

ATLAS.ti 8 Windows What's New



ATLAS.ti 8 Windows – What's New

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About This Document

In this article, we will provide an overview of the new features that come with ATLAS.ti 8 Windows.

Although keeping the philosophy and guiding principles of all ATLAS.ti products that have characterized the software since its inception in the late 1980s, ATLAS.ti 8 Windows represents a paradigmatic shift towards the future. This shift is represented in a new interface, a change from being an object-oriented application to one that is function-oriented; the move from menus to ribbons.

List Of New Features

In addition to the new interface, the following features are new in version 8:

- Redesigned margin area
- Navigator ion Tool (formerly "Object Explorer"): In addition to project items, the Code Forest and Code Code Cooccurrence Explorer can now also be displayed in the Navigator
- Open window can be floated or docked in tabs
- Tabs can be organized in multiple regions next to each other (vertically or horizontally) to work with multiple data sources
- Evernote import
- Reference manager import (Endnote, and others)
- Twitter import
- Geo documents (Open Street map) with margin area
- Improved visibility of quotation boundaries and very easy modification of start and end positions
- Full quotation preview in Quotation Manager
- Retrieved quotation lists can be docked
- Memos now also can have comments
- Split Code Tool
- New powerful project search
- Word clouds for documents, for quotations of one ore more selected codes, and for one or more selected quotations
- Networks can now be grouped
- Redesigned query tool: Visualize your queries while you build them
- Powerful automatic layout options in networks
- Preview images for image quotations
- New Export options for networks
- Customized reports
- Project Management made easy – there is only one project file that contains everything
- Full Undo/Redo for all actions

The following concepts you may know under different names; they have been completely re-thought, expanded, and augmented equipped with powerful new options:

- *Families* are now called *groups*
- *Network Views* are now called *Networks*
- *Super codes* and *super groups* are now called smart codes and smart groups
- *Primary documents* are now called *documents* (as a consequence, the document ID has changed from PD1, PD2, PD3 to D1, D2, D3 and so forth).

The various new features are now explained in more detail below. However, first we will show you how to transfer your version 7 (or even version 5 or 6 projects) into the new version, how to handle large-size multi-media files in A8 and how to work in teams.

Useful Resources For Getting Started

- **System requirements** and **installation instructions** can be found [here](#).
- Download the **ATLAS.ti 8 Quick Tour** [here](#).
- **Video tutorials** in English and Spanish can be found on our [YouTube channel](#).

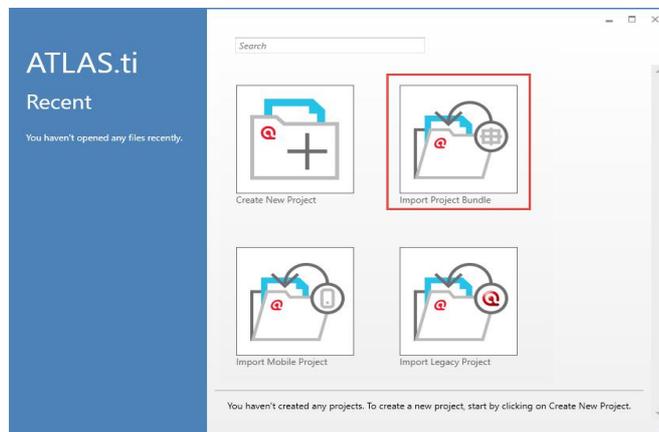
Transferring Projects To Version 8

You can install version 7 and 8 side-by-side. Thus, after installing version 8, you can still open your projects in version 7 and export them into the required format.

Version 7 —> Version 8

If you currently work with version 7, please make sure your installation is updated to version 7.5.16 or higher.

To prepare your projects for import to version 8, it is best to create a transfer bundle file: Select **PROJECT / TRANSFER BUNDLE (FOR MAC AND A8)**.



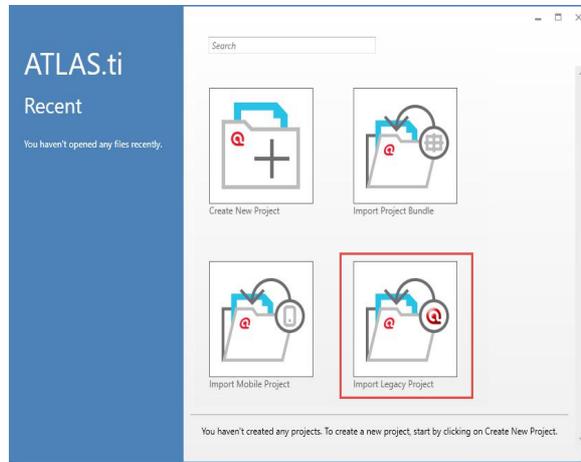
Open ATLAS.ti 8 and select the option **IMPORT PROJECT BUNDLE**.

You can also import version 7 Copy Bundle files (.atlcb) into version 8. If so, use the **IMPORT LEGACY PROJECT** option. However, we recommend to prepare a transfer bundle file in version 7 first.

ATLAS.ti 8 is not downward compatible. This means a version 7 project can be read by version 8, but not vice versa. A version 8 project cannot be opened in version 7 or earlier.

Version 6 Or Earlier —> Version 8

If you work with an older version of ATLAS.ti, the preferred option is to have a copy bundle file. If so, open ATLAS.ti 8 and select the option **IMPORT LEGACY PROJECT**.



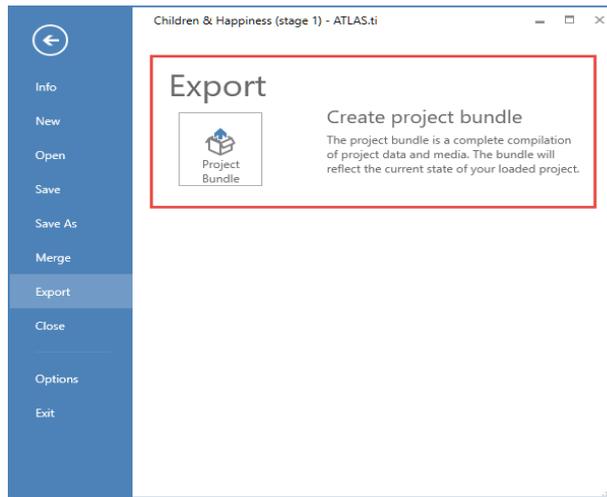
If you do not have a copy bundle file, it is possible to just import the HU file. This however requires that all links to the documents are still valid. If so, also use the **IMPORT LEGACY PROJECT** option. Instead of selecting a copy bundle file, select the HU (.hpr5 / .hpr6 / .hpr7) file.

Project Management

Project Export And Backup

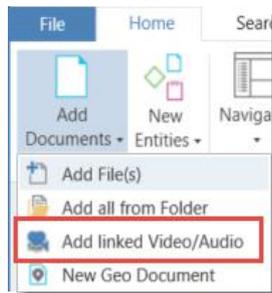
Currently all projects are stored internally with ATLAS.ti. When saving a project, there is no need to define a location for the file. If you want to transfer your project to a different computer, you need to export it: **FILE / EXPORT**.

Also use this option to create a regular backup of your projects.



All of your project data is stored in the AppData/Roaming/Scientific Software/ATLAS.ti 8 folder. If you create regular backups of your computer, make sure to include this folder in your backup.

Further customized option like specifying a location for your document library will follow in future updates of version 8.



Working With Large Multi-Media Files

If your project requires that you work with large-sized data files like videos, you still have the option as in version 7 to link those files to your project, rather than to import them.

Setting Up A Team Project

When you plan to set-up a team project, you need to proceed as follows:

- One person sets up a Master Project and adds all documents.
- This project needs to be saved, exported (see above) and distributed to all team members.
- When starting ATLAS.ti, you will be asked to create a user account. If you want to change it later or need to switch user, see the **SWITCH USER / USER MANAGEMENT** option on the Home Tab.
- To merge the sub projects, each team member exports their project (see above) and sends it to the project administrator for merging.
- The **PROJECT MERGE** option is available under **FILE** in the Backstage area. Currently no user-configurable options are available. All items that are the same will be merge, all items that are different will be added. Further merge options will follow.

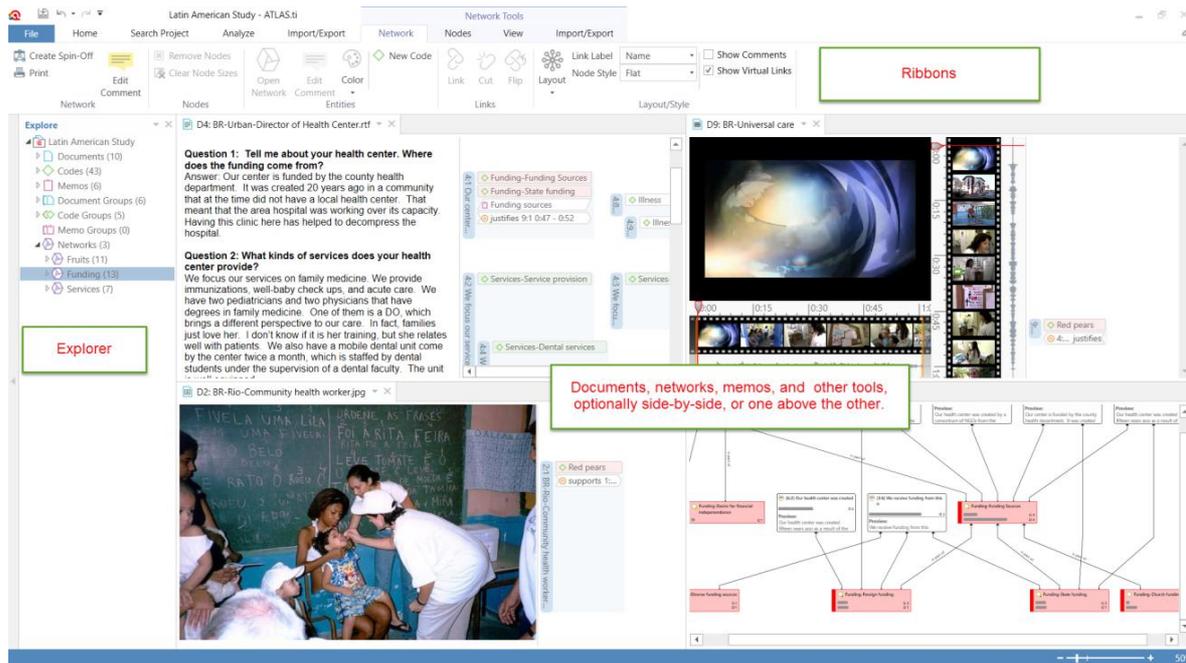
If all team members initially work on a different set of documents, they can start to work on their sub projects independently without first having to create a Master Project.

Mac-Windows Compatibility

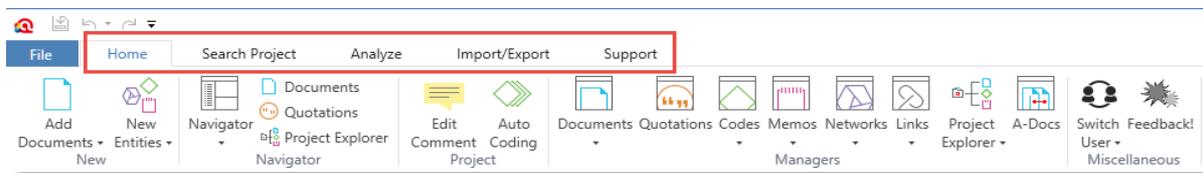
Until **version 1.5 for Mac** is released (expected mid-January 2017), there is no Mac-Windows compatibility. Version 8 projects cannot be read by version 1.0 for Mac, and Mac version 1.0 can also not export projects that are compatible with version 8 for Windows. We apologize for this temporary inconvenience!

The Interface

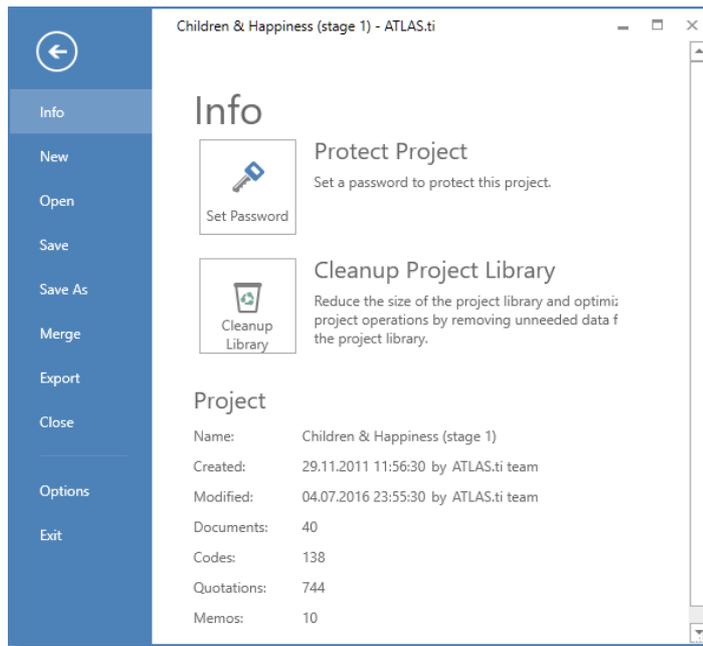
The interface of ATLAS.ti 8 Windows has changed. The top hanging menus have been replaced by a system of ribbons. Some of those ribbons are contextual in the sense that they are dependent on the current selected item in the application. For example, once a document is loaded and a segment is selected, the options for creating and commenting quotations, coding and other related tasks are activated. The image below shows a general view of the interface with documents and a network opened side-by-side.



There are five core tabs, as shown below: Home, Search Project, Analyze, Import/Export and Support.

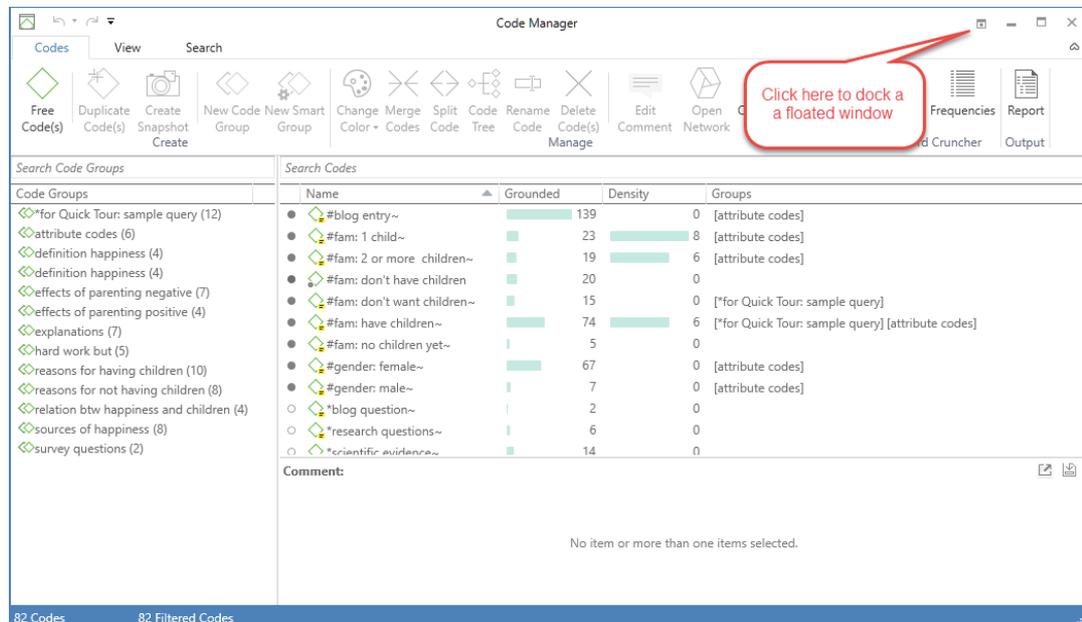


Additionally, there is the *ribbon backstage* under *File* that gives access to the options for information on the project, to create a new project, save and save as the project, merge two projects, export the project, close it, exit it and other options. See below.

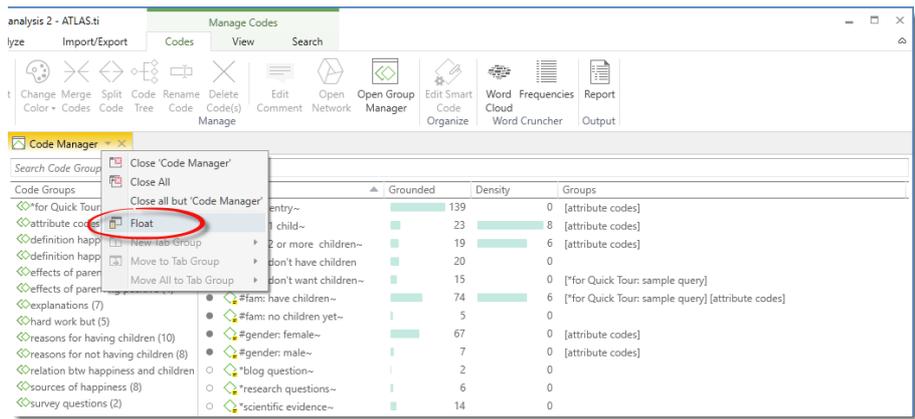


Docked And Floated Windows

When you first open a manager or other windows, they will be opened in floating mode. All windows can however also be docked and depending on what you are currently doing, you may prefer a window to be docked or floated. Once you have docked a window,

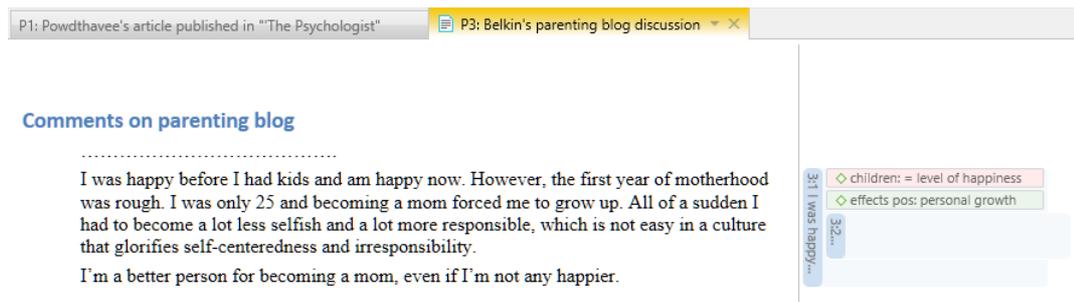


ATLAS.ti will remember this as your preferred setting for the current session.



Working With Tabs And Multiple Regions

If you open two or more documents, they are loaded into tabs in the main work space. The tab of the currently loaded document is colored in yellow.



If you want to see the documents side-by-side, you can move one of the documents into a different tab group. You have the option to move it into a tab group (or new region) to the right, left, below or above:

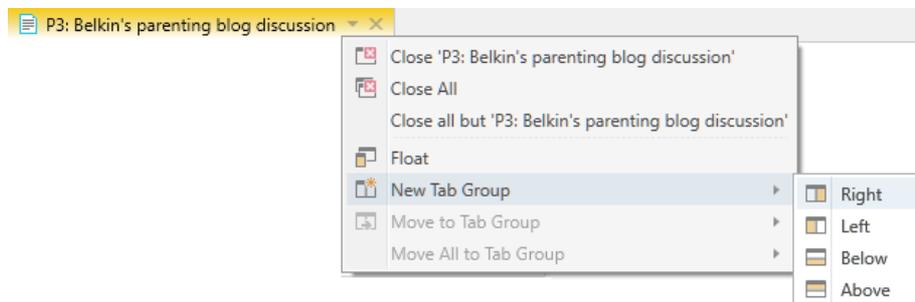
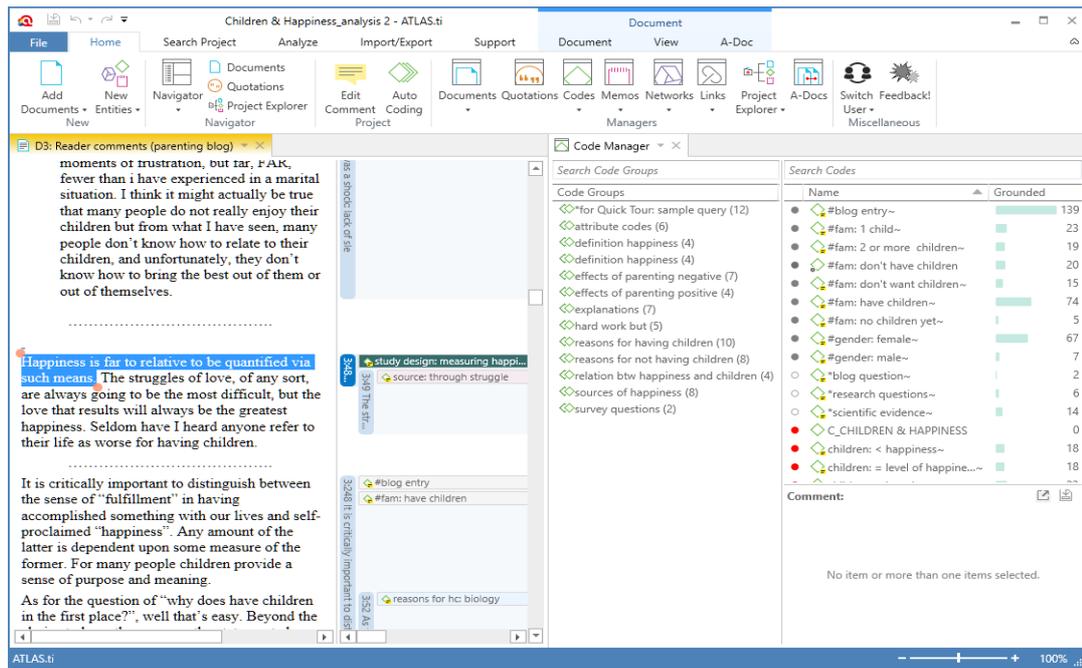


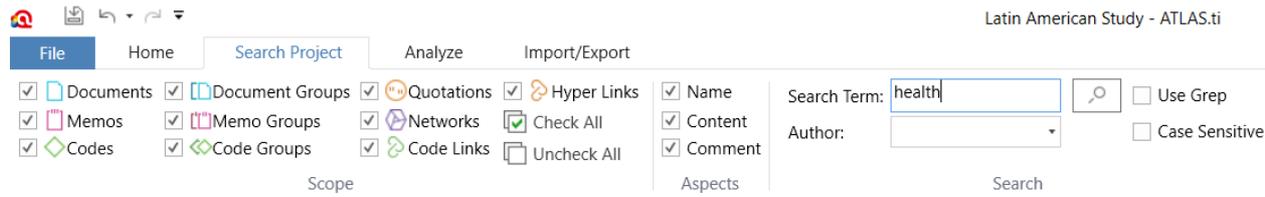
Figure 1: Moving a document into a new tab group

This can also be done with any other items you open, be it your list of codes, a memo, or a network. Below you see the docked Code Manager and a document side-by-side. Given sufficient screen space, you could also add a region at the bottom of the screen for instance to display a memo.



Full Project Search

Under 'Search Project', you will find a powerful Keyword in Context tool, an improved version of the former Object Crawler found in ATLAS.ti 7 and earlier. Here you can search for specific words or combination of words, and look for them everywhere in the project: documents, memos, codes, document groups, memo groups, code groups, quotations, networks, code links and hyperlinks.



The results of the search are listed in an interactive list, where you can click on a specific hit and you will be able to see the term within its larger context. See the result list below.

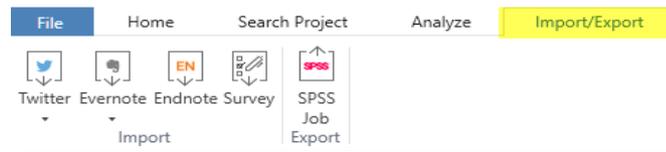
Text Search Result

Name	Type	Author	Date	Field	Location	Length
1:5 program, called PSF -- Programa de Saúde da Família— health community workers can be found in two	Quotation	Ricardo	16/6/2015	Content	1 - 1581	6
1:5 different situations in relation to the health care system:	Quotation	Ricardo	16/6/2015	Content	1 - 1667	6
1:5 Linked to a basic health unit not yet attached to the Family Health Program;	Quotation	Ricardo	16/6/2015	Content	1 - 1706	6
1:5 Linked to a basic health unit not yet attached to the Family Health Program;	Quotation	Ricardo	16/6/2015	Content	1 - 1749	6
1:5 Connected to a basic family health as a member of the multidisciplinary team.	Quotation	Ricardo	16/6/2015	Content	1 - 1794	6
1:6 Currently (October 2009), there are more than 260,000 community health agents present both in rural and periurban areas of small municipalities as well as in highly urbanized and industrialized cities.	Quotation	Ricardo	17/6/2015	Content	1 - 1909	6
1:7 Duties of the Community Health Agent	Quotation	Ricardo	17/6/2015	Content	1 - 2077	6
1:7 Strengthen links between the community and health services;	Quotation	Ricardo	17/6/2015	Content	1 - 2335	6
1:7 Inform other team members on the availability of health needs and social dynamics of the community;	Quotation	Ricardo	17/6/2015	Content	1 - 2402	6

264 Matches found for health

New Data Formats

Under the Import/Export ribbon tab (see below), you will find the following options: importing data from Twitter, Evernote, reference managers (e.g., Endnote) and survey data. Also, here you will find the option to export the project in SPSS format.



Twitter Import

You do not have to have a Twitter account of your own to import Twitter data.

After starting the Twitter Import tool, you enter a query, e.g. searching for a hashtag. You can also look for multiple hashtags or authors by using OR. For example: #WordAidsDay|#HIV|#Aids.

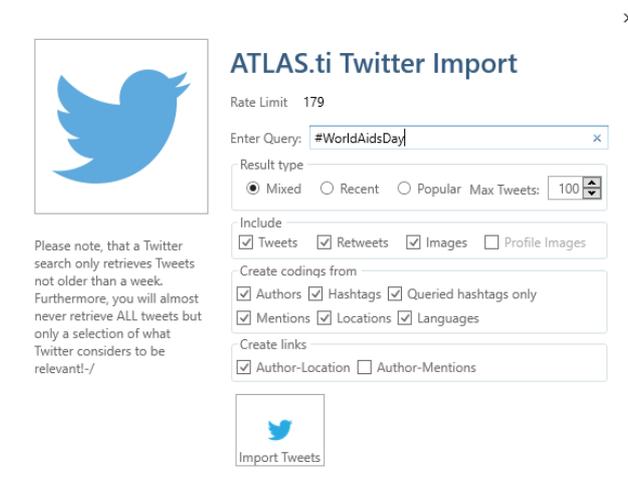


Figure 2: Set Twitter import options

Further options are to select the most recent or the most popular tweets and whether to include retweets, images and profile images. The imported data is automatically coded based on the selection you make.

Tweets often contain many more hashtags than the original one you searched for. Coding all hashtags often results in a lot of codes. Therefore you have an option to only code the queried hashtags. Further options are to code all authors and all mentioned Twitter users, the location and the language. Lastly you can decide whether a link should be created between authors and locations and between the authors and mentioned Twitter users.

Note that you only will not be able to import tweets older than one week. Queries at different times or on different computers may results in different tweets, as the final selection is done by Twitter and not within our control.

The result of the importation will produce a single document with all tweets and a set of codes for the hashtags, the author, the language of the tweet and the location from where the tweet was made. The tweets themselves become quotations. So, for example, all of the tweets under the hashtag '#Deco' will be quotations linked to that code.



Tweets can be visualized graphically using one of the 11 automatic node layouts that come with ATLAS.ti 8 Windows. These networks show the linkages between authors, mentioned authors, hashtags, locations, languages and actual tweets. This provides a holistic view of the Twitter social networks. See an example below.

The screenshot displays two windows in ATLAS.ti. The left window, titled 'D1: Twitter Import: #arquitectura', shows a tweet by Aura Suárez (@aura_suarez_) from 11/10/2016. The tweet text is 'Arquitectos crean torres de alta tension simulando humanos #arquitectura bit.ly/2csL.Kew?Az0sa'. Below the text is a photograph of a person standing in a field with power lines. A red box highlights the tweet with the text: 'Tweet by @@irannGR, shown in context. The tweet is a quotation.' The right window, titled '@ArchDailyMX - Network hashtags', shows a network diagram. A red box at the top states: 'Network representation showing tweet authors, mentions and actual tweets. Network created using the Orthogonal node layout.' The diagram consists of nodes representing tweets and users, connected by lines representing mentions and retweets. Nodes include '@@irannGR - Iran R.', '@ArchDailyMX - ArchDaily', '@@taag00 - Arq. Gerardo Ayala', '@@robertherth - Robert Rivero', and '[137] Arquitectos crean torres de alta tension simulando humanos #arquitectura'.

Evernote Import

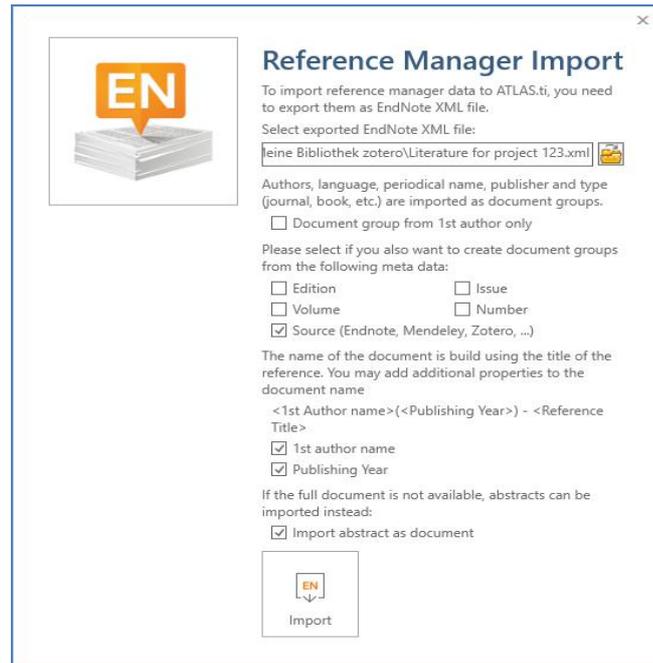
You can import your notes from Evernote libraries. Each note becomes a document in ATLAS.ti. Once imported, you can proceed to work with it as you would with any document: segment it, code it, annotate it, diagram it, and so on. See below some document imported from Evernote.

The screenshot shows the ATLAS.ti interface with the 'Evernote on climate change - ATLAS.ti' project open. The top menu bar includes 'File', 'Home', 'Search Project', 'Analyze', 'Import/Export', 'Document', 'View', and 'A-Doc'. Below the menu is a toolbar with various tools like 'Create Free Quotation', 'Code In Vivo', 'List Coding', 'Open Coding', 'Quick Coding', 'Auto Coding', 'Edit Doc Comment', 'Browse Geo Location Document', 'Renumber Quotations', 'Edit Quotation Comment', 'Rename Quotation Quotation', 'Delete Quotation', 'Edit Entity Comment', 'Edit Link Comment', 'Unlink Margin Entities', and 'Revert Link'. The 'Explore' pane on the left shows a tree view of documents, with 'D1: Climate change NA' selected. The main workspace shows a document titled 'D2: Climate change NASA : NASA figure'. The document text reads: 'From the [Global Climate Change NASA website](#): The Earth's climate has changed throughout history. Just in the last 650,000 years there have been seven cycles of glacial advance and retreat, with the abrupt end of the last ice age about 7,000 years ago marking the beginning of the modern climate era — and of human civilization. Most of these climate changes are attributed to very small variations in Earth's orbit that change the amount of solar energy our planet receives.' Below the text is a line graph showing 'carbon dioxide level (parts per million)' on the y-axis (ranging from 160 to 500) and 'years before today (0 = 1950)' on the x-axis (ranging from 400,000 to 0). The graph shows a fluctuating line that stays below 300 ppm for most of the period, with a sharp spike to over 400 ppm at year 0. Two horizontal lines are drawn: one at approximately 280 ppm labeled '1950 level' and another at approximately 410 ppm labeled 'current level'. A red box on the right side of the graph contains the text: 'Note from Evernote as a project document'.

Reference Manager Import

This option allows you to import data from any reference management software such as Endnote, Zotero, Mendeley and Reference Manager. The prerequisite is that your Reference Manager can export your bibliographic records as 'Endnote XML Export File'. Once that is done, they can be imported into ATLAS.ti. Each one of the bibliographic records (e.g., journal articles) will become a single document in ATLAS.ti.

If the record has an attached PDF, the PDF will be the ATLAS.ti document, and if it does not, you have the option of having the abstract become the document. All documents will be grouped according to authors, language, periodical name, publisher and type (e.g., journal or book). This will allow you to interrogate the bibliographic data according to any, or a combination of, these attributes.



Additionally, you are given the option of grouping the documents according to edition, volume, source, issue and number. You also have the option of naming each document by the first author's name and the publishing year.

Once imported, you can proceed to segment and code each bibliographic record as you would any other document of your project. The notes you wrote in association to your articles will show in ATLAS.ti as document 'comments'. The figure below shows the Document Manager with the imported records (i.e., documents, the preview and the comment).

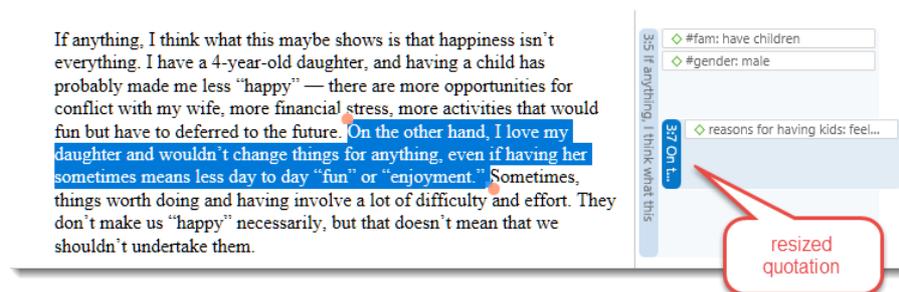
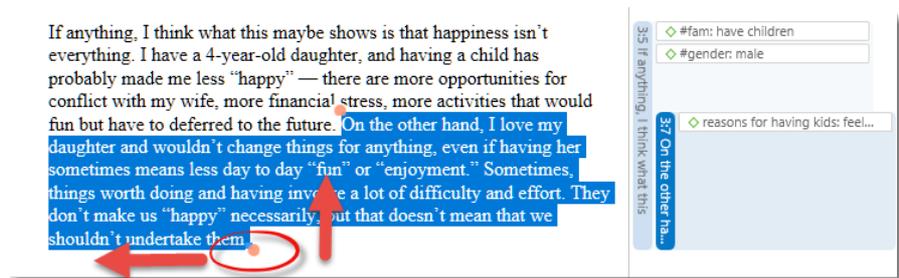
The screenshot shows the Document Manager application window. The interface includes a menu bar with 'Documents', 'Utilities', 'View', and 'Search'. Below the menu is a toolbar with icons for 'Add Document(s)', 'New Document Group Create', 'New Smart Group', 'Rename Document', 'Delete Document(s)', 'Browse Geo Location Manage', 'Edit Comment', 'Open Network', 'Open Group Manager', 'Auto Coding Coding', 'Word Cloud Word Count', 'Frequencies', and 'Report Output'. The main area is divided into two panes. The left pane, titled 'Search Document Groups', lists several document groups: 'Periodical:Latin American Perspectives (3)', 'Periodical:Sociological Forum (1)', 'RM-Import (4)', 'RM-LastImport (4)', 'RM-Library:Guatemala 2 Copy (4)', 'Year:2004 (1)', and 'Year:2005 (3)'. The right pane, titled 'Search Documents', displays a table of search results with columns 'Id' and 'Name'. The results are: 'D1 Bossen (2005) - New Directions for Maya Labor: Guatemala and Beyond-', 'D2 Carter (2004) - Gender and Community Context: An Analysis of Husbands' Household Authority in Rural Guatemala', 'D3 Goldin (2005) - Labor Ideologies in the International Factories of Rural Guatemala', and 'D4 Hamilton (2005) - Maya Farmers and Export Agriculture in Highland Guatemala: Implications for Development and Labor Relations'. Below the table is a 'Preview' section for document D1. It features the SAGE logo and the title 'New Directions For Maya Labor: Guatemala and Beyond'. The preview text includes the author's name, journal information, and a comment: 'Edited 11/15/2016 10:43 AM by Ricardo'. A 'Notes' section follows, containing a detailed paragraph about the annual fiesta in the Mam-speaking village of Todos Santos (northwest highlands) and the historical context of migration and labor relations in the region. The bottom status bar shows '4 DOCUMENTS'.

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New Ways Of Working With Quotations

Display And Modification

Quotations now have 'handles' (orange dots) that makes the quotation boundaries easy to see and also easy to modify. You simply need to drag the handles to a different position to modify the length of a quotation. This works for all media types.



Quotation Preview In Quotation Manager

The full quotation can now be preview in the Quotation Manager. This applies to all text, PDF and image quotations. The comment field is next to the preview area, which allows you to write comments whilst reading through your quotations.

Id	Name	Document	Density	Author
1:1	hook for article	1_Powdthavee_Think having childr...	0	Susanne
1:2	consistent evidence of neg. correlation between having children and happin...	1_Powdthavee_Think having childr...	0	Susanne
1:3	worse than expectations - even less happiness	1_Powdthavee_Think having childr...	0	Susanne
1:4	guiding questions	1_Powdthavee_Think having childr...	0	Susanne

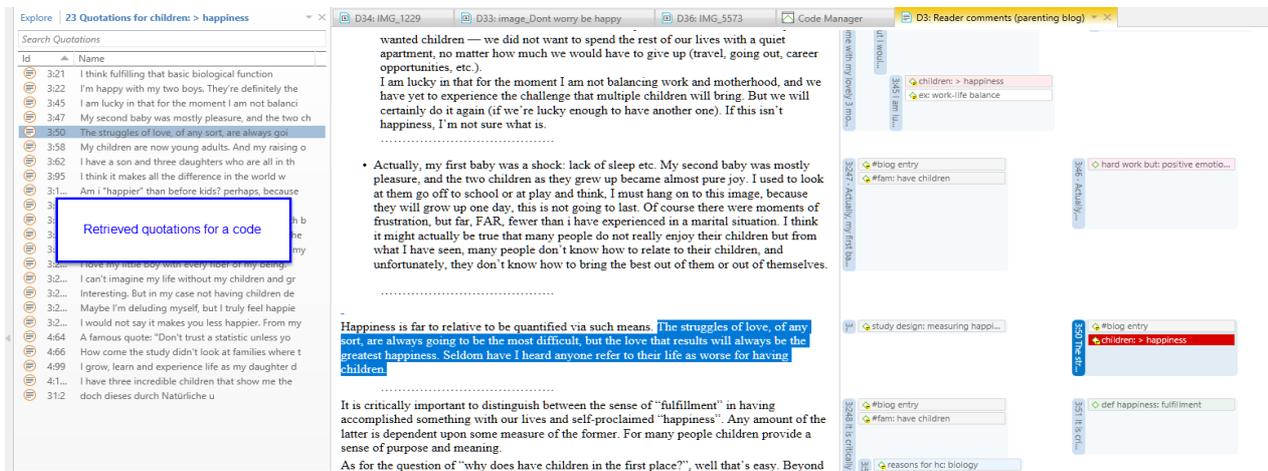
Preview:
 Other than children and money, do we also suffer a similar kind of focusing illusion with other happenings in our lives, such as getting a new job or moving into a new neighbourhood? If we often mispredict how happy we will be after the birth of our children, do we also mispredict how unhappy we will be with the death of our loved ones?

Comment: Edited 14.10.2016 16:14 by Susanne
 Explaining the gap between expectations and reality with focusing illusion that might also be common in other parts of life

4 QUOTATIONS

Quotation Retrieval Made Easier

Quotation Retrieval windows can be docked on the right or left-hand side of your screen. This facilitates the process of reviewing your quotations in context.

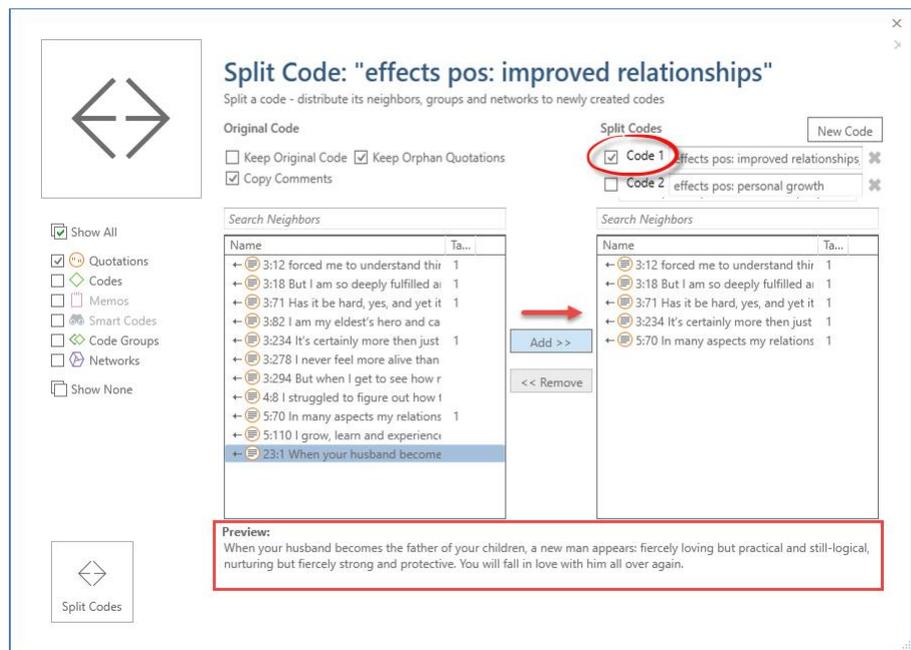


Split Codes



Splitting a code is necessary if you have been lumping together many quotations under a broad theme. At some point, however, those codes need to be split up into smaller sub codes. This procedure is now much better facilitated with the new Split Code tool.

In the Split Code dialogue, you see a list of the quotations coded with the code that was selected for splitting and all other related entities.

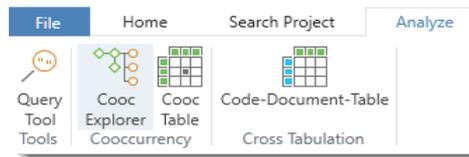


ATLAS.ti by default creates two sub codes, but you can add more when you click on the New Code button. Further options are to keep the original code including the quotations or without them.

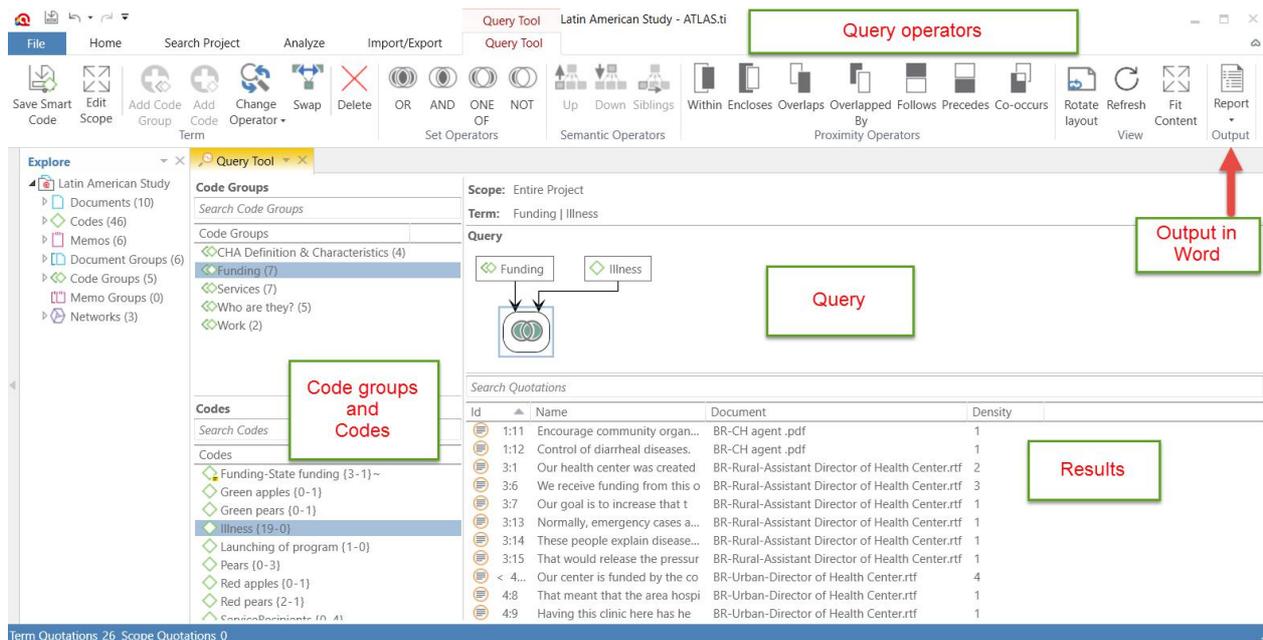
Before you decide which quotation goes into which sub code, you can read it in the preview area, or in the context of the data.

Redesigned Query Tool

Under the Analyze tab, you will find the Query Tool, the Code Co-occurrence Explorer and Table, and the Code-Document-Table.



The Query Tool deserves a few extra words. This tool has been redesigned completely via-à-vis version 7 and earlier. There is a graphic interface that facilitates the creation of queries, still using Set, Semantic and Proximity operators, as well as allowing for the specification of the scope of the query (i.e., the subset of documents where to conduct the query). The reports are now directly in Word or equivalent and the user is in control over what to include in that report.



Query operators

Query

Code groups and Codes

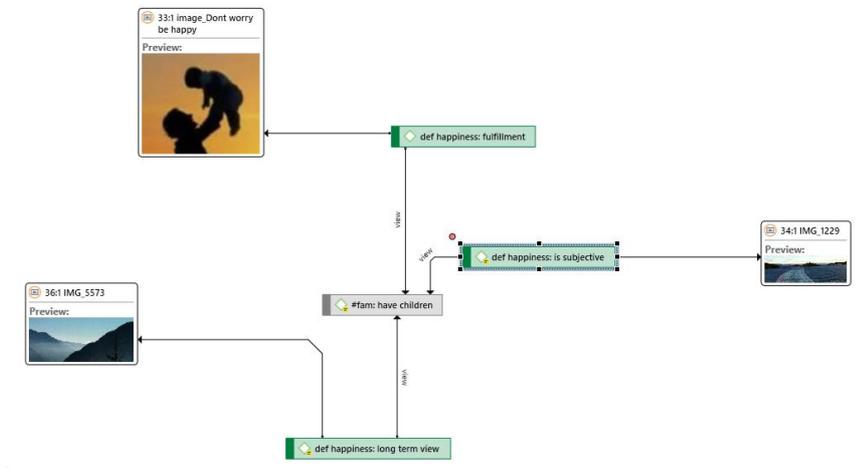
Output in Word

Results

Id	Name	Document	Density
1:11	Encourage community organ...	BR-CH agent .pdf	1
1:12	Control of diarrheal diseases.	BR-CH agent .pdf	1
3:1	Our health center was created	BR-Rural-Assistant Director of Health Center.rtf	2
3:6	We receive funding from this o	BR-Rural-Assistant Director of Health Center.rtf	3
3:7	Our goal is to increase that t	BR-Rural-Assistant Director of Health Center.rtf	1
3:13	Normally, emergency cases a...	BR-Rural-Assistant Director of Health Center.rtf	1
3:14	These people explain disease...	BR-Rural-Assistant Director of Health Center.rtf	1
3:15	That would release the pressur	BR-Rural-Assistant Director of Health Center.rtf	1
< 4...	Our center is funded by the co	BR-Urban-Director of Health Center.rtf	4
4:8	That meant that the area hospi	BR-Urban-Director of Health Center.rtf	1
4:9	Having this clinic here has he	BR-Urban-Director of Health Center.rtf	1

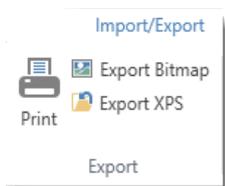
Previews For Image Quotations

In addition to previewing documents and including full text quotations into a network, you can now also view image quotations in a network:



Exporting Networks

Networks can be exported in various graphic file formats, in xps and PDF format and inserted into other applications. Available graphic file formats:



- PNG - Portable Network Graphics (*.png)
- PNG - Portable Network Graphics (*.png)
- JPG - JPEG Image (*.jpg;*.jpeg;*.jpe)
- Gif Image (.gif) (*.gif)
- Tiff Image (.tiff) (*.tiff)

To save a network in the Microsoft XPS format, select the **EXPORT XPS** option. The XPS format is Microsoft's alternative to PDF.

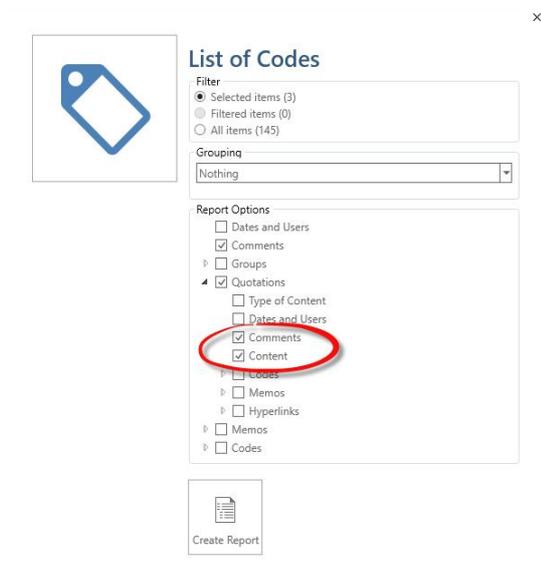
If you want to create a PDF file, make sure a PDF writer is installed on your computer. If so, you can select the **PRINT** option and chose your PDF Writer as printer.

Customized Reporting



ATLAS.ti 8 in addition to providing predefined reports also offers user configurable reports. This means you can decide what should be displayed in the report. Predefined reports are available in the Query Tool under the Report button.

You can now select how the output is sorted. The default sort order is by code. If you select multiple codes from different code groups, you can chose to group the output by code groups. Or if work in a team, you may want to view the quotations by creating or modifying user.



Given the selections made above the output will contain the code name, the code comment, all quotations linked to this code, their comments and content. If you do not select the content option, only the quotation ID and and name are included in the report.

Project: Children & Happiness

Report created by Susanne on 06.12.2016

Codes Report

Selected codes (1)

● children: > happiness

23 Quotations:

3:21 I think fulfilling that basic biological function ... (6937:7044)

Content

I think fulfilling that basic biological function is probably gratifying, if not happiness-producing per se.

3:22 I'm happy with my two boys. They're definitely the... (7061:7128)

Content

I'm happy with my two boys. They're definitely the light of my life.

3:45 I am lucky in that for the moment I am not balanci... (14489:14766)

Content

I am lucky in that for the moment I am not balancing work and motherhood, and we have yet to experience the challenge that multiple children will bring. But we will certainly do it again (if we're lucky enough to have another one). If this isn't happiness, I'm not sure what is.

3:47 My second baby was mostly pleasure, and the two ch... (14839:15088)

Content

My second baby was mostly pleasure, and the two children as they grew up became almost pure joy. I used to look at them go off to school or at play and think, I must hang on to this image, because they will grow up one day, this is not going to last.

3:50 The struggles of love, of any sort, are always goi... (15542:15761)

Content

The struggles of love, of any sort, are always going to be the most difficult, but the love that results will always be the greatest happiness. Seldom have I heard anyone refer to their life as worse for having children.

If you are familiar with the XML export options in ATLAS.ti 7, these are not yet available in the initial release version. However, they are expected to be included in version 8.1 (second quarter 2017).