ATLAS.ti 8 Windows
What's New

ATLAS.ti 8 Windows – What's New
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About This Document

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

While 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 many important aspects, the sum total of which makes for an exciting and powerful, all new ATLAS.ti experience. We hope you'll enjoy it!

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 Cooccurence Explorer can now also be displayed in the Navigator
- Open windows 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
- Full Undo/Redo for all actions
- Full Unicode support

The following concepts you may know under different names; they have been completely re-thought, expanded, and augmented 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.

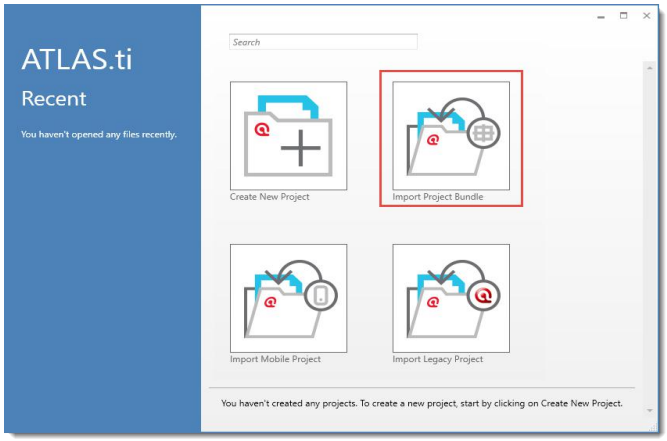
Transferring Projects To Version 8

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 in 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 / Export /Transfer Bundle (for Mac and A8)**.



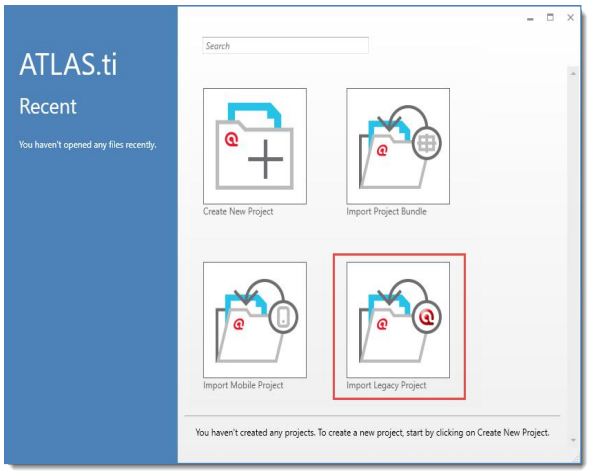
Open ATLAS.ti 8 and select the option **Import Project Bundle**.

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**.



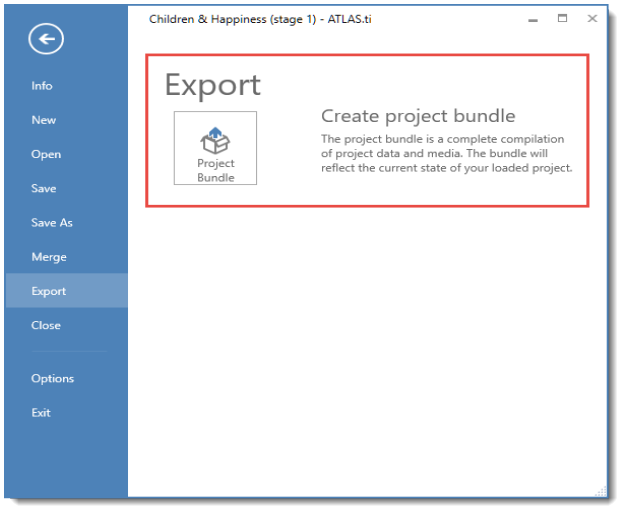
If you do not have a copy bundle file, it is possible to just import the HU file. This however requires that all links to the documents are still valid. If so, also use the **Import Legacy Project** option. Instead of selecting a copy bundle file, select the HU (.hpr5 / .hpr6 / .hpr7) file.

Project Management

Project Export And Backup

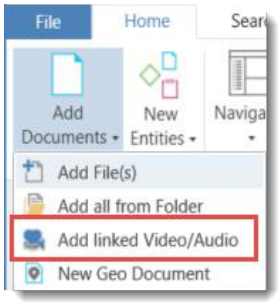
Currently all projects are stored internally with ATLAS.ti. When saving a project, there is no need to define a location for the file. If you want to transfer your project to a different computer, you need to export it: **File / Export**.

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.

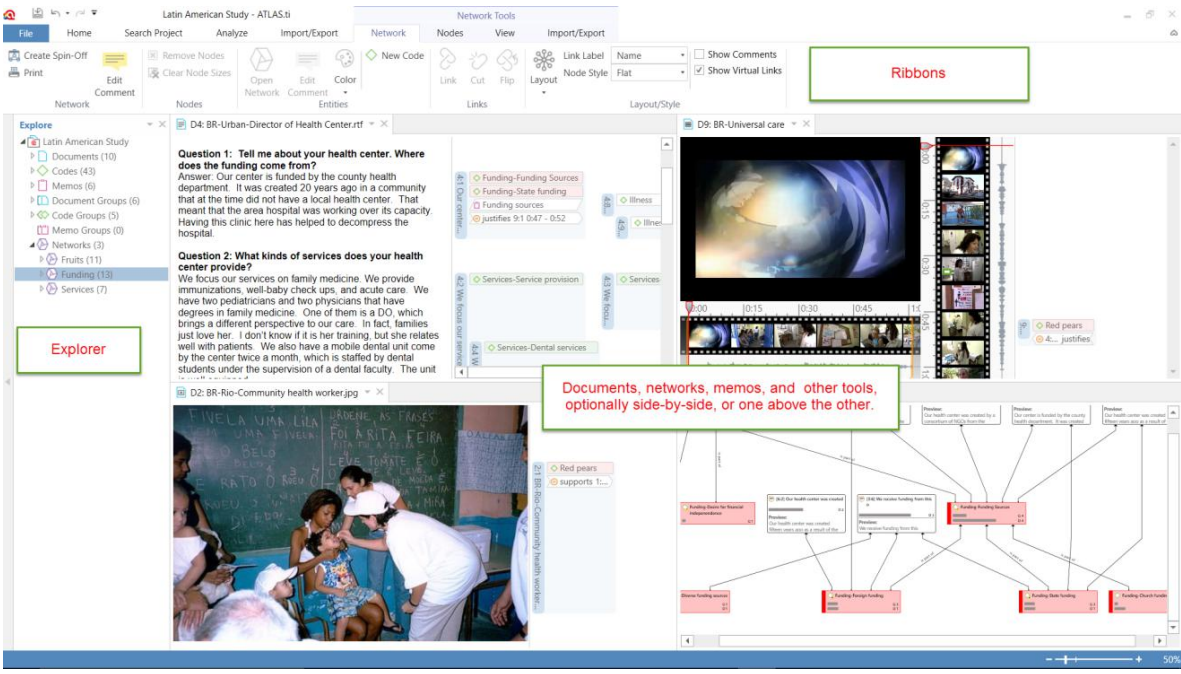
If all team members initially work on a different set of documents, they can start to work on their sub projects independently without first having to create a Master Project.

Mac-Windows Compatibility

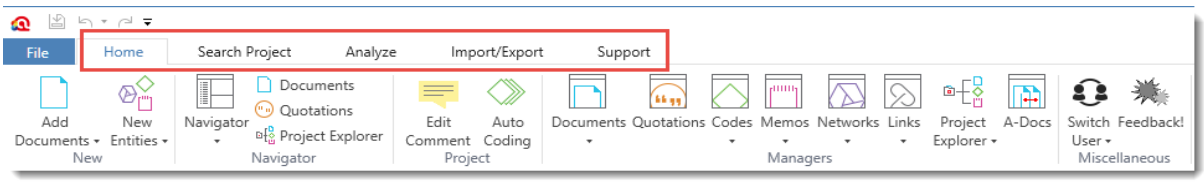
Until **version 1.5 for Mac** is released (expected mid-January 2017), there is no Mac-Windows compatibility. Version 8 projects cannot be read by version 1.0 for Mac, and Mac version 1.0 can also not export projects that are compatible with version 8 for Windows. We apologize for this temporary inconvenience!

The Interface

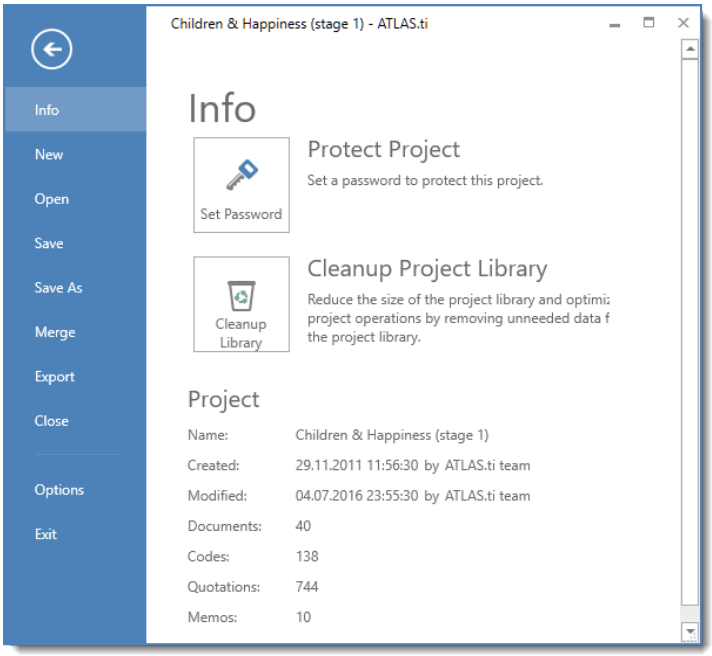
The interface of ATLAS.ti 8 Windows has changed. The top hanging menus have been replaced by a system of ribbons. Some of those ribbons are contextual in the sense that they are dependent on the current selected item in the application. For example, once a document is loaded and a segment is selected, 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.

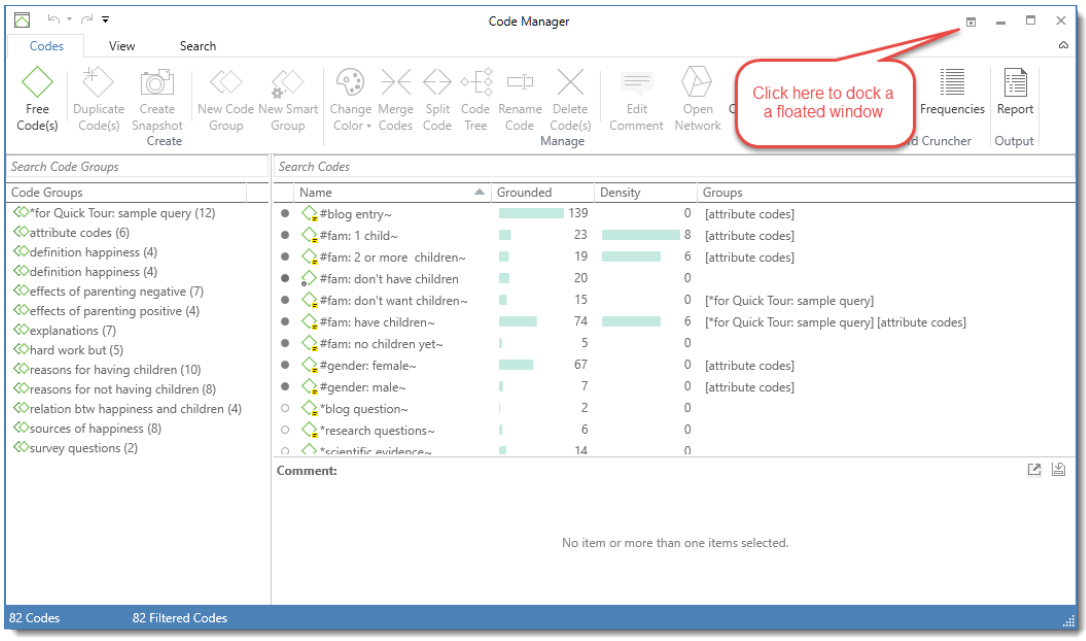


Additionally, there is the *ribbon backstage* under *File* that gives access to the options for information on the project, to create a new project, save and save as the project, merge two projects, export the project, close it, exit it and other options. See below.

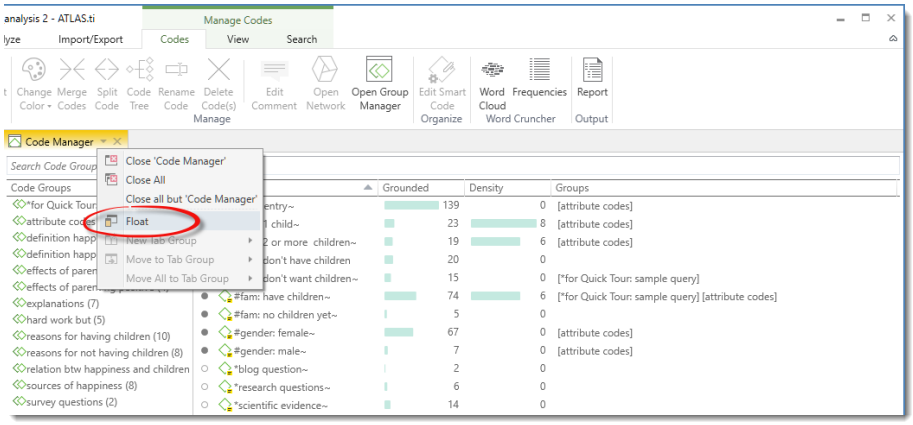


Docked And Floated Windows

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,

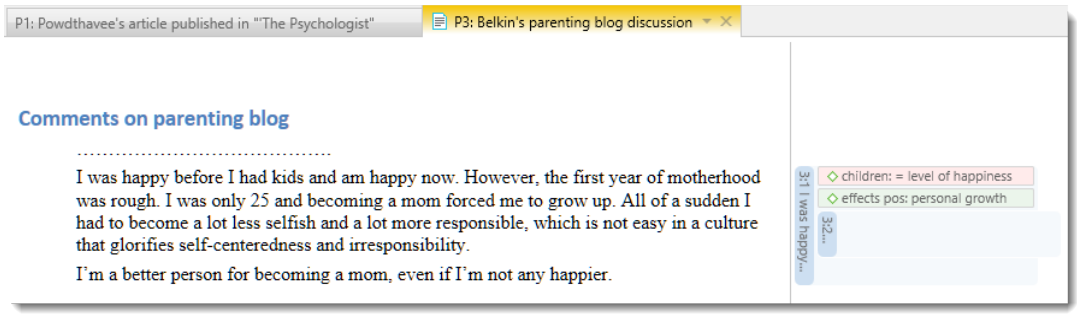


ATLAS.ti will remember this as your preferred setting for the current session.



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:

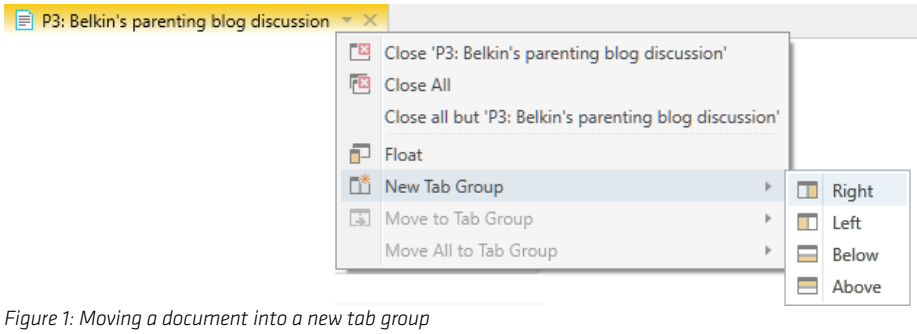
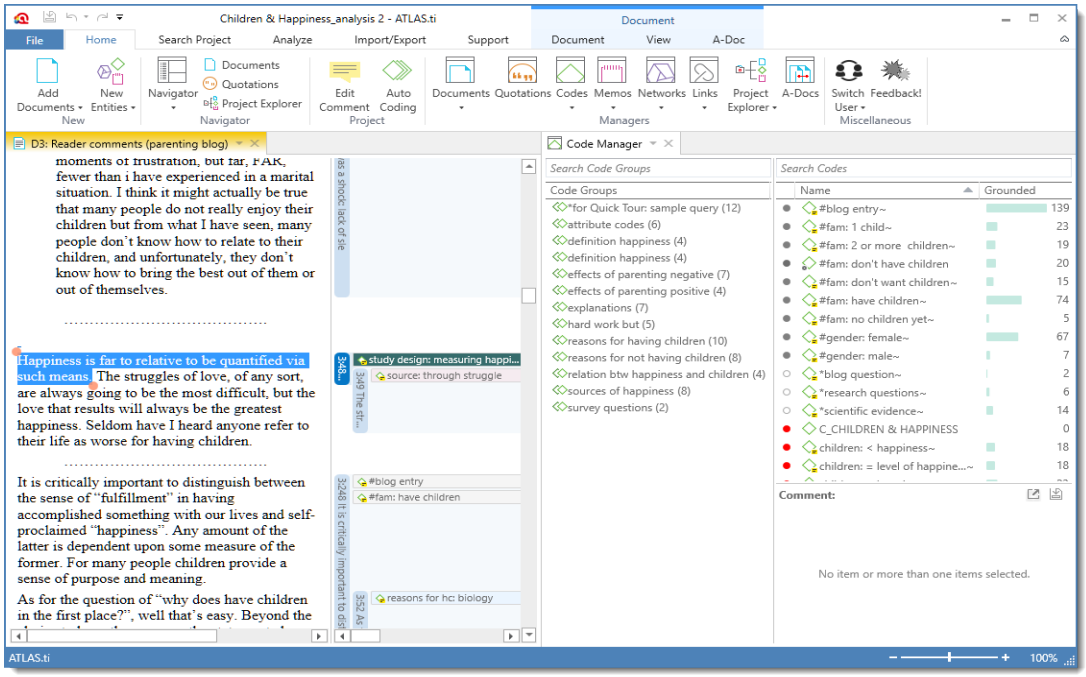


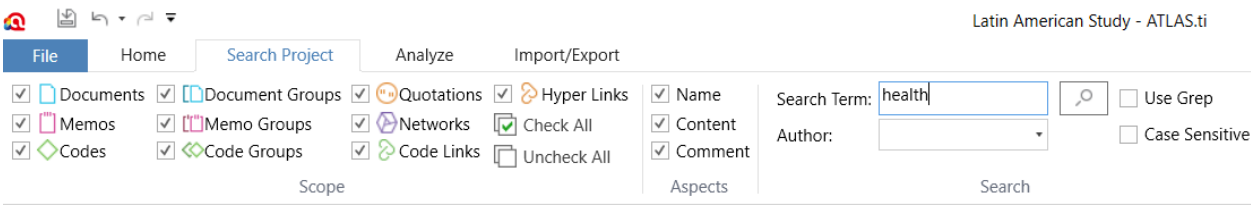
Figure 1: Moving a document into a new tab group

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.

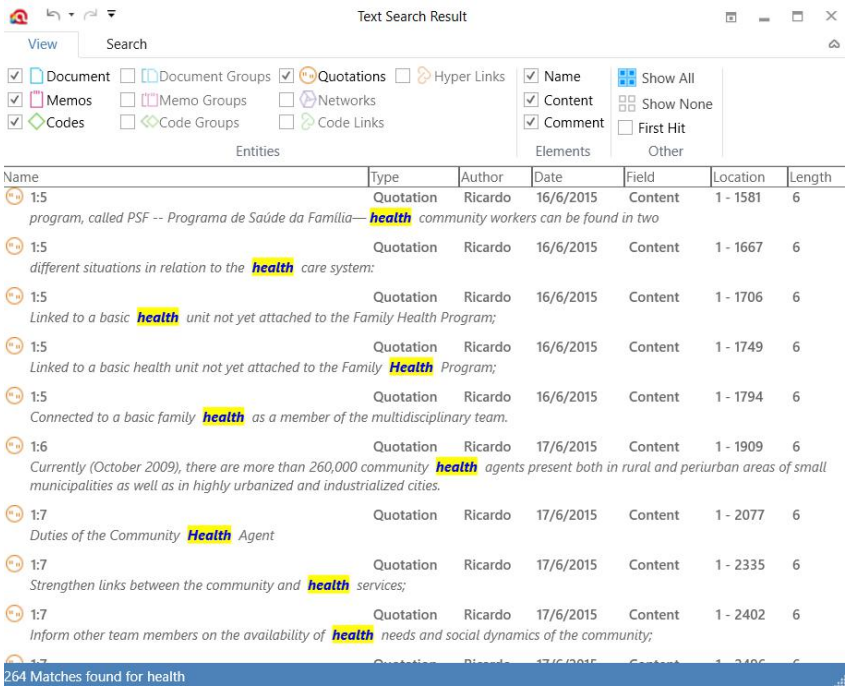

Children & Happiness_analysis 2 - ATLAS.ti
File
Home
Search Project
Analyze
Import/Export
Support
Document
View
A-Doc
Add Documents
New Entities
Navigator
Documents
Quotations
Project Explorer
Edit Comment
Auto Coding
Codes
Memos
Networks
Links
Project Explorer
A-Docs
Switch User
Feedback!
D3: Reader comments (parenting blog)
Code Manager
Search Code Groups
Code Groups
*for Quick Tour: sample query (12)
attribute codes (6)
definition happiness (4)
definition happiness (4)
effects of parenting negative (7)
effects of parenting positive (4)
explanations (7)
hard work but (5)
reasons for having children (10)
reasons for not having children (8)
relation btw happiness and children (4)
sources of happiness (8)
survey questions (2)
Search Codes
Name
Grounded
#blog entry~ 139
#fam: 1 child~ 23
#fam: 2 or more children~ 19
#fam: don't have children 20
#fam: don't want children~ 15
#fam: have children~ 74
#fam: no children yet~ 5
#gender: female~ 67
#gender: male~ 7
*blog question~ 2
*research questions~ 6
*scientific evidence~ 14
C_CHILDREN & HAPPINESS 0
children: < happiness~ 18
children: = level of happine...~ 18
Comment:
No item or more than one items selected.
moments of frustration, but far, FAR, fewer than i have experienced in a marital situation. I think it might actually be true that many people do not really enjoy their children but from what I have seen, many people don't know how to relate to their children, and unfortunately, they don't know how to bring the best out of them or out of themselves.
Happiness is far to relative to be quantified via such means. 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.
It is critically important to distinguish between the sense of "fulfillment" in having accomplished something with our lives and self-proclaimed "happiness". Any amount of the latter is dependent upon some measure of the former. For many people children provide a sense of purpose and meaning.
As for the question of "why does have children in the first place?", well that's easy. Beyond the
study design: measuring happi...
source: through struggle
#blog entry
#fam: have children
reasons for hc: biology
ATLAS.ti
100%

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.

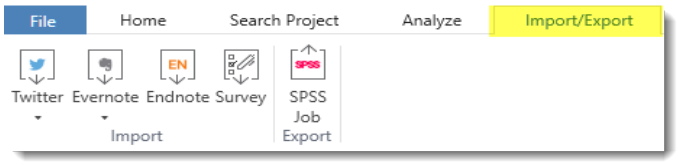


The results of the search are listed in an interactive list, where you can click on a specific hit and you will be able to see the term within its larger context. See the result list below.



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 took, 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.

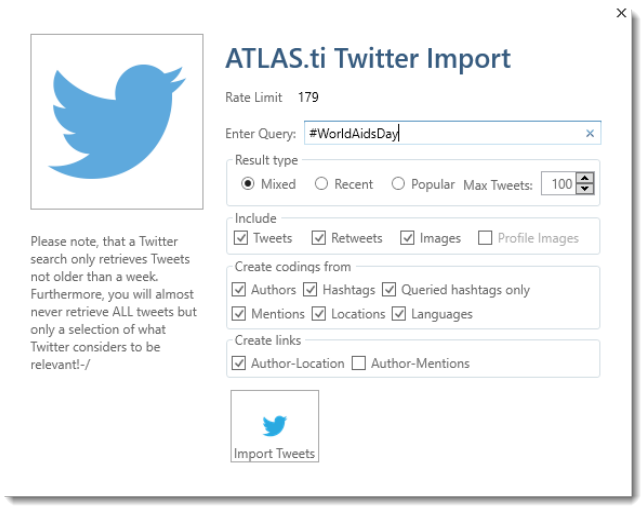


Figure 2: Set Twitter import options

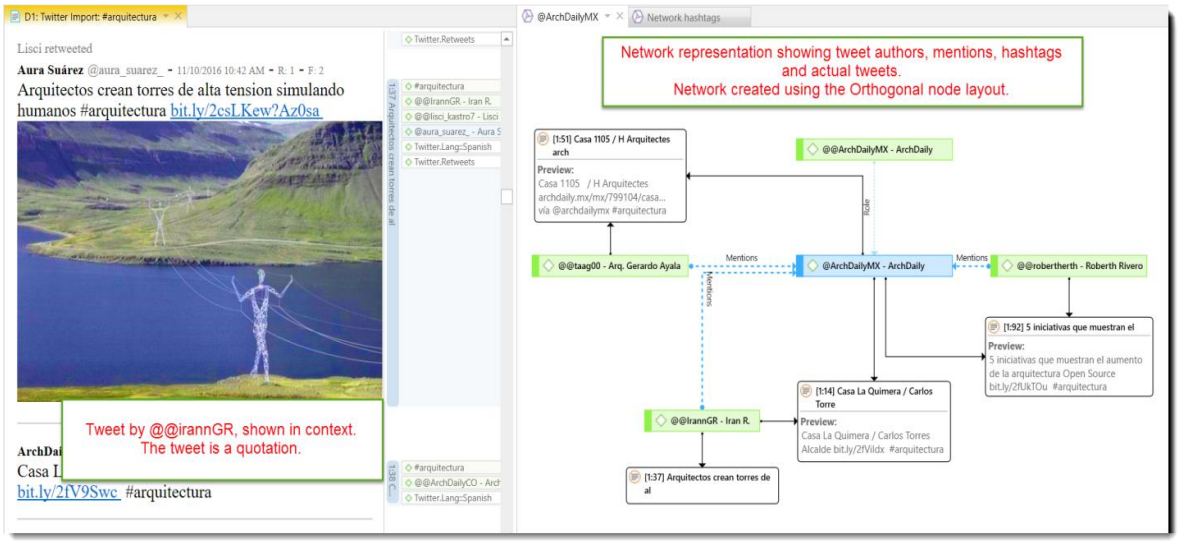
Further options are to select the most recent or the most popular tweets and whether to include retweets, images and profile images. The imported data is automatically coded based on the selection you make.

Tweets often contain many more hashtags then 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.

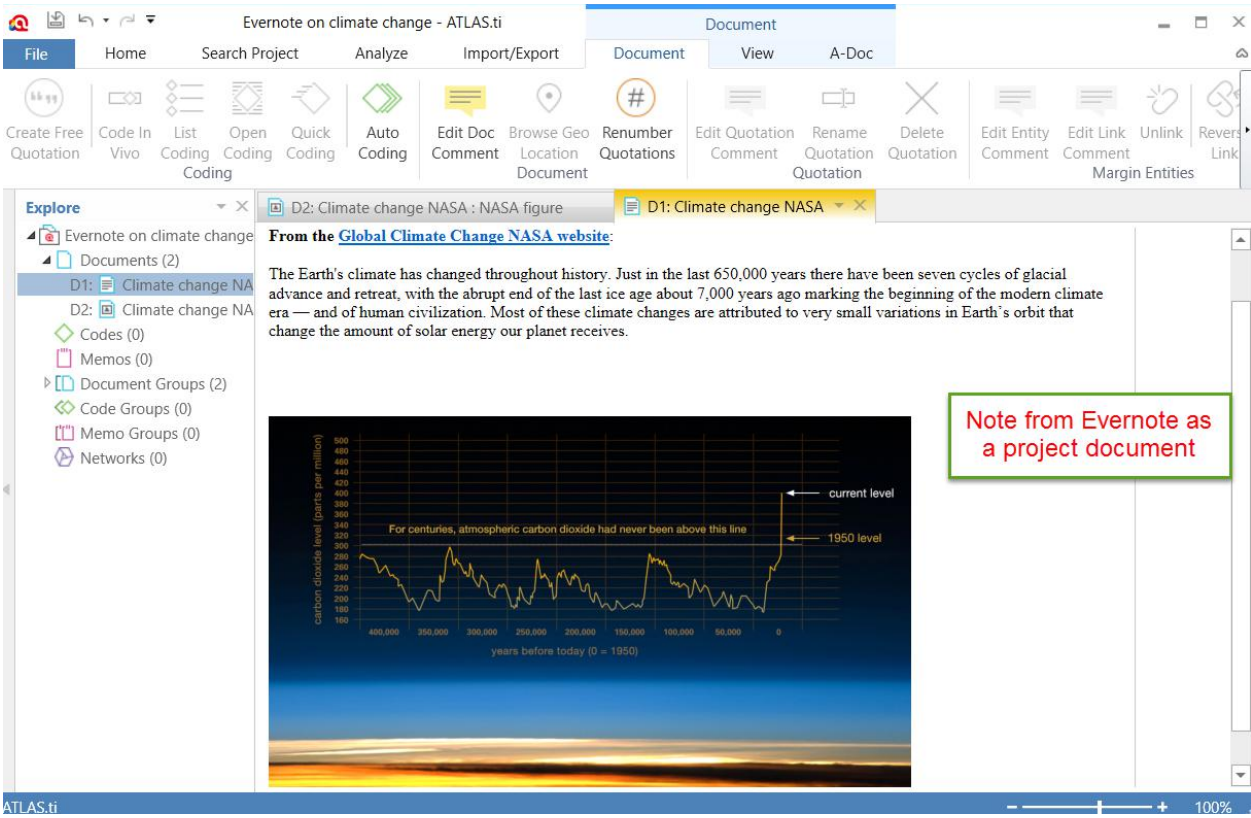
The result of the importation will produce a single document with all tweets and a set of codes for the hashtags, the author, the language of the tweet and the location from where the tweet was made. The tweets themselves become quotations. So, for example, all of the tweets under the hashtag '#Deco'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



Evernote Import

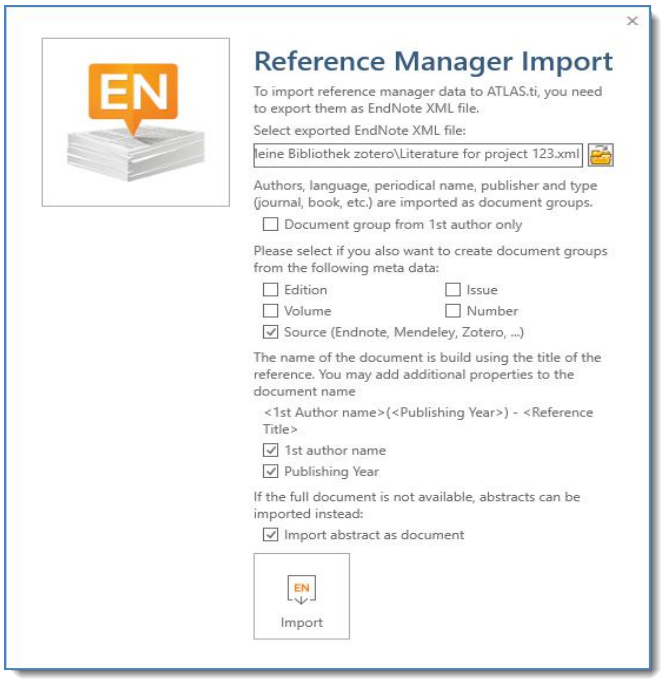
You can import your notes from Evernote libraries. Each note becomes a document in ATLAS.ti. Once imported, you can proceed to work with it as you would with any document: segment it, code it, annotate it, diagram it, and so on. See below some document imported from Evernote.



Reference Manager Import

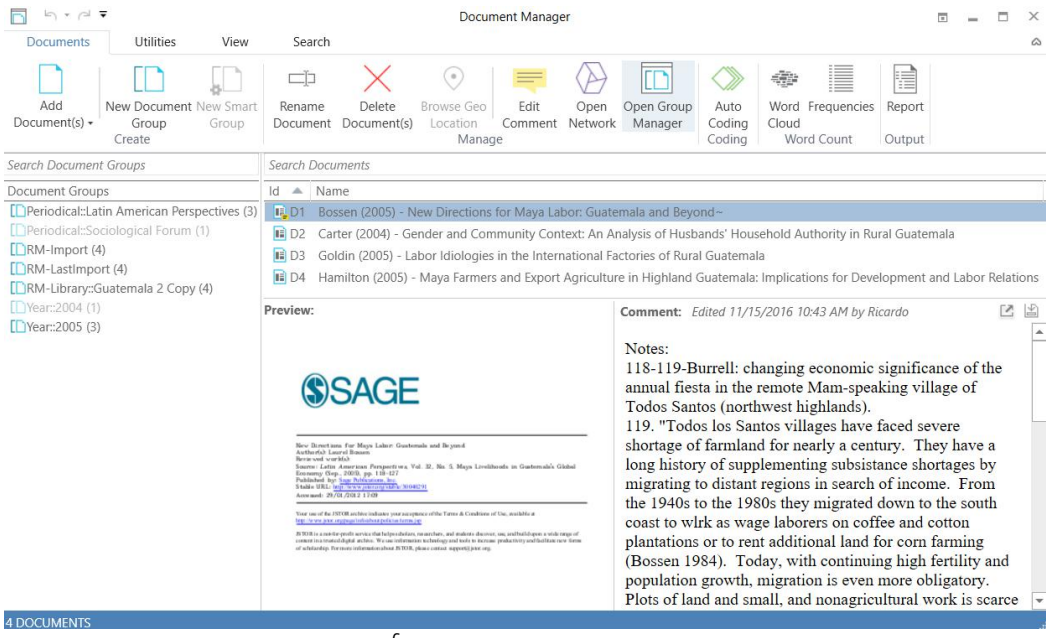
This option allows you to import data from any reference management software such as Endnote, Zotero, Mendeley and Reference Manager. The prerequisite is that your Reference Manager can export your bibliographic records as 'Endnote XML Export File'. Once that is done, they can be imported into ATLAS.ti. 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.


Document Manager
Documents
Utilities
View
Search
Add Document(s)
New Document Group
New Smart Group
Create
Rename Document
Delete Document(s)
Browse Geo Location
Manage
Edit Comment
Open Network
Open Group Manager
Auto Coding
Coding
Word Cloud
Frequencies
Word Count
Report
Output
Search Document Groups
Search Documents
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)
Year::2005 (3)
Id
Name
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 Idiologies in the International Factories of Rural Guatemala
D4 Hamilton (2005) - Maya Farmers and Export Agriculture in Highland Guatemala: Implications for Development and Labor Relations
Preview:
Comment: Edited 11/15/2016 10:43 AM by Ricardo
Notes:
118-119-Burrell: changing economic significance of the annual fiesta in the remote Mam-speaking village of Todos Santos (northwest highlands).
119. "Todos los Santos villages have faced severe shortage of farmland for nearly a century. They have a long history of supplementing subsistance shortages by migrating to distant regions in search of income. From the 1940s to the 1980s they migrated down to the south coast to wlrk as wage laborers on coffee and cotton plantations or to rent additional land for corn farming (Bossen 1984). Today, with continuing high fertility and population growth, migration is even more obligatory. Plots of land and small, and nonagricultural work is scarce
4 DOCUMENTS

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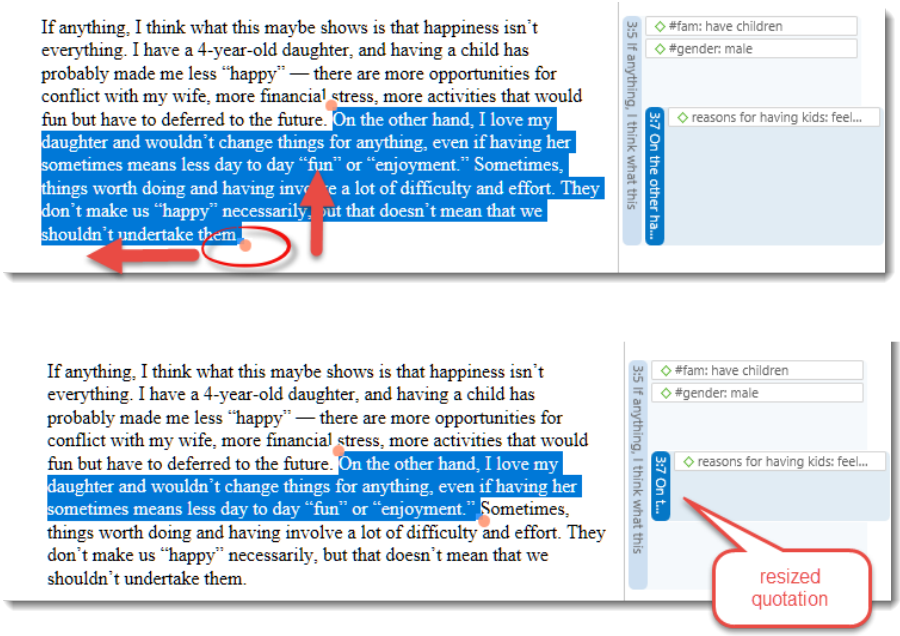
New Ways Of Working With Quotations

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.

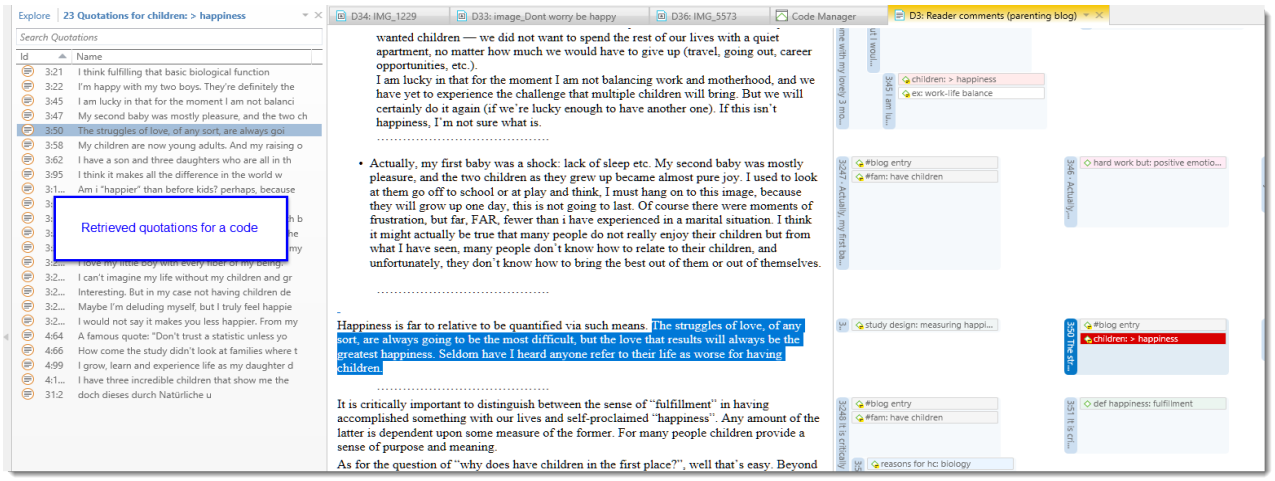


Quotation Preview In Quotation Manager

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.

Quotation Retrieval Made Easier

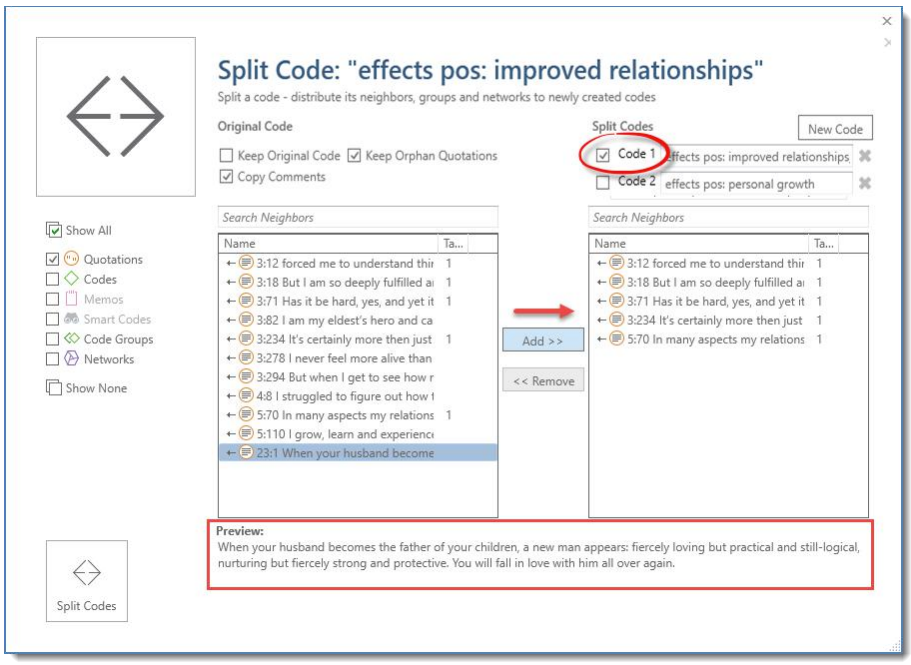
Quotation Retrieval windows can be docked on the right or left-hand side of your screen. This facilitates the process of reviewing your quotations in context.



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.



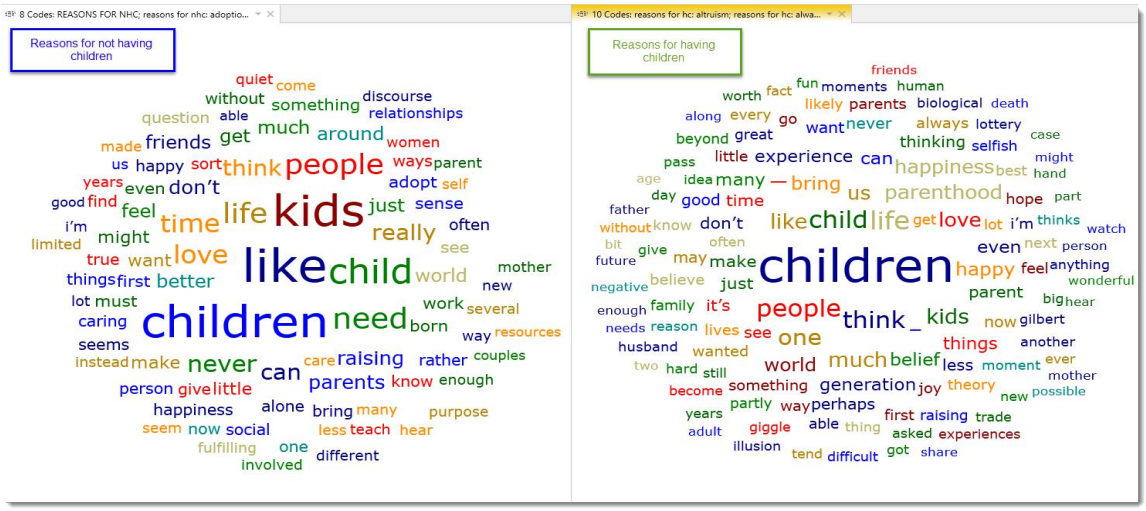
ATLAS.ti be default creates two sub codes, but you can add more when you click on the New Code button. Further options are to keep the original code including the quotations or without them.

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.

Word Clouds Reloaded

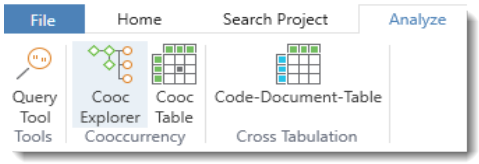
A quick way to get a feeling for the content of a text document is by creating a word list or word cloud. Word clouds in A8 are colored and in addition to displaying word clouds for document, you can also create word clouds from coded content.

The following example shows two word clouds based on of coded data segments comparing answers provided with regards to reasons for having and reasons for not having children:

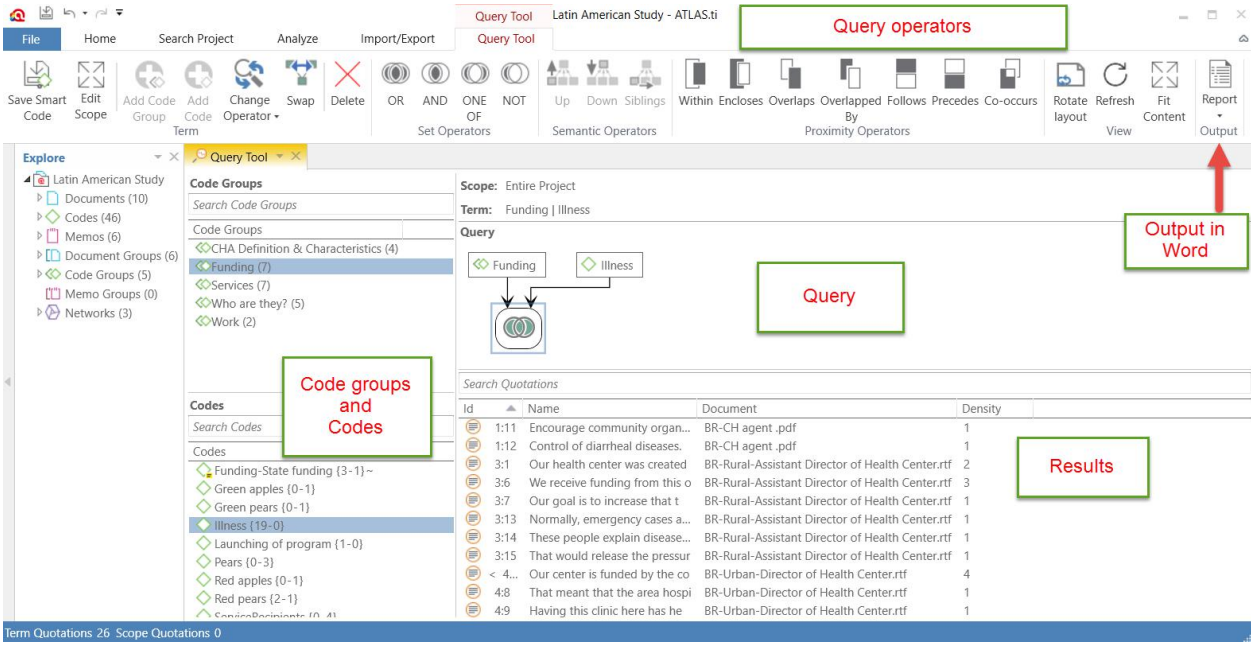


Redesigned Query Tool

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



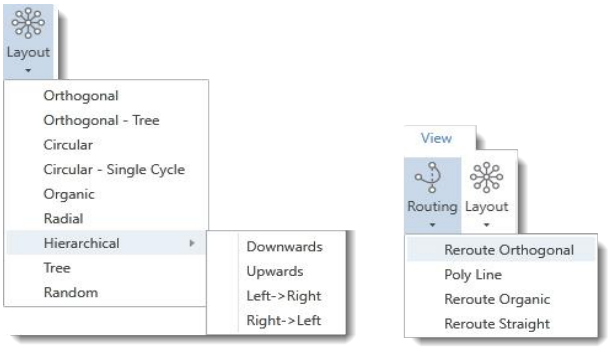
The Query Tool deserves a few extra words. This tool has been redesigned completely via-à-vis version 7 and earlier. There is a graphic interface that facilitates the creation of queries, still using Set, Semantic and Proximity operators, as well as allowing for the specification of the scope of the 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.



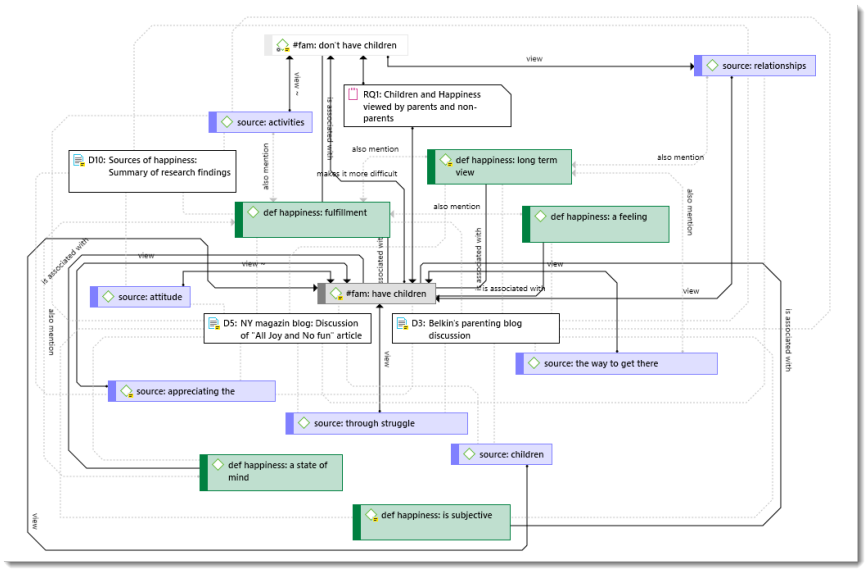
Networks

Layout

Now, you can represent your networks in 11 different automatic layouts. You will select the one that best represents the meanings that you want to express through the network visualizations. These layouts are the following:

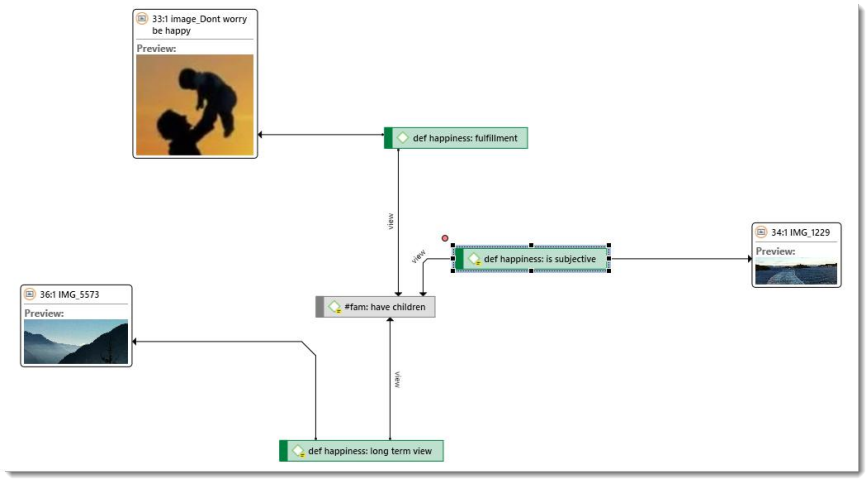


To create the network below, the Organic layout was used in combination with Poly Line.

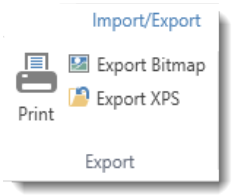


Previews For Image Quotations

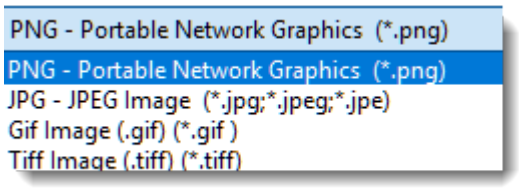
In addition to previewing documents and including full text quotations into a network, you can now also view image quotations in a network:



Exporting Networks



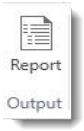
Networks can be exported in various graphic file formats, in xps and PDF format and inserted into other applications. Available graphic file formats:



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

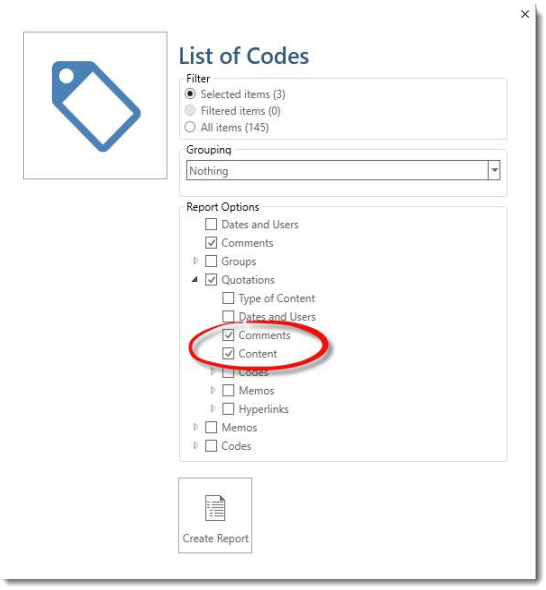
If you want to create a PDF file, make sure a PDF writer is installed on your computer. If so, you can select the **Print** option and chose your PDF Writer as printer.

Customized Reporting

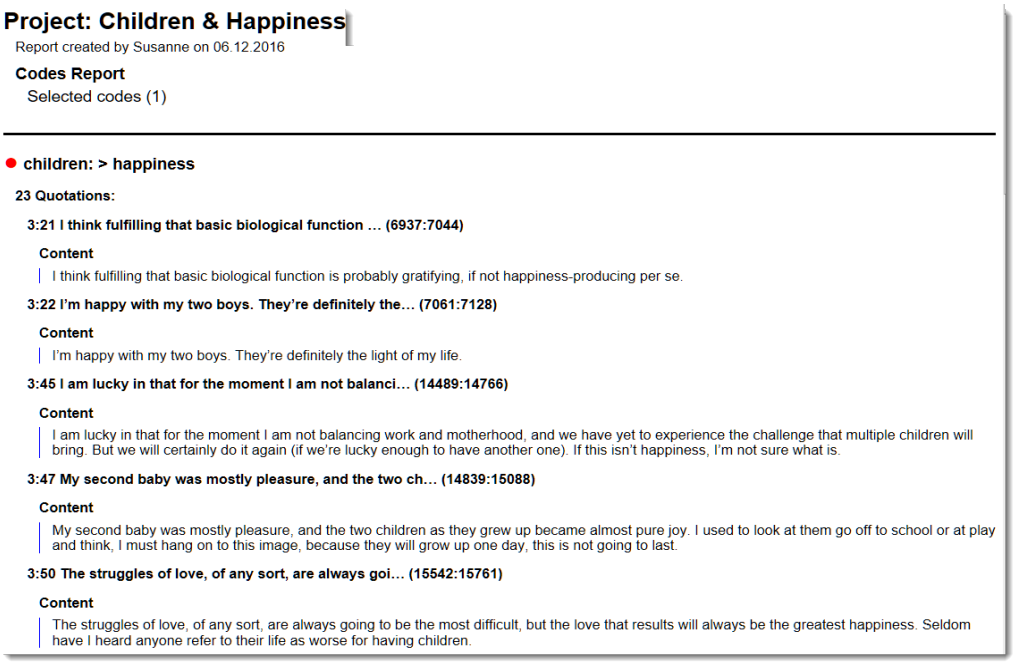


ATLAS.ti 8 in addition to providing predefined reports also offers user configurable reports. This means you can decide what should be displayed in the report. Predefined reports are available in the Query Tool under the Report button.

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).