

## Rearranging A Selected Primary Document

- Select the PD in the Document Manager whose list position should be changed.
- Choose **DOCUMENTS / MISCELLANEOUS / CHANGE POSITION** from the main menu.
- Enter a position number after which the selected document is to be moved.

## Rearranging Primary Documents Using Drag & Drop

Rearranging PDs via drag & drop is a convenient alternative and lets you rearrange a number of selected PDs concurrently.

- Open the PDocs Manager.
- Select one or more PDs.
- Start to drag the PD(s).
- A dashed bar appears at the current list insertion point.
- Drop the PDs when you reach the desired location for the documents.

Set the sort criterion to ID by clicking on the ID header for an optimal feedback of the renumbering procedure.

## Renumbering All Primary Documents

This option becomes useful after you removed several documents from a HU. When removing PDs from a HU, previously assigned IDs (e. g. "P 1") are not "released." This results in gaps in the sequence of PD numbers. You may remove these gaps by renumbering all PDs in the HU using the Renumber All feature.

- Select **DOCUMENTS / MISCELLANEOUS / RENUMBER ALL** from the main menu.

It is not necessary to renumber PDs in ATLAS.ti. Doing so can give reports a cleaner appearance.

# Loading And Navigating Primary Documents

## Loading Primary Documents

Whenever the content of a PD needs to be displayed, printed, or searched, it accesses its data source (file, memo) and loads the content. This request is often triggered indirectly, e. g., by displaying (or printing) a quotation. For



performance reasons, documents are only loaded once; they are “cached” unless this option is turned off.

The following lists a few procedures that directly or indirectly load the content of a PD:

- Activating it in the document drop-down list or the PD Manager.
- Activating a quotation in the quotation drop-down list or the Quotation Manager.
- Selecting a quotation for an activated (double-clicked) code or memo.
- Activating a hyperlink in the margin area.
- Using the **LOAD** option from the context menu of a PD node in a Network Editor.

### To Load A PD Using The Drop-down List

- Click on the PD drop-down list.
- Select a PD by clicking on an entry in the list. The selected PD is displayed in the PD pane. If the list does not display all PDs assigned, the scrollbar lets you navigate the list of entries.

### To Load A PD Using The PD Manager

P-Docs

- Open the PD Manager by clicking the button to the left of the PD drop-down list.
- Double-click an entry in the PD Manager to load and display the PD.

The HU is also protected against accidental concurrent editing.

### Content Caching

By default, the content of PDs is “cached,” (i. e., kept in memory) unless this option has been switched off in **GENERAL PREFERENCES**. The benefit of caching is that the time a document requires to be ready for use is greatly reduced whenever its content is accessed more than once (e. g., when auto-coding text passages). The drawback of caching is that a larger amount of internal memory is needed when loading many large documents, which might in turn create performance issues on systems with insufficient memory. Caching can be turned off completely, but you can also empty the cache periodically by choosing menu option **DOCUMENTS / DATA SOURCE MANAGEMENT / CLEAR DOCUMENTS CACHE**.

With caching turned off, repetitive operations like auto-coding will be significantly slowed down.

## Multi Document View



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

Drag a document from the navigation pane (see Navigation Pane [11]) or the P-Docs Manager onto the region button at the right hand side of the HU Editor to load a second document. Alternatively, click on the region button first to open a new region and then drag a document in the empty region pane.

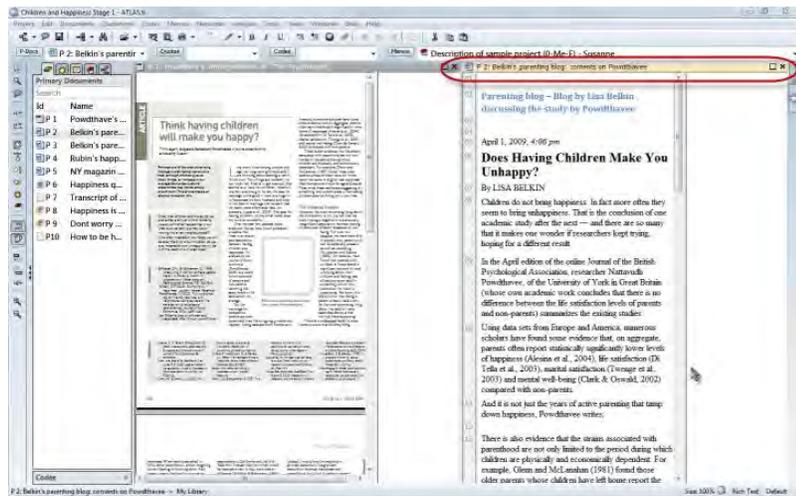


Figure 54: HU editor with two document regions

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



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

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

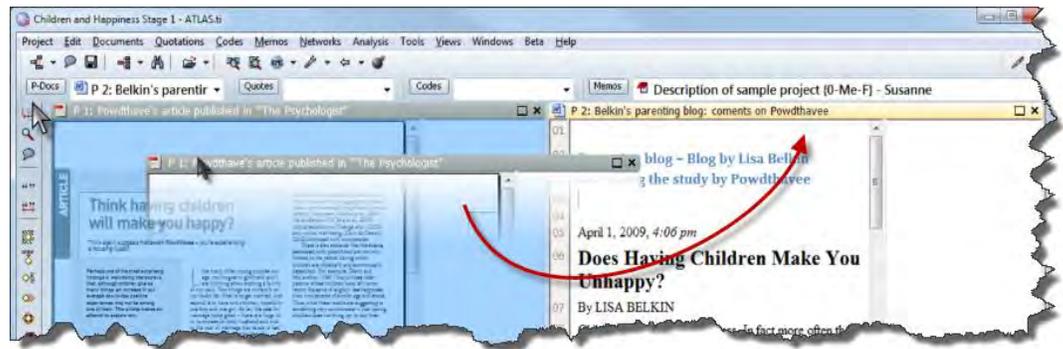


Figure 55: Moving documents between regions

## Navigating Within Primary Documents

The available navigation options depend on the media type of the selected PD.

### Navigating Within Textual Primary Documents

Textual PDs allow for a variety of options to display different parts of the text:

- You can scroll up and down using the mouse wheel.
- The arrow keys and other navigational keys can be used to move through the text.
- Jump to specific line/paragraph numbers using the **Go-to-Paragraph** button to the left of the PD pane.
- You may also zoom the content via the **Zoom PD** button in the vertical tool bar (see left). To reset the view to 100%, hold down both **SHIFT+CTRL** key while you click on the **Zoom +** button.

You find a selection of predefined sizes in the Size tab in the bottom right of the ATLAS.ti window:



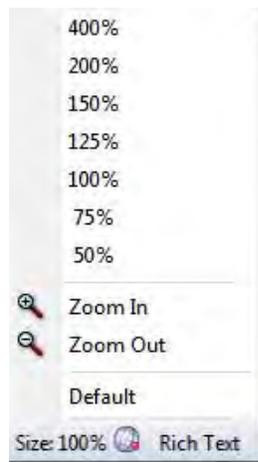


Figure 56: Setting the display size of primary documents

## Some Additional Notes On Displaying And Navigating PDF Documents

You can view PDF documents page by page or select to view continuous pages. If your PDF documents contain bookmarks, you can choose whether you want to see them or not and where to position them.

To change the settings for PDF documents, select the main menu option **TOOLS / PREFERENCES / PDF PREFERENCES**.

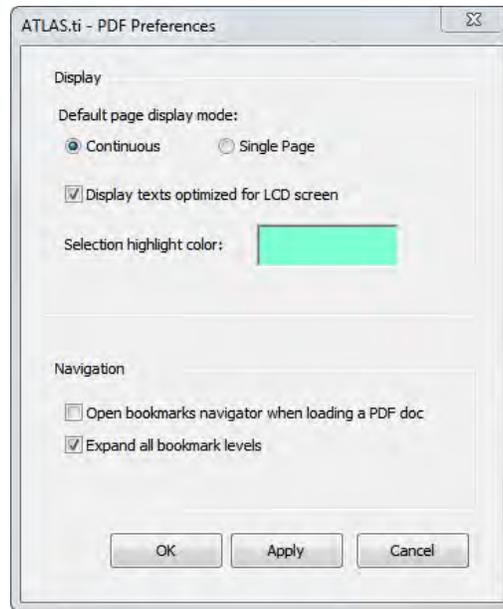


Figure 57: Setting PDF preferences

- Click on the colored rectangular area to select a highlight color.
- Select the continuous page display option to scroll down the entire PDF document.

If selecting the single page option, only one page at a time is displayed. When moving down and up the scroll bar, a preview image of the other pages is displayed (see below).



Figure 58: Single page view with preview image

When selecting the single page view, click on the Page button in the status bar to move back and forth. Or click on the preview image to jump to the displayed page.



Figure 59: Page button in the status bar

In case, the PDF document includes bookmarks and you want to display them, select the appropriate option in the Preferences window (see Figure 57). Bookmarks are displayed in the navigation pane:



Figure 60: Display of PDF bookmarks

## CHANGING THE DISPLAY SIZE OF PDF DOCUMENTS

If you increase the size of the editor window, the size of the PDF page is enlarged. You can also use the Zoom buttons in the vertical tool bar and the size tab in the status bar to set the display size of your PDF document. The size tab in status bar shows the actual size of the PD.

When clicking on the Size tab when a PDF document is loaded, you have a few additional options:



Figure 61: Additional display options for PDF files

## Navigating Within Image Primary Documents

To change the visible section of a graphical PD:

- Use the scroll bar.
- You can scroll up and down using the mouse wheel.
- The cursor arrows and other navigational keys can be used.

When you click on the upper left corner of an image PD, its comment is displayed in a pop-up window:

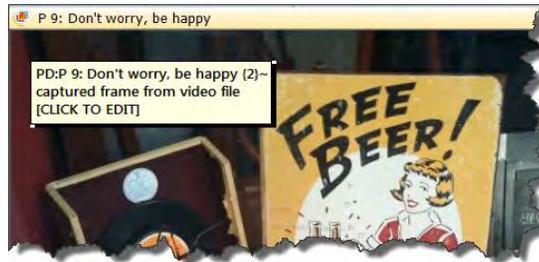


Figure 62: Displaying comments of image documents

If you see a red dot in the upper left hand corner, the image contains information about the geographical location where the photo was taken. Double-click on the red dot to open Google Maps at this location.



Figure 63: A red dot indicates that the photo PD contains geographical information

## Navigating Within Multimedia Primary Documents



Figure 64: The various aspect of a loaded video document

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

If you right-click on the video preview, you can set a number of display options in the context menu (see Figure 64). You can for instance hide the preview images, the audio waveform or the time indicators that are displayed when selecting a multimedia data segment (see “Coding audio and video documents” on page 193).

Two orange sliders that appear when you move the mouse pointer over the full preview let you select just the section of the video that you want to see in the margin area (see Figure 65):

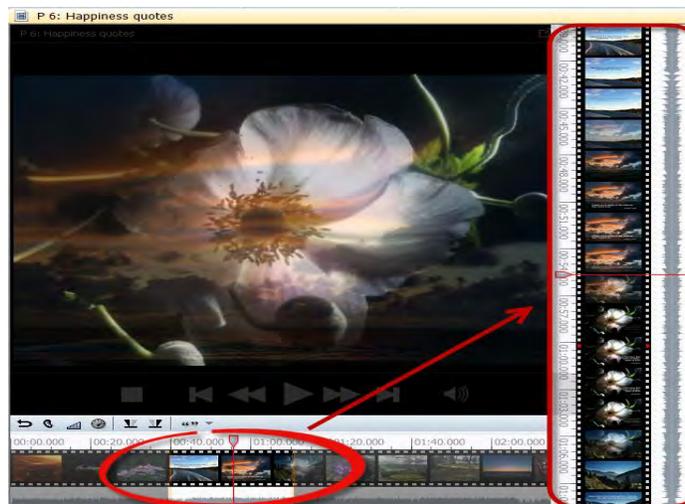


Figure 65: Selecting an area of the video file to be displayed in the margin area

### SHORT-CUT KEYS

**Play / Pause:** Play = **P**, to switch between play and pause, press the Space bar.

**Stop = S**

## Removing Primary Documents From A Project

If you remove a PD, the data source to which it refers is not deleted or otherwise affected. If you have documents to one of the two libraries, the document remains in the library (see “The Document Libraries“ on page 100). However, removing a PD does delete all of its quotations from the HU. As a consequence, all references to other quotations (hyperlinks), other codes, and memos are also removed.

- Select the PD to be removed from the HU.
- Choose **DOCUMENTS / REMOVE FROM PROJECT** from the main menu. Or select a PD in the Primary Document Manager, right click on the document and choose **REMOVE FROM PROJECT** from the context menu.

## Data Transcription

The A-Docs function, introduced in ATLAS.ti 6, allows you to not only transcribe your data within ATLAS.ti, but to also link documents to each other in such a way that you view them synchronously. This means you can read your transcript and listen to the audio file hearing the original tone of voice or viewing the segment in the video file. When in the midst of your analysis, you can mark a segment or a quotation of an associated document and instantly listen to the original audio or view the video. The audio/ video file stops at the end of the marked segment. You can also use the association points as navigation device, e. g., to enter at a particular point in the file or to easily jump around.

### Adding And Associating Multimedia Files And Transcripts

Below the process of adding a blank transcript file to an ATLAS.ti project and the process of transcription is explained step-by-step: