Welcome!

In this document, we will provide an overview of the new features that come to you with ATLAS.ti 9 Windows and Mac, and point out important differences between v.9 and the previous version.

While adhering to the philosophy and guiding principles of all the ATLAS.ti editions that have come before it and which have characterized the application since its inception some thirty years ago, ATLAS.ti 9 nonetheless represents a huge step toward the future. Implementation of new technologies (e.g. machine learning), a sleek and unified design between platforms, and laser-focused concentration on user experience and usability sets new standards.

We have listened carefully to our users and have streamlined and redesigned many areas of the program to even better accommodate user’s needs and workflows. Numerous innovative new functions show the way where ATLAS.ti is further headed—and where it continues to lead the pack of similar products.

The sum total of these new features makes for an exciting and powerful new ATLAS.ti experience. We hope you’ll enjoy it!

New Features At A Glance

The following features are new in ATLAS.ti 9 (Windows and Mac):

**IMPORTANT:** ATLAS.ti 9 is now exclusively available as a 64-bit application. This means more processing power and speed. But it also means that 32-bit computers (typically older Windows machines) can no longer run and install ATLAS.ti 9. Please check on this aspect prior to installing.

<table>
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<tr>
<th><strong>Headline Features</strong></th>
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<tr>
<td>Powerful new Search &amp; Code functionality:</td>
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<tr>
<td>• New auto coding with synonyms, AND/OR queries, and inflected terms</td>
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<td>• Expert mode with GREP and overall improved workflow</td>
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<td>• Named Entity Recognition</td>
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<td>New Coding Dialog</td>
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<td>A.I.-Based Sentiment Analysis</td>
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<td>Sankey Diagram in Code Co-occurrence Table and Code-Document Table</td>
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<td>Welcome Screen with important information and helpful resources at your fingertips</td>
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## User Favorites / Most Requested Features

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

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
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<tbody>
<tr>
<td>Document Editing (=make changes to imported documents)</td>
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<tr>
<td>Partial bundles for easier project portability</td>
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<tr>
<td>Audit trail for code merging</td>
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<td>Paragraph numbering in the Document Editor and for references</td>
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<td>“Print with Margin” (export documents with segments/codes in place)</td>
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<tr>
<td>Full Support for macOS Dark Mode</td>
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<tr>
<td>Table</td>
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<tr>
<td>Ribbons (Windows) and Menus (Mac) have been re-organized for an optimized</td>
<td>workflow.</td>
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<td>workflow.</td>
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<tr>
<td>Word Clouds now also in ATLAS.ti Mac</td>
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<tr>
<td>Flexible License Management (shift available seats easily between users)</td>
<td></td>
</tr>
<tr>
<td>A new, modern look and all-around optimized user experience</td>
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## Other New Features

Some aspects of our desktop applications have been re-designed and expanded.

<table>
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<tr>
<th>Feature</th>
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<tbody>
<tr>
<td>Fully UX-optimized user interface with many new usability features (e.g., empty states, redesigned tools)</td>
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<td>‘Create New Relation’ option when creating a link in a network</td>
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<tr>
<td>New comprehensive header for quotations in the Quotation Reader</td>
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<tr>
<td>Stop lists in over 30 languages, from Arabic to Ukrainian</td>
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<tr>
<td>Scope in Query Tool added in ATLAS.ti Mac</td>
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<tr>
<td>Searchable Help</td>
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<tr>
<td>ATLAS.ti 9 Windows is now a 64-bit application for extra power/speed</td>
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</table>
Getting Started - 1. Signing In To ATLAS.ti 9

Your ATLAS.ti User Account

The fact you are reading this document lets us assume you have already installed the program. This also means that you have, in all likelihood, already created your user account at my.atlasti.com.

Your user account plays an important role in your continued use of the program. It provides information about your license(s) and lets you administer them. If, for example, you have a multi-user license and need to invite colleagues from your research team, you can conveniently do that through the account. If you have a trial version of the program and decide to buy a license, you can do that through the user account as well. To switch your license from one computer to another, you guessed it: User account!

If you are reading this document and have not yet created a user account at my.atlasti.com, perhaps right now would be a good time to do so.

The Login Screen

Register/Sign in and activate your license or select Trial. Download and install the program, and get started right away.
Accessing/Using The Trial Version

You can access the trial version by requesting a trial license. This activates the program for a period of 14 days during which you can use all the tools and functions without limitation. The limitations of the trial version are few; they are listed here.

Once the trial period expires, the program is converted into a limited version that lets you view projects, but not create, save, or change existing projects.

If you decide to buy a license at this point (you can initiate the purchase from the program, from your account, or the online shop), it will be added to your account, and the program will be (re)activated to full capacity again.

Your existing project data is never affected by a change in license status.

Accessing, Activating And Using Your License

If you have purchased an individual license from the ATLAS.ti web shop, your license has been added to your account. The next step is to activate it.

Similarly, if you are a member of a team of users under a multi-user license, you have received a license key, an invitation code, or invitation link from the person or office that manages the license.

Log in to your ATLAS.ti account. If you have no account yet, create one by registering.

Navigate to License Management (the default page) and enter either the license key or the invite code that you were given by the license owner/license manager.

Click Activate License.

Start ATLAS.ti on you PC or Mac and click Check For Updated License and follow the on-screen instructions to complete a few easy steps to activate your license.

Your installation is now activated and you can start using ATLAS.ti.

Multi-user licenses: The ATLAS.ti License Management System allocates seats of multi-user license dynamically. This means, you are assigned the first free seat under your license. If all seats are occupied, you will be allocated the next seat that opens up. This happens automatically as soon as no other user is "logged in" on your license.
Useful Resources For Getting Started

- **System requirements** and installation instructions can be found here.
- Find the ATLAS.ti 9 Quick Tour here.
- **Video tutorials** in English and Spanish can be found on our YouTube channel.

Getting Started - 2. The Welcome Screen

The newly enhanced Welcome Screen lets you perform all important project management tasks, such as creating, importing, deleting and renaming your projects.

On the right-hand pane, it also gives you quick access to essential resources like the manual, the Quick Tour, and sample projects. Further, you no longer miss important information about updates, free webinars, new video tutorials blog articles or other publications about ATLAS.ti.

Transferring Existing Projects To ATLAS.ti 9

**ATLAS.ti 8 Windows/Mac —> ATLAS.ti 9 Windows/Mac**

You can install versions 8 and 9 side-by-side. Your existing v.8 library will be copied to work in the new v.9 format. This means you can still use the older version. If you however work on your project in version 9 and save it as version 9 project, you can no longer load it in version 8.

No special steps are necessary if you install on the same computer. ATLAS.ti 9 will copy and convert your existing v.8 library. All projects from v.8 will automatically be available in ATLAS.ti 9.
If ATLAS.ti 9 is installed on a computer with no previous v.8 installation, but you have v.8 projects on another computer (PC or Mac), export these projects as project bundle files. These bundles can be imported via the regular **IMPORT PROJECT** function in ATLAS.ti 9.

**NOTE:** ATLAS.ti 9 is not downward compatible. This means a version 8 project can be read by version 9, but not vice versa. A version 9 project cannot be opened in version 8 or earlier.

### ATLAS.ti 7 Windows —> ATLAS.ti 9 Windows/Mac

If you still work with version 7, please make sure your installation is updated to version 7.5.18, the final service pack for that version.

To prepare your projects for import to version 9, it is best to create a transfer bundle file: Select **PROJECT / EXPORT /TRANSFER BUNDLE (FOR MAC AND A8)**. Ensure that your projects are in full working condition prior to creating the bundle.

Open ATLAS.ti 9 and select the option **IMPORT PROJECT** from the start screen.

You can also import version 7 Copy Bundle files (.atlcb) into version 9 (Windows only). However, we recommend to prepare a transfer bundle file in version 7 first.

If you do not have a copy bundle file, it is possible to just import a version 5, 6 or 7 HU file. This, however, requires that all paths to the primary documents are still valid. If that is the case, use the **IMPORT PROJECT** option. Instead of selecting a copy bundle file, select the HU (.hpr5 / .hpr6 / .hpr7) file.

### New: The Coding Dialog

Considering that coding is perhaps the single-most fundamental activity in ATLAS.ti, we have re-invented it to make your work faster and more efficient!

![New Coding Dialog (ATLAS.ti Windows)](image)

- Actually, my first baby was a shock: lack of sleep etc. My second baby was mostly pleasant, and the two children as they grew up because almost never got bored. 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. Of course there were moments of frustration, but for FAIR, 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.

*Figure 4: New Coding Dialog (ATLAS.ti Windows)*
The coding dialog opens automatically when you double-click on a quotation in the margin area. You can then add an existing code to the quotation by clicking on the "plus". Remove a code by clicking on "minus."

Type the first few letters in the entry field to see codes that match this letter combination. This makes coding with existing codes easy and fast. Also, you will be reminded of the codes you already have. This helps for quick and easy picking from existing codes, and avoids creating duplicate codes with a similar name if you forgot that you already had the code.

You can view your code definition by selecting a code in the list.

Click on **Apply Codes** to see the applied codes.

New: The Quotation Reader

Another area where our focus on usability and efficiency comes to bear is the new Quotation Reader. It allows you to conveniently read quotations coded by a selected code or as a result of a query. You can modify existing codings, i.e. adding or removing codes. This allows you to review already coded data and continue coding on sub sections of your data.

You will encounter the Quotation Reader across the entire program--basically every time you retrieve quotations that are either based on a single code or on a query. Under the View tab, you can switch the preview mode between single line, small, and large preview modes.

To work in the Quotation Reader, use the icons in the upper-right corner:

- Click on the "eye" symbol to switch between the different preview settings: single line, small, and large preview.
- Click on the "hamburger" menu symbol to export all quotations to Excel.
- Click on the green code icon to bring up the the coding functionality.
New: Search & Code

With the recent advances in Deep Learning technology, the ability of algorithms to analyze text has improved considerably. Creative use of advanced artificial intelligence techniques can be an effective tool for doing in-depth research. ATLAS.ti 9 now includes such technology to enhance the research experience and to increase your productivity.

Under the **Search & Code** tab, ATLAS.ti offers four ways of searching for relevant information in your data that can then be automatically coded.

- **Text Search**
- **Expert Search**
- **Named Entity Recognition (NER)**
- **Sentiment Analysis**

As ATLAS.ti is a tool for qualitative data analysis, the process is not (and should not be) fully automated. But it offers a very fast and efficient point of departure and serves as a useful additional enhancement tool.

Before coding the data, you can review all results, make modifications, or decide not to code certain finds.

**Text Search & Code**

This is the previous "auto coding" tool, but with a greatly improved workflow and significantly enhanced functionality:

- If searching for single words, ATLAS.ti suggest synonyms (currently for English only).
- Combine multiple search terms using AND and OR within a given context like a sentence or paragraph, or multiple syllables in a word.
- Search for inflected forms, i.e. searching for "run" will also search for running, runs, ran.
- Use wildcards (*).
- Search for exact phrases by adding parentheses around the search term.
- Determine what should be coded—exact match only, word, sentence, or the containing paragraph.

The figure below shows a text search looking for the occurrence of two search terms, one including synonyms, within a sentence. The search is restricted to two documents.
In the result window you can review the search finds and code each individual find, or code all at once. If the search terms you are looking for occur in an already existing coded quotation, the existing coding is also shown.

The text search result window offers all options of the coding dialogue. To open it, you click on the green code icon.

**Figure 7: Defining a text search query (ATLAS.ti Windows)**

**Figure 8: Coding text search results (ATLAS.ti Windows)**
Exact Match Search
An exact match search finds the characters as they are entered into the search field. The search results for ‘emotion’ could look as follows:

- emotions
- emotionless
- demotion
- demotional

If you only want to find “emotion,” you need to search for exact phrases.

Exact Phrase Search
When you want to search using an exact phrase, you simply surround your search expression with quotation marks. For example, if you want to search for limited liability corporations but only want to retrieve results in which the terms appear as an exact phrase, type “limited liability corporations” (including the quotation marks) into the search field.

Your search results will only include data segments that contain the exact phrase—limited liability corporations—as typed between the quotation marks, but will not include results where the terms are separated by other words, as in: corporations with limited liability.

For best results, do not include wildcard characters in an exact phrase search unless the wildcard character is part of the phrase you are looking for.

Named Entity Recognition
In natural language processing, Named Entity Recognition (NER) is a process where a sentence or a chunk of text is parsed through to find entities that can be put under categories like persons, organizations or locations. You can think of it like a special auto coding procedure, where you as the user do not enter a search term. Instead, ATLAS.ti goes through your data and finds entities for you.

You can select which entities you want to search for:

- Person
- Organization
- Location
- Miscellaneous (works of art, languages, political parties, events, book titles, etc.)

After the search is completed, ATLAS.ti shows you what it found. You can review all categories, or select only one category as is shown in the figure below. This make it easier to select what you are interested in. It is possible to sort a search find into a different category.

For coding the data, you can select among different code labels: the entity name, just the category name (person, organization, location or miscellaneous), or both the category name + the entity name. All codes of one category can be added to a code group.
In the next step you can review the results in context and code all results with the suggested codes, or decide for each hit whether to code it or not.

Figure 9: Named Entity Recognition: Configure results (ATLAS.ti Mac)

Figure 10: Reviewing and (auto) coding results (ATLAS.ti Mac)

**Sentiment Analysis**

Sentiment analysis is the interpretation and classification of emotions (positive, negative and neutral) within text data using text analysis techniques.

Application Examples:

- Identifying and cataloging a piece of text according to the tone conveyed by it.
- Understanding the social sentiment of a brand, product or service.
- Identifying respondent sentiment toward the subject matter that is discussed in online conversations and feedback.
- Analyzing student evaluations of lectures, seminars, or study programs.
First, specify which documents or document groups you want to search. Next you specify the sentiment you are looking for. You can also adjust the suggested code name at this stage.

As shown above with Text Search and Named Entity Recognition, in the result window you can review the search finds and decide for each individual find whether to code it, or to code everything with the suggested codes.

For both Entity Recognition and Sentiment Analysis, we are using spaCy as our natural language processing engine. More detailed information can be found here.

New: Sankey Diagrams

Data Visualization is a great way to simplify the complexity of understanding relationships among data. The Sankey Diagram is one such powerful technique to visualize the association of data elements. Originally, Sankey diagrams were named after Irish Captain Matthew Henry Phineas Riall Sankey, who used this type of diagram in 1898 in a classic figure showing the energy efficiency of a steam engine. Today, Sankey diagrams are used for presenting data flows and data connections across various disciplines.

Sankey Diagrams provide rich interactive visualization, resulting in attractive graphics for information materials, and effective visual data exploration practices! We are putting this tool into your hands so that you do not need a graphic artist for creating beautiful visualizations of your results.

Sankey diagrams allow you to show complex processes visually, with a focus on a single aspect or resource that you want to highlight. They...

- ...offer the added benefit of supporting multiple viewing levels: Viewers can get a high level view, see specific details, or generate interactive views.
- ...make dominant factors stand out, and help you to see the relative magnitudes and/or areas with the largest contributions.
- ...complement the Code Document Table: As soon as you create a table, a Sankey diagram visualizing the data will be shown below the table.
The row and column entities of the table are represented in the Sankey model as nodes and edges, showing the flow between each pair of nodes. In the Code Document table, the connecting pairs are codes or code groups and documents or document groups. In the Code Co-occurrence table, the connecting pairs are codes for both rows and columns.

The key to reading and interpreting Sankey Diagrams is remembering that the width is proportional to the quantity represented.

New: Color Maps For Code-Document And Code-Co-Occurrence Tables

Color maps provide an intuitive visual feedback in code-document and in code-co-occurrence table. A darker color indicates a higher value.
New: Text Editing / Paragraph Numbering / Print With Margin

Several features have been long-time favorites of our users, meaning they have topped our list of most-requested user suggestions. As they are actually technically related, we are happy to give you full text editing, paragraph numbering, and full-text output with codes in place, also known as "Print with Margin."

![Text Editing](image1)

**Figure 14:** This screen shot shows paragraph numbering and how to access text editing and the print with margin option (ATLAS.ti Windows)

**Text Editing**

Found a typo in a document while coding or otherwise engaged with it in ATLAS.ti? Or need to retroactively redact passages, obfuscate dates, or anonymize names because of privacy concerns? Don’t worry, you can now simply switch to Edit Mode and make all such edits in any (non-PDF) text documents.

![Text Document](image2)

**Figure 15:** Text document in edit mode (ATLAS.ti Windows)
Paragraph Numbering

Especially when working in a team, it is often helpful to be able to refer to specific text passages on semi-granular level. Enter paragraph numbers. Switch them on, and they show up next to text as a reference that is easily communicated and thus makes for swifter, more efficient work.

Print With Margin

Print with margin does what it says: It lets you create an output of a primary document with all its codes in place in the margin, just the way they appear in the program. You can actually print this out on paper, or save the output as a PDF files. This way, you can easily show some central parts of your work to others and/or discuss them in a team.

New: Creating Partial Bundles To Exclude Audio/Video Data

If a project that you import contains linked media files, and the files have not been included in the bundle, you can re-link them.

You can also decide not to re-link the files when importing the project on a different computer. The linked multimedia documents are still listed under Documents, but you cannot load them. They will appear gray in the Document Manager.
NEW: CREATING PARTIAL BUNDLES TO EXCLUDE AUDIO/VIDEO DATA

If you double-click on a multimedia file that is not available, ATLAS.ti gives you the option to repair the link. This means, you point ATLAS.ti to the folder where the multimedia file is stored, so that it can be re-linked to your project.

New: Audit Trail When Merging Codes

ATLAS.ti automatically lists all the codes that you merge and adds the date and time when they were merged.

If a code that is merged already has a comment, this comment is merged as well.
New Quotation References

Quotations references now include the document name, the start and end position of the text quotations, page numbers for PDF documents, start position for audio and video quotations, and width times length for image quotations.

![New way of referencing quotations (ATLAS.ti Windows)](image)

Figure 19: New way of referencing quotations (ATLAS.ti Windows)

If you have added a name to a quotation, it will be shown before the document name in bold. This also applies to all quotation reports.

New In ATLAS.ti 9 Mac

Scope In Query Tool

In the Mac query tool, code query results can now also be restricted to documents or document groups.
Word Clouds

In the Mac version, the word cloud is an alternative view of the word list. You can change between list and cloud view in the same window.
Dark Mode

![Figure 22: ATLAS.ti Mac in Dark Mode]

New: Miscellaneous

Create New Relation Option When Creating A Link

When linking two codes or two quotations in networks, you can now add a new relation type in the process. You no longer need to go to the Relation Manager first.

![Figure 23: Create new relationship while linking entities in networks]

Searchable Help

You can access the manual in form of a help file from within ATLAS.ti by clicking in F1 (Windows) or the question marks. This will take you directly to the built-in searchable help.

PDF versions of the manual and the Quick Tour are also available and can be used for easier printing and offline reading.
Ribbons – Windows

Via the new Search & Code ribbon you can access the following tools:

![New Search & Code ribbon](image)

Figure 25: New Search & Code ribbon

The Tools & Support ribbon has been split into two tabs: Tools and Help. Project Search can now be found under the Tools tab.

![The new Tools and Help ribbon](image)

Figure 26: The new Tools and Help ribbon
Interface And Menus In The Mac Version

You find now Quick Access buttons above the Project Explorer for functions related to Documents, Quotations, Codes, Memos and Networks.

The menus have been reorganized to optimize usability and work flow. There is no longer a Tools menu, its options have been integrated elsewhere.
New Sample Projects

We would like to introduce you to a new resource. You might be familiar with the *Children & Happiness* project that we have been using as sample project for a while now. We have been adding a number of new projects in English and Spanish, featuring a variety of data sources.

Each project comes with a project description, if available the original data sources, and research questions are included.

You are free to use all of these projects for demonstration purposes and for teaching. You can use the raw data to build a project from scratch and use the coded version to practice some more advanced tools.

You find all projects [here](#) for download.

Getting Assistance

We hope this short overview of ATLAS.ti 9 has been helpful. If you need additional guidance, we are here for you:

**ALL ISSUES**: Write to [general@support.atlasti.com](mailto:general@support.atlasti.com) with all questions or problems re. buying, licensing, learning, or using the program, as well as technical problems.

**USING/LEARNING THE PROGRAM**: If you have questions specifically about learning and using ATLAS.ti, you can also call one of our support phone numbers near you.

**LICENSING/ACTIVATION**: For problems specific to licensing and activation as well as your user account, write to [account@support.atlasti.com](mailto:account@support.atlasti.com).

Let us know how we can help you, and tell us how we can further improve our suite of programs to make them even more useful for you.

We look forward to hearing from you!