

ATLAS.ti 6

What's New in v.6.2



Software for qualitative data analysis,
management, and model building.

Contents

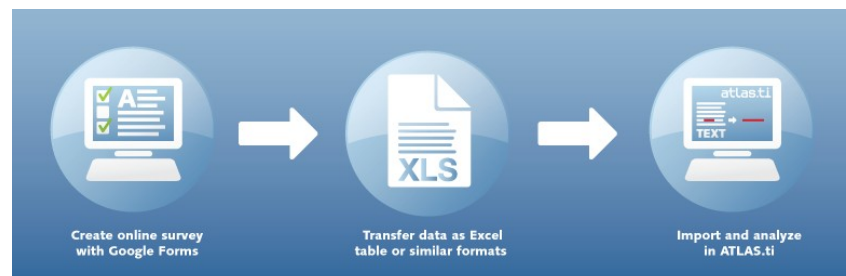
Survey Data Import.....	3
How survey data is treated in ATLAS.ti.....	3
Concept Mapping.....	4
Creation of documents.....	5
Long names.....	5
When to apply the prefixes?.....	5
When creating the online-survey.....	6
By editing the Excel table.....	6
How to.....	6
Families.....	6
PDF Reloaded.....	7
Compatibility and Performance.....	7
Compatibility.....	7
Performance.....	7
Look & Feel.....	7
Continuous and Single Page Mode.....	7
Page up and down.....	8
Selections.....	8
Tools.....	8
Bookmark Navigator.....	8
Thumbnail Scroll Preview.....	9
Conversion of old PDF PDs.....	9
Preferences.....	9
User Interface.....	10
The Margin.....	10
The Drop Downs.....	10
The Network Editor.....	10
Embedded Documents.....	12
Font Themes.....	13
The XML-XSL Converter.....	14
Network Editor.....	15
Drag & drop FROM the network editor.....	15
All kinds of families.....	15
Rounded rectangle nodes.....	16

Survey Data Import

Imagine converting the results of a large online survey into a Hermeneutic Unit in ATLAS.ti with just a few mouse clicks?

A typical work flow now looks like this:

1. Create an online survey using Google Docs (a very convenient option, though other frameworks are available)
2. Download and store the survey as an Excel table
3. Import the table into ATLAS.ti
4. Voilà: Each row (= one respondent) becomes a primary document, and content is collected and created from the answers to open-ended questions. PD families are created from single and multiple-choice questions; quotations are created for each answer and coded with the respective question (you may use abbreviations). This accomplishes a lot of tedious pre-coding in a few seconds.
5. Now you can get started with what really matters: Your analysis!



How survey data is treated in ATLAS.ti

There are different ways of transferring the results of a survey into an analysis software. The most sophisticated read and interpret a survey's definition and use this specification to import the bulk of the survey data. However, for now we take a less complex approach which does also work with simpler survey tools, or, even simpler, with **any Excel table** that contains meaningful data.

To represent the results of an online survey within the framework of ATLAS.ti in the most accurate and complete manner, a few basic requirements need to be considered.

A survey broadly consists of

- the name of the survey
- the questions
- the answers for each respondent

Questions can be of different type:

- single choice between two (yes/no) or more options
- multiple choice
- open ended

Concept Mapping

Within the framework of ATLAS.ti these concepts are mapped as follows:

Survey Concept	ATLAS.ti Concept
Open-ended question	Code
Single Choice 0/1	PD Family
Single Choice > 2 options	PD Family from Question plus Value
Multiple Choice	PD Families from Question plus Value

Each row of the Excel™ table that is imported from the online survey tool is transformed into a primary document.

Depending on the type of field, codes, quotations, author, comment, families are created. The first row is reserved for the field names containing the questions enhanced by the type prefixes listed below. *Note: If you import the same table repeatedly, rows with already existing PDs are ignored.* This way, you do not have to wait until the last respondent has filled out the questionnaire.

Column Control via Field Name Prefixes	
Prefix	Result
!	this column defines the primary document's name
~	this column defines the primary document's comment
^	this column defines the primary document's author
&	this column defines the primary document's date. Expects ISO8601 format
<	Ignore this column. Use this to exclude stuff inserted by the survey tool
.	PD Family from the field name. Currently, the cell needs to contain one of 1, yes or ja to be applied.
:	PD Family from the field name plus the actual cell value
#	PD Families from field name plus values

Now how do I make a question be interpreted as open-ended? Quite simple: every field name (question) that has no prefix is an open-ended question by default.

A Sample Table:

!caseId	&dateTime	^Name	.Academic	.Army::Did you serve?	:Sex	#Favorites::What bands do you listen to regularly?	Tell us a dream	Open End::Now how do I make a question be interpreted as open-ended?
case 1	20100414T120000	Fritz	0	1	male	beatles, stones	I was walking on the roof of a 12-story building ...	This is a longish response to a question that may elicit loooong answers
case 2	20100415T171000	Mary	1	0	female	stones, yes	I am sorry, I don't remember any dreams at all.	Quite simple: every field name (question) that has no prefix is an open-ended question by default

By importing the sample table above we get:

- the name, date and author of the resulting PD
- two dichotomous families Academic and Army
- two families Sex::male and Sex::female
- four families Favorites::beatles, Favorites::stones, etc
- two codes "Tell us a dream" and "Open End"

Creation of documents

During the import of an Excel™ table exported from a survey tool, one primary document is created from every row. Unlike "normal" PDs who get their contents from files, these primary documents need to have their content (data source) created as well. These data sources are embedded within the HU. The creation of the textual contents is done as follows: Each row is scanned from left to right, column by column. Each cell's content belonging to an open-ended question field is appended to the currently built document (case). In addition, each piece of appended text is also referenced as a *quotation* automatically coded with the current question (in the column's field which is the cell in row 1).

Long names

While questions can be very long, they do not meet the crispness requirement for code names. To get codes with meaningful but short names without cutting down the original question you can use the :: separator:

Open End::Now how do I make a question be interpreted as open-ended?

This creates a code named *Open End*. The text following the separator becomes the comment of this code, so that the complete question is still accessible (e.g., in the margin area via a mouse double-click).

The same can be applied to family names (both dichotomous and multiple-choice). Just prefix the response option with the :: separator.

When to apply the prefixes?

Unless all columns contain responses to open ended questions, you should mark up the field names prior to importing the table into ATLAS.ti. If you don't, all responses will be concatenated in the document, and all field names will become codes.

When creating the online-survey

By inserting the prefixes directly into the definition of the survey you have the benefit of being able to export Excel tables that do not need further editing. Just wait for responses, download, and import.

The drawback is that such early applied mark-up also displays in the online survey interface and your respondents might wonder about the funny characters at the beginning of questions. If you make use of the abbreviation feature using :: you may need to give some thought as to how you formulate your questions:

#Favorites::What bands do you listen to regularly?

This may be an acceptable clutter of the interface. If you plan to use abbreviations for options, this is the only economical way to go.

By editing the Excel table

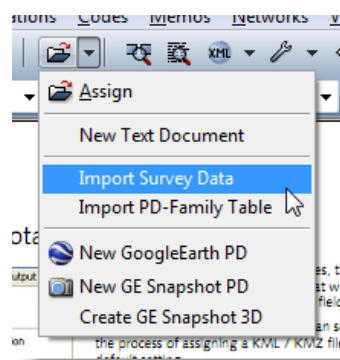
Editing the downloaded Excel table prior to importing into ATLAS.ti has the advantage of not displaying unusual formatting characters to the user.

A drawback is that you need to do this every time you download the table, for instance, because you are checking incrementally, and not all respondents have filled out the questionnaire yet. Another disadvantage is that you cannot easily use abbreviations for response choices as this would mean going into every cell as opposed to every field (which is row 1 only).

Of course, when all you have is "legacy" data in tables, this is the only option you have.

How to

Choose Import Survey Data from the Assign menu in the tool bar or the Documents menu. Alternatively you can choose Extras|Import|Excel Survey Data from the HU Editor main menu.



Families

Special families are created for all imported PDs and codes to make filtering for the survey material easy.

PDF Reloaded

A considerable amount of work has gone into revising the current PDF processing engine which—while still being the only native PDF implementation in a QDA program—we nevertheless felt could use a few aspects to be further improved. You will notice significant changes in regard to compatibility, speed, display, and bookmark navigation, to name only the most important.

Compatibility and Performance

Compatibility

ATLAS.ti can now handle PDF documents up to version 1.7 (ISO 32000, Adobe Acrobat 8). This should cover virtually all existing documents.

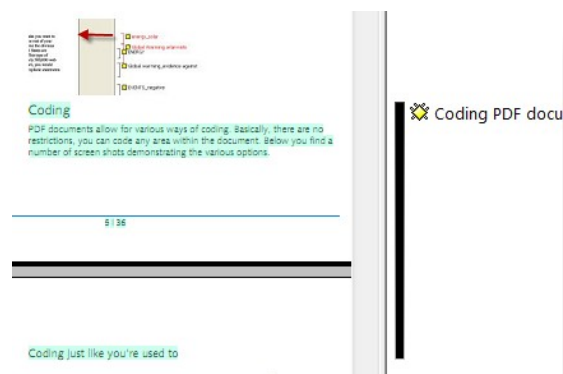
Performance

You will definitely note a difference when loading, scrolling and searching through PDF documents now. Smooth scrolling, cross-page quotations, and significantly faster search (and auto coding) will make your life even easier.

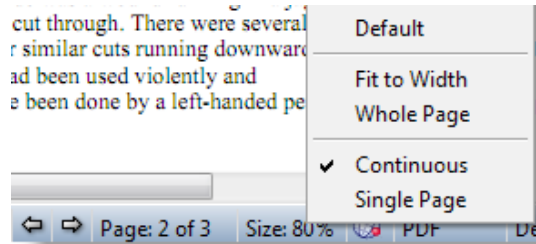
Look & Feel

Continuous and Single Page Mode

Previously, only a single page mode was available. Although this is more than sufficient for many situations, being able to page through documents while seeing more than a single page is definitely nicer. Also, in cases where quotations span page borders, a continuous mode is indispensable.



the Zoom Size field in
ect the desired mode



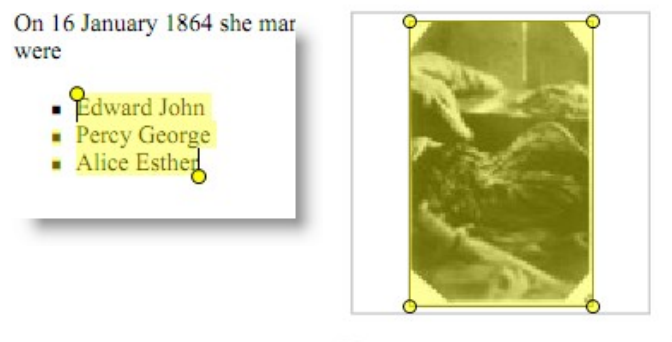
Page up and down

Two extra “buttons” in the status area allow page forward and backward scrolling. A right-click lets you reverse the paging direction so you can easily go back and forth without moving the mouse.

Clicking on the Page field in the status bar lets you jump to as specific page.

Selections

Both rectangular and continuous (text) selections display handles when the mouse is hovering over the selected area. The handles can be “picked” and the selections can be resized by moving the handles. The selection color can be set via the PDF preferences dialog.



Tools

Bookmark Navigator

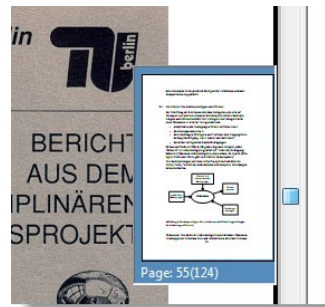
If a document contains a table of contents or other bookmark links, a navigator will open to let you jump direct to those links.

If you accidentally close the navigator you can reopen it via the Views menu.

The navigator only opens if the document actually contains bookmarks.

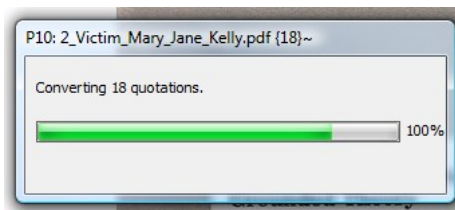
Thumbnail Scroll Preview

In single page mode, a thumbnail image of the current page will be displayed along with its page number while moving the scroll bar slider. This makes going to a specific page a breeze.



Conversion of old PDF PDs

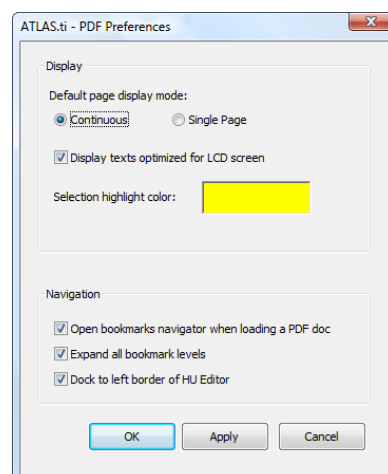
All PDs that were created from PDF documents before switching to v.6.2 need to be converted to fit the new data model. This is done automatically when loading a v.6.0 or 6.1 HU that uses PDFs. Save the HU after documents have been converted. Otherwise, the procedure will have to be repeated the next time you open this HU.



In some rare cases the system may detect a discrepancy between the dimensions of a quotation created with the old PDF engine and the new one. A program wizard will assist you to fix such a situation by either ignoring--frequently minor—differences, or by re-selecting and modifying the ambiguous quotation.

Preferences

From the menu item Preferences you can select PDF preferences. This lets you choose your favorite selection color, the page mode and the bookmark navigator's startup behavior.



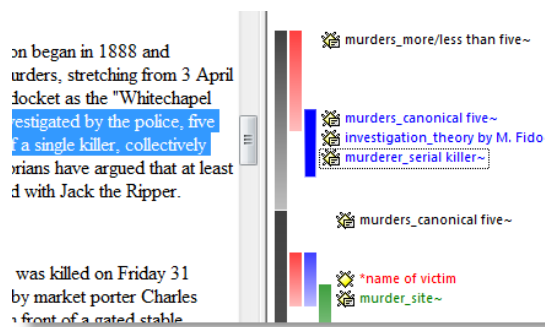
User Interface

A few changes have been implemented in the user interface.

The Margin

A new kind of bracket replaces the old thin one. Its advantages: Easier recognition of color indicators and easier to point at for menus and drag & drop operations. Additionally, the gradient coloring makes adjacent brackets more distinguishable.

The width of the brackets can still be adjusted via the Views menu.



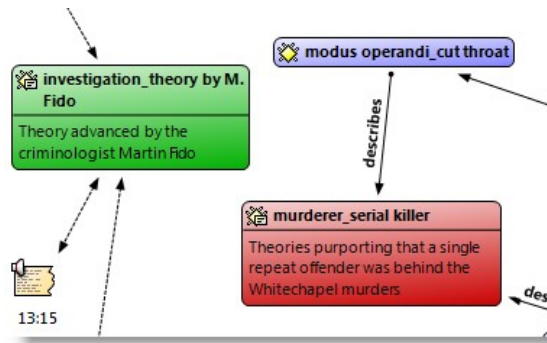
The Drop Downs

If we wouldn't tell you, you might never notice!-) The drop down lists now display the objects images, which makes distinguishing the different types (e.g., documents) easier.



The Network Editor

The network editor section goes a little more into detail now. A new display mode for network nodes has been introduced:



And, very importantly, it is now possible to drag & drop using the Network Editor as the drag source, i.e. to drag objects FROM the Network Editor. Very handy!

Embedded Documents

For shorter texts and in situations in which you do not need to share a document between different projects there is hardly a need to have a file “lying around” just to act as a container for this text.

Up to now, memos were used for such purposes: Create a memo, select Assign as PD, and from then on the content of the memo is also displayed in a corresponding primary document. You now have two places where you can read the original text: the memo and the PD. However, editing the content is only possible in the primary document area; the memo itself becomes read-only.

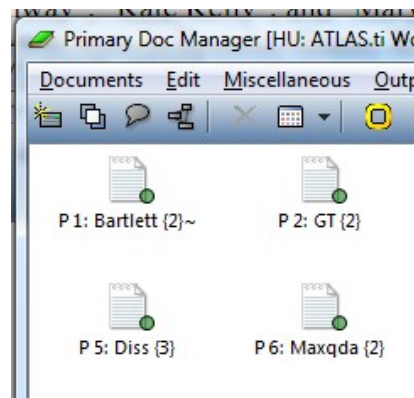
The drawback of using memos as file-less PDs is duplication: When searching or crawling through the contents, the same text needs to be scanned twice, e.g. when you selected Memos and PDs content to crawl through. There might be good reasons to make a memo a primary document and so an analyzable item which is a perfect reason for Memo PDs, but frequently this feature is only used for having an embedded “file.”

The new embedded documents can be created by two operations.

You can create an empty New Text Document from the Assign drop down menu. To fill this document with content, simply select its PD and switch to edit mode. This is a great way of incrementally building a journal to be analyzed.

Embedded documents are also used when importing content, as we currently do when importing survey data.

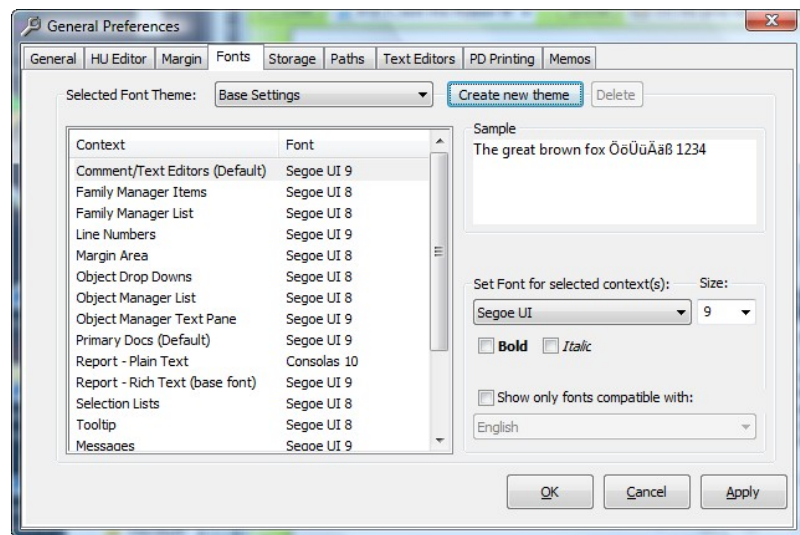
You will notice that there is no separate browser for viewing embedded documents; they are only accessible indirectly by way of their “clients,” e.g., primary documents. Primary documents based on embedded documents show a green dot when their icon is displayed:



Font Themes

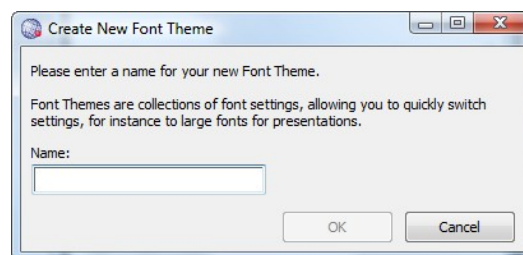
The new font preferences page in General Preferences addresses two issues:

1. Optionally reduce the number of fonts offered to a specific language
2. Allow named sets of fonts (themes) that may serve different purposes: presentation, notebook, etc.



On the left side are the contexts for which individual fonts can be set. The top allows you to select an existing font theme to instantly set all contexts to the fonts as defined in that theme.

Create New Theme creates a new theme derived on the currently selected theme. If you want to start from the default, choose the Base Settings first. The "Show only fonts compatible with" check box will reduce the number of fonts in the font drop down list to those that can display the specifics of the language you selected. Previously, you had to set a font and then check the "script" if it has a Chinese variant. This was quite laborious if you have a few hundred fonts installed on your system.



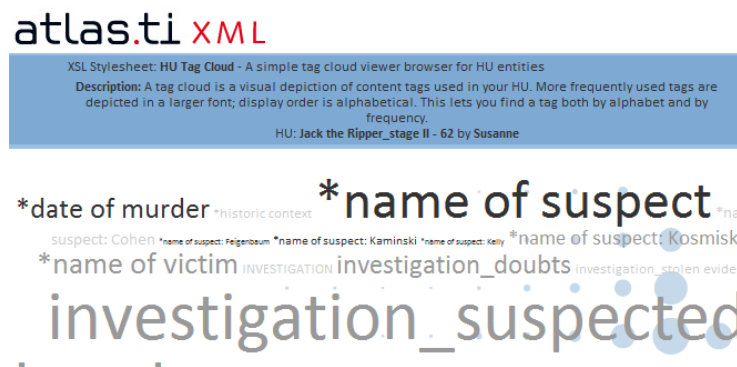
The XML-XSL Converter

The XSL Converter, introduced several years ago, is a very handy tool. Users can expand existing functionality by editing or creating style sheets that control the transformation of HUs into web sites, rich texts and other representations. However, little has been explained about the principles inside those style sheets and easy ways to edit them or create new ones.

For version 6.2 we have taken a few steps towards increased usability. This includes a completely redesigned set of style sheets plus a few new simple ones that encourage learning to create your own ("Very Simple Stylesheet" 1-3). Hopefully we will find some time to boost XML a bit via the XML forum.

In the XML Converter tool you will find a new version column that lets you sort the new ones to the top, and vice versa.

Below is an image of the new look of the tag cloud. Pretty, isn't it?-)



Network Editor

Drag & drop FROM the network editor

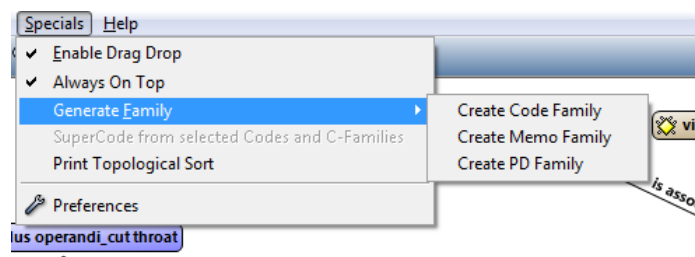
Up to now the network editor was only a target for drag & drop operations. Dragging something within the editor was reserved for moving nodes across the network editor's pane. Now you can move the nodes - or to be more accurate, the objects they represent - to all possible targets of drag & drop:

- other network editors
- selections in the primary document area
- brackets and objects in the margin
- and even targets outside ATLAS.ti: Word™, PowerPoint™

To initiate a drag & drop operation, you need to hold down the ALT key before starting the drag. You will notice, that the node does not move as usual. You can also drag multiple nodes which is a little more tricky: you need to hold down both the ALT and the CTRL key before starting the drag. This will transfer all selected objects (you need to select them in advance) to an appropriate target. Note that in the margin area to receive all the selected nodes, you have to release the CTRL key before dropping (releasing the mouse button).

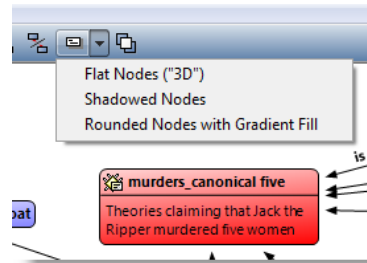
All kinds of families

Create any kind of family from the nodes in a network view.



Rounded rectangle nodes

The network editor is receiving a major overhaul. As a first step we have included a new node look that goes especially nice with colored codes. You can select this option from a drop down now available with the toggle button in the toolbar.



When switching comment display on, a header line is inserted between the node label and the comment.

