard option is to see thumb nails. But you can also increase the size by selecting View / Set Image Size.

Set the size to Extra Large (128 x 128).

Figure 7: Preview images for documents in Primary Doc Manager

Next to each tile, you find further information about the document; its type, the families it belongs to and the number of quotations.

Play around with the various view options. The view you see in Figure 6 is based on the settings: Details and Display Frequencies.

Multi Document View

When you click on the plus sign on the right hand side of the editor, you can open up three more regions for the display of documents. Thus, you can view (and work on!) up to four documents side-by-side.

Drag a document from the navigation pane or the P-Docs Manager onto the region button at the right hand side of the HU Editor to load a second document. Alternatively, click on the region button first to open a new region and then drag a document in the empty region pane.
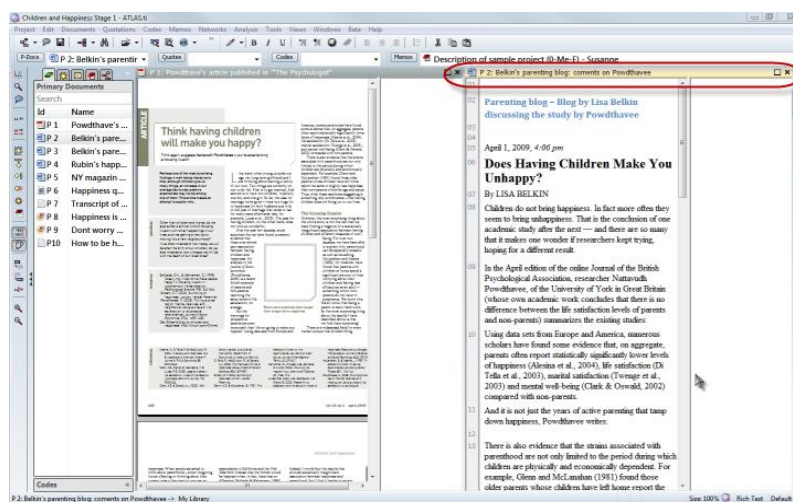
Figure 8: HU editor with two document regions

The PD bar is yellow to indicate the current active document. All inactive PD bars are gray. You can turn an inactive document into an active one by either clicking on the gray PD bar, or simply click inside the document pane of the inactive document.

If you only want to compare the documents without seeing the margin area, you can switch the margin area off by selecting the main menu option **VIEWS / MARGIN AREA** or click on the Margin button in the vertical tool bar. This switches the margin area on or off for the currently active document only.

If you want to change the position of the documents, click on a PD bar and drag & drop it into the desired document region.

Figure 9: Moving documents between regions

Multi-Document View And Hyper-Linking

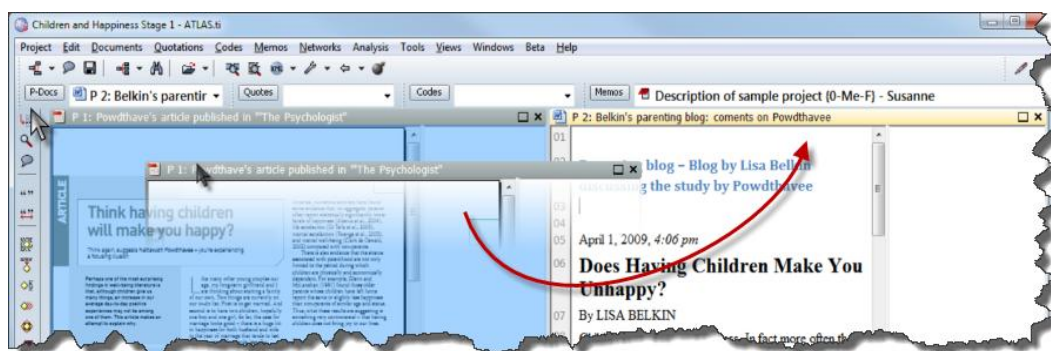The multi-document view makes it easy to set hyperlinks. Left click a quotation bar in the active region, drag the mouse to a quotation bar in the same or a neighboring region, release the left mouse button and select a relation (see Figure 10).

Figure 10: Creating hyperlinks across regions

As before, if you double-click on a hyperlink, a window pops up providing information on the linked quotation and you can click inside to visit this quotation. Or use the short-cut **Ctrl + double-click** to immediately jump to the linked quotation. Differently as before, ATLAS.ti now loads the document containing the linked quotation into the neighboring region and you can view the linked segments side-by-side.

Associated Documents

Associated documents were first introduced in ATLAS.ti 6 and can be used for text, audio and video files. The purpose is to link a text document, e.g. a transcript of an interview, to an audio or video file via time marks. You can then listen to the original audio file or watch the video while you go through the transcript. Or you can select a piece of the transcript, e.g., a coded segment and immediately play the associated audio or video segment. You may also use the time marks to navigate through a document.

To make this option even neater, you can now view the two associated documents side-by-side. When you load a document that has an associated file, then a red circle is shown in the PD bar.

Load the video document "P6: Happiness proverbs of famous people".
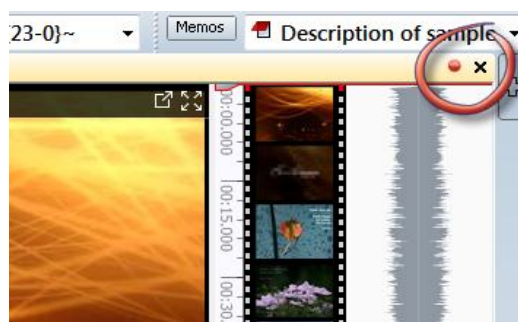
Figure 11: Click the red dot to load the associated document

Deactivate the margin area so that the associated document will be loaded right next to it.

Click on the red dot; the associated document is loaded into the document region next to it

Highlight one of the associated paragraphs, e.g. the one starting with *Happiness is a way to travel....* and use the shortcut option Ctrl+P to play the associated video segment (or select Documents / Associated Docs / Play Selected Text).

Figure 12: Playing associated audio or video segments

New Location Of A-Docs Menu

The former "A-Docs" menu has been moved and can now be found under
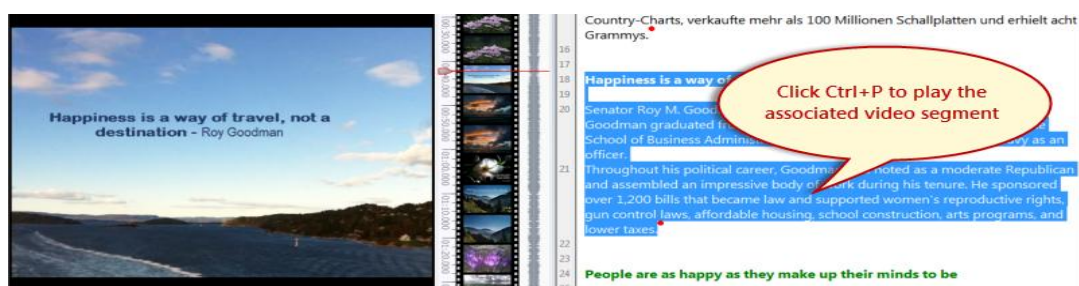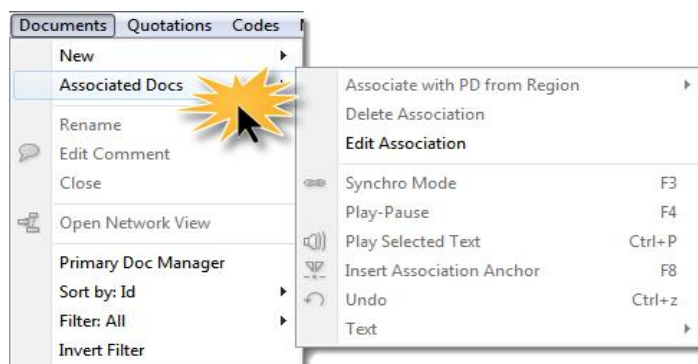

Figure 13: New location and content of former A-Docs menu

"Documents" on the main menu:

To get an overview of the association points that have been set, open the Association Editor: DOCUMENTS / ASSOCIATED DOCS / OPEN ASSOCIATION EDITOR.
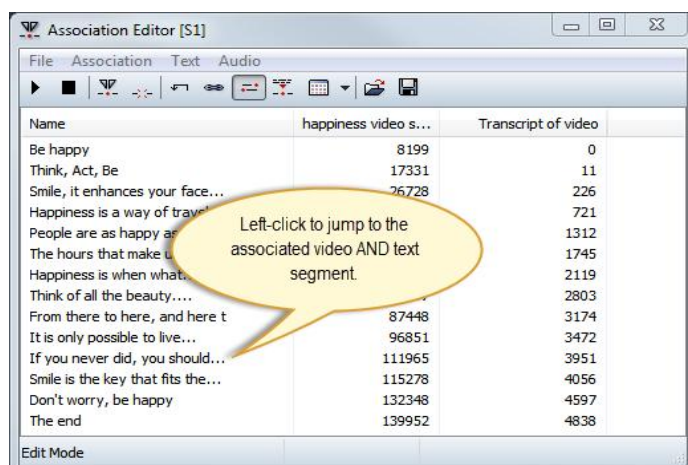
Figure 14: Association Editor

Change the display option so that the entire associated section will be highlighted: Select **Text / Highlight Section**.

Left click on the various association points. Notice that the play head in the video PD moves to the associated point in the video and that the associated text segment is highlighted.

Associating Documents

You now find a menu option to associate two documents which each other. To do so, load a text document into one region and the audio or video file that you want to associate with it into a second region.

Make sure that the text document is the active one. Then select the option **Documents / Associated Docs / Associate with PD from Region**.

Open the association editor to begin setting your associated points (see the full manual for step-by-step instructions on click F1 to open the Help file. Enter the search term "start transcribing").

Reorganization Of Menu Items

As can be seen in Figure 2, the most obvious changes are the **Project** and the **Analysis** menu items. The "A-docs" and "Extras" menu have disappeared altogether. The A-Docs menu has been added to the Documents menu and the options under the Extras menu have been relocated to more appropriate places like the Tools and Help menu. The Tools menu has been almost completely revised.

The yellow color in the following images indicates the addition of a new sub menu. Purple indicates where a sub menu has been renamed.

new or moved item

renamed menu item

Project Menu

Under the project menu, you find all options that are related to your entire project like creating it, saving it, making backups in form of copy bundle files, merging HUs, accessing the HU Explorer, importing or exporting content.

The copy bundle window has been modified to make packing up a project easier. The "Consolidate Documents" menu is a new option related to the way ATLAS.ti handles projects. Both are described in the section "Project Management Made Easy" below.
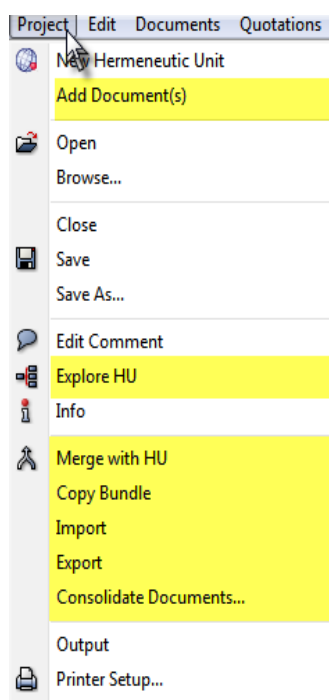
Figure 15: Project menu

Explore HU: Previously located in the Tools menu as OBJECT EXPLORER.

Merge with HU: Previously located under the TOOLS menu

Copy Bundle: Previously located under the TOOLS menu

Import: All project related import options have been gathered here (see Figure 16).
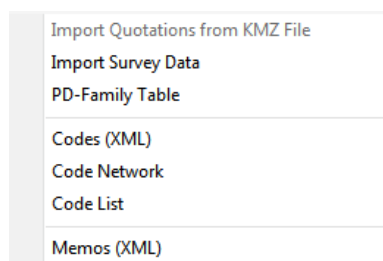
Figure 16: Import sub menu gathering at all project related import options

Export: All project related export options have been assembled here (see Figure 17).

Figure 17: Export sub menu gathering all project related export options

The new XML Explorer is discussed in more detail in the section "New and Improved Report Options" on page 80.

Documents Menu

Sub menu New: The way ATLAS.ti handles files has been completely revised in Version 7. This is explained in detail in the section "Project Management Made Easy" on page 31.

Figure 18: Documents menu

Associated Docs: This replaces the **A-D**OCS main menu. For more detail see "Associated Documents" on page 15.
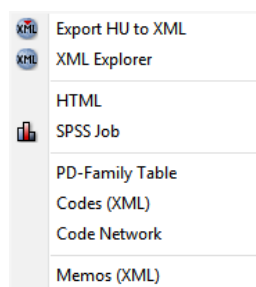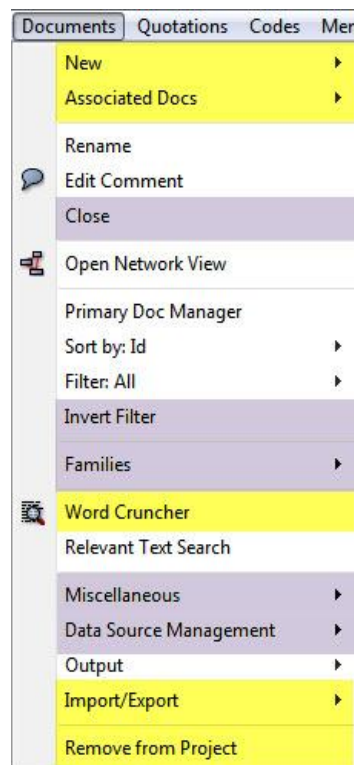
Close: Previously C**LOSE** D**OC**

Invert Filter: Previously T**OGGLE** F**ILTER**.

Families: Previously E**DIT** F**AMILIES**.

Word Cruncher: This option could previously only be found under the T**OOLS** menu.

Import/Export: The options subsumed here could previously be found under the M**ISCELLANEOUS** sub menu.

Remove from Project: This option is similar to the Disconnect option in V6. See "Project Management Made Easy" for further detail.

The **Miscellaneous** sub menu also include a number of new or renamed options: Reloading a PD previously only worked using a probably mostly unknown short-cut option, Change Creation Date was called Change Date,

GoogleEarth PD options: Update GoogleEarth PD used to be "Export Special" and Import Quotations from KMZ/KML file was called "Import Quotations". The option "Create GoogleEarth 3D Snapshot" was previoiusly available from the Assign button or menu.

Extract Meta Data is a new option that makes use of existing meta data (see page 29 for further detail).
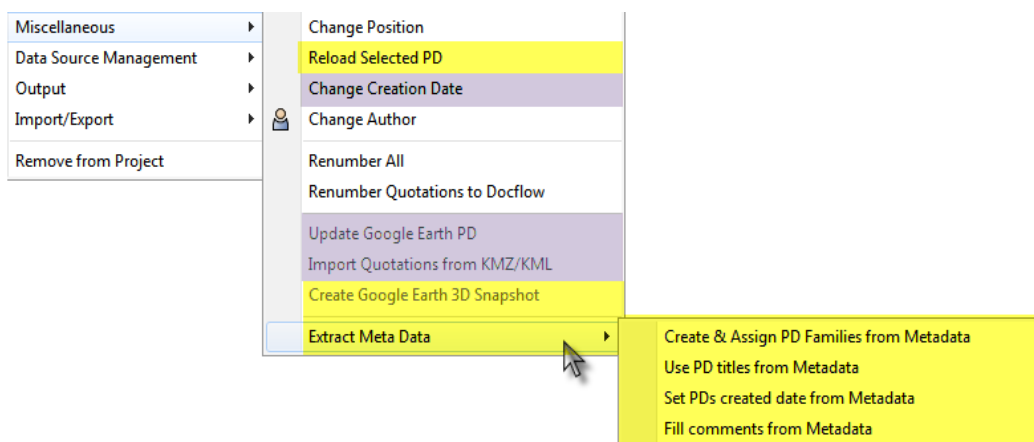
Figure 19: Miscellaneous sub menu

Data Source Management sub-menu: This menu is divided into options for managed and linked documents. A new option is the **File Convert Service** (see "File Convert Service" on page 29).

Figure 20: Data Source Management sub menu

Clearing the documents cache and creating an accessibility report are options that are useful for both managed and linked documents. Some options for linked documents have been taken out (like resetting the change logs) as they are no longer relevant.
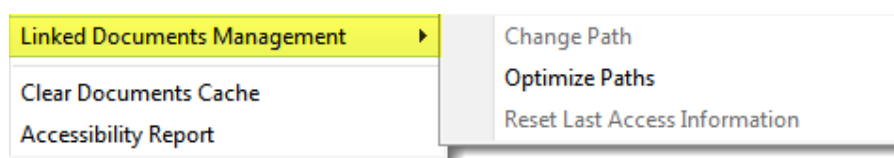
Figure 21: Linked Documents sub menu

Quotations Menu
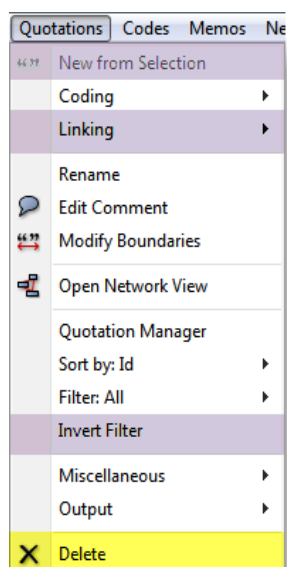
Figure 22: Quotations menu

New from Selection: Previously Cʀᴇᴀᴛᴇ ғʀᴇᴇ Qᴜᴏᴛᴀᴛɪᴏɴ
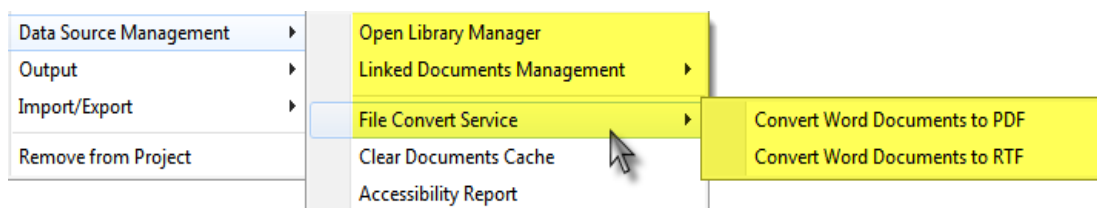
Linking: Previously Hʏᴘᴇʀ-Lɪɴᴋ

Invert Filter: Previously Tᴏɢɢʟᴇ Fɪʟᴛᴇʀ

Delete: This option was previously not available from the main menu

Codes Menu

Invert Filter: Previously Tᴏɢɢʟᴇ Fɪʟᴛᴇʀ

Import/Export: The options were previously included in the Oᴜᴛᴘᴜᴛ menu

Delete: This option was previously not included in the Cᴏᴅᴇs main menu

Figure 23: Codes menu

Memos Menu

Invert Filter: previously TOGGLE FILTER

Import / Export: the options were previously included in the OUTPUT menu

Delete: This option was previously not included the MEMOS main menu

Figure 24: The Memos menu

Networks Menu

Edit Relations: Previously Relation Editor

Two menu items have been removed (Iᴍᴘᴏʀᴛ and Eхᴘᴏʀᴛ Cᴏᴅᴇ Nᴇᴛᴡᴏʀᴋ). They can now be found under the Iᴍᴘᴏʀᴛ / Eхᴘᴏʀᴛ menu of the main Cᴏᴅᴇs menu (see above).

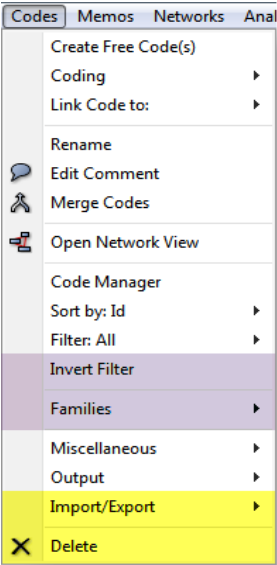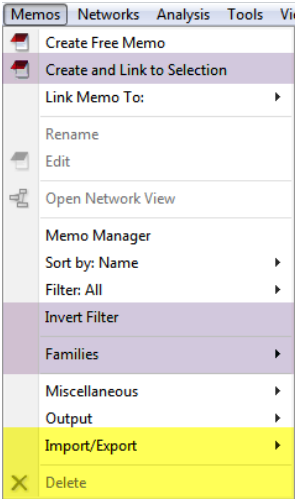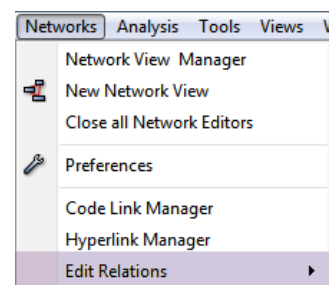*Figure 25: The Networks menu*

Analysis Menu

The new Aɴᴀʟʏsɪs menu subsumes all analysis options that used to be distributed under multiple menus in Version 6.
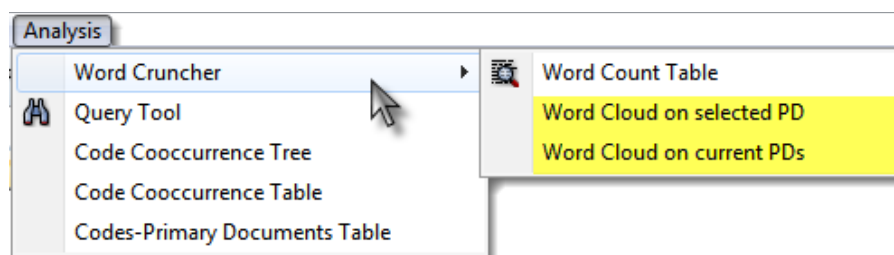
Figure 26: The new Analysis menu

Previously you found the first four options under the Tools menu and the last option under Codes / Output menu. The Word Cruncher now also includes a word cloud view of either all primary documents or the selected one (see "Word Cloud View in Word Cruncher" on page 66.

The Coocurence Table Explorer and the Codes-Primary Documents Table have been revised. The changes are explained in the section "New Data Analysis Options "on page 66ff.

Tools Menu

In Figure 27 below you see the old and new Tools menu. In Version 6, a number of different options had been lumped together like actual tools, analysis options, or project management issues. For Version 7 we have cleaned up this menu.
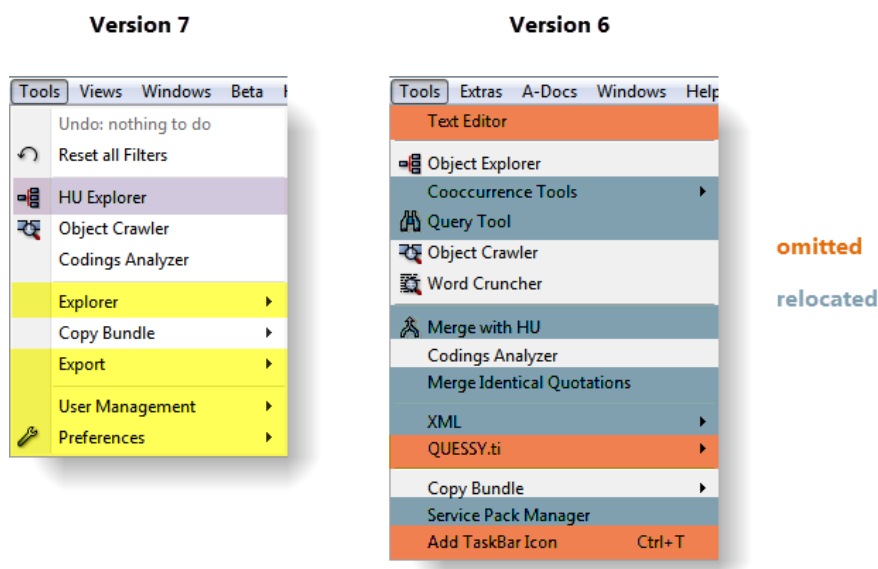
Figure 27: A7 and A6 Tools menu in comparison

The *Text Editor*, *Quessy.ti* and the option *Add Taskbar Icon* are no longer available in version 7.

The *Cooccurence Tools*, *Query Tool* and *Word Cruncher* have been moved to the ANALYSIS menu in V7 (see above).

The option *Merge Identical Quotations* can be found under QUOTATIONS / MISCELLANEOUS in V7.

Merge with HU and *Copy Bundle* are both project related options and can be found under the PROJECTS menu in V7. You however still find the Copy Bundle option in the V7 Tools menu as it is an important function, even more important than it was in Version 6 (see "Project Management Made Easy" on page 31). Some users may - just out of habit - look for this option under the Tools menu. Therefore we kept it there.

HU Explorer: Previously OBJECT EXPLORER

The following four menus were previously located under the EXTRAS menu: **Explorer**, **Export**, **User Management** and **Preferences**. Further, all user management functions have now been subsumed under one menu option plus sub menus.
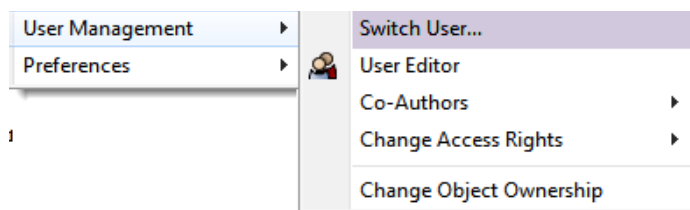
Figure 28: User Management sub menu

Switch User...: Previously LOGIN.

The Preferences menu now collects the following options:
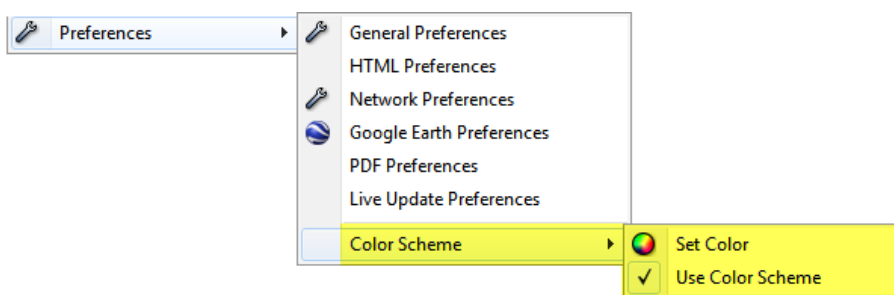
Figure 29: Preferences sub menu

With the color scheme option you can color the ATLAS.ti work space with your preferred color. This option was previously located under the Views menu.
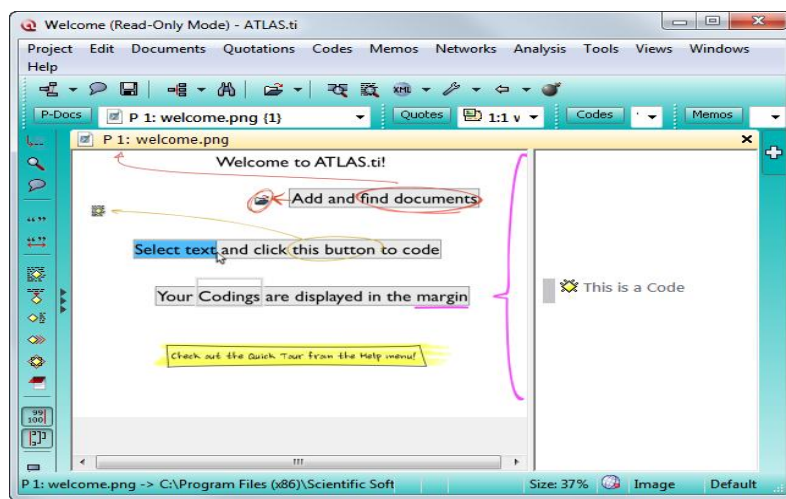
Figure 30: Individualizing your work space

Views Menu
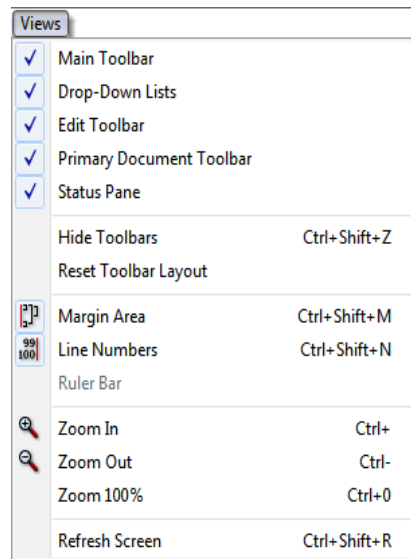
Figure 31: Views menu

The Views menu as been streamlined as well and a number of options have been moved to other locations:

All windows related options like *minimizing*, *restoring*, *closing* and *sending back* can now be found under the Wɪɴᴅᴏᴡꜱ menu.

The *Toolbar Layout* options can be found under Tᴏᴏʟꜱ\ Pʀᴇꜰᴇʀᴇɴᴄᴇꜱ \ Cᴏʟᴏʀ Sᴄʜᴇᴍᴇ.

Activating *Margin Tips*, *Setting the Bracket Width* for quotations and *Using Short Margin Names* for codes are all preferences settings and can therefore be found in the margin tab under Tᴏᴏʟꜱ \ Pʀᴇꜰᴇʀᴇɴᴄᴇꜱ \ Gᴇɴᴇʀᴀʟ Pʀᴇꜰᴇʀᴇɴᴄᴇꜱ. As usual the preference settings can also be accessed via the main tool bar (see left).

Windows Menu
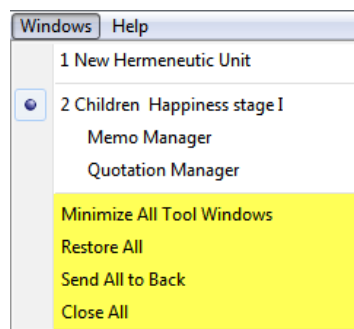
Figure 32: Windows menu

The Windows menu shows all open windows as usual. New at this location are the options to minimize, restore, send to back and to close all windows.

Help Menu
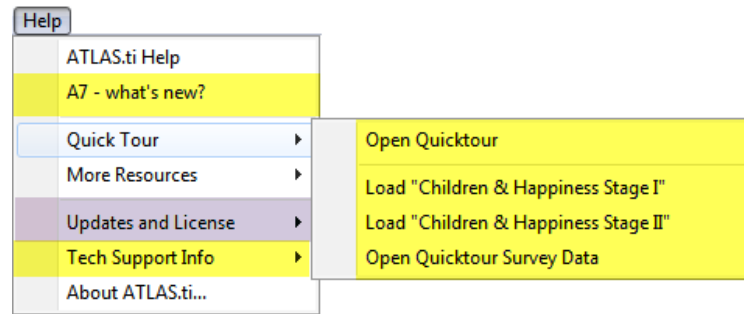
Figure 33: Help menu

You can also access the "**What's New**" document that you are currently reading from the Help menu.

The new A7 **Quick Tour** document and **all new sample files** can be access via the Quick Tour menu.

Updates and License: All options related to updating and licensing have been subsumed here. Previously, some of these options were located under the EXTRAS menu.

Tech Support Info is a new option collecting all items related to technical problems. In V6 the various options were spread out being located under DOCUMENTS \ DATA SOURCE MANAGEMENT , the WINDOWS menu, the EXTRAS menu or the HELP \ MORE RESOURCES menu.
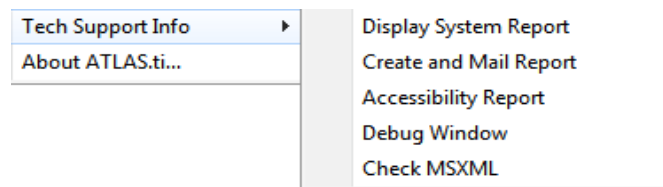
Figure 34: Tech Support Info sub menu

File Convert Service

File Convert Service offers a convenient way to batch converts Word document to PDF files and Word DOC(X) files to rtf files.

> To use this service, select DOCUMENTS / DATA SOURCE MANAGEMENT / FILE CONVERT SERVICE.

> The File Explorer opens. Select for instance a few DOC files that you want to convert and click OPEN.

ATLAS.ti converts the files and stores the converted versions in the same folder as the DOC(X) files that were converted.

Extract Meta Data

This option utilizes already existing meta data of your files that is contained in the fields *descriptions* and *copy right*.
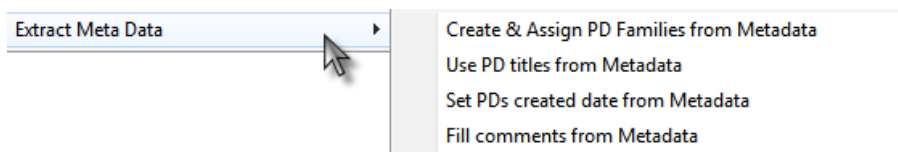
Figure 35: Extract Meat Data sub menu

Create & Assign PD Families from Metadata: For multimedia PDs, the following information is extracted: album author, composer, genre and year.

Use PD titles from Metadata: If the file name is something like title 1, title 2, title 3, etc., use this option to extract the full title name from the meta data as name for the primary document. It is applicable to multimedia and PDF files.

Set PDs created date from Metadata: The date a photo or video was taken and the creation date of the actual file name are not necessarily the same. Use this option if you want to use the date when the photo or video was actually taken as creation date for the PD.

Fill comments from Metadata: If the commentary field of the file contains information, this will be added into the comment field of the primary document.

Project Management Made Easy

The Past And The Future

Up until now all documents that you assigned to a project were **linked** to the HU. Version 6.2 also offered an option to work with embedded documents. This applied to imported f4 transcripts, text documents that you created within the HU itself and imported survey data.

Often users were not aware that they were working with linked documents and they did not pay attention to the dependencies this created between the documents and the ATLAS.ti HU. It meant documents could not be moved to different locations or renamed *without* "notifying" the ATLAS.ti HU about it.

There have always existed solutions to the problem like the one folder setup (HUPATH). However, if users ended up in a situation where they could no longer load their documents, it caused moments of irritation ("have I lost all of my coding now?"), many hours of support time explaining users the principles of linked documents and why it actually makes a lot of sense to NOT import all materials. Did you for example ever notice (and appreciate) how small the HU file remained, that the program did not crash even if you worked with hundreds or even thousands of files, or with large sized documents like video files?

The Concept Of Managed Documents – An Overview

But even if this did make a lot of sense from a technical point of view, we did not overlook that working with linked documents was problematic for many users. So we came up with a solution to make data and project management easier. The solution is called **managed documents** and it sort-of combines the best of both worlds now.

How does this work?

If you **add** (rather than **assign**) documents to a project, ATLAS.ti makes a **copy** of the documents and puts them into a **library.** The library is a special file repository.

The actual library is "buried" deep in the file structure of your computer. This is a workspace for ATLAS.ti and you do not have to concern yourself with it. You can, however, change the location of the library if you want to. This for example is relevant for team projects where documents are stored at a shared location (more below).

Two predefined libraries are available to you, a **private library** for single user projects and a **team library** for team projects.

Once you have added documents to either the private or the team library, ATLAS.ti will not need the original source documents anymore.

More information on the document library is available in the manual.

What You Should Know About Managed Documents

Unique Fingerprints For Documents

During the process of importing documents into the library, each document is provided with a unique fingerprint. In version 6, the order of the documents (P1, P2, P3, ….) still mattered when merging projects. This does no longer apply due to the new way of identifying documents in A7.

> Team Projects: In order to ensure that identical documents in fact get the same fingerprint, the project administrator needs to create a Master HU first, adds documents to it and then distributes either the Master HU or a copy bundle file to all team members depending on whether a shared location or distributed locations are used. See Setting up a Team Project on page 46.

Handling of DOC and DOCX Files

Word files (DOC and DOCX) are automatically converted to rich text, but only once when adding them to the library. No further conversion is necessary. In addition, the restriction that DOC and DOCX files cannot be edited with ATLAS.ti was dropped.

Modifying Text Documents

Whether you add documents as txt, rtf or doc(x) files no longer makes a difference. In V7, all of these formats can be modified using the ATLAS.ti edit function, albeit only as managed files. The advantage is that all log files are now handled invisibly by the managed document framework. If you want to edit a linked document, you will be asked to turn it into a managed file. With that done, editing is now possible.

> Modifying documents in a team project: Unless a team accesses their library within a shared space such as a network drive, you still need to be aware of the restriction that the same document should not be modified at two different locations. If this happens, this results in multiple versions of the

> document that can no longer be merged into one common primary document!

What Happens To My Version 6 HU(s)?

If you load a version 6 project, you will be asked whether you want ATLAS.ti to manage your documents (see Migrating A6 Single User Projects to A7 for further detail).

You can also decide that the HU should currently not be managed by ATLAS.ti. This is for example necessary in the process of migrating an A6 team project to A7 if team members work at different locations (see Migrating A6 Team Projects to A7 on page 36.
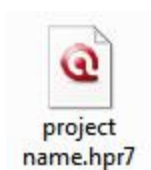
What File(s) Do I Need To Pay Attention To?

Basically, the only files you need to concern yourself with are your HU file and a proper backup thereof:

A version 7 project (HU) file has the file extension hpr7. This file can be stored anywhere and you can move it to any location as long as access to the library is available. Since documents are added to the library and not embedded in the HU, the HU file still remains rather small.

A second file you will want to attend to is the copy bundle file as a backup of your entire project (see page 47).

> **Compatibility between ATLAS.ti Version 5 , 6 and 7 projects**
> If you save your project in ATLAS.ti 7, as mentioned above, the file is saved as hpr7 file. Thus, version 5 or version 6 project files will not be overwritten. However, a hpr7 file can not be read by older version of ATLAS.ti. It is not possible to save a file as hpr6 or hpr5 file in Version 7. In other words, ATLAS.ti is upward but not downward compatible.

How Do I Move A Project When I Work With Managed Files?

If you want to move an A7 project to a new location, you create a copy bundle file as usual and install it at the new location. On the target computer, all documents that are not already in the library are added to it.

> To make it more obvious what a copy bundle file is, we have created a new icon. We love it and we hope that you will like it too. Furthermore, the copy bundle file has a new extension: **atlcb.**

If during the course of the project new files were added to the HU or documents were modified, you can create a partial bundle that only includes those documents. This reduces the size of the bundle considerably (see Creating a Copy Bundle File on page 47).

Once all documents are available in the library at the various locations, you only need to move back and forth the HU file.

Can I Still Use Linked Documents?

Yes, if you prefer, you can still manage your documents yourself, i.e. working with linked documents as before.

However, our recommendation would be that you transfer your projects to the new managed format since it offers numerous advantages: There is much less to consider in terms of project and data management; files are compressed, so you save hard disc space; all document revisions are tracked; you can edit all text documents (also original doc and docx files); and your entire project is more robust.

Migrating A6 Single User Projects To A7

Open an A6 project in version 7. You will see the following message:
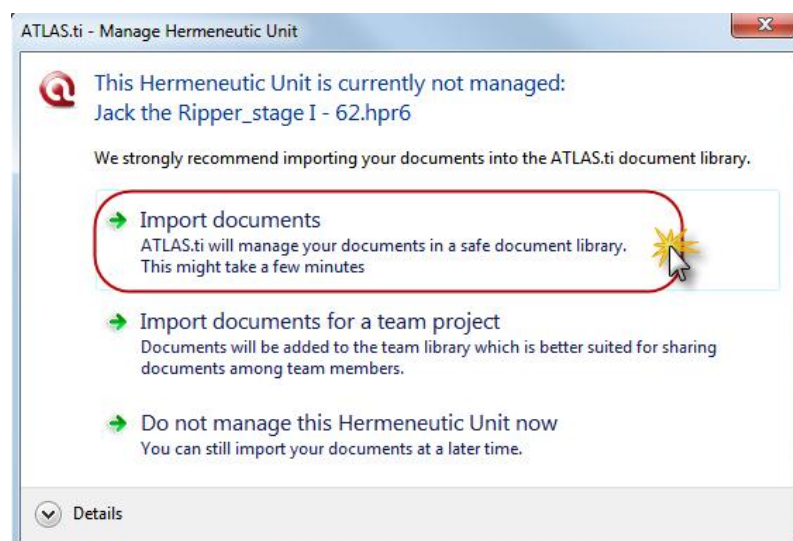

Figure 36: Invitation to turn over data management to ATLAS.ti

Select the first option to import all documents. The conversion process starts and may take up to a few minutes depending on the number of primary documents in your project. Once this process is finished, you will see the following message:
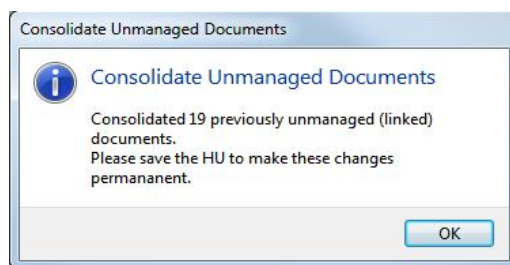
Figure 37: Dialog informing you about the number of documents that have been added to the library.

Click on the OK button and save the HU. There is no need to change the file name in case you want to keep your old version. As ATLAS.ti adds a new file extension (hpr7). Your version 6 file remains untouched.

Figure 38: Display of A7 file in File Explorer

File Quality Check

During the import process, a quality check takes place. If your version 6 project contains large-sized files, you will be asked whether you want to keep these documents linked rather than to import them.

If your audio files are saved with a variable bit rate (VBR), ATLAS.ti offers to convert them into files with a constant bit rate. This increases the precision of the quotations. VBR files can behave very poorly when it comes to playing the exact clips that were captured as quotations.
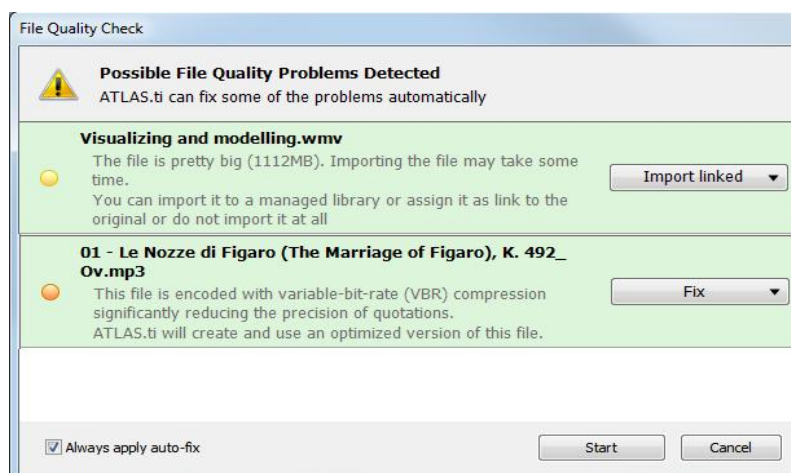
Figure 39: File quality check during import

Migrating A6 Team Projects To A7

Team Members Work With Different Documents At Different Locations

If all team members work with a different set of documents, they can open their A6 HUs in Version 7 and allow ATLAS.ti to import all documents into the team library (see Figure 40).

Common Set Of Documents Stored At A Shared Locations

Tasks Of The Project Administrator

The project administrator opens the A6 HUs of the various team members in A7, imports all documents into the team library (see Figure 40) and saves the files as A7 HUs.
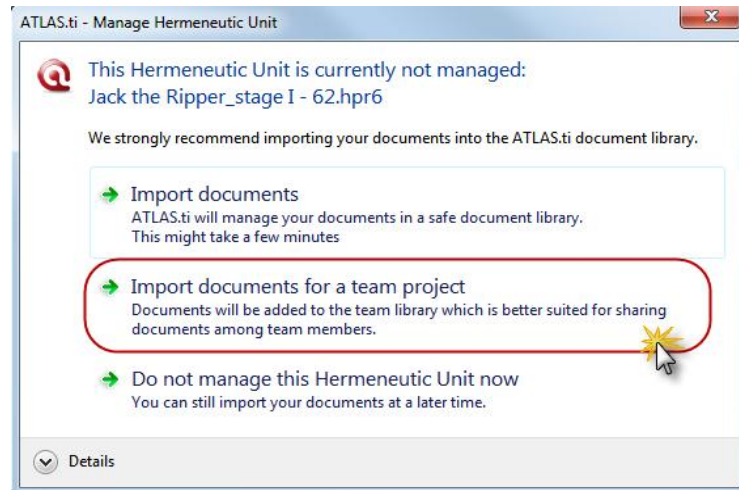
Figure 40: Project migration for team projects if documents are stored at a shared location

Next, he/she merges the A7 HUs and creates a new Master project file (**Project / Merge with HU**).

Now the team library needs to be moved *by the project administrator* to a location that can be accessed by all team members. The steps are:

Select **Documents / Data Source Management / Open Library Manager**.

In the Library Manager, select **Extras / Manage Library Location**.

Figure 41: The Manage Library window

Select the appropriate location for the team library and click **OK**.

You will be asked to restart ATLAS.ti. During this process all documents are moved to the new location.

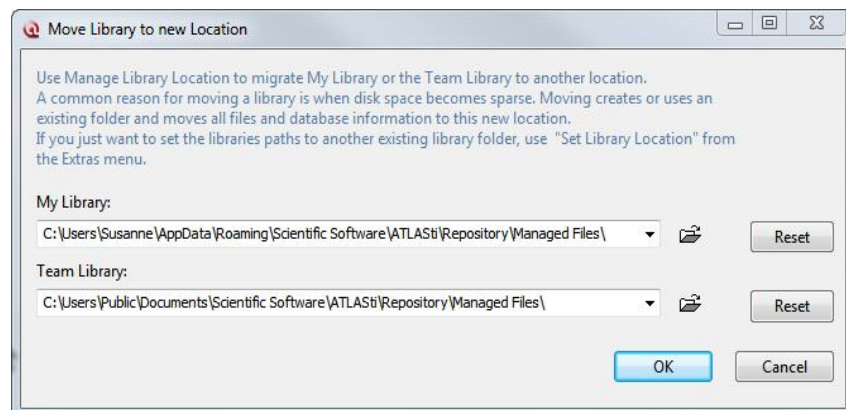> If you click on the **Rᴇsᴇᴛ** button, ATLAS.ti sets the location of My Library or the Team Library back to the default location.

Send the new Master HU to all team members and instruct them to reset the location of the team library (see below).

Tasks of the team members

The team members need to set the location of the team library to the shared location.

▌ Select **Dᴏᴄᴜᴍᴇɴᴛs / Dᴀᴛᴀ Sᴏᴜʀᴄᴇ Mᴀɴᴀɢᴇᴍᴇɴᴛ / Oᴘᴇɴ Lɪʙʀᴀʀʏ Mᴀɴᴀɢᴇʀ.**

▌ In the Library Manager, select **Exᴛʀᴀs / Sᴇᴛ Lɪʙʀᴀʀʏ Lᴏᴄᴀᴛɪᴏɴ.**
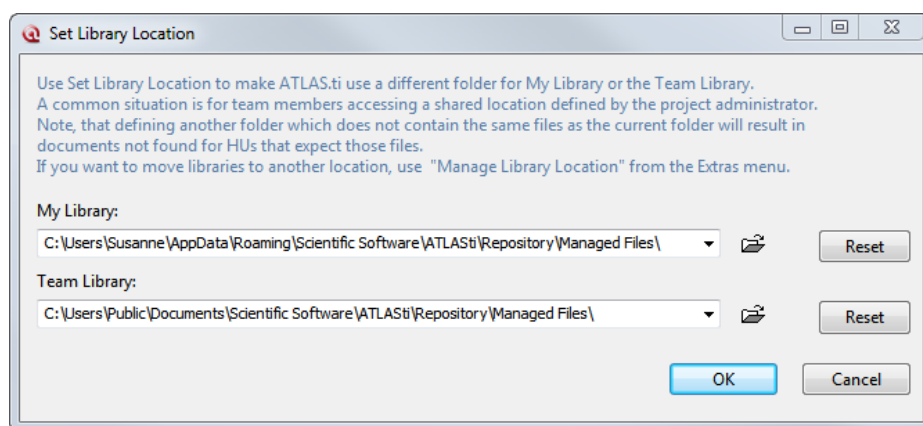
Figure 42: Set Library Location window

▌ Set the location of "Team Library" to the shared location as instructed by the project administrator and click on the **OK** button.

▌ Save the Master HU file under a different name, e.g. by adding your name or initial to it. The HU file can be saved to any location.

> If you click on the **Rᴇsᴇᴛ** button, ATLAS.ti sets the location of My Library or the Team Library back to the default location.

Work Flow: Team project migration to A7 (common data set - shared location)

The project administrator:

... opens all A6 HUs in A7 and imports the documents into the team library. Saves the resulting A7 HUs.

... merges all HU files and creates a new A7 Master HU.
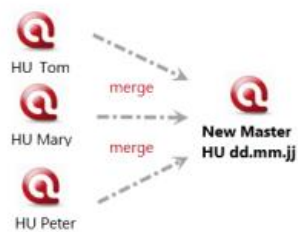
... moves the library to a shared location

... distributes the new A7 Master HU to all team members and instructs them to set their team library to the shared location.

Figure 43: Work flow for team project migration if a common data set is stored at a shared location

Common Set Of Documents Stored At Different Locations

Tasks Of Team Members

Option A: Team members create a copy bundle file in A6 before upgrading to A7 and send it to the project administrator.

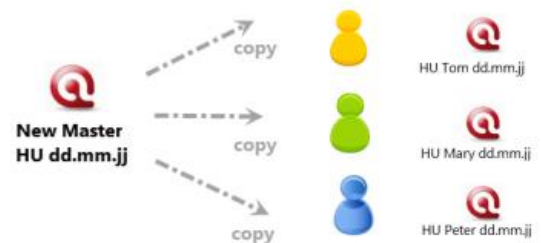Option B: Team members open their A6 HU in Version 7 but do *not* allow ATLAS.ti to import the documents (see Figure 44).They need to select option 3: *Do not manage this Hermeneutic Unit.*
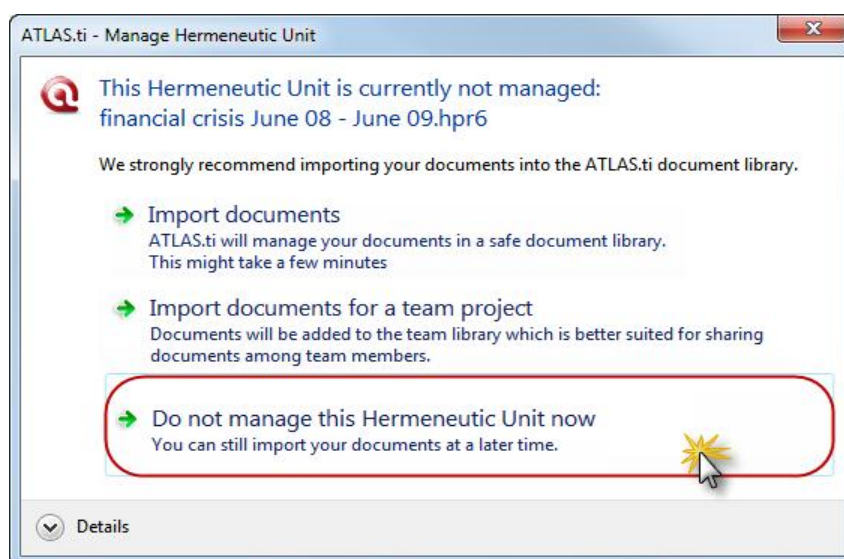
Figure 44: When migrating distributed team projects, initially do not let ATLAS.ti manage your documents

Then they create a copy bundle file and send it to the project administrator.

Tasks Of The Project Administrator

The project administrator first installs the copy bundle files, merges all HUs and then consolidates the documents into the team library:

Double-click the A7 copy bundle file; or if you received A6 bundle files, select PROJECT / COPY BUNDLE / INSTALL BUNDLE.

Select UNBUNDLE.

When you are asked whether ATLAS.ti should manage the documents for you, select the second option *Do not manage this Hermeneutic Unit now* (see Figure 44 above).

Save the HU (PROJECT / SAVE).

Repeat this for all copy bundle files.

Now all A7 HUs can be merged to create a new Master file (**PROJECT / MERGE WITH HU**). This new Master file can now be turned into a managed project:

To to this, select **PROJECT / CONSOLIDATE DOCUMENTS…**.
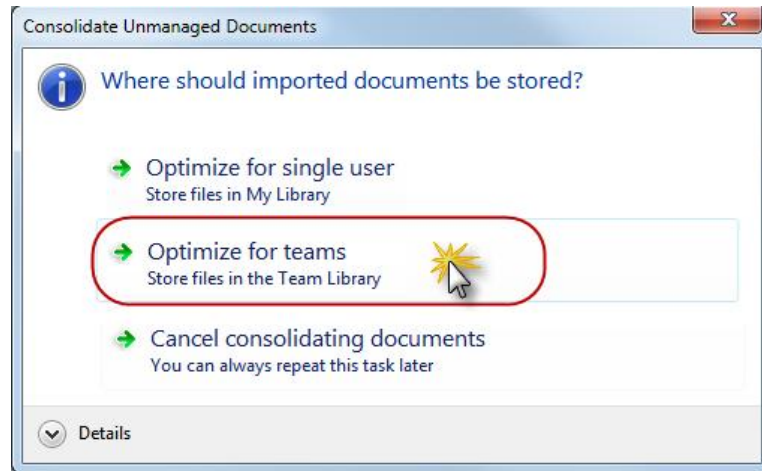
Figure 45: Consolidate unmanaged documents when transferring team projects

Select the second option "Optimize for teams" and save the HU. This means all documents will be imported into the team library and the HU will be set as team HU (see Figure 49). Save the HU.

Next, create a copy bundle file (**PROJECT / COPY BUNDLE / CREATE BUNDLE**) and distribute the bundle to all team members (see Figure 46) for a depiction of the work flow).

Tasks Of Team Members

Team members install the copy bundle file (**PROJECT / COPY BUNDLE / INSTAL BUNDLE**). Then they save the HU under a different name, e.g. by adding their name or initial to it. The HU file can be saved to any location.

Work Flow: Team project migration to A7
(common data set - different locations)

Option A: Team members create a copy bundle file in A6 and send it to the project administrator.

Option B: Team members open their A6 HU in A7 but do now allow ATLAS.ti to manage the HU. Next, they save the HU in A7 and create a copy bundle file.

A6 copy bundle file

A7 copy bundle file

atlcb

admin

The project administrator:

... installs all bundle files but does not yet allow ATLAS.ti to manage the documents.

... merges all HU files and creates a new A7 Master HU.

... consolidates all documents (optimized for teams) and saves the HU again.

... creates a copy bundle file of the new A7 Master project and distributes it to all team members.

copy bundle of new A7 Master HU

Figure 46: Work flow for distributed team projects working on a common set of data

Setting Up a New Project

If you click on the main menu **DOCUMENTS / NEW /** …. you find a number of options to add documents to an ATLAS.ti project:
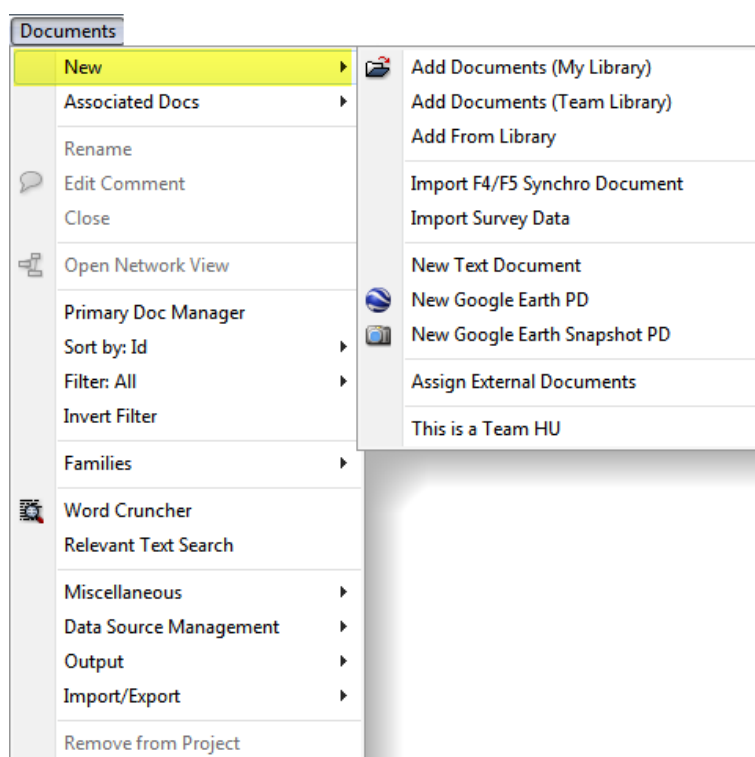
Figure 47: There are a number of options to add documents to a project

- Adding documents to either My Library or the Team Library (see The Past and the Future on page 31).

- Adding documents from the library.

- Importing documents that you have transcribed using F4 or F5 (Mac). The transcripts are turned into an embedded documents and the associated media file are added to the library (see Associated Documents on page 15).

- Importing survey data based on an Excel spread sheet. Case-based data are imported as embedded documents.

- Creating a new embedded text document.

- Creating a new Google Earth PD or a snapshot from the currently loaded GoogleEarth location as image PD.

- Assigning external (linked) documents like you are used to from older versions of ATLAS.ti. Please see the V6 manual for a description of various project setup options. – In Version 7, working with externally linked documents can still be useful if you work with large-sized video files as managed documents are duplicated and added to the library. This requires hard-disk space.

- The option "THIS IS A TEAM HU" is activated, if documents were added to the team library.

Setting Up A Single User Project

Open ATLAS.ti and select DOCUMENTS / NEW / ADD DOCUMENTS (MY LIBRARY), or drag and drop a folder / selected documents from the File Explorer onto the HU Editor.

During the data import process a file quality check is carried out (see page 35).

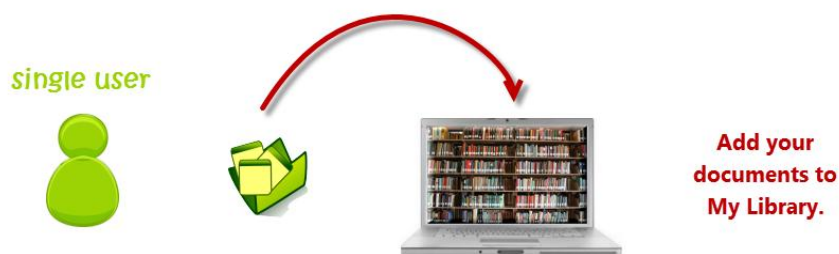After you have added documents to your project, save the project file (the HU) to any location: PROJECT / SAVE.

Figure 48: Creating a single-user project.

Setting Up A Team Project

Shared Location

If all team members access the data at a shared location like a network drive, the team library needs to be set to the this location and the documents need to be added to the team library accordingly. The menu options you need are:

DOCUMENTS / DATA SOURCE MANAGEMENT / OPEN LIBRARY MANAGER.

In the Library Manager, select EXTRAS / SET LIBRARY LOCATION.

To add documents, drag them from the File Explorer into the HU editor, or select DOCUMENTS / NEW / ADD DOCUMENTS (TEAM LIBRARY).

The HU file can be saved to any location.

As all documents were imported into the team library, the HUs of all team members will be identified as team HUs (see Figure 49).
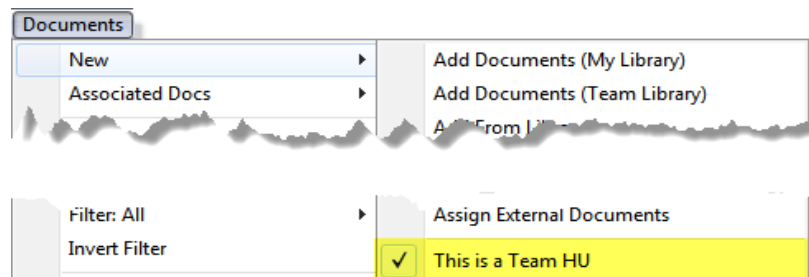

Figure 49: HUs that reference documents in the team library are shown as Team HUs

If an HU is identified as Team HU, all further documents that are added via drag and drop or via the Add Documents button will automatically be imported into the team library (unless you explicitly select My Library as location).

Common Set Of Documents Stored At Different Locations - Distributed Team Work

If team members are located at different sites, various scenarios are possible - depending on whether the same set of documents or initially different documents are analyzed at each site.

If initially different documents are analyzed, everyone can set up his/her sub project by adding documents to the team library (see above).

If a common set of documents is analyzed, the team administrator needs to set up the project. Here are the steps:

Add documents to the team library (see above).

Save the HU.

> █ Create a copy bundle file of the Master project.
>
> █ Distribute the copy bundle file to all team members.

> See the full manual for a detailed description of how to set up team projects.

Backup And Transfer Of A7 Projects

Creating A Copy Bundle File

To backup and to transfer A7 projects, you need to use the copy bundle function. You find this option under the PROJECT menu (and to support old habits, it is still available from the TOOLS menu).
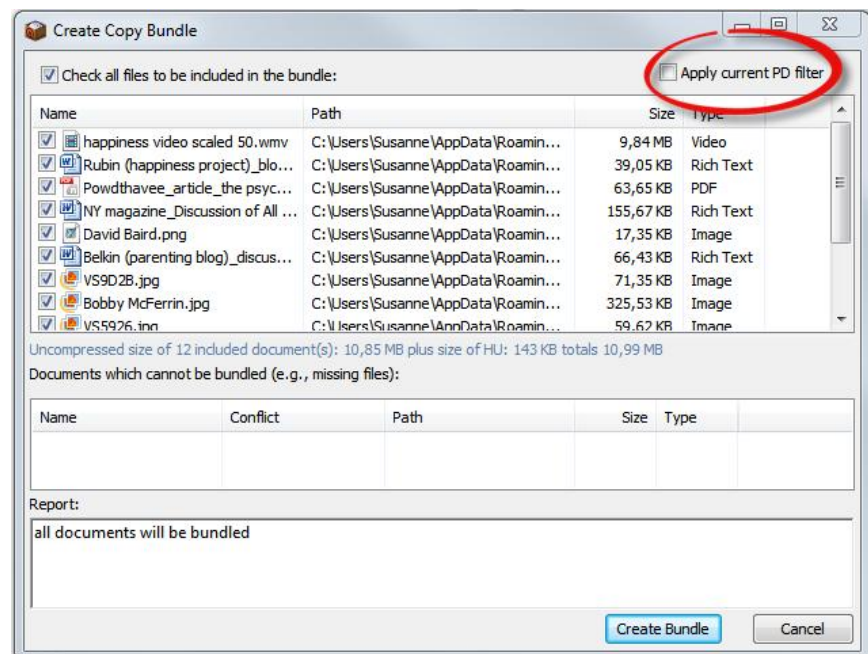
The Create Copy Bundle dialog has a new look:

Figure 50: V7 Create Copy Bundle window

It is now easier to remove documents that should not be included in the bundle by either deactivating the check-marks or by setting a document filter. The filter needs to be set before you open the Copy Bundle window.

Make your selection and click on the **Create Bundle** button. A7 copy bundle files have a new icon and a new file extension (see Figure 51).
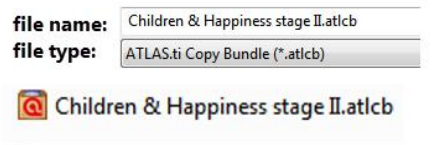

file name: Children & Happiness stage II.atlcb
file type: ATLAS.ti Copy Bundle (*.atlcb)

[icon] Children & Happiness stage II.atlcb

Figure 51: New file extension and icon for V7 copy bundle files

Installing A Copy Bundle File

To install a copy bundle file, select PROJECT / COPY BUNDLE / INSTALL BUNDLE.

The unbundling window has changed only slightly. You find one additional conflict color at the bottom of the window: *Existing file is identical.*
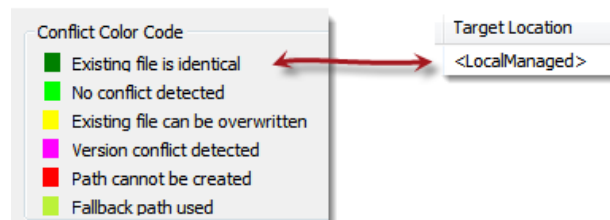

Conflict Color Code
■ Existing file is identical
■ No conflict detected
■ Existing file can be overwritten
■ Version conflict detected
■ Path cannot be created
■ Fallback path used

Target Location
<LocalManaged>

Figure 52: V7 add-on in unbundling window

If a file in the bundle already exists in the library, then you see a dark green square. The Target Location is indicated as <LocalManaged>.

If there are no issue indicated in the status report that need to be solved, as in Version 6 click on the **Unbundle** button to unpack the copy bundle file.

New Code-Related Options

Adding New Codes Made Easy

The menu name for entering a new code word has slightly changed. It is now called: CODING / ENTER CODE NAME(S). Thus, it has become a bit more instructional.

Instead of using the vertical bar (|) to enter more than one code, in V7 you have multiple fields to enter code names.
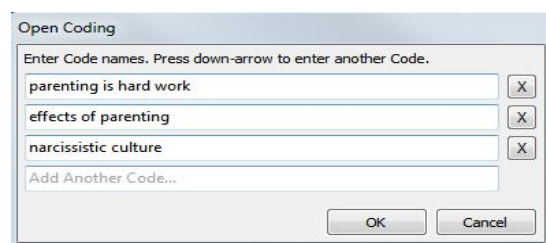

Figure 53: Entering code names

You can either use the down arrow to move one field down or click with the mouse into the next field. When you are done entering code names, click on the **OK** button.

Cloud View For Codes

Select VIEW / CLOUD VIEW to change the display of your code list into a cloud; the higher the frequency the larger the font.

Figure 54: Cloud View for Codes

New Output Option
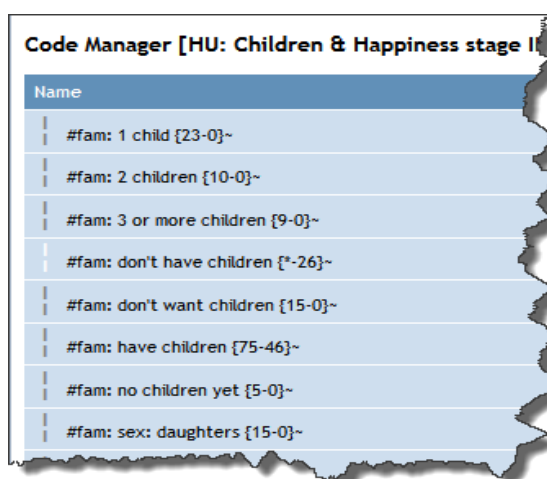
You can now export your code list in detail or single column view to a web browser. If you have selected a specific sort option, this is reflected in the output as well. The resulting html output can be copied and pasted as table into Word or Excel.

In the Code Manager select OUTPUT / OPEN IN WEB BROWSER.

Figure 55: Exported detail view

The web browser output option is available in all Managers under the output menu.

Figure 56: Exported single column view

Further output options are offered by the revised XML Explorer. It for example offers reports that list all code families and their members, codes sorted by primary documents, and so on. See New and Improved Report Options on page 80.

New Multimedia Framework

If you want to try out the new video coding options, open the "Children & Happiness Stage I" via HELP / QUICK TOUR. Load the video primary document "P6: Happiness proverbs of famous people."

If you move the cursor inside the video pane, the media controls appear and you can start, stop and pause the video, skip forward and backwards.

At the right-hand side, preview images are displayed. To create the images, one frame per second is selected. The size is up to 50 x 50 pixels. Next to the preview images you see the audio wave form.

When you add a new video to a project, you do not immediately see the preview images as they first need to be created. Depending on the length of the video this may take a few seconds or up to a few minutes.
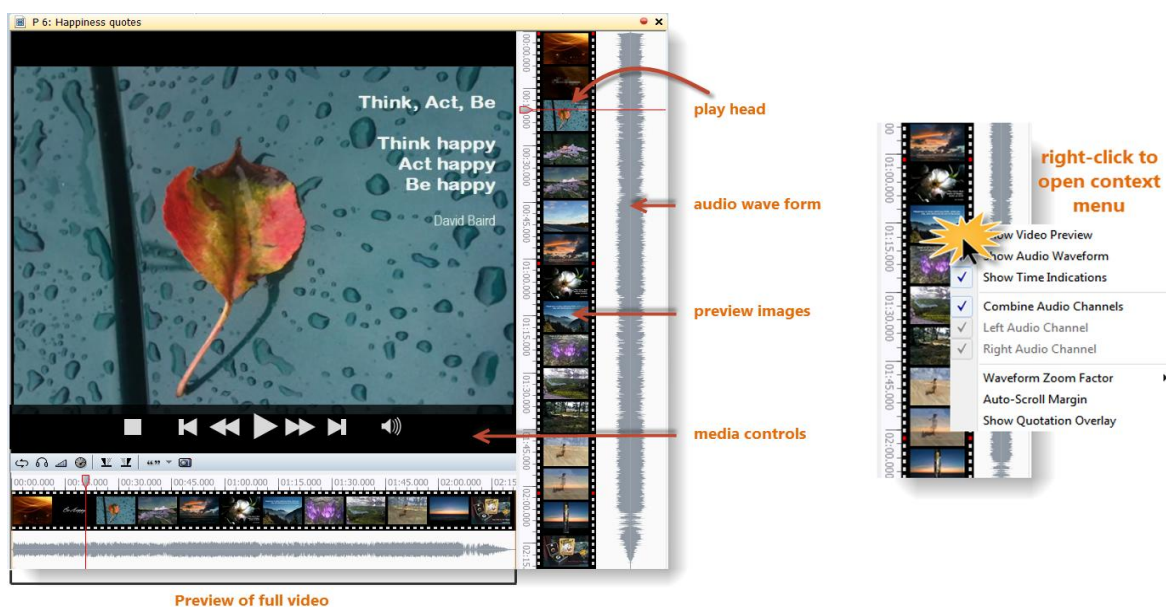
Figure 57: The various aspect of a loaded video document

If you right-click on the video preview, you can set a number of display options in the context menu (see Figure 57).

Two orange sliders that appear when you move the mouse pointer over the full preview let you select just the section of the video that you want to see in the margin area (see Figure 58):
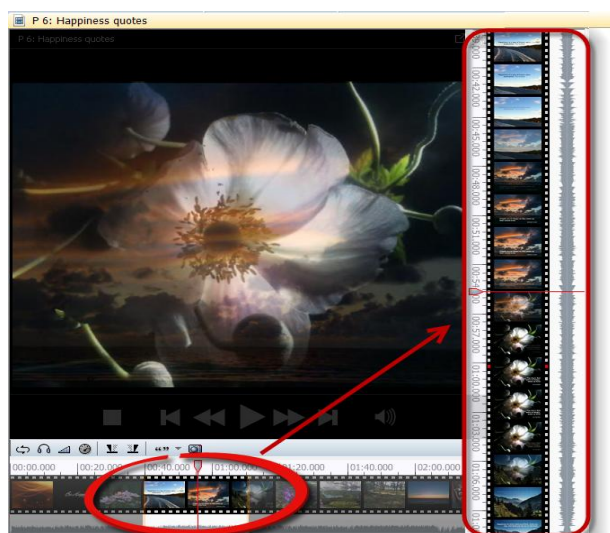
Figure 58: Selecting an area of the video file to be displayed in the margin area

Coding An Audio Or Video Document

To code a video segment, move your mouse pointer on top of the audio wave and mark a section by clicking on the left mouse button where you want it to start. Then drag the cursor to the end position.

Figure 59: Selecting a video segment

If you want to preview your selection click on the "play current selection" button.
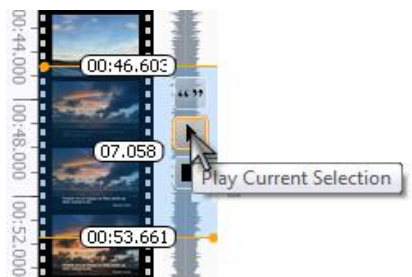
Figure 60: Playing the current video selection

If you do not want to see the time for start position, end position and total length of the highlighted segment, right-click on the preview images and deactivate the option **Show Time Indicators**.

Right-click inside the selection to code the segment (**Coding / Enter Code Name(s)**), for example use the code name "how to achieve happiness".

Figure 61: A coded video segment

A new quotation will be listed in the Quotation Manager with the ID 6:1. The default name for audio and video quotations is the document name. Each quotation can, however, be renamed. Right click on the quotation bar in the margin area or on a quotation in the Quotation Manager and select the option **Rename**.

To play the quotation, double-click on the quotation bar.

If you want to move the play-head to the beginning of an existing quotation, hold down the Ctrl-key and click on the quotation bar.

Figure 62: Positioning the play-head at a beginning of a quotation

Adjusting The Size Of An Audio Or Video Quotation

To adjust or change the length of the quotation, drag the start or end position to the desired place and click on the "modify quotation" button in the vertical tool bar on the left hand side of the scree (see Figure 63 below).

Figure 63: Adjusting the size of a video quotation

You can also use the play-head to adjust the size of a quotation: Position the play-head at the desired position. Hold down the SHIFT-key and double-click on the area above the play-head if you want the start position to change. Double-click on the area below the play-head to change the stop position.
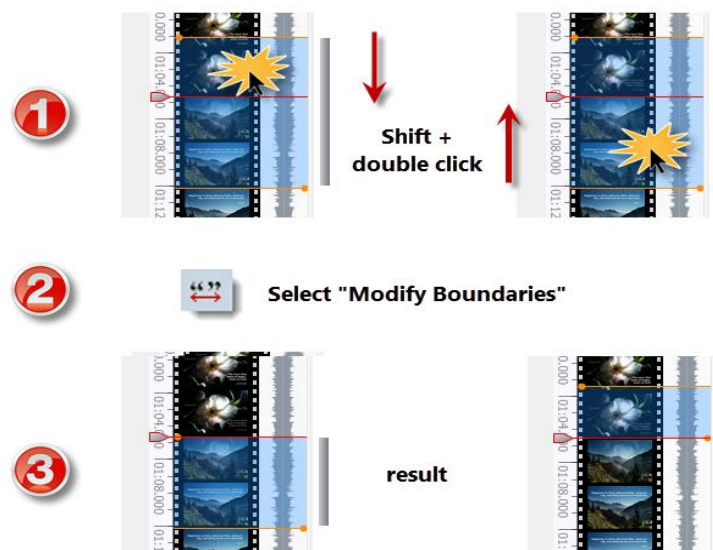
Figure 64: Using the playhead to adjust the size of a video quotation

To modify the length of the quotation, click on the "modify quotation" button.

Improved Coding And Output Of Image & PDF Documents

Load an image document (e.g. P8 or P9), select a rectangular area, right-click inside the rectangle, and select CODING / ENTER CODE NAMES (S) from the context menu. Enter a code name.

Figure 65: Coded image segment

Writing A Comment

To write a comment, right-click on the rectangle and select the option **EDIT COMMENT**. An editor opens.

Write something about your personal association with the image. Press **CTRL+S** or click on the check-mark to save the comment. Close the editor.
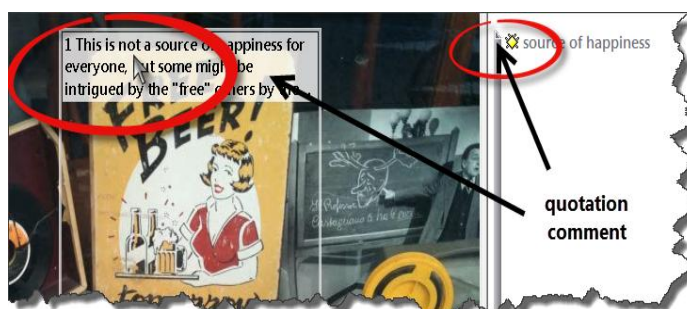
Figure 66: Writing a comment for an image quotation

The quotation number and comment bar are optional display features. They can be turned and off via the context menu.

The look of the quotation bar in the margin area changes if a quotation has been commented. This applies to all media types.

Modifying An Image Quotation

To modify an image quotation, double click inside the rectangle so that you see the green lines and dots at the four corners. The dots act like handles and you can use them to resize the quotation.

Figure 67: Resizing an image quotation

Adjust the quotation to the desired size and then click on the "modify quotation" button on the vertical tool bar (see left).

Output Of Image Quotations

If you output quotations of image files or graphic PDFs, the coded segments are included in the output:

Figure 68: Coded graphic segment in rtf output

Figure 68 shows an example of an output created based on graphic quotations in PDF files. You have to take into account a reduction in quality. But if a document is only available as graphic PDF, then this might be an acceptable tradeoff.

P 6: harvey_cosmopolitanism.pdf - 6:1 [The revival of the science of ..] (@582-@524) (Super)
Codes: [quote]
No memos

The revival of the science of geography . . . should create that unity of
knowledge without which all learning remains only piece-work.
Immanuel Kant

P 6: harvey_cosmopolitanism.pdf - 6:2 [Without a knowledge of geograp..] (@523-@478) (Super)
Codes: [quote]
No memos

Without a knowledge of geography gentlemen could not
understand a [newspaper].
John Locke

P 6: harvey_cosmopolitanism.pdf - 6:3 [Cosmopolitanism and the Banali..] (@752-@693) (Super)
Codes: [quote]
No memos

Cosmopolitanism and
the Banality of
Geographical Evils

Figure 69: Output of graphic quotations in PDF files

Print With Margin—Now Also Available For PDF And Graphic Files

The Print with Margin option (**Documents / Output**) was previously only available for text documents. In V7, you can also use this option for graphic and PDF files (see Figure 70 below).
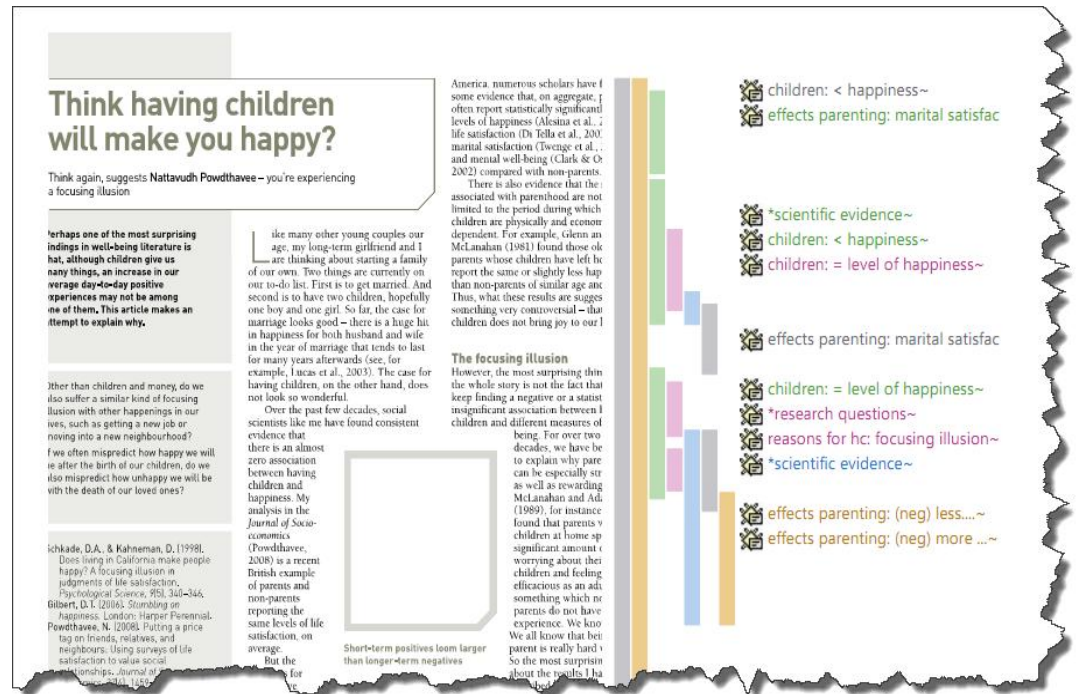
Figure 70: PDF PD: Print with margin

Added Functionality In Managers

The side panels in the managers allow much more immediate access to fundamental activities like selecting families, creating families and super families, and setting local and global filters. This allows a much more effective integration into the work flow and saves a lot of mouse movements and clicks. You will come to appreciate the powerful new side panels very quickly.

Setting Local And Global Filters

On the left-hand side of the V7 managers you see an optional side panel that shows the existing families. To activate / deactivate the panel, select View / Show Side Panel.

The functionality explained below applies to the Primary Document, the Code, and the Memo Manager.
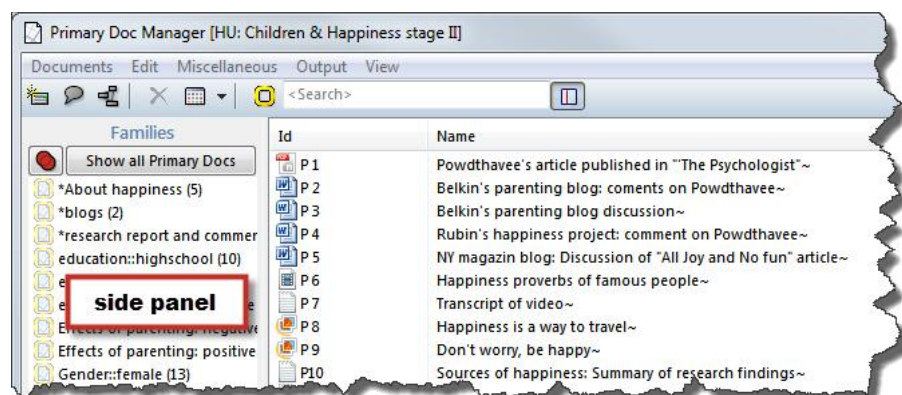
Figure 71: Side panel in Primary Documents Manager

If you click on an object, all families are highlighted that this object is assigned to. For instance, in Figure 72 below, you can immediately see that case 9 has

some college education, is male, single, has no children, reports parenting to have negative effects, but also believes that children bring fulfillment and purpose.
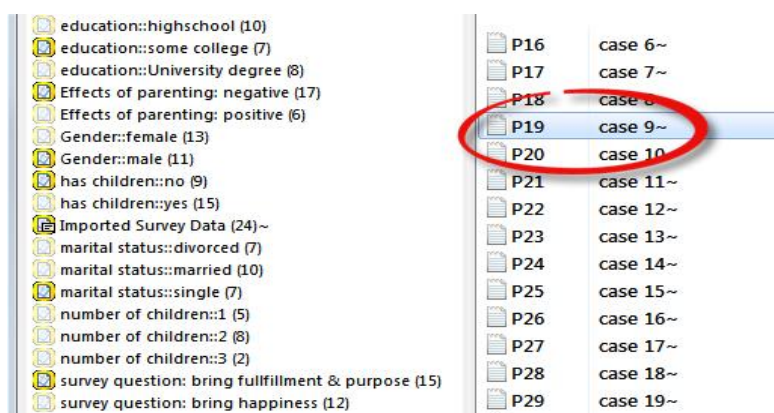
Figure 72: Link between list items and families in side panels

Setting A Local Filter

If you click on a family in the side panel, the list only shows the documents of that family. Note that the family is displayed in bold characters:
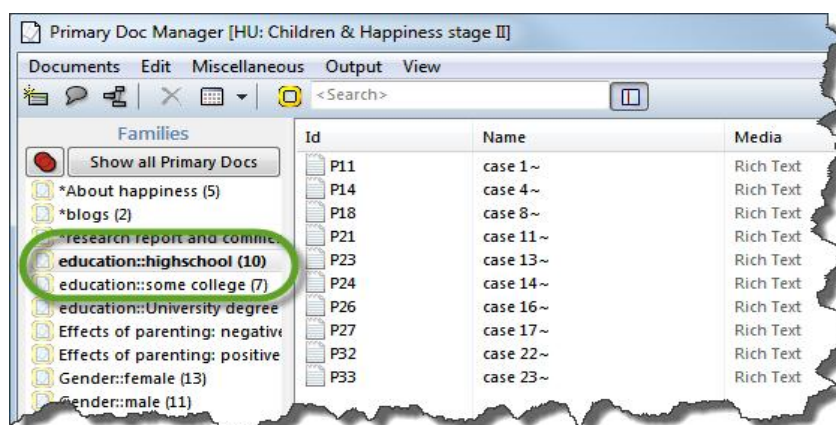
Figure 73: Selecting all cases with education: high school

Just clicking (or double-clicking) on a family in the side panel only has an effect on the items shown in the manager. Thus, it functions as a local filter.

Click on the button SHOW ALL PRIMARY DOCS to reset the local filter.

Creating A Local Filter Using AND And OR

You can make a selection combining the members of multiple families via AND or OR. You can see which one is the currently active operator at the button displayed at the top left of the list of families. The default operator is OR (see Figure 74 below).

Figure 74: AND and OR operators

To change the operator, you can either click on the button, or right click inside the side panel and select the option CHANGE OPERATOR from the context menu.

If you select multiple families in the side panel and the OR operator is active, all items of all selected families are shown (think plus).

If the AND operator is active, only the common items of the selected families are shown (think intersection).

Setting A Global Filter

If you want to set a family as global filter, thus effecting the display of the selected items in the entire HU, right click on a family and select the menu option SET GLOBAL FILTER (see Figure 77 below); or hold down the **Ctrl+Shift** key and **double-click** on a family.

To set a global filter, you can only select one family at a time. If you want to set a combination of families as global filters, create a super family first (see Creating Super Families on page 65)
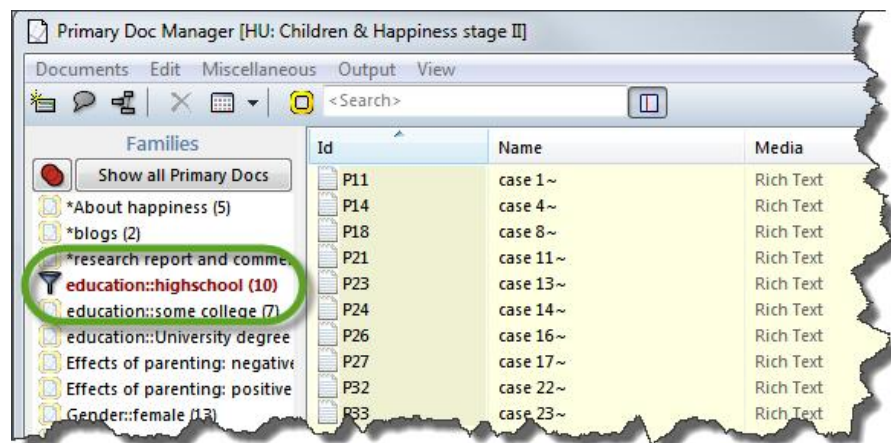
Figure 75: Display of a global filter setting

The family icon is replaced by the filter icon, the name of the family is shown in red characters and the effected lists show a pale yellow background color.

To reset a global filter, right click the family item and select REMOVE GLOBAL FILTER (or **Ctrl+Shift double-click**).

If you have set multiple global filters on more than one manager, use the main menu option **TOOLS / RESET ALL FILTERS**.

Creating Families And Super Families

Creating And Deleting Families

To create a new family, select the codes that you want to include using common Windows selecting techniques (either by holding down the Ctrl- of Shift key).

Drag and drop the selected codes to the side panel, or right-click in the side panel area and select the option NEW FROM SELECTED ITEMS. Enter a name for the new family and click OK.
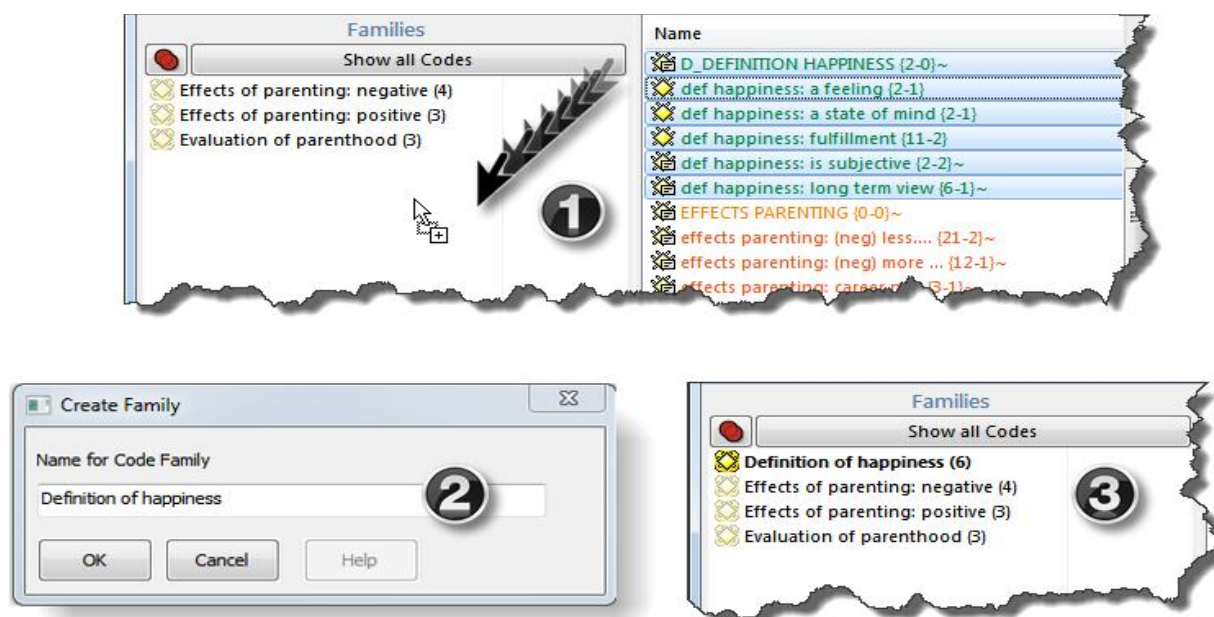
Figure 76: Creating a new family in the side panel

To delete a family, select it in the side panel, right click and select the option DELETE FAMILY.
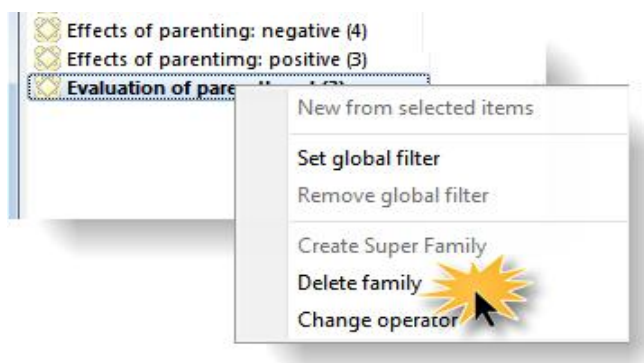
Figure 77: Side panel context menu

Creating Super Families

You can create super families using the operators AND or OR (see Figure 74 above).

If you select the OR operator, all items of all selected families are included in the new a super family (plus).

If you select the AND operator, all common items of the selected families are included in the new super family (intersection).

To create a new super family, select the desired operator first. Click on the operator button, or right-click in the side panel and select CHANGE OPERATOR.

Next select the families that you want to combine.

Right-click and select the option CREATE SUPER FAMILY from the context menu (or hold down the **Ctrl**-key and click on the operator button).

New Data Analysis Options

To follow the explanations from this point onward, open the pre-coded sample project entitled "Happiness & children: Stage II."

Word Cloud View In Word Cruncher

From the main menu, select Analysis / Word Cruncher / Word Cloud on Selected PD or Word Cloud on current PDs.
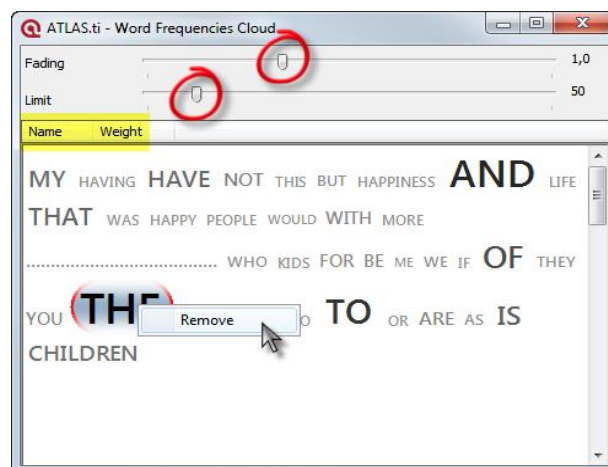
Figure 78: Word Frequency Cloud

Fading fades out the less frequent words and they appear in a lighter gray.

With the slider **Limit**, you can select how often a word need to occur to be displayed in the list.

Right-click on a word to remove it from the view. The display will be adjusted accordingly.

Switch the sort order by name or weight by clicking on either the name or the weight tab.

Improved Coocurence Table Explorer

As you know, the Cooccurrence Explorer allows to ask ATLAS.ti to show you all codes that co-occur across all of your primary documents. The result is a cross-tabulation of all codes.

Instead of cross-tabulating all project codes, it is often more meaningful to apply filters for certain codes and documents in order to concentrate on a more specific set of concepts. The new side panel options allow you to quickly prepare the kind of filters you need in order to produce the kind of tables you want.

A special code family as been prepared in the stage II example project in order to find out how parents and non-parents respond to the question of why or why not having children. The family contains the two attribute codes (#fam: has children and #fam: no children) plus all sub codes of the two categories "reasons for having children" and "reasons for not having children".

If not already opened, open the Code Manager and set the code family "for Quick Tour: Coocurrence Example" as global filter (see Setting local and global filters on page 61).

From the main menu select ANALYSIS / CODE COOCCURRENCE TABLE.

Next you need to select which codes should be displayed in the rows and
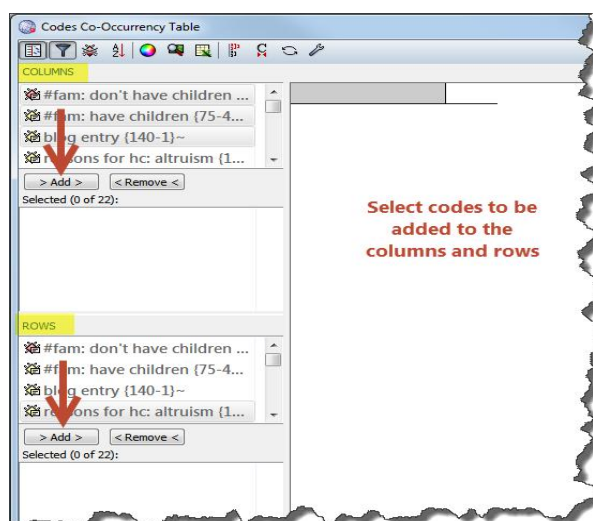
Figure 79: Selecting row and column codes

which in the columns:

Select the first two codes: "#fam: don't have children" and "#fam: have children"" as columns and all other codes as rows.
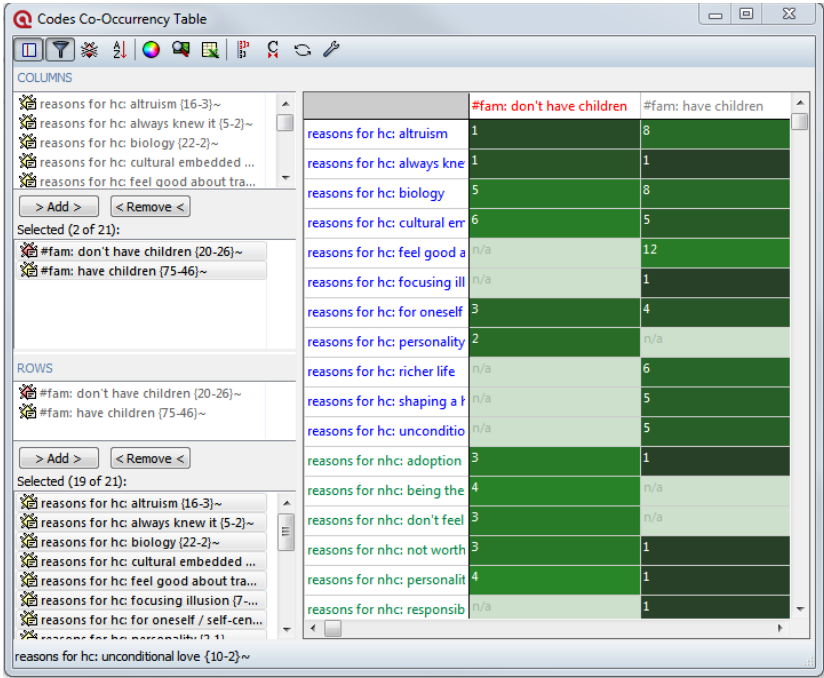
Figure 80: Result of cooccurence query

Take a look at the results.

New Preference Settings

The preference settings allow you to set the column and row header width and to set the code colors as header background.
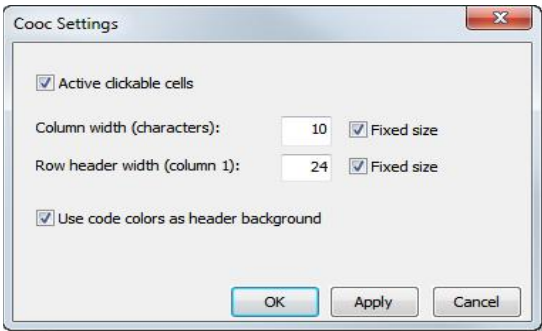
Figure 81: Code Cooccurence Table preference settings

The following table shows how you can alternate the look of the table by changing the settings:

	#fam: don't have children	#fam: have children
reasons for hc: altruism	1	8
reasons for hc: feel good about trade-of	n/a	12
reasons for hc: for oneself / self-centere	3	4
reasons for hc: personality	2	n/a
reasons for hc: richer life	n/a	6
reasons for hc: shaping a human life	n/a	5
reasons for hc: unconditional love	n/a	5
reasons for nhc: adoption	3	1
reasons for nhc: being there for others	4	n/a
reasons for nhc: don't feel the need	3	n/a
reasons for nhc: not worth the trade-off	3	1
reasons for nhc: personality	4	1
reasons for nhc: responsibility	n/a	1
reasons for nhc: self-centered	3	1
reasons for nhc: state of the world	4	n/a

Figure 82: Settings: No color for table cell; use code color as header background

Improved Codes-Primary-Documents-Table

In V6, the Codes-PD-Table provided an overview of code frequencies by documents. If one wanted an aggregated view, e.g. based on PD families or code families, one had to use Excel to calculate the numbers. Now, ATLAS.ti lets you choose codes and code families, primary documents and primary document families to be displayed in either rows or columns.

To try out the new options, let's compare statements that express either a positive or negative effect of parenting across different groups. For this purpose two code families grouping all codes about positive and negative parenting effects have been created.

To open the tool, select ANALYSIS / CODES-PRIMARY DOCUMENTS TABLE from the main menu. You also still find the option at its previous location under CODES / OUTPUT.

Before running the next analysis, remove the global filter that is still set: Select TOOLS / RESET ALL FILTERS.
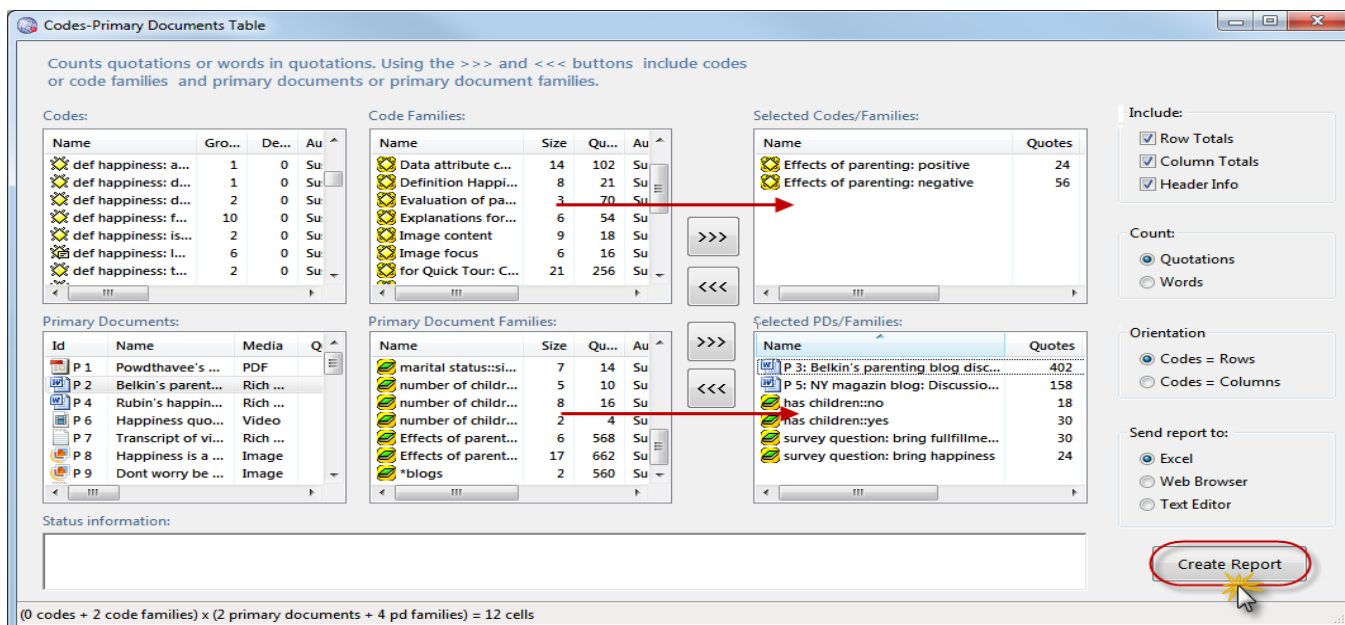
Figure 83: Setting options for the Codes-Primary-Documents-Table

Select these two code families "Effects of parenting: positive" and "Effects of parenting: negative" from the list.

Select the following documents and document families:

- P3: Belkin's parenting blog discussion

- P5, the New York magazin blog discussion

- survey respondents with children

- survey respondents without children

- survey respondents that answered the question about happiness with either: "children bring happiness" or "children bring fulfillment"

On the right hand side of the window, set the options as shown in Figure 83: Count: Quotation / Orientation: Codes – Rows / Send report to: Excel.

Click on the button **Create Report**.

Before the table opens in Excel, you will be asked to convert the exported results. Confirm the message.

	P 3: Belkin's parenting blog discussion	P 5: NY magazin blog discussion	has children no	has children yes	survey question: bring fullfillment & purpose	survey question: bring happiness	TOTALS:
Effects of parenting: negative	23	13	4	8	9	5	62
Effects of parenting: positive	16	4	2	2	3	1	28
TOTALS:	39	17	6	10	12	6	90

Figure 84: Formatted Excel output of a codes-primary-documents-table

Across all groups, we find more negative than positive statements. While coding the data, this was apparent. But at the same time, an other interesting observation was that explanations on the hard part of being a parent was almost immediately followed by a "but". This resulted in the following five codes: HARD WORK BUT... / hard work but: a worthwhile trade-off / fulfillment / joy / rewarding. These five codes were grouped to a code family called the "the BUT group".

Looking at the above results, the immediate next idea is to compare those people who expressed negative effects and those who expressed positive effects on the "BUT" codes. The query tool allows to create document families based on the results of a code query. These have already been created in this sample project.

So, the next table you can run is a table based on the codes from the BUT group comparing respondents that have reported positive or negative effects of parenting. Overlaps may possible exists, but these can be dealt with in later stages of the analysis.

Select the four sub codes as rows: hard work but: worthwhile trade-off, hard work but: fulfillment, hard work but: joy, hard work but: rewarding.

Select the two primary document families as columns: Effects of parenting:

Figure 85: Comparing respondents who reported positive or negative effects of parenting in relation to the "BUT" codes

negative and Effects of parenting: positive.

The result table shows no difference between the two groups. Now it is up to you to interpret the findings. You are already in the midst of the analysis. Based on the information provided in the Excel tables, you can go back to the data in ATLAS.ti, read the responses behind the numbers, begin your interpretation and start to write analytic memos.

	Effects of parenting: negative	Effects of parenting: positive	TOTALS:
hard work but: a worthwhile trade-off	6	6	12
hard work but: fullfillment	6	5	11
hard work but: joy	8	8	16
hard work but: rewarding	8	7	15
TOTALS:	28	26	54

Figure 86: Comparing different groups of respondents

If you are interested in more ideas to explore the new analysis options, including the new possibilities provided by the Network View editor (see below), open the Memo Manager and look for the memo RQ4: Ideas for further issues to explore.

Network Views Reloaded

Visualization can be a key element in discovering connections between concepts, interpreting your findings, and effectively communicating your results. Network views in ATLAS.ti allow you to accomplish all three of these important objectives. These small segments of your larger web of analysis are modeled using the Network View Editor, an intuitive workspace that we also like to think is easy on the eye.

Previewing Network Views

The network view manager offers different views. One of them is a Tiles view. With preview sizes set to Large, Extra Large, Jumbo or Godzilla, the standard icon turns into images.

• Open the Network View Manager (**Networks / Network View Manager).**

• Select **View / Tiles** and then **View / Preview Size: Jumbo**. Or try out other sizes.
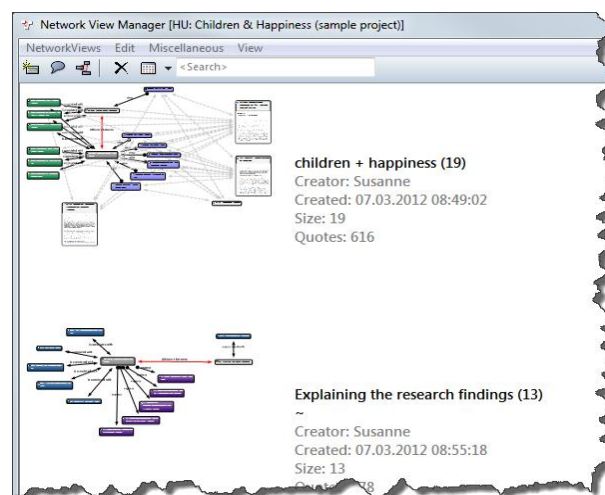
Figure 87: Preview images of network views in the Network View Manager

Exploring A V7 Network View

The next exercise requires that we work with data in a later stage of analysis, i.e., a project file that already contains some codes. Thus, we need the stage II project again. If not still open, click **HELP** on the main menu and select the project "Children and Happiness - stage II" from the **QUICK TOUR** submenu.

Click on the main menu option **NETWORKS / NETWORK VIEW MANAGER**. Select one of the network views.

To get a feeling for the new network editor, move a few items around, highlight a group of objects and move them, resize single nodes.

If you select a node, you see a red dot at the top left corner. This is the new linking point.

Linking Nodes

To link two nodes, lick on the red dot with with the left mouse button and drag the mouse pointer to the code that you want to link (see Figure 88).

Figure 88: Linking nodes

Release the left mouse button on top of the node and select a relation.

Full Images For PDs

Seeing full images for PDs is now easier to activate and deactivate via the Display menu. It also applies to all documents. Take for example a look at the network view "Hyperlink web looking at sources of happiness".
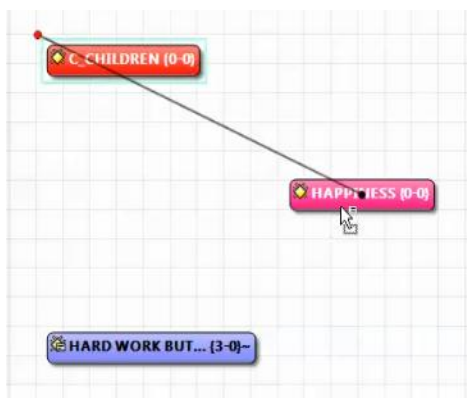
Select the **D**ISPLAY menu and then activate / deactivate the option **F**ULL **I**MAGE FOR **PD**S to see the effect.

Using Network Views As Analysis Tool (more Often)

Global Filters Affect The Import Of Cooccuring Codes

In V7, filter settings have an effect on network views. Previously if you used the option import cooccuring codes, all cooccuring codes were imported. This resulted in pretty pictures but most often not in meaningful results.

If for instance you are interested in what people who have children and those who do not have children think about sources of happiness, you can do the following:

Add the code "#fam: have children" to a new network view.

Set the code family "Sources of happiness" as global filter.

In the network view right-click on the inserted code and select the option **I**MPORT **C**OCCOURING.

Now only the "Sources of happiness" codes are imported. The links that you see between the codes have previously been created manually.

Repeat the steps with the super code #fam: don't have children" and compare the outcome. To create the network view shown in Figure 89, all codes were added to one network view. This however can only be done after linking the related codes.

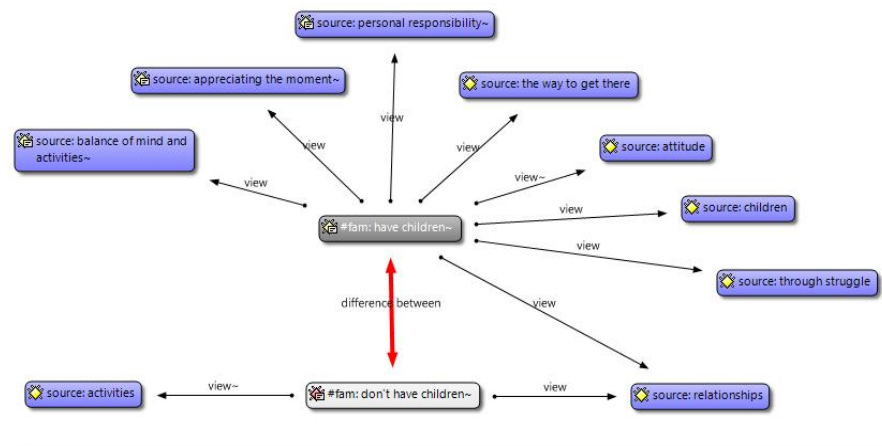*Figure 89: Differences between parents and non-parents with regard to their views on sources of happiness*

Global Filters Can Be Used To Fade-Out Objects

If you set a global filter and click on the filter icon in the Network View editor, all objects that are not included in the filter are faded out. This is best demonstrated by way of example in the figures below:
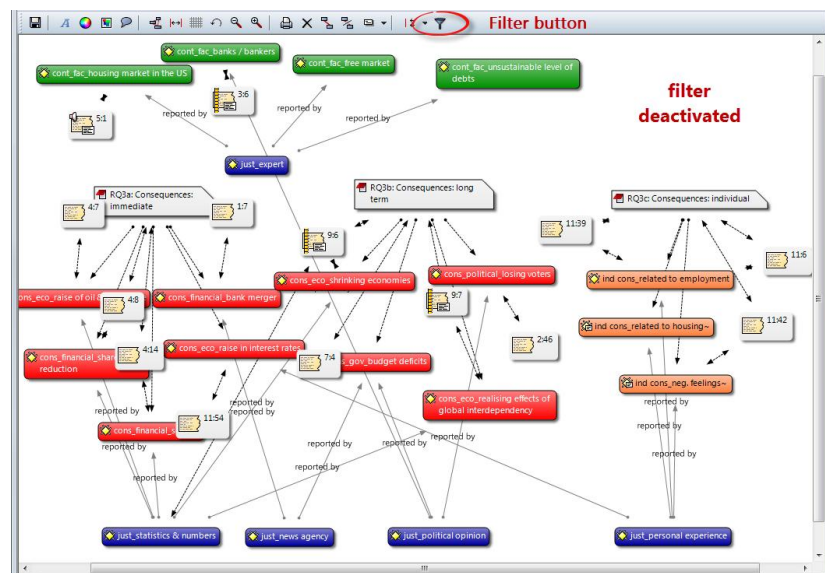
Figure 90: The full network view without active filter
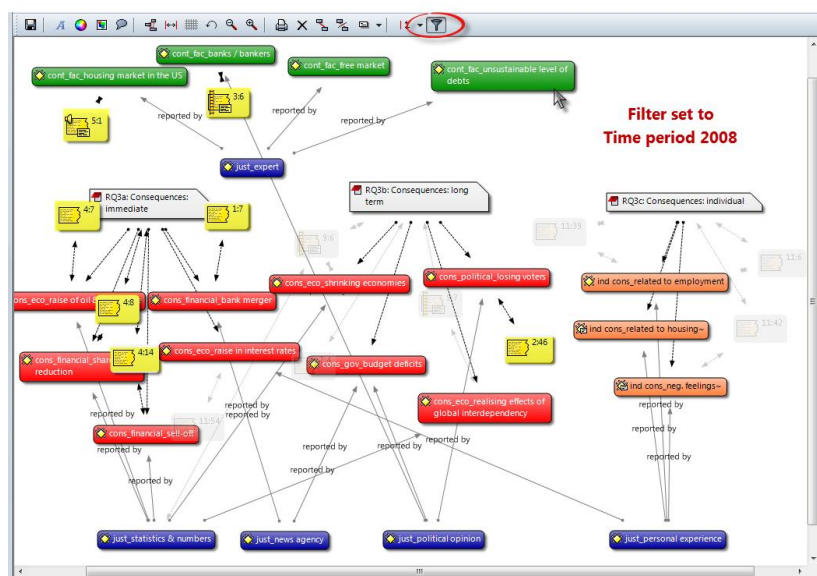
Figure 91: PD family filter is set: All quotations that are not from 2008 are faded out

In Figure 91 above the filter is set to the PD family "time period 2008" and thus only those quotations are shown that occur in primary documents from 2008. All other quotations are faded out.

In Figure 97 below, the reverse is true. You see all quotations from documents included in the PD family "time period 2009" and all other quotations are faded out.
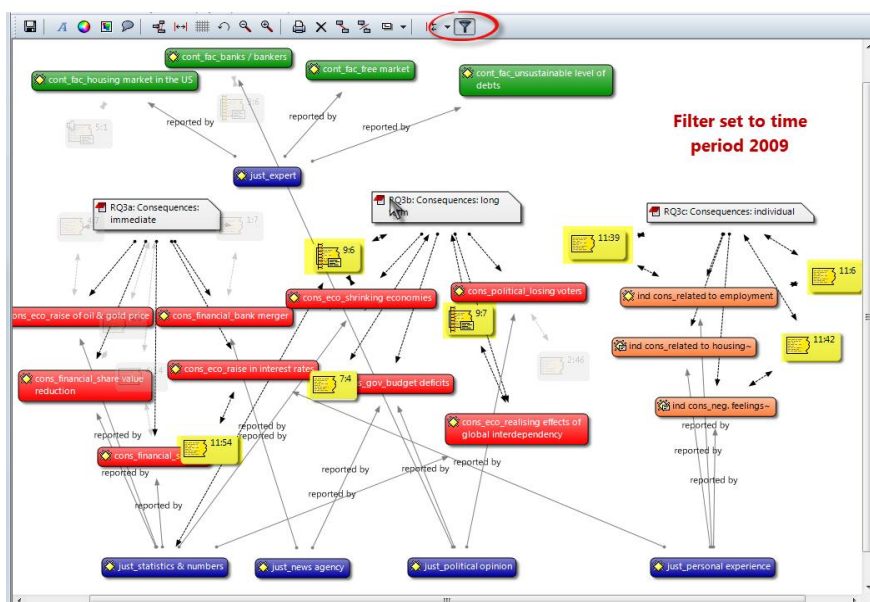

Figure 92: PD family filter is set: All quotations that are not from 2009 are faded out

If you set other filters, e.g. a code family, then all but the codes of that family are faded out. This works for all filters in the same way.

Improved And Extended Import Neighbor Function

V6 already offered an import neighbor function, but it did not differentiate by objects. The only option you had to control the import of neighbors was by holding down the Ctrl-key, so that only the object of same kind were imported.

In V7, the Import Neighbor menu is object sensitive. Below the options for the various objects types are listed, whereby common neighbors always refers to the directly linked objects:

Quotations

- Import common Neighbors

- Import Codes

- Import Memos

- Import Hyperlinks

Documents / Codes / Memos

- Import common Neighbors

- Import Codes

- Import Memos

- Import Quotations

- Import Families

Families

- Import Neighbors (i.e. family members)

The option to import codes for document nodes allows to create case-based network views. Further you can ask questions like: Which of the codes have been applied in which document (and where do they not occur). ATLAS.ti automatically draws light gray lines between codes and the primary documents.

The network view "Hyperlink web looking at sources of happiness" provides an example. What can be nicely seen is that statements that support the view that one is personally responsible for one's own happiness are mainly coming from the blogs (P3 and P5). They contradict the view that relationships might be a source of happiness as well, which however is supported by scientific evidence (P10).

Or take a look at the network view "Survey results for having / not having children by gender". Deactivate the option DISPLAY / FULL IMAGE FOR PDS. The gray lines between documents and codes show which of the codes apply to female or male respondents, which to both. On the left-hand side in green you see codes related to "reasons for having children" and on the right-hand side in blue, you see codes related to "reasons for not having children."
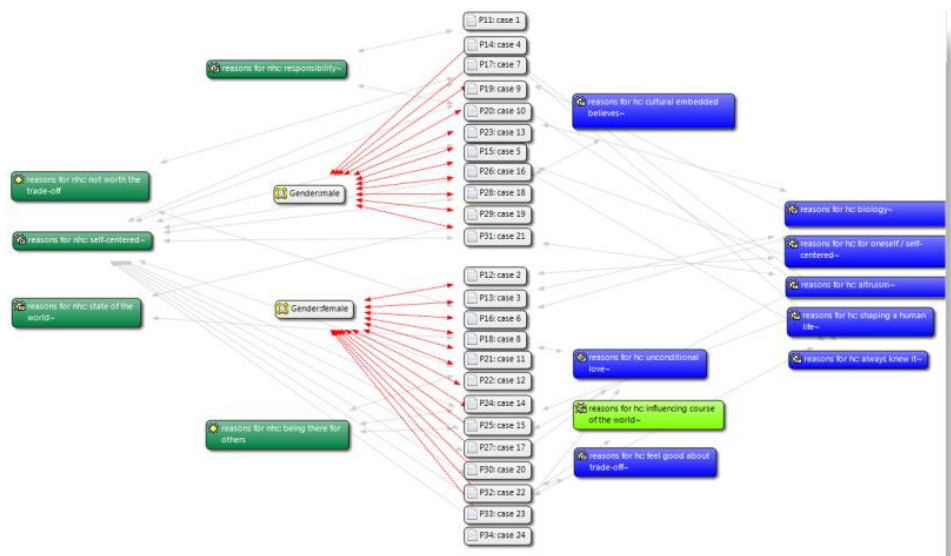
Figure 93: Example for the use of code-PD links

High Quality Network View Export

Network Views can be exported as graphic files and inserted into other applications. Or you can copy and paste them straight into MS Word or PowerPoint files. This has already been possible in Version 6, but the quality of the output was not as good. Try it out.

To save a network view as graphic file, select **Network / Save as Graphic File**.

To paste a network view into other documents, select **Network / Copy to Clipboard** (then all nodes, or only the selected ones). In Word or another application, select the **Paste Special** option to insert it.

New and Improved Report Options

ATLAS.ti offers a number of reports via flexible XML/XSLT style sheets. If you are skilled in XSLT, you can create any output you like based on the raw XML file of your ATLAS.ti project.

To create a raw XML file, click on the XML button in the tool bar and then select the option EXPORT HU TO XML.

For all others, we have put together a selection of useful reports. Click on the XML button, or select PROJECT / EXPORT / XML EXPLORER.

The Explorer divides the available style sheets into three groups: Reports, Viewers, and Programming/Demos:

- **Reports** offer a number of predefined reports sorted by Codes, Families, Memos, Network Views, Primary Documents and Quotations.

- **Viewers** include style sheets that offer various display forms for the HU.

- **Programming /Demos** provide style sheets that may inspire and help you to write additional style sheets on your own to create just the report you want.

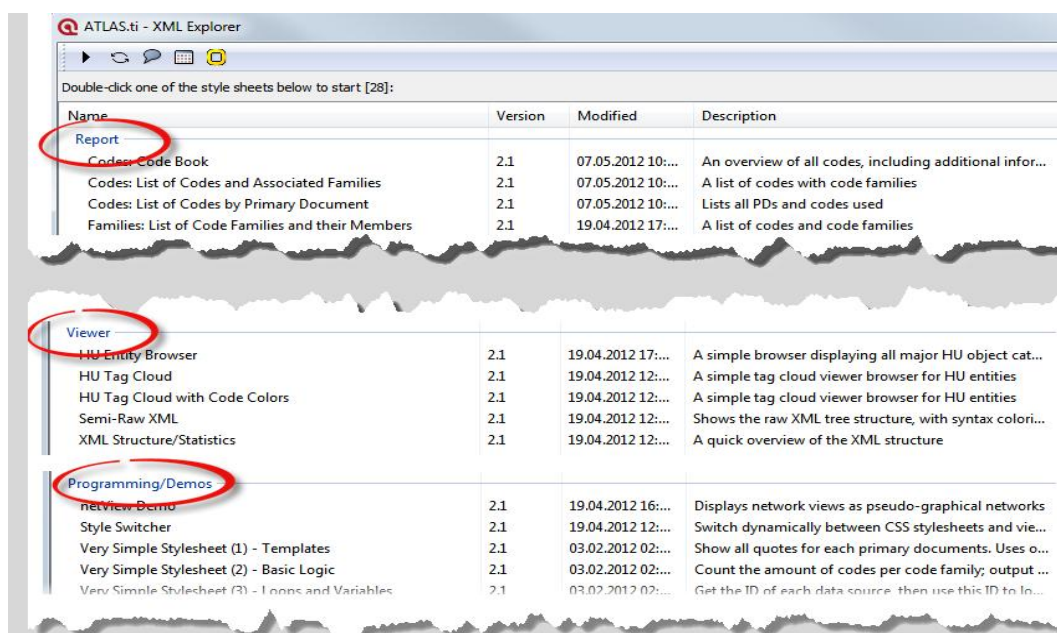*Figure 94: XML Explorer*

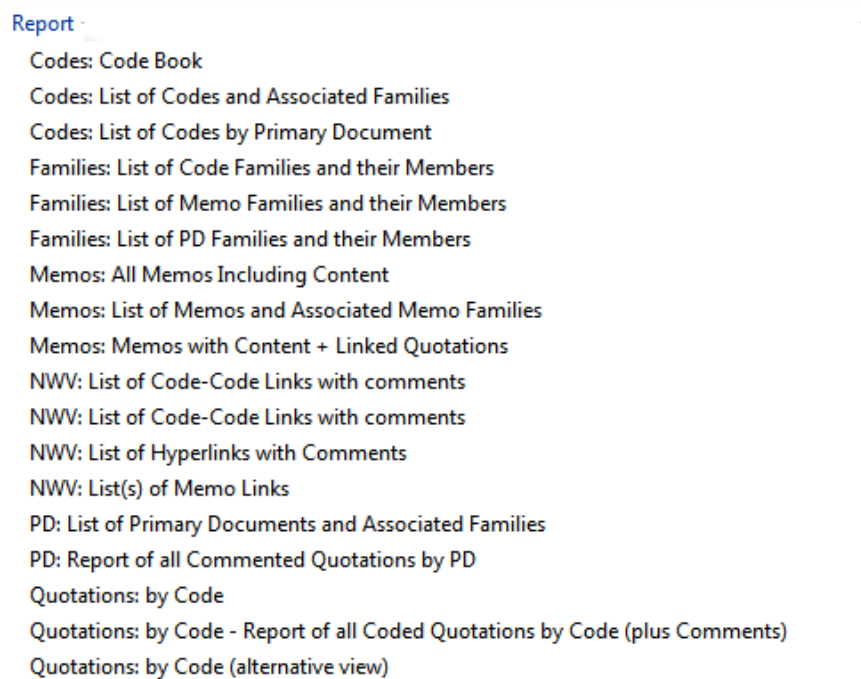The following predefined reports are available:

Figure 95: Available Reports

If you click on a report, a short description is provided in the comment field at the bottom of the XML Explorer window

How To Create A Report

Select one of the reports and double-click.

A window opens offering the following three export options:

Figure 96: XML export options

The last option (also include quotations contents (as plain text)) exports the full content of the HU. This is however not always needed.

For exporting a code book, for instance, you only need to export the code names and comments. Therefore, selecting the first export option:**Do not include Primary Documents** is sufficient.

If you have selected the wrong option, this will be indicated in the report.

To create a Code Book:

Double click on the report: Codes: Code Book.

Select the first export option: **Do not include Primary Documents.**

Then wait for your browser to open (see Figure 97).

Coding: Code Book

Number of Codes: 141, commented: 96

Code Info		Comment	Author
EX: EXPLANATION	■	explanations why numerous studies have found a negative correlation between having children and happiness / life satisfaction / well-being	Susanne
ex: attitude	■	[no entry]	Susanne
ex: narcistic culture	■	[no entry]	Susanne
ex: salient experiences	■	this code needs to be considered in relation to the issue whether it is really happiness that is important to look at - thus asking the right question	Susanne
ex: self-delusion	■	explaining the findings with the self-delusion argument	Susanne
ex: work-life balance	■	explaining the findings with an imbalance between work and life due to children	Susanne
ex: wrong expectations	■	[no entry]	Susanne
GIVE	■	What children give	Susanne
give: joy	■	children give joy	Susanne
give: purpose and meaning	■	children give purpose and meaning to life	Susanne
give: special moments	■	The special moments that you have with kids make it worthwhile the effort	Susanne
HAPPINESS	■	[no entry]	Susanne
Happiness - Joy	■	this code is used when the difference between happiness and joy is debated.	Susanne
Happiness: effect of wanting children	■	or different outcomes than happiness - the point here is whether there are differences when there is a strong desire to have kids	Susanne
Happiness: is not the key	■	statements where people express that happiness is not the key question when it come to decide whether to have a child or not	Susanne

Figure 97: Code book report

Even Easier Installation and Updating

System administrators will appreciate new support for silent/unattended installations. Service packs and updates can now be deployed via .msi installer —a huge advantage for large pool installations.

Final Considerations

This concludes the overview of changes and innovations in ATLAS.ti 7. While this document touched upon the most central innovations and provides fairly detailed instructions on how to use most of various new features, you will find that the majority of them will be learned quickly and intuitively simply "by doing, "i. e., things will quickly fall into place once you start actually using the new program version. Ultimately, this is no coincidence, since ATLAS.ti 7 was developed with actual users and the way they actually work—and the results they expect from their QDA tool—in mind.

So, after reading through the information in this document, the best advice is simply to delve in and start putting ATLAS.ti 7 to good use in your work!

We thank you for taking the time to get to know this latest incarnation of our product and hope that the above instructions prove helpful in your transition to ATLAS.ti 7. We are convinced that version 7 is the best ATLAS.ti ever and once again pushes the envelope, if not sets new standards, for contemporary qualitative analysis software.

> Of course, if you have additional questions or problems, you can always contact our friendly and competent support: http://support.atlasti.com. We will be happy to help!