AnSWR

Analysis Software for Word-Based Records

User's Guide

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Chapter 1:
About AnSWR

AnSWR is a software program for coordinating and implementing large-scale team-based qualitative data analysis. It was developed by the Centers for Disease Control and Prevention as a free (public domain) tool to assist with applied research. Although the program was originally developed to assist with managing and analyzing large multi-site research studies that integrate qualitative and quantitative techniques, it can also effectively be used by a single researcher for more limited research projects.

Recognizing the challenge that researchers face in trying to manage, process, and analyze large volumes of data generally produced by qualitative research as well as the potentially complex, multifaceted issues associated with a single research topic, AnSWR was designed with a systems approach in mind (1). A systems approach has three underlying principles: systematic scientific inquiry is supported, complexity is the organizing framework, and data is object-oriented.

Given the increased interest in and use of qualitative research in both public and private settings, the assurance of data rigor and documentation of research procedures becomes increasingly important (2). Collaborative qualitative research efforts lacking systematization quickly run the risk of falling apart or becoming individual endeavors. Systematization does not curb creativity or limit analytical flexibility. Rather, it enables the analysis research team to coordinate and consistently apply procedures, explain how analytical decisions evolved, and to examine the validity of the analytical lens used to frame, filter, and present information. It provides the "audit trail" necessary for explaining how concepts, theories, and hypotheses are developed (3). With computers, the "audit trail" becomes easier to access and maintain.

Qualitative data analysis of unstructured or semi-structured textual data generally entails coding and indexing of ideas or themes, ordering codes, and establishing relationships between codes (4-6). Codes, however, are not linked just to segments of text. They are connected to other important data elements, such as whom or what provided the information and who interpreted the information. In turn data elements are characterized by particular features or attributes that may be important in understanding and interpreting phenomenon.

Among AnSWR's features are tools to organize and streamline common tasks necessary for systematic analysis of lengthy, complex text such as that associated with open-ended interviews. For example, AnSWR can help a researcher create and maintain codebooks; create links to documents stored on a local drive, a network, or the World Wide Web; develop hierarchical connections among codes; assess intra- and intercoder agreement; and flexibly segment and apply codes to text passages. Text retrieval is aided by the ability to selectively choose sub-sets of information using search parameters such as files, codes, coders, segments, and attributes of information sources.

More than 30 easy-to-use report formats are included with the AnSWR system. These pre-defined reports allow researchers to rapidly summarize their work in different formats such as narrative text, descriptive tables, or matrices that can be import to other software systems for additional analysis. Researchers can also customize reports to display information in a particular order or to include their own logos.

Textual data can be typed into the system directly or it can be linked as plain text file (TXT) or rich text formatted file (RTF). Textual data requires no special formatting and file size limitations are not imposed. Since the system creates a set of relational databases as opposed to individually coded data files, the analyst has a great deal of flexibility in how text files are set up and examined.

System Overview

The Study

In AnSWR, a Study provides the basic organizing framework for a coordinated research effort. AnSWR permits you to document information about the research design and analysis objectives of a research "Study." Minimally, three types of information are associated with a Study:

- **Sources** – who or what provides the textual data
- **Codes** – labels used to organize/classify concepts and retrieve textual data
- **Coders/analysts** – who applies the codes and interprets the textual data

The Study can also include source data. Source data characterizes sources on one or more properties. Source data can be used to filter or limit analytical output. Generally, source data is derived from a respondent profile, standardized questionnaire (e.g., demographic, behavioral or psychological assessment, performance evaluation) or an attribute/categorization resulting from the analysis or some other means (e.g., researcher-developed). Similar to a quantitative database, the source data captures the degree, presence/absence, or frequency of specific information.

When a new Study is created, a database named study30.mdb is automatically set up. The database reflects all additions or modifications to the Study sources, codes, source data or coders/analysts.

Note: In AnSWR, codes are different from source data. Source data tells you something about who or what provided the textual data, such as an interviewee's age, ethnicity, sex, health status, education, employment, professional or social network. Codes are what you have used to index or encode information provided by your source(s). Codes tell you something about what is contained in an interviewee's story, his/her response or comment to a question, or description about an event or process. Codes signal that particular content and context is present or absent. In addition, codes should indicate why you have interpreted that a particular indexing or classification of the textual data is appropriate.

The Project

A Project typically includes all the textual data that will be analyzed, including pictorial images or non-text based data objects. For example, textual data can be in the form of observation notes, interview transcripts, historical documents, meeting minutes, publication abstracts, ethnographic maps, drawings, or musical scores. All coding and report processing is at the Project level.

A Study must contain at least one analysis "Project." A Study can include an unlimited number of Projects, each with a smaller, more focused, research objective. Some Projects may build on each other sequentially, while others can be undertaken simultaneously.

For Studies in which multiple Projects are created, the Study becomes a repository for all the codes, sources, and coders/analysts associated with all the Projects. Hence, any of these items can be shared across Projects. Each Project, however, may have its own set of textual files.

If multiple analyses are planned, the criteria listed below may help you determine whether to set up (a) a single Study with multiple Projects or (b) multiple Studies that are each associated with a single Project.

If you are unsure of which approach is appropriate for your analysis needs, keep in mind that you can use the AnSWR merge wizard to help you to merge Studies or Projects, split them up, or borrow sources and codes from any Project at a later time.

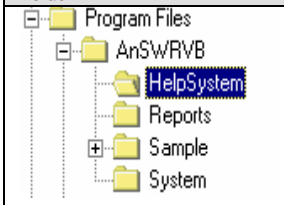
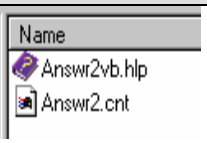
Note: Codes used across multiple Projects or Studies should be applied consistently. That is, the meaning of the code should change from one analysis to another. When applying codes under new conditions, makes sure that the original intent of the code does not get lost. Code application must match the definition that has been established via previous coding.

When a new Project is created, a database named project3.mdb is automatically set up. All analyses are written to this database. Textual data files are also associated with the project3.mdb file.

System Layout

Use Windows Explorer or My Computer to view the system layout. By default, AnSWR creates separate Study and Project folders under the main AnSWR directory. The Study location, however, may be changed to another folder or physical drive on a network.

Unless otherwise specified, AnSWR is installed under a folder named AnSWR under the C:\Program Files folder. Three system folders are found under the AnSWR folder: Reports, HelpSystem, and System. These folders should not be modified or removed.

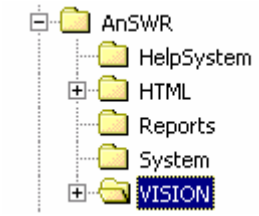
Folder	Files	Description
		**Contains the system help files**

Folder	Files	Description
Program Files AnSWRVB HelpSystem Reports Sample System	Name source.rpt Kappa.rpt kmatrx.rpt SCodes.rpt Select.rpt filestats.rpt filesegs.rpt PCodes.rpt cdrstats.rpt CodeTxt.rpt cdrsegs.rpt CdrDiff.rpt Cdrcodes.rpt CdPrcnt.rpt CodeView.rpt Codebk.rpt Codebkm.rpt	**Contains the system report modules** **Note: These files should not be modified**
Program Files AnSWRVB HelpSystem Reports Sample System	Name tips.sys reports.sys project.mdb MasterCB.mdb UserData.mdb Credits.Sys	**Contains the system databases** **Note: These files are used by the system when creating new Studies and Projects** **Never modify these files**

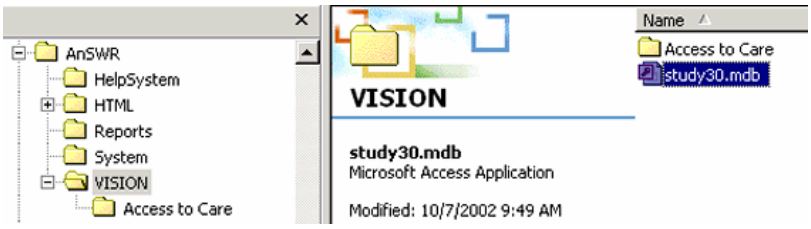
The Study Folder

AnSWR sets up a folder for each Study that you create. The folder is automatically assigned the same name as the Study. Once a Study name has been established it cannot be modified or renamed. If changing the Study name is required, the Project Merge Wizard can be used to duplicate the Study under a new name. See Chapter 4 for help on using the Project Merge Wizard.

In the tree diagram below, a Study named VISION was created in AnSWR.



If you were to click on the plus sign next to the VISION folder, the tree diagram would expand to display its contents. Inside the VISION folder you would find the study30.mdb. Study information (optional), sources, sources data (optional) coders/analysts, and codes are written to this database.



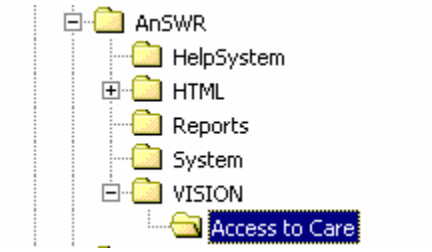
Study information essentially refers to the overall research design (i.e., Study title, investigators, rationale, objectives, data collection and sampling methods, data preparation procedures, analysis plan, etc.). While AnSWR provides basic fields for documenting this type of information, you may create your own fields using the Advance Study Utility.

Note: Traditional databases are organized by fields, records, and files. A field is similar to a variable in that it is only a single piece of information; a record is one complete set of fields; and a file is a collection of records.

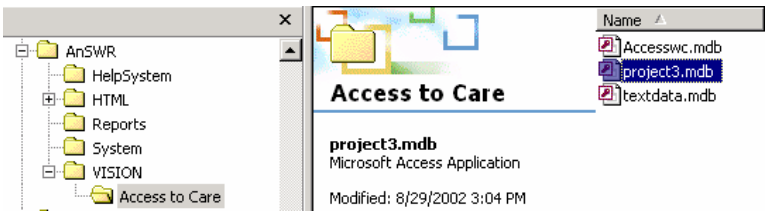
The Project Folder

A separate folder is created for each Project associated with a Study. The folder is automatically assigned the same name as the Project. Once a Project name has been established, it cannot be renamed. If a change in the Project name is required, the Project Merge Wizard can be used to duplicate the Project and assign it a new name.

In the tree diagram below, VISION Study includes a Project named Access to Care.



If you were to click on the on the plus sign next to the Access to Care Project folder, the tree diagram would expand to display its contents. Inside the Access to Care Project folder you would find three databases: project3.mdb; accesswc.mdb; and textdata.mdb.



Text, sources, coder/analysts, codes, and text segments specific to a Project analysis are written to the project3.mdb database.

The Access to Care accesswc.mdb includes any word count analysis performed. The word count database remains empty until Word Count Administration is selected as an analysis preference.

The Access to Care textdata.mdb contains all textual data directly entered in AnSWR. Each direct text input is saved as record in this database. For team-based analyses, always use direct text input. This avoids having all coders/analysts encounter problems in physically locating textual data files or using different versions of a file.

System Utilities

AnSWR includes five data maintenance utilities that can be accessed without running AnSWR. To initiate any of these utilities click on **Start**, then **Programs**, then **AnSWR** on your computer.

- **Code Sources Utility** – keeps codes and sources synchronized between two or more related Studies and ensures that coders/analysts working on the same analysis Project have consistent *codebook* and *sourcebook* entries. This utility can also be used to bring in or borrow codes from unrelated Studies.

- **Coder Cleanup Utility** – identifies inactive coders/analysts from Studies and Projects. If a listed coder/analyst has not performed any *sources- or text-based coding*, you have the option of deleting coders/analysts from the Study and Project databases.

- **AnSWR Update Utility** – determines if you are running the most current release of AnSWR available. An Internet connection is required to run this utility. The system gives you the option of downloading and automatically installing an upgrade patch. *This utility is also available through the AnSWR Coding Editor.*

- **Database Compact Repair Utility** – removes fragmentation and optimizes database performance. *This utility is also available through the AnSWR Study Manager Window.*

- **AnSWR Package Utility** – compresses and extracts shared Studies or Projects.

Database Compact & Repair

If you delete data from an AnSWR Study or Project, the study30.mdb and project3.mdb database files can become fragmented and result in inefficient use of disk space. When compacting a database file, a temporary backup of the file is made. The system then rearranges how the file is stored on your computer or network server. Once this process is completed, the backup file created by the system is removed.

If the system detects that a selected Study or Project has been damaged or is corrupt, it automatically repairs the database when the file is compacted. If you have a Study or Project that does not open or is behaving unpredictably, use the Database Compact Repair Utility to correct the problem.

Compacting optimizes the performance of your AnSWR databases. Hence, Study (study30.mdb) and Project (project3.mdb) databases should be compacted periodically.

Note: The system only creates a temporary backup of your selected database file. As an extra data security measure, you should always create a backup copy of your selected databases prior to running the Compact Repair Utility.

From **Start**, go to **Programs**, and locate **AnSWR**. Click on the arrow to display the drop-down menu. Select the **AnSWR Database Compact Repair Utility**. Locate the folder containing the Study (study30.mdb) or Project (project3.mdb) database that you want to compact/repair, click the **Open** button, click the **Repair Database** button, and then click **OK** to the prompts that follow.

Note: If you are trying to compact a database that is accessed by multiple coders/analysts and is located on a shared server or shared folder, first make sure that no other users have it open.

Typical AnSWR Analysis Sequence

- Create a Study
- Setup a Project
- Add textual data
- Enter sources
- Add source demographic data (optional)
- Create codebook
- Create text segment
- Source code text segment
- Code text segment
- Generate analysis reports

KEY TERMS

STUDY - basic organizing framework for a coordinated research effort. Study-related information is stored in database named study30.mdb. Each Study will have a study30.mdb file.

PROJECT – level at which all processing and analysis occurs. Project-related information is stored in a database named project3.mdb. Each Project will have a project3.mdb file.

SOURCES - who or what provides the textual data

SOURCES DATA - tells you something about the person or group that provided the textual data (e.g., age, ethnicity, sex, health status, education, employment, and professional or social network).

TEXTUAL DATA – text or graphics that will be analyzed (e.g., observational notes, interview transcripts, historical documents, minutes of meetings, publication abstracts, maps, drawings)

CODES - labels used to organize/classify concepts and retrieve textual data.

CODER/ANALYST – person who applies the codes and interprets the data.

Chapter 2:
Getting Started

AnSWR requires a few preliminary steps before actual coding of the textual data can begin. The standard sequence is as follows:

1. Log in to AnSWR
2. Create an analysis Study
3. Setup an analysis Project
4. Add text or image file(s)
5. Input the data source(s)
6. Enter and define code(s)

To add data files, sources, or codes, choose the **Modify a Project** option from the File menu, or click the **Modify Project** button in the Coding Editor.

AnSWR Login

The system requires a user-defined login consisting of coder/analyst ID and password. These items may be up to eight characters long and can include letters and numbers. Special characters are not permitted.

Logins serve two purposes:

- Allows more than one coder/analyst to process code in the same Project without deleting or modifying one another's work.
- Identifies what areas of the system a user may access.

User rights are generally determined by the person creating the Study. Typically, this individual is the Study Administrator. The four levels of user access are specified below.

- **Coder/Analyst** can process data and generate reports
- **Reporter** can generate reports, but may not enter or process data
- **Project Administrator** can process data, generate reports, and assign coder/analysts, but cannot modify Study codes that have been locked by the Study administrator
- **Study Administrator** can process data, generate reports, assign coder/analysts information, and modify Study codes

The Study Administrator may also set up a Study password. When the Study is opened, the system displays a prompt requesting the password. If an incorrect password is entered, the Study will open, but the user will have only reporter rights.

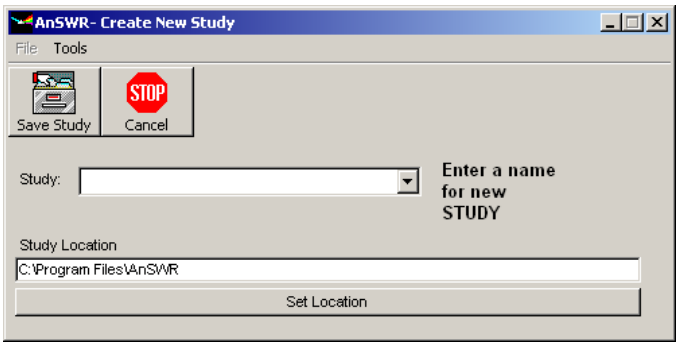
First-time users should enter a unique Coder/Analyst ID of their choice and then enter NEWUSER (one word, case sensitive) as the password. The system will display a Coder/Analyst information window for the user to complete.

Studies and Projects

The Study Manager Window

The Study Manager window will always display after a login has been completed. The first time that the system is used, the Study Manager window will prompt you to create a new Study.

Although the Study name does not need to be limited to a particular number of characters, it is suggested that you keep the name brief for display purposes. If you are running the system from a network server, Study names should be limited to eight alphanumeric characters.

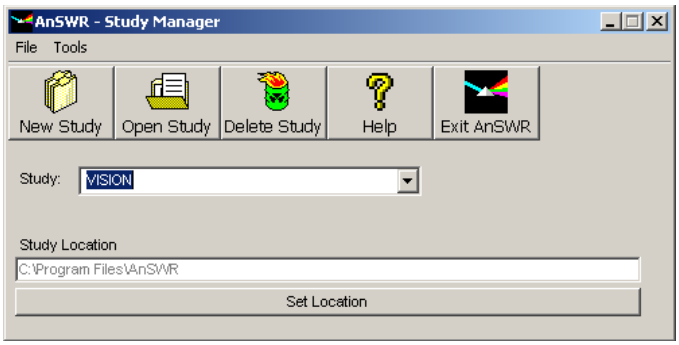


Note: Unless you have otherwise specified, AnSWR is installed under C:\Program Files. By default, Studies are saved under C:\Program Files\AnSWR.

Reminder: Once a new Study has been created, the system sets up a Study folder with the same name and writes a blank study30.mdb database to the folder. Any Study–related information you enter will be automatically written to the appropriate study30.mdb table.

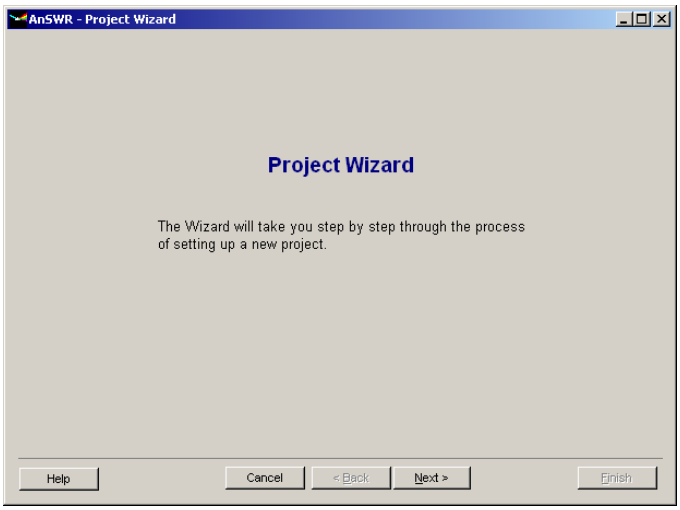
Other items on the Study Manager Window include:

- A File menu that duplicates the system functions available via icons in the AnSWR Study Manager Window
- A Tools menu that gives you access to the AnSWR Compact Repair Database Utility
- Icons for creating a new Study, opening an existing Study, deleting a Study, accessing the system Help file, and exiting AnSWR.

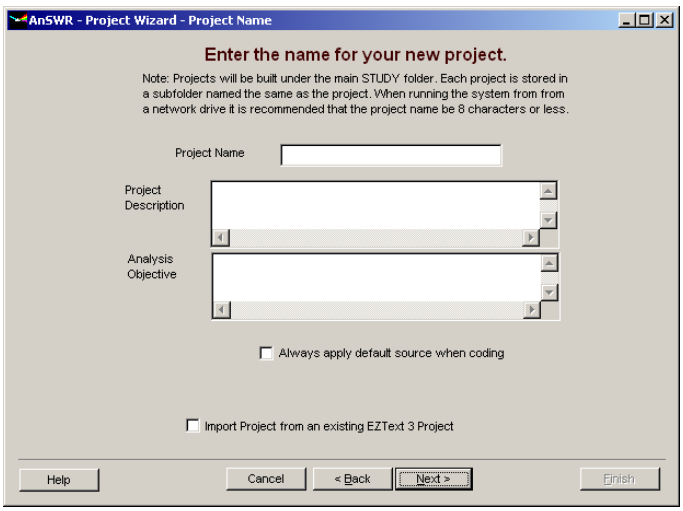


The Project Wizard

After a Study has been created, the Project Wizard will prompt you to create a new Project. This process creates a Project folder under the Study folder



At minimum, you must enter a Project name. Again, it is recommended that Project names be kept brief. More detailed information about the Project can be entered in the **Project Description** field.

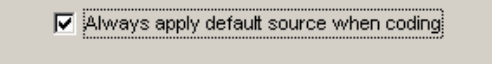


Note: If multiple coder/analysts are coding text for the same analysis and each will be completing their coding on a separate computer, it is recommended that the AnSWR Package Utility be used. See Chapter 10 for help on using the AnSWR Package Utility. Alternatively, each coder's first or last name can be assigned as the Project name. If multiple coders will be completing their coding on the same computer or network, no special Project naming convention is required. The system will use the coder/analyst login to assign analysis with the appropriate coder/analyst ID.

Once a Project name has been saved, it cannot be modified. You may opt to complete the **Project Description** and **Analysis Objective** fields at any time. Unlike the **Project Name** field, these fields are intended to store lengthier, more detailed information.

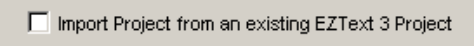
The **Project Description** and **Analysis Objective** fields are important in stating the rationale and defining the specific foci and objectives of the analysis Project. It is recommended that these fields always be filled in before an analysis Project is completed. Because these fields can be modified at any time, adjustments can be made if the focus of the analysis changes.

AnSWR requires that a source be assigned to all units of text that are coded. If you do not wish to differentiate between sources, or have only one source (e.g., a single researcher, a case Study, or a life history), click on the check box to always have the system assign a default source. In this case, the system will assign AnSWR as the source.



Note: The default sources can be changed. See Chapter 6 for help for creating a user-defined default source.

CDC EZ-Text databases can also be imported for further analysis or reporting in AnSWR. To import CDC EZ-Text databases, click the Import Project from an existing EZ-Text 3 Project check box.



New Study

To create a new Study follow the steps outlined below:

1. Click the **New Study** button.
2. Enter a name for the new Study.
3. Change Study location if different from default.
4. Click the **Save Study** button.

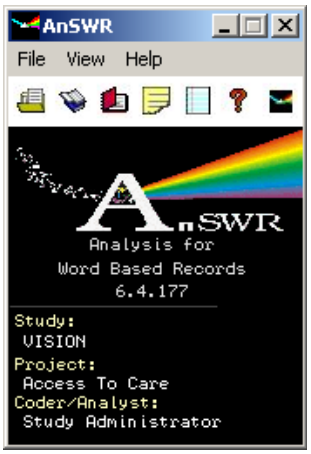
The Project Wizard starts up and prompts you for the Project to add.

Note: The system only detects Studies that have been identified by this process.

Chapter 3:
The AnSWR Main Window

After you create a Study, the AnSWR main window is displayed on your desktop. By default, the window displays on the top right-hand corner of your desktop. The window can be placed elsewhere on your desktop. The system will "remember" this new location each time the window is displayed.

The window displays:



- Three dropdown menus: File, View, and Help
- The version of AnSWR you are currently running
- The active Study's name
- The active Project's name
- The active coder/analyst's ID
- Icons with links to key system functions

ICON	FUNCTION
	Open a Project
	Open Codebook Editor
	Open Sourcebook Editor
	Open Coding Editor
	Open Reports Manager
	Open Help File
	Close AnSWR

File Menu

The following system functions can be accessed from the File menu:

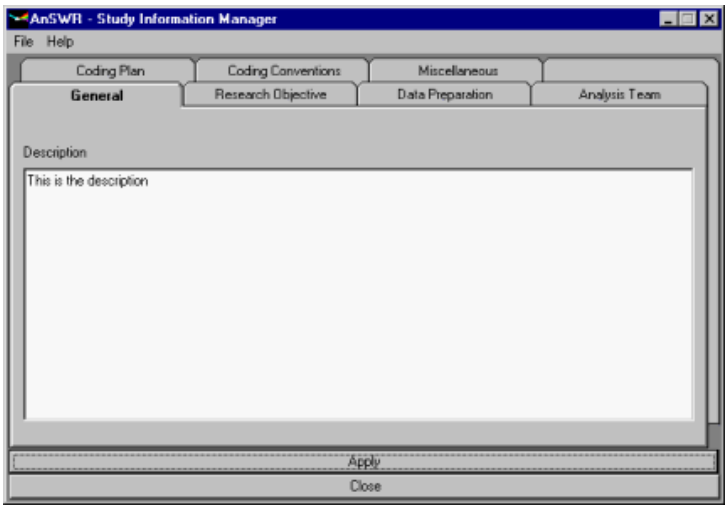
- Study Information Manager
- New Project
- Open Project
- Modify Project
- Delete Project
- Project Merge Wizard

Study Information Manager

The Study Information Manager you maintain an electronic "audit trail" to process notes on research design, sampling techniques, coding guidelines, the emerging theoretical design, and analytical strategies and decisions made (3). Memo fields for provided to support descriptive explanations about the overall Study.

Researchers can use the Study Information Manager to document:

- Study design and research objectives
- Data collection methods, sampling techniques, data management and preparation procedures
- Data analysis plan, including data reduction strategies, coding plans, time lines, and coding conventions for ensuring systematic data analysis, including procedures for assessing intra or intercoder agreement
- Problems, biases, or Study limitations



Note: User-defined fields can be created using the Advance Study Utility located under File/System Utilities.

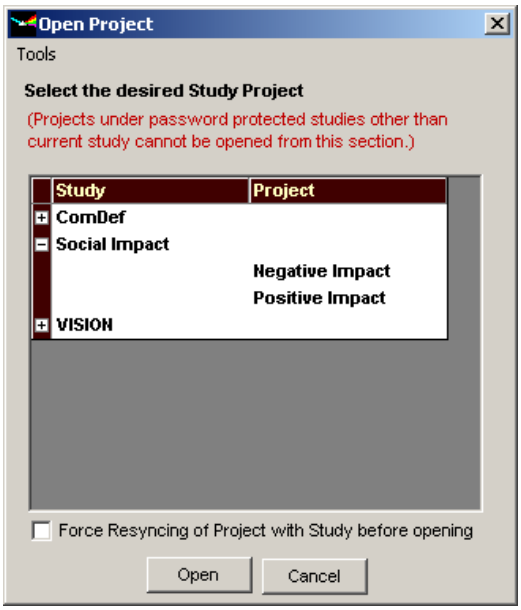
New Project

The New Project feature initiates the Project Wizard so that a new Project can be created under the active Study.

Open Project

The Open Project feature opens an existing Project. The Project need not be associated with the active Study. When you select a Project under another Study, the appropriate Study is activated.

1. To open a Project, click on the plus sign (+) next to the Study name



2. Select the Project to open.
3. Check **Force Resyncing of Project with Study before opening**. The system keeps Projects synchronized ("in sync") with the Study. If the system detects that a Project is no longer synchronized ("out of sync") with the Study, it will adjust (i.e., update) the Project to the Study before it is opened.

Note: Projects under password-protected Studies cannot be opened using this feature. To open a Project under a password-protected Study, use the **Change to Another Study** option.

Modify Project

The Modify Project feature initiates the Project Wizard. All changes to the Project description and textual data are completed through the Project Wizard. The Project Wizard is also accessible via the Coding Editor by clicking the **Add Files** button. Typical Project modifications include:

Adding a New Text File

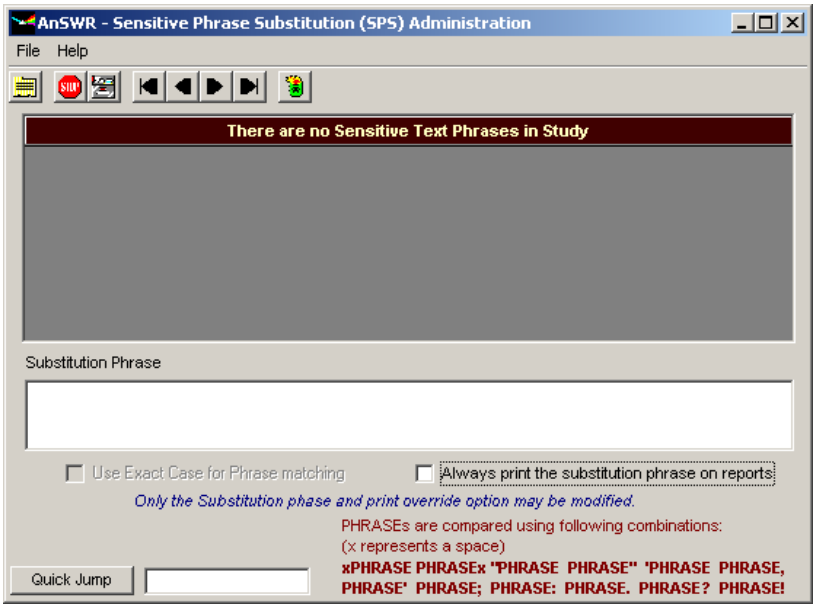
1. Click the **Add File to Project** button.
2. Select the type of file to add (i.e., TXT/RTF or Direct Text File).
3. Clickthe **Apply** button.
4. Use the pop-up browser window to locate a plain text (.TXT) or rich text file (.RTF) to add to the Project and click the **Add File** button.
5. For direct text files, type in or paste the textual data and click the **Save** button.

Note: Only plain text (.TXT) or rich text (.RTF) files can be added using the Modify Project feature. HTML files can only be added via the Coding Editor.

A message box to process the file through the Sensitive Phrase Substitution (SPS) function will display. The SPS feature replaces confidential or sensitive data contained in a text file. For example, if a file contains a person's name (e.g., John Smith) and it is preferable not to have this individual's name appear in the text file, a pre-defined substitution phrase is applied. This option is only selected if substitution text has been previously entered via the Sensitive Phrase Substitution Administration. Upon selecting this option, a browser window will display. You must provide a new file name and click the **New File** button.

To create a SPS database to process text files against:

1. Go to the File menu and select the **System Utilities** submenu.
2. Click on **Sensitive Phrase Substitution (SPS) Administration** or press **[CTRL]** + **[P]**.
3. Click on the yellow folder icon to add a new SPS record.

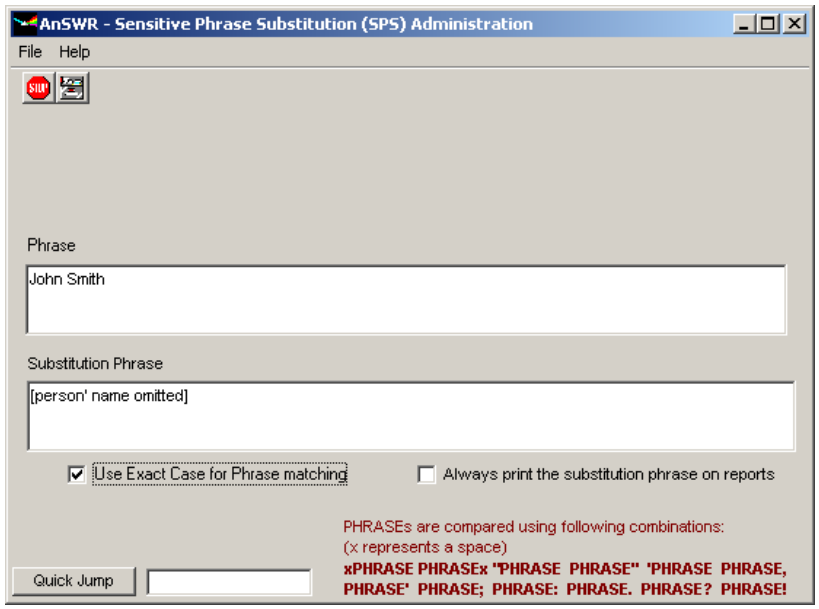


4. Enter sensitive/confidential words or phrases contained in the original text files requiring replacement.

5. Type in the substitution phrase.

6. Check on the **Use exact case for phrase matching** checkbox if the word/phrase is case sensitive.

7. Ignore the **Always print the substitution phrase on reports** checkbox if SPS is being processed on text files as they are added to the Project.



Note: A copy of the original file is made and a search/replace process is applied to the new file. The original file is not included in the analysis.

If it is unknown beforehand what confidential or sensitive text requires replacement, you can perform SPS as you code in the Coding Editor. In this instance, coders/analysts always view the original text. Substitution text only appears in text-based output reports.

Removing a File

Removal of a text file results in deletion of associated source and textual coding from the project3.mdb file. Thus, make sure that a file is not needed before removing it.

1. Select the desired file and click the **Remove Selected File From Project** button.
2. Click **Yes** when the Confirmation Request window displays.
3. A Deletion Confirmation window will display.

Changing a File's Location

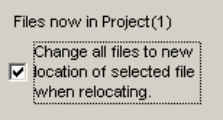
If the physical location of a TXT/RTF file has been changed, the file cannot be read in the Coding Editor. The file's new location must be set using the Relocate Selected File from the Project Wizard.

Note: AnSWR cannot be used to actually move a file. My Computer or Windows Explorer must be used to change the file's location on your system.

1. Select the desired file and click the **Relocate Selected File** button

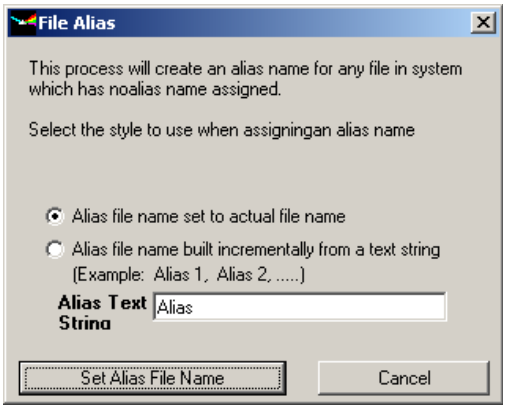
2. Use the browser window to locate the files new location.
3. Click the **Open** button.

Note: If the folder, drive, or server location of all your Project files has changed, the new location can be set for all files by selecting the first file, clicking on the option to **Relocate All Files**, and then clicking the **Relocate Selected File** button.



Setting File Alias to File Name

1. Click the **Set Alias for ALL Files to File Name** button.
2. Select the style to use when assigning an alias name: set to actual file name or set a prefix text string. The prefix string will be preceded by a system-assigned number that increases incrementally.

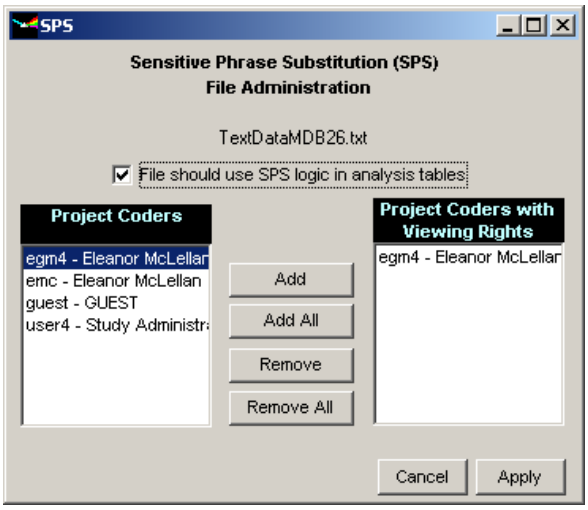


3. Click the **Set Alias File Name** button

Setting a File's SPS Status

If confidential or sensitive data will be replace as the coder/analyst performs the coding, the Study or Project Administrators can assign viewing rights to Project coders/analysts. By default, text-based output always prints substitution text rather than original text. Coder/analysts with viewing rights may print the original text.

Note: SPS rights are Project and file specific. SPS rights only apply to files that are processed while coding in the Coding Editor. Text files that were processed through the SPS feature as they were added to the Project will always print the substitution word/phrase. To view original text, coders/analysts would need to have access to these uncoded files.



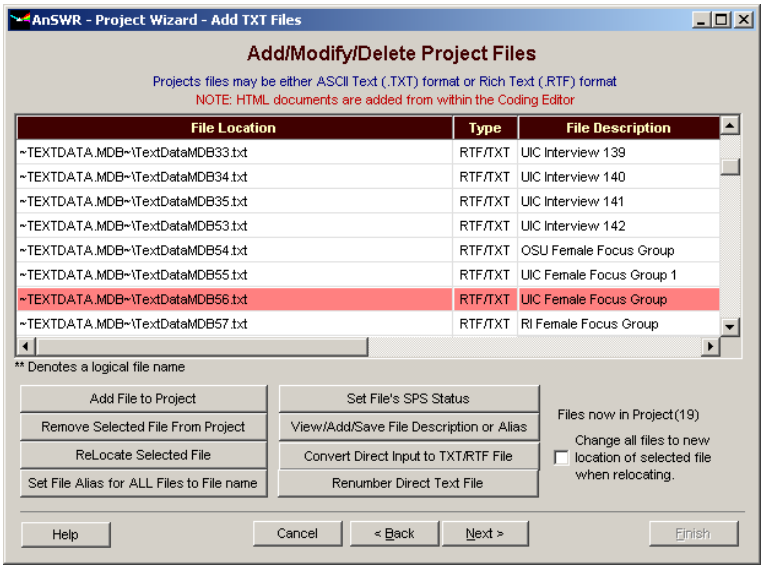
Once a file has been set to use SPS, any coding will automatically check the SPS table and update the analysis tables with the SPS phrasing. Steps for setting SPS status are as follows:

1. Select a text file.
2. Click the **Set File's SPS Status** button. The SPS File Utility Window is displayed.
3. Activate SPS logic by checking the **File should use SPS logic in analysis tables** checkbox.
4. Set coders/analysts that have SPS rights. At least one must be selected.
5. Click the **Apply** button.

Note: By default, text-based output always prints SPS text rather than the original text. Only Coder/Analysts with viewing rights may print the original text.

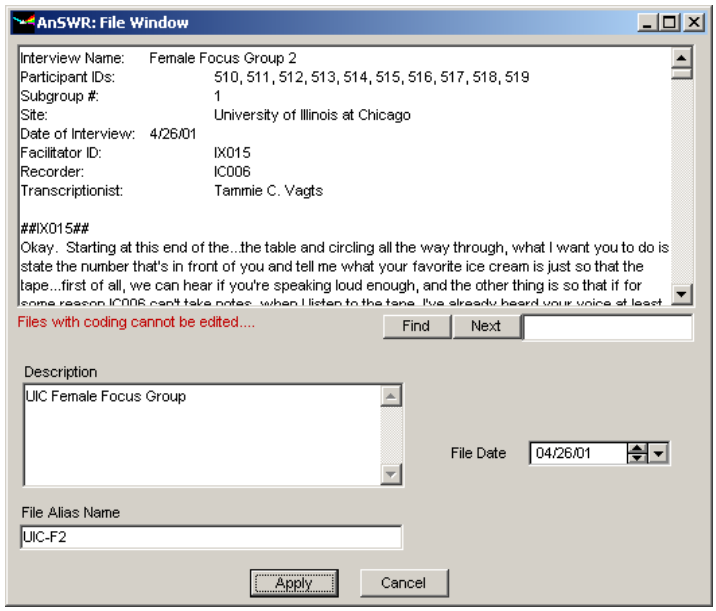
Describing a File

Because file names may not always help identify the contents of a file, AnSWR includes a feature that permits you to assign a brief description to a text file.

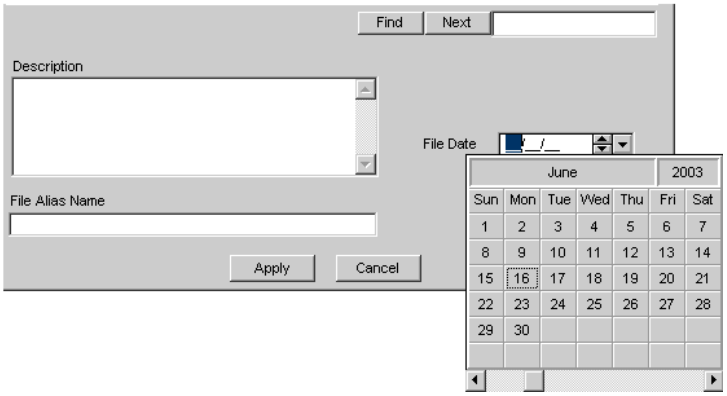


To enter the file description:

1. Click on the text file you wish to describe.
2. Click the **View/Add/Save File Description or Alias** button.
3. In the **File Description** field, type in a brief description for the file.
4. In the **Alias Name** field, type in a brief file name (up to ten alphanumeric characters).
   Note: The system automatically assigns TextDataMDB1.txt to the first direct text file. Only the MDB# will change in subsequent files. Files are numbered in the order in which they are added to a Project. Unless an alias file name is assigned to each direct text file, the TextDataMDB file name appears in the file list in the Coding Editor. Hence, it is strongly recommended that an alias be assigned to each direct text file.



5. Enter a file date (optional). Clicking on the downward arrow displays a calendar.
   Note: The only date format accepted by the system is mm/dd/yyyy.

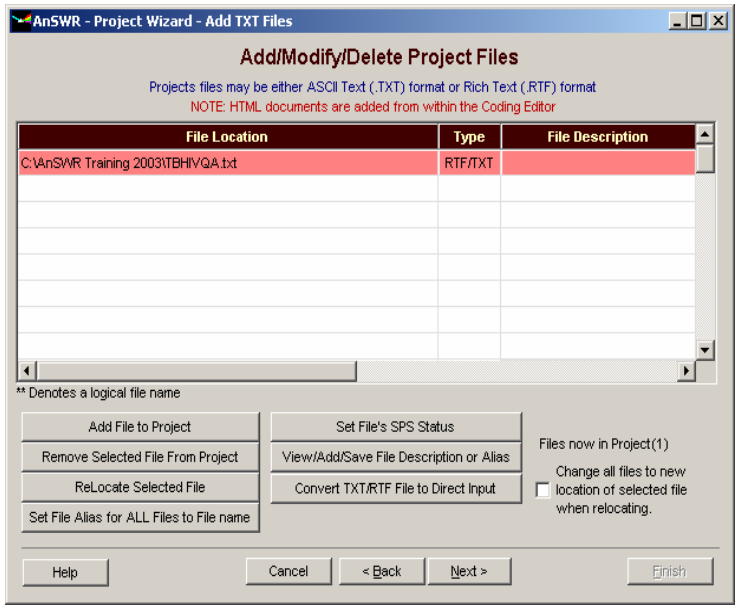


6. Click the **Apply** button.

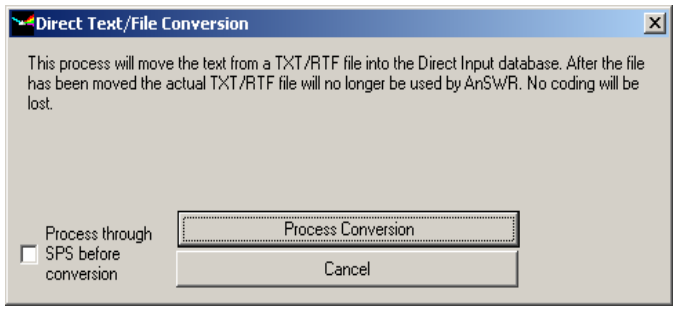
Converting a File

To convert a TXT/RTF file into a direct input file:

1. Click on the file you wish to convert.



2. Click the **Convert TXT/RTF File to Direct Input** button.



Note: A file can be process through SPS before being converted. If this option is selected, a new text file that contains the SPS text is created. The original text file is not modified. To activate this process, check the **Process through SPS before conversion** checkbox. Click the **Process Conversion** button. The system creates a direct text file and assigns it a TextDataMDB#.txt file name.

Converting a Direct Input File into a TXT/RTF File

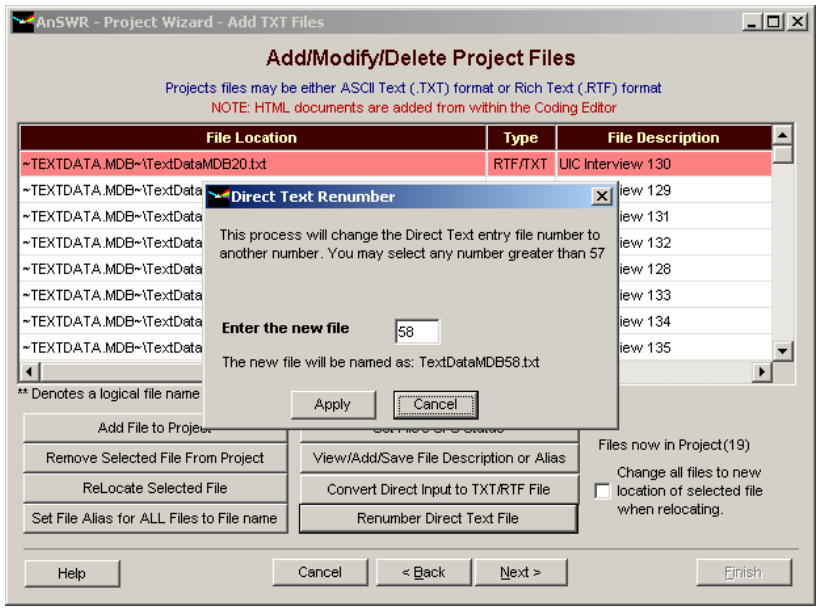
1. Click on the file you wish to convert.
2. Click the **Convert TXT/RTF File to Direct Input** button.
3. Check **Process through SPS before conversion** if applicable.
4. Click the **Process Conversion** button.
5. Enter a name for the new file.
6. Select the file type.

7. Click the **New File** button.

Renumbering Direct Text Files

Although the system numbers direct text files consecutively, you may want the files to be listed in the Coding Editor or on report output in another order. The Renumbering option permits you to assign a new number to your direct-entry text file. Numbers already assigned to other direct text input files cannot be used.

1. Select desired direct text file and click the **Renumber Direct Text File** button.
2. Enter the new file number.
   Note: The system provides the smallest number that can be assigned.



3. Click the **Apply** button.

Delete Project

When selecting this option, only the reference to a Project is deleted from a Study. As long as a Project is not physically deleted from a server or folder, it can be reintroduced at a later time.

1. Open the Project to be deleted.
2. Select **Delete [Name] Project** from the File menu. Deletion confirmation is displayed.
3. Click **Yes** to continue with deletion.

Note: To restore a deleted Project, choose **New Project** from the File menu. When the Project Wizard prompts you for a Project name, enter the name of the Project you wish to restore. The Project name must be keyed in exactly as it was originally entered. If the location of Project TXT/RTF files has changed, use the **Relocate Files** option to update the pointer to these files. The system will then reopen the Project and resynchronize it so that it is consistent with the most recent version of the Study.

Project Merge Wizard

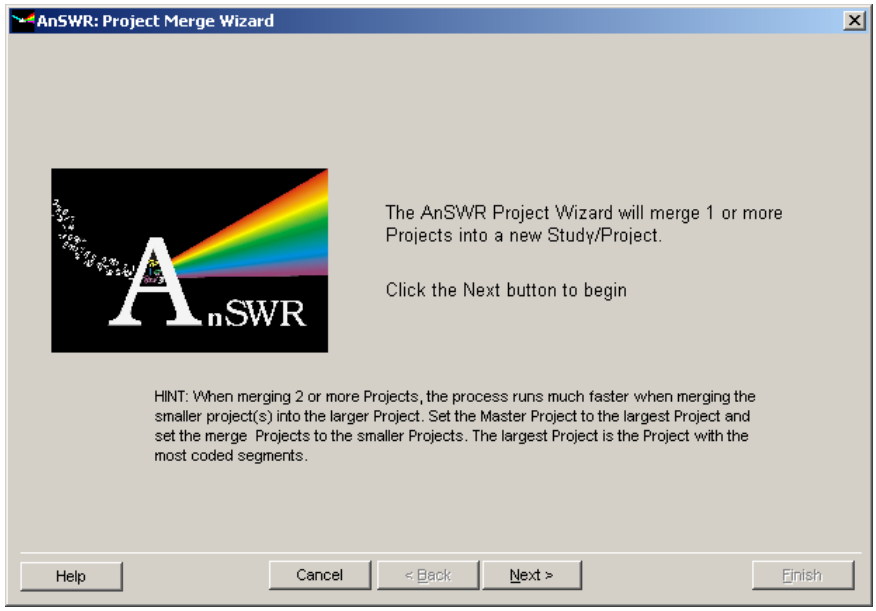
The Project Merge Wizard is used to duplicate a Project, or to merge one or more Projects into a new Project or Study. Projects that are merged together share the same codebook/sourcebook structure.

In instances where the volume of textual data is large or complex, we recommend splitting up the analysis into a number of smaller Projects. Once coding has been complete, these Projects can be merged and final data analysis and interpretation undertaken.

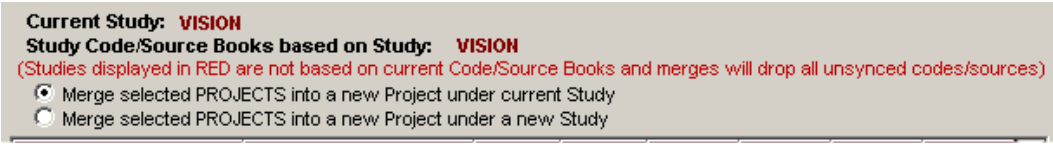
Duplicate of a Project:

To fully or partially duplicate an existing Project:

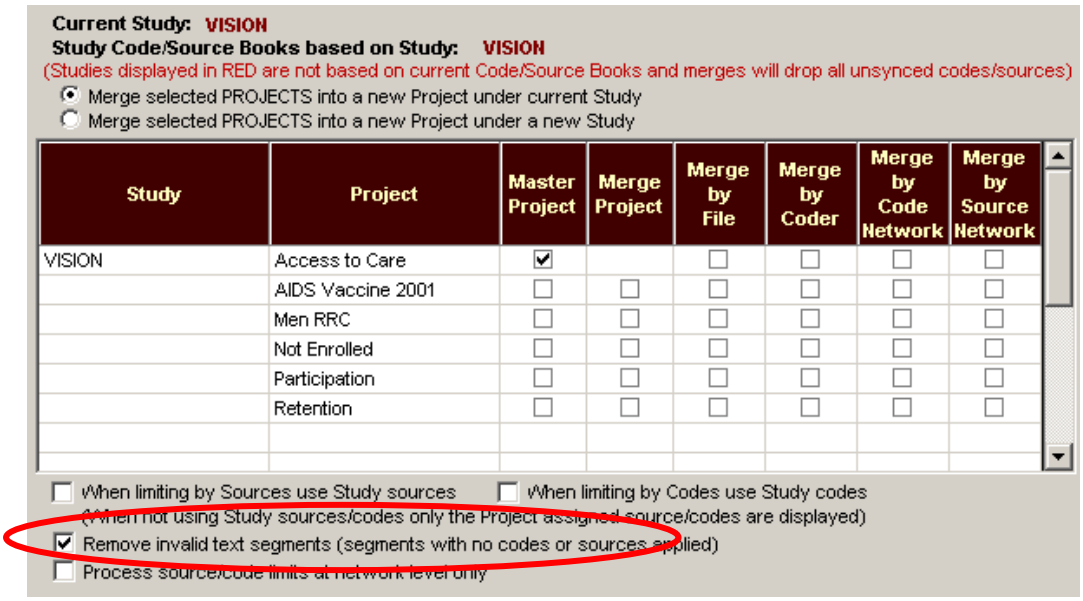
1. Open the Project to be merged.
2. Select **Project Merge Wizard** from the File menu.
3. Click the **Next** button.



4. Accept the system default to **Merge Selected Projects into a New Project Under Current Study**.



5. Check the checkbox next to the desired Project as the **Master Project**.
6. If you have not run a quality assurance report to verify that all segments have been source and text coded, uncheck the default option to **Remove invalid text segments (segments with no codes or sources applied)**.



7. Click on the **Next** button.

8. Enter a new Project name.

9. Click the **Next** button.

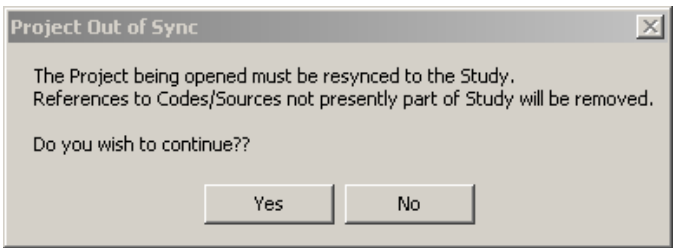
10. Click the **Next** button to start the duplication.

11. A merge log will display. The log will list any information data.

12. Click on the **Next** button.

13. Click on the **Finished** button.

14. A **Project Out of Sync** message will display. Click the **Yes** button to synchronize the new Project with the Study.

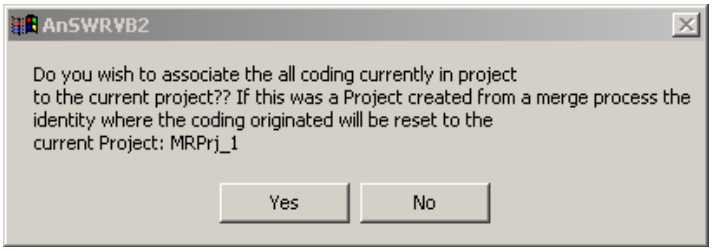


15. A **File Conversion/Resync** bar will display.

    Note: If you are duplicating a large Project, it may take a few minutes to complete this process.

16. A message will display asking if you wish to associate all coding to the new Project. Essentially, this is asking you if you would like to keep or delete retain the where the Project originated. **Yes** resets the coding origin to the newly created Project; **No** retains the original

Project as the **Master Project.** Because there is the potential that new Study code or sources made be added to this the newly created Project, **No** is typically selected.



17. A message indicating that the Project was successfully resynced to the Study will display. Click the **OK** button.

Note: The newly created Project becomes the active Project.

Merge Two or More Projects Under the Current Study

To create a new Project out of one or more Projects:

1. Open the Project to be merged.
2. Select **Project Merge Wizard** from the File menu.
3. Click the **Next** button.
4. Accept the system default to **Merge Selected Projects into a New Project Under Current Study**.
5. Check the checkbox next to the desired Project as the **Master Project**.

Study	Project	Master Project	Merge Project	Merge by File	Merge by Coder	Merge by Code Network	Merge by Source Network
VISION	Access to Care	☑		☐	☐	☐	☐
	AIDS Vaccine 2001	☐	☐	☐	☐	☐	☐
	Men RRC	☐	☐	☐	☐	☐	☐
	MRPrj_1	☐	☑	☐	☐	☐	☐
	Not Enrolled	☐	☑	☐	☐	☐	☐
	Participation	☐	☐	☐	☐	☐	☐
	Retention	☐	☐	☐	☐	☐	☐

Note: If a Master Project is already checked, you must uncheck it before you try to check another Project.

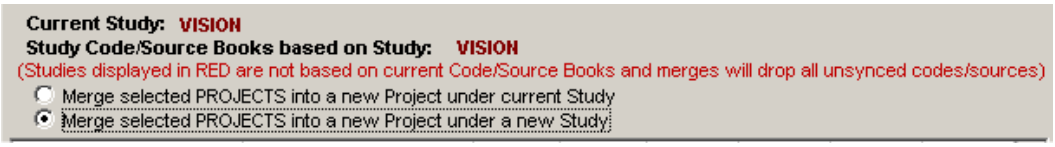
6. Check the checkbox next to the **Merge Project** for each project that you want to merge with the **Master Project**.
7. If you have not run a quality assurance report to verify that all segments have been source and text coded, uncheck the default option to **Remove invalid text segments (segments with no codes or sources applied)**.
8. Click on the **Next** button.

9. Enter a new Project name.
10. Click the **Next** button.
11. Click the **Next** button to start the merge.
12. A merge log will display. The log will list any information data.
13. Click the **Next** button.
14. Click the **Finished** button.
15. A **Project Out of Sync** message will display. Click the **Yes** button to synchronize the new Project with the Study.
16. A **File Conversion/Resync** bar will display. If you are duplicating a large Project, it may take a few minutes to complete this process.
17. A message will display asking if you wish to associate all coding to the new Project. Essentially, this is asking you if you would like to keep or delete retain the where the Project originated. **Yes** resets the coding origin to the newly created Project; **No** retains the original Project as the **Master Project.** Because there is the potential that new Study code or sources made be added to this the newly created Project, **No** is typically selected.
18. A message indicating that the Project was successfully resynced to the Study will display. Click the **OK** button. The newly created Project will display in the AnSWR main window as the active Project.

Merge One or More Projects into a New Project under a New Study

To take one or more Projects to create a new Project under a new Study:

1. Open the Project to be merged.
2. Select **Project Merge Wizard** from the File menu.
3. Click the **Next** button.
4. Click on the radio button for **Merge Selected Projects into a new Project under a new Study**.



5. Check the checkbox next to the desired Project as the **Master Project**.

   Note: If a Master Project is already checked, you must uncheck it before you try to check another Project.

6. Check the checkbox next to the **Merge Project** for each project that you want to merge with the **Master Project**.

7. If you have not run a quality assurance report to verify that all segments have been source and text coded, uncheck the default option to **Remove invalid text segments (segments with no codes or sources applied)**.

8. Click on the **Next** button.

9. Enter a new Study name

10. Enter a new Project name.

11. Click the **Next** button.

12. Click the **Next** button to start the merge.

    A merge log will display. The log will list any information data.

13. Click on the **Next** button.

14. Click on the **Finished** button.

15. A **Project Out of Sync** message will display. Click the **Yes** button to synchronize the new Project with the Study.

16. A **File Conversion/Resync** bar will display. If you are duplicating a large Project, it may take a few minutes to complete this process.

17. A message will display asking if you wish to associate all coding to the new Project. Essentially, this is asking you if you would like to keep or delete retain the where the Project originated. **Yes** resets the coding origin to the newly created Project; **No** retains the original Project as the **Master Project.** Because there is the potential that new Study code or sources made be added to this the newly created Project, **No** is typically selected.

18. A message indicating that the Project was successfully resynced to the Study will display. Click the **OK** button. The newly created Project will display in the AnSWR main window as the active Project.

Select Data to Include in a Study/Project

A new Project can be created using a subset of code, coders, sources, source data, or text files. The Project Merge Wizard displays a merge column for textual files, coders, code networks, and source networks. Source data is selected from the Sources column.

Study	Project	Master Project	Merge Project	Merge by File	Merge by Coder	Merge by Code Network	Merge by Source Network
VISION	Access to Care	☐	☐	☐	☐	☐	☐
	AIDS Vaccine 2001	☐	☐	☐	☐	☐	☐
	Men RRC	☐	☐	☐	☐	☐	☐
	MRPrj_1	☑		☐	☐	☐	☐
	Not Enrolled	☐	☐	☐	☐	☐	☐
	Participation	☐	☐	☐	☐	☐	☐
	Retention	☐	☐	☐	☐	☐	☐

To select data to include in a merged Study or Project:

1. Check the column checkbox(es) for the data elements that you want to limit.

Note: If data is to be selected from multiple Projects, the appropriate data element column must be checked for each Project.

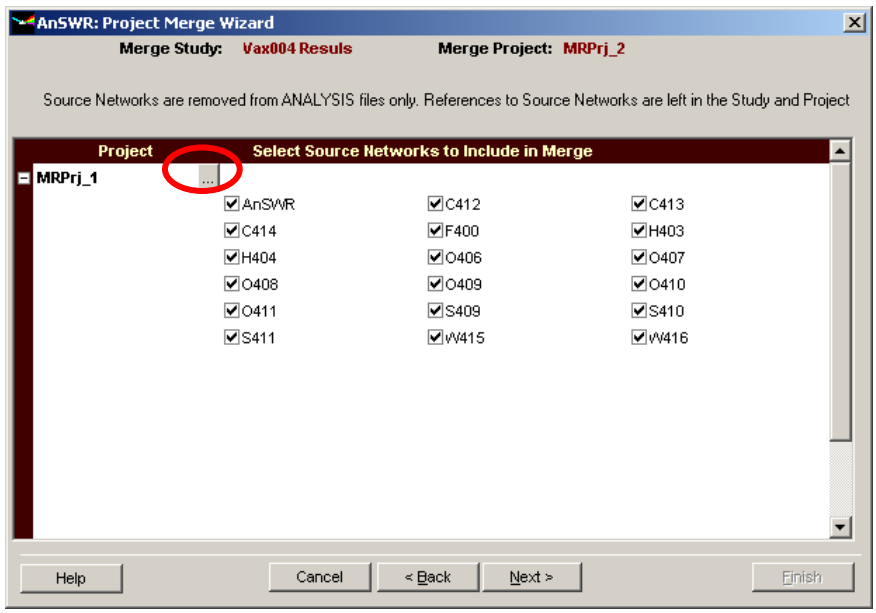
2. Click on the **Next** button.

3. Enter new Project name. Include a new Study name if a new Project is being created under a New Study.

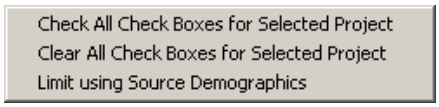
4. Click the **Next** button.

5. Click on the plus sign next to the Project name.

6. Click on the same line as the Project name. A gray box contain three periods will display to the right of the Project name.



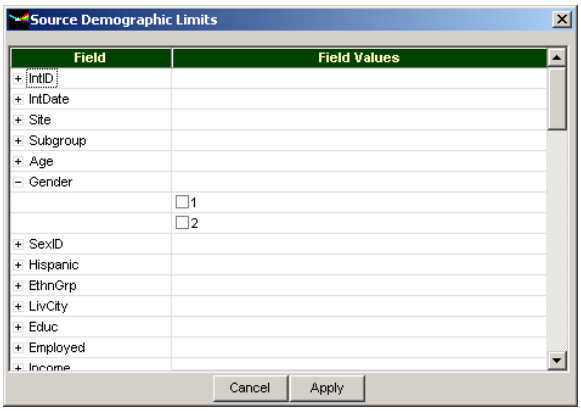
7. Click on the gray box. With the exception of the Source Networks, all data elements will display two options: check all checkboxes and clear all checkboxes. Checked items are included in the merge. Uncheck items are excluded from merge. Clearing out all the checkboxes lets you manually check those items you would like to include. The Source Networks has a third option that will let you select records based on Source Demographics you entered using the Advance Source Utility.



   a. If you are selecting records using source data, select the **Limit Using Source Demographics** option. A **Source Demographics Limits** window will display.

   b. Select the desired field(s) and field values.

Note: If you assigned categorical values to numeric fields, only the numbers will display. If necessary print a copy of the Advance Source Utility Report under the Data/List Table Reports.



c. Click the **Apply** button.

d. Click the **Next** button.

e. Repeat for each data element limitation you have selected for each Project and proceed with steps for completing a merge.

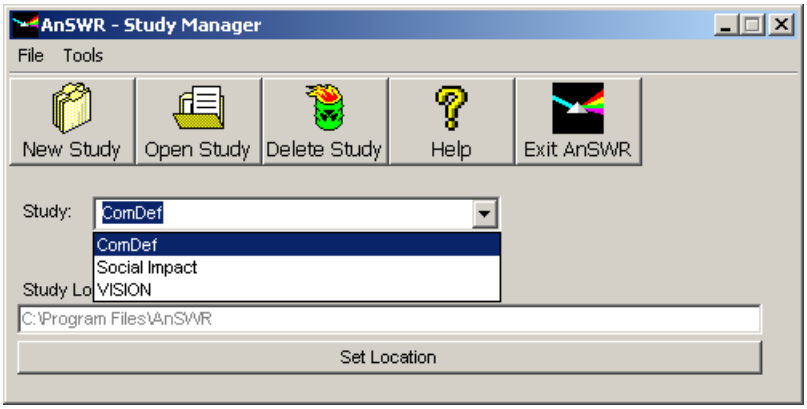
View Menu

The window can be changed to display a brief version of the Main Study Window. The brief view displays only menu options and the system icons. From the View menu, select **View Brief Form** to activate this view. To deactivate, select **View Brief Form** again.

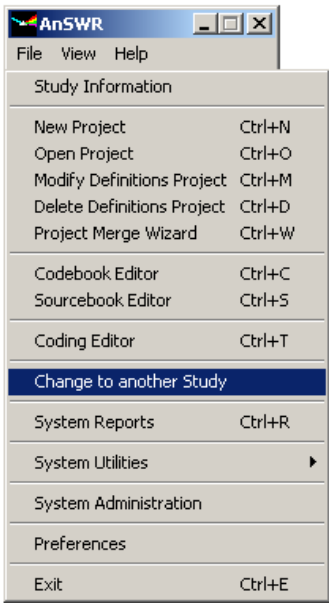
Chapter 4:
Working with Studies

Open an Existing Study

To open an existing Study from the AnSWR Study Manager Window, click on the down arrow in the **Study Name** field. This will display active AnSWR Studies. Select the desired Study from the dropdown list and click the **Open Study** button.



Note: To change to another Study from the Main ANSWR Window (i.e., return to the Study Manager window), select **Change to another Study** from the File menu.



Delete Study

To delete a Study:

1. Select the desired Study from the Study Manager.
2. Click the **Delete Study** button.

Note: Only the reference to the Study is deleted from the system. To permanently remove the databases, use My Computer or Windows Explorer after deleting the Study from AnSWR.

Re-Add a Deleted Study

To re-add a previously deleted Study:

1. Click on the **New Study** button.
2. Type in the exact Study name as it was originally created.
3. Click the **Save** button.

Note: The main AnSWR Window rather than the Project Wizard will display.

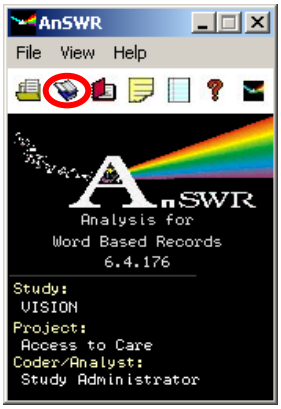
Help

Click the **Help** button to access AnSWR Help. The Help file can also be accessed via the AnSWR Main Window, the Codebook Editor, the Sourcebook Editor, the Coding Editor, and the System Reports Manager.

Exit AnSWR

Click the **Exit AnSWR** button to close the system. The exit option can also be accessed via the AnSWR Main Window, the Codebook Editor, the Sourcebook Editor, the Coding Editor, and the System Reports Manager.

Chapter 5:
The Codebook Editor



Codes are assigned to the text during the coding process; AnSWR analysis uses code and source data to categorize text. The codes are stored in the Study Codebook. In AnSWR, codes are referred to as code networks given that a) the Codebook is a system or network of codes that have some relationship to one another and b) every code in the Codebook can be used to create a hierarchical code network. Codes without a hierarchical structure are referred to as *flat codes*.

The position a code holds within a code network will be important in applying codes and generating reports. Each Project within a Study can use all of the Study code networks or use subset of selected code networks. Hierarchical code networks can be created from the onset or constructed after coding as been initiated or completed. The **Analyzed Item Change Process** option must be used to reassign codes already applied to a newly developed hierarchical network.

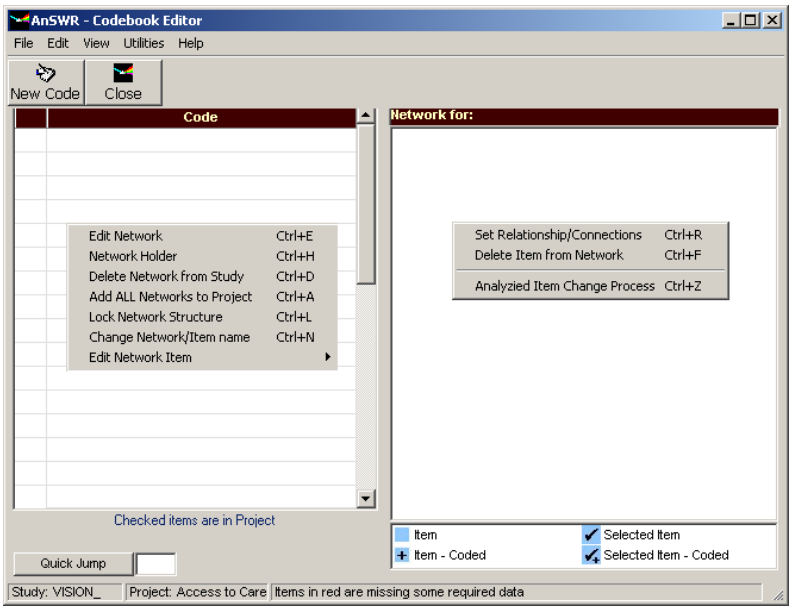
Open Codebook Utility

To open the Codebook Utility, choose **Codebook** from the File menu, or click the **Codebook** icon on the main AnSWR window.

The **Codebook Editor** is split into two windows. The left window displays all your Study codes, code networks that have been activated for use in the Project. In the left window, you can perform the following:

- Define and edit a Code Network.
- Assign a Network Holder
- Delete a Code Network from a Study (can only be deleted if it has not been applied in any Project).
- Lock a Code Network Structure.
- Globally change the name of a Study Code Network/Code Network Item.
- Change application a selected Project Network Item to another Network Item.

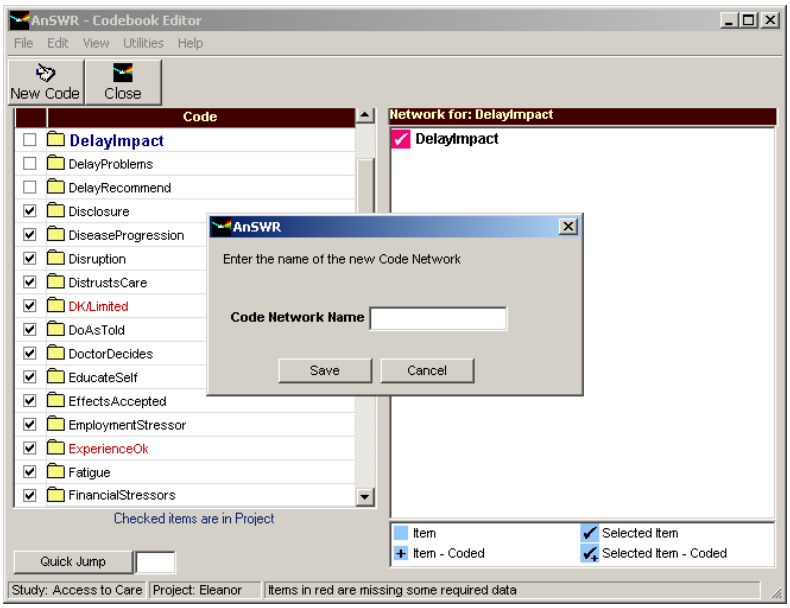
The right window displays hierarchical code network trees, lets you define relationships between items in a code network, delete items from a code network, change the application of a selected Project code network to another network item, and determine if an item has been used.



Add a New Codebook Network

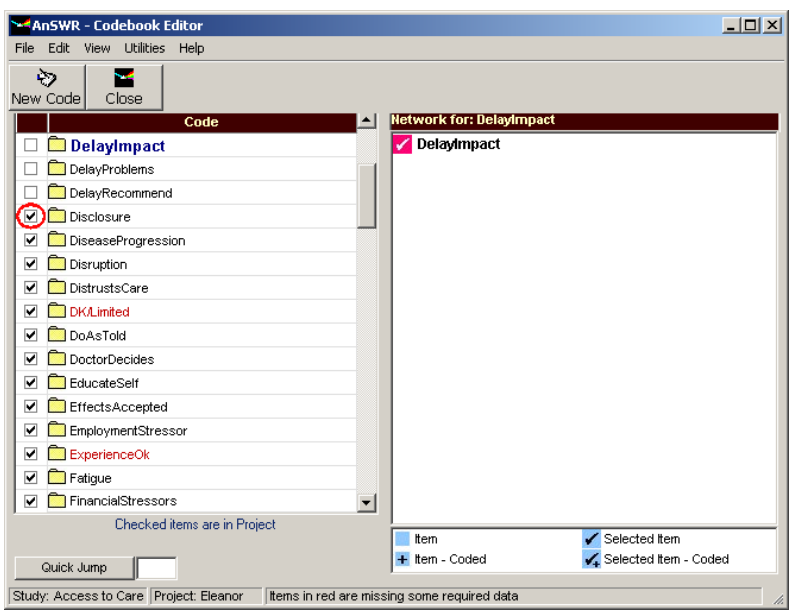
1. Open the Codebook Editor.
2. Click the **New Code** button. A pop-up window prompts you to enter the New Code Network.
3. Enter a new code network name up to 20 alpha-numeric characters in length, then click the **Save** button. Note: Code names greater than 20 characters in length will cause the system to crash. Code names may not contain blank spaces or special characters (e.g., @#$%^&*?+><). Duplicate code names are not permitted.
4. To add information for a new Code Network, select the **Edit Network** option from the Edit menu or by double-clicking on the code network name. All of the Edit menu items can also be accessed by right-mouse clicking on a selected code.

Important: If a **Save** button is displayed, it must be used to save information. Failure to use the **Save** button will result in loss of data. If no **Save** button is displayed, the system automatically saves the entry.



To use a Study **Code Network** in a Project, it must be activated. Code Networks not activated will not display in the **Code Network List** in the Coding Editor. Codes not appearing on this list cannot be applied to Project textual data. To add a network to the Project:

1. Open the Codebook Editor.
2. Click the checkbox next to the desired network under the network list. A check mark indicates that the network and all of its network items have been assigned to the current Project. To simultaneously activate all Study codes into the current Project, enter **[CTRL] + [A].**



Edit a Codebook Network

1. Open the Codebook Editor.
2. Right-click on the desired code network under the network list. A pop-up menu opens.
3. Select the menu option **Edit Network** or double-click on the code network name. The Code Network Edit Window is displayed.
4. Enter the desired information for the code network. Use the tabs to move through code network data fields: Description, Usage, Example, Values.
5. Click the **Save** button to save any changes or additions.

To assist the coder/analyst in creating coding categories that are distinct from one another, AnSWR uses a codebook structure that contains six basic components: the code, a brief definition, a full definition, explanations for when to use the code, guidelines for when not to use the code, and examples. For analytical flexibility, coding schemes can be developed *a priori, a posteriori,* or as part of an *iterative* process. In addition, non-coded text segments can be created, reviewed, and have codes attached to them later.

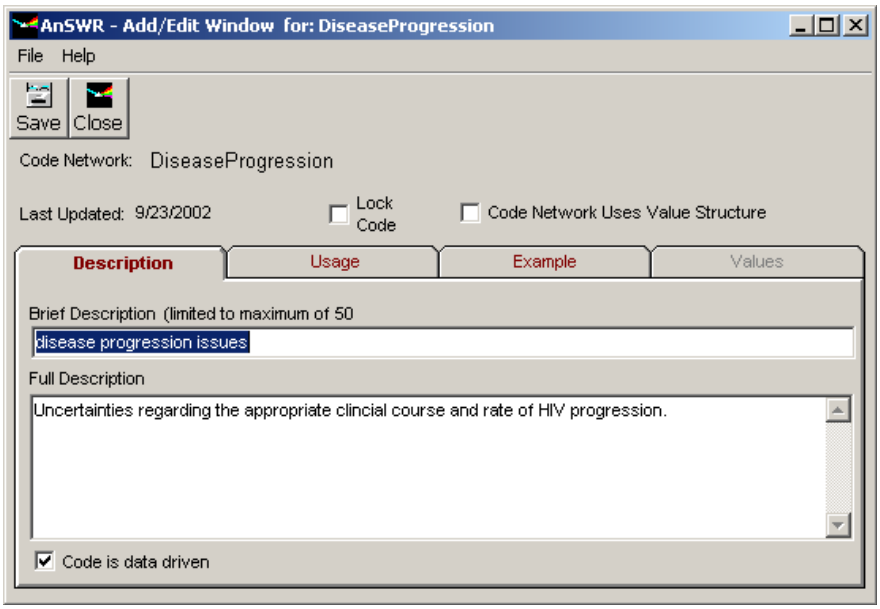
- The **Brief Definition** is a one-line, quick reference explanation of what the code represents. The brief definition can be a maximum of 50 characters in length.

- The **Full Definition** is a detailed, expanded explanation of what the code represents. The full definition does not have any field length limitations.

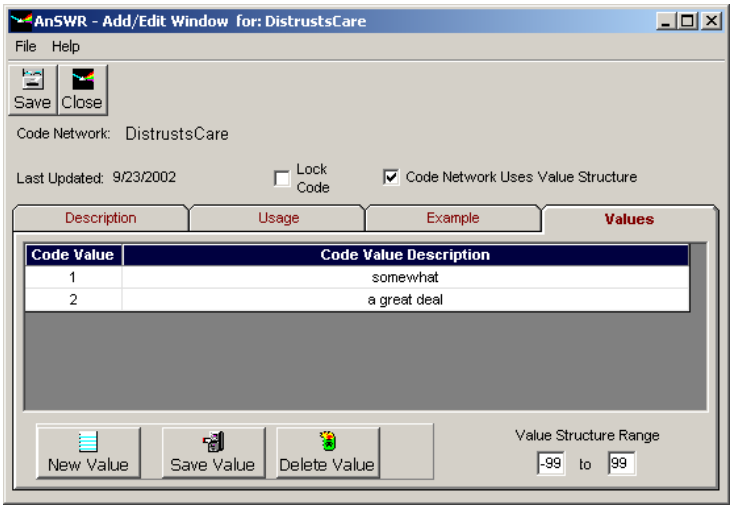
- **When to Use** is a detailed code application statement (i.e., inclusion criteria). We suggest guidelines include linguistic cues that may assist the coder/analyst in applying codes. In addition, it is recommended that the When to Use explanation provide clear directions on whether concepts or ideas must be explicitly stated by a source or if they can be implicitly inferred by the coder/analyst.

- **When Not to Use** is a detailed explanation of when the code should not be used (i.e., exclusion criteria). We suggest that exclusion items provide some reference note for codes that fit the application criteria for an item. For example, to help coders/analysts find the appropriate code or set of codes that better fits the exclusion criteria, codes can be placed in brackets or parentheses immediately after the listed item.

- **Examples** are selected text excerpts where the code is applicable.



Note: The Values tab is not activated until the box for **Code Network Uses Value Structure** is checked. Values can be -99 to 99. Zero cannot be used.

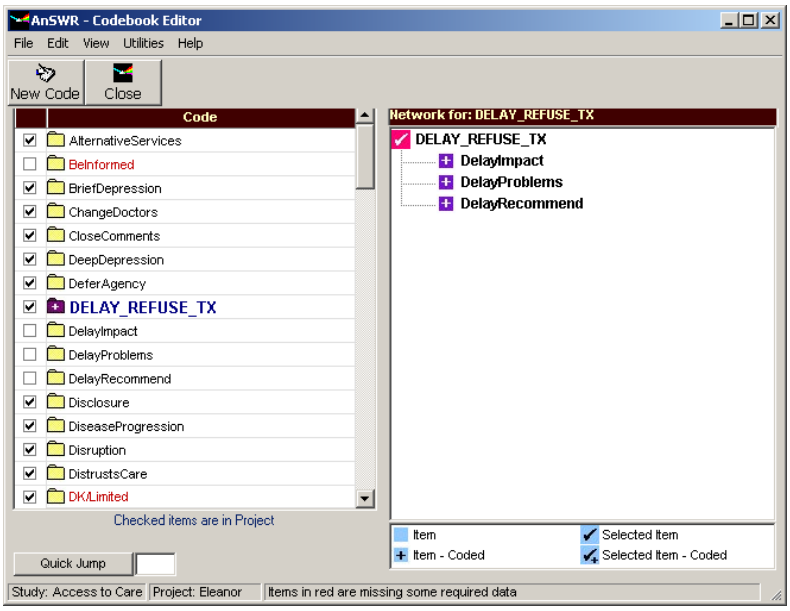


The **Lock Code** is available only if the user/analyst has Study Administrator rights.

Add a Network Item to a Network

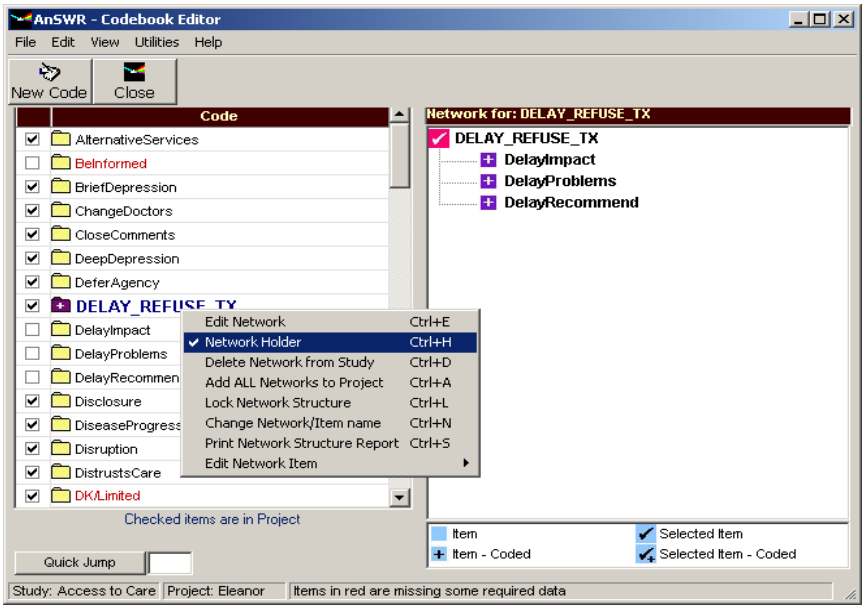
1. Select a network on the Network List. The current network structure for the selected code will be displayed under Network Layout.
2. Select the Network Item under Network layout in which to assign the new Network Item.
3. Select the desired network from the network list to add as a network item by clicking the network and holding down the left mouse button. **Important:** Do not release the mouse button.
4. The pointer will change to Drag mode. Drag the network over the network layout and drop it by releasing the mouse button.

5. The network and any underlying network structure will be added as new network items to the displayed network.



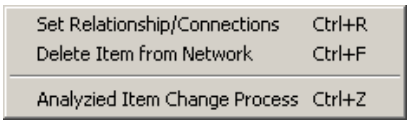
Note: In the display above, DelayImpact, DelayProblems, and DelayRecommend are **Network Items** under the **Code Network** DELAY_REFUSE_TX. The **Code Network** DELAY_REFUSE_TX has been setup as a **Network Holder** (right-mouse click on the code name to get this option)**.** When a code network is designated as a **Network Holder,** it cannot be applied to the text. The Network Holder feature permits you to group a set of codes that may have an abstract or theoretical relationship. This relationship between codes is implicitly understood by all coders/analysts. The Network Holder is used to group related codes for coding ease. The system will display the small folder icon under the network list in purple for networks that have been set as **Network Holders**.

Note: Because DELAY_REFUSE_TX has been activated, all network items are also activated. If coders/analysts are **only** to apply **Network Items** from either a **Network Holder** or **Code Network**, the check boxes for these codes **should not** be marked.

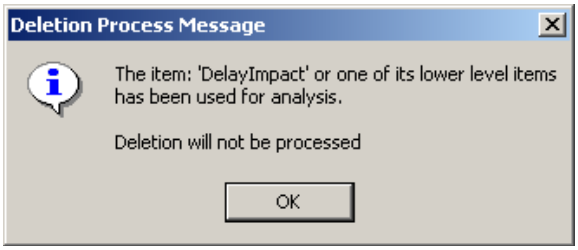


Delete a Network Item

1. Select the desired code network from the network list.
2. Select the desired code network item from the network layout.
3. Right click on the desired code network item. A pop-up menu is displayed.
4. Select the menu option **Delete Item from Network** or enter **[CTRL] + [F].**
5. The code network item and any underlying items in the network structure will be deleted.



Note: If any Network Item has been assigned to a text segment under any Project in the Study, the network item deletion process will stop. A message box will display indicating which Project has used the network item in coding.



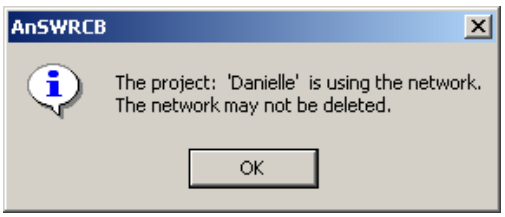
Delete a Code Network from a Study

1. Click on the desired code network to select it, then click **Edit**, or right click on the desired network under the network list.

   The Edit menu is displayed.

2. Select the menu option **Delete Network from Study** or enter [**CTRL]** + **[D**].
3. A confirmation box is displayed. Confirm the delete action and the network will be deleted from the Study.

Note: If the network or any of its network items have been assigned to a text segment under **any** Project under the Study, you will be unable to delete the network. A message box is displayed indicating why the network deletion was stopped.



Delete a Code Network from a Project

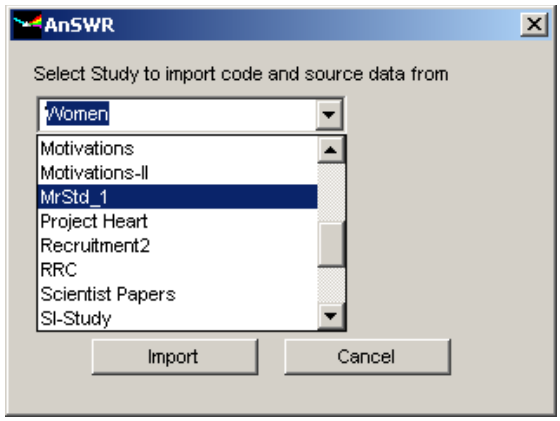
1. Click on the desired code network to select it, then click **Edit**, or right click on the desired network under the network list. The Edit menu is displayed.
2. Click the checkbox next to the desired network under the network list.
3. The check box will be blank indicating that the network and all of its network items has been removed from the current Project.

Note: If the code network or any of its network items have been assigned to a text segment in the current Project, the action will be stopped.

Import Codebook from Another Study

If no sources and no codes have been added to the current Study, the system allows you to import the codebook and sourcebook from another Study. Studies that share the same Codebook/Sourcebook structure may be merged using the Project Merge Wizard.

1. Open the Codebook Editor.
2. From the Utilities menu, select **Use a Codebook and Sourcebook from another Study**. A window is displayed with a drop-down list of Studies.
3. Select the desired Study and click the **Import** button, or click **Cancel** to abort.

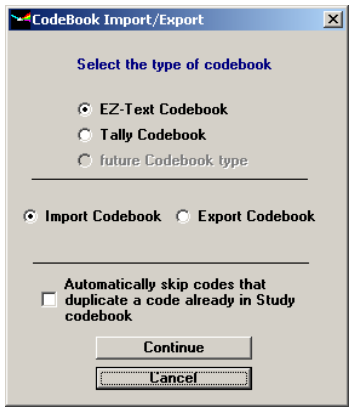


Note: Use the AnSWR Code Source Utility to import sources and codes from another Study if the Codebook is **not empty**. The AnSWR Code Source Utility should also be used if coders have independently added new codes to a shared study.

Import/Export Tally or EZ-Text Codebook

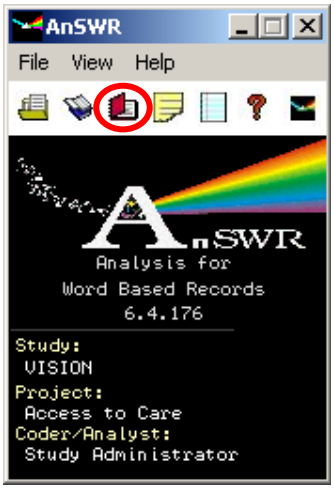
AnSWR will let you import codebooks from two other software programs: Tally, an MS-DOS program, and EZ-Text, a Windows-based CDC developed program designed specifically for surveys containing a large number of brief, open-ended questions.

1. Open the Codebook Editor.
2. From the File menu, select **Import/Export Tally or EZ-Text Codebook**
3. Select the type of codebook to import or export.
4. Select the desired process---to import or to export.
5. If a codebook is imported and both codebooks contain the same code network labels, you can have the system leave out duplicate items by checking the **Automatically skip codes that duplicate a code already in Study codebook** checkbox.
6. Click the **Continue** button.



Chapter 6:
The Sourcebook Editor

The Sourcebook Editor is opened from the main AnSWR window by clicking on the **Sourcebook** icon or selecting **Sourcebook Editor** from the File menu.



A text segment must contain a source and a code to valid. The AnSWR analysis uses code and source data to categorize text. The source networks are written to the Sourcebook. Each Project within a Study can use all of the Study's source networks or use only a selected subset of source networks.

Open Sourcebook Utility

To open the Sourcebook Utility, choose **Sourcebook Editor** from the File menu, or click the **Sourcebook** icon on the main AnSWR window.

Note: The Sourcebook Editor layout is very similar to the Codebook Editor. The sole exception is that source networks are "defined" in the Advance Source Utility.

Add a Sourcebook Network

1. Open the Sourcebook Editor.
2. To add a new Source Network to the Study, click the **Add Source** button. A pop-up window opens.
3. Enter the new network code name or source ID, then click the **Save** button.
4. To add information for a new Source Network, use the Advanced Source Utility. See Chapter 7 for Advanced Source Utility help.

To add a network to a Project:

1. Open the Sourcebook Editor.
2. Click the checkbox next to the desired network under the network list. A check mark indicates that the network and all of its network items have been assigned to the current Project.

Add a Network Item to a Network

1. Click on a network on the **Network List**. The current network structure for the selected code is displayed under Network Layout.
2. Select the network under Network Layout in which you wish to assign the new network item.
3. Select the desired network from the **Network List** to add as a network item by clicking the network and holding down the left mouse button. Do not release the mouse button.
4. The pointer will change to Drag mode. Drag the network over the network layout and drop it by releasing the mouse button.
5. The network and any underlying network structure will be added as new network items to the displayed network.

Delete a Network Item

1. Select the desired network from the network list.
2. Select the desired network item from the network layout.
3. Right click on the desired network item. A pop-up menu is displayed.
4. Select the menu option **Delete Item from Network** or press **[CTRL]** + **[F]**. The network item and any underlying items in the network structure will be deleted.

Note: If any network item has been assigned to a text segment under any Project in the Study, the delete process will stop. A message box will indicate which Project uses the network item in coding.

Delete a Source Network from Study

1. Click on the desired network to select it, then click **Edit**, or right click on the desired network under the network list. The Edit menu is displayed.
2. Select the menu option **Delete Network from Study** or press **[CTRL]** + **[D]**.
3. A confirmation box is displayed. Click **Yes** to delete the network from the Study.

Note: If the network or any of its network items have been assigned to a text segment under any Project under the Study, you will be unable to delete the network. A message box will indicate why the network deletion was stopped.

Delete a Code/Source Network from Project

1. Click on the desired network to select it, then click **Edit**, or right click on the desired network under the network list. The Edit menu is displayed.
2. Click the checkbox next to the desired network under the network list.

3. The checkbox will be blank, indicating that the network and all of its network items has been removed from the current Project.

Note: If the network or any of its network items have been assigned to a text segment in the current Project, the action will be stopped.

Import a Sourcebook from Another Study

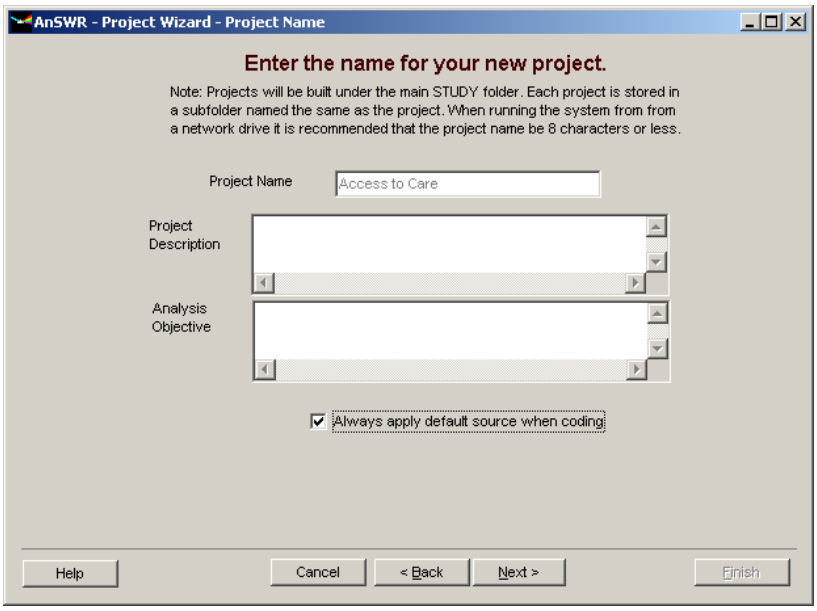
If no sources and no codes have been added to the current Study, the system allows you to import the codebook and sourcebook from another Study. Studies that share the same codebook and sourcebook structure may be merged using the Project Merge Wizard.

1. Open the Sourcebook Editor.
2. From the Utilities menu, select **Use a Codebook and Sourcebook from another Study**. A window opens with a drop-down list of Studies.
3. Select the desired Study and click the **Import** button, or click **Cancel** to abort.

Set the Default Source

Each Project may be assigned a default source. Unless another source is specified, the system will source code all text segments with "AnSWR".

1. Go to File/Modify Project.
2. The Project Wizard will display. Click the **Next** button.
3. Check the **Always Apply Default Source When Coding** box.
4. Continue to click the **Next** button until the Project Wizard Finished window displays.
5. Click the **Finish** button.



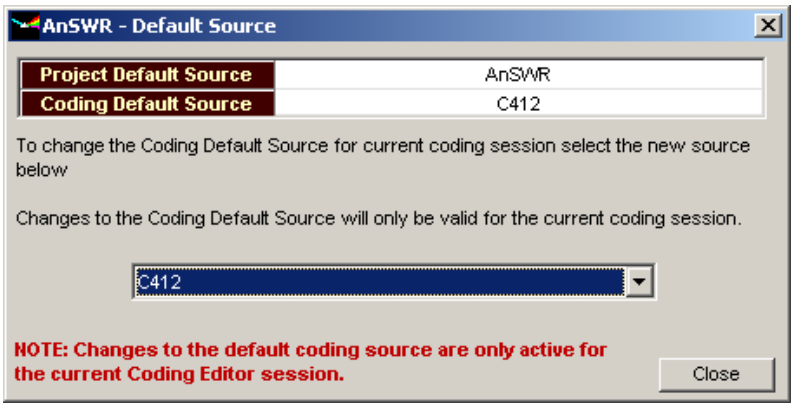
Note: The Project default source can be changed in the Coding Editor. However, the new default must be added to the Sourcebook Editor before this change can be made.

1. From Coding Editor's Tools menu, select **Coding Tools**, then select **View/Change Default Source** or press **[CTRL]** + **[D]**. The AnSWR Default Source Window is displayed
2. The window displays the Project Default Source and the currently set Coding Default Source. Unless changed, the Coding Default Source will be set to the Project Default Source.
3. To change the coding editor default source, select the desired source from the drop-down list and click **Close**.

Set Temporary Default Source

The Project default source may be temporarily set to a different source from the Coding Editor for the current Coding Editor session.

1. From Coding Editor's Tools menu, select **Coding Tools**, then select **View/Change Default Source** or press **[CTRL]** + **[D]**. The AnSWR Default Source Window is displayed.
2. The window displays the Project Default Source and the currently set Coding Default Source. Unless changed, the Coding Default Source will be set to the Project Default Source.
3. To change the coding editor default source, select the desired source from the drop-down list and click **Close**.



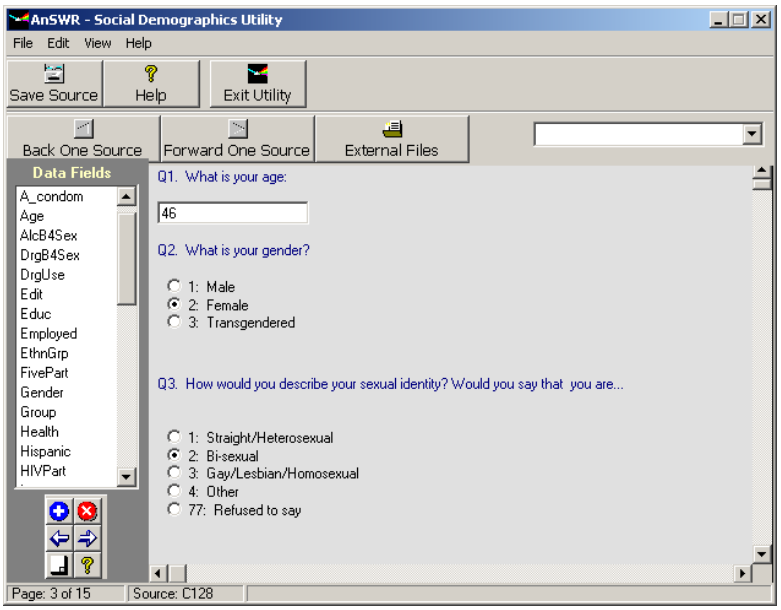
Note: If each text file is associated with a different default source, a new default source must be set when segmenting and coding a new text file.

Chapter 7:
Advanced Source Utility

Use the Advanced Source Utility to add or update source data. The utility allows for the addition of user-defined fields to the source table and the building of a custom data entry form. To reach the Advanced Source Utility, select **System Utilities** from the File menu, then select **Advanced Source Utility**.

The Advance Source Utility is divided into three windows.

- Data fields
- Source Utility function keys
- Form page



Important: To enter source data, fields (i.e., variables) must be placed on the **Form** entry page.

The top of the window lets you move to a previous or next source network by clicking on the back and forward buttons. A dropdown option to the far right of this tool bar lets you scroll through your list of source networks to jump to that source's data. Alternatively, you may type in the sources ID label.

Note: New sources cannot be added from the **Advance Source Utility.** They must be added from the **Sourcebook Editor.**

The bar across the bottom of the **Advance Source Utility** window, tells you what Form page you are on and the source.

The Source Utility function keys are:

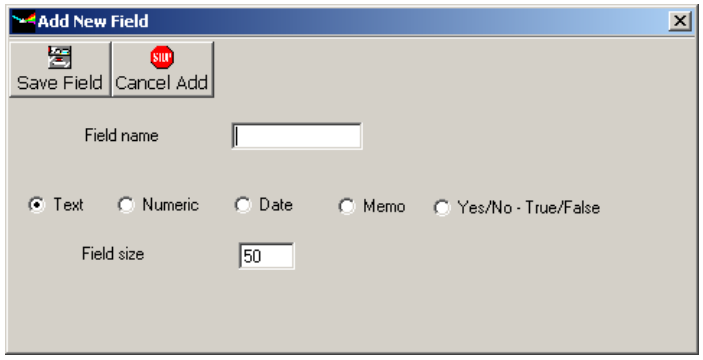
	Add a field to the source data table
	Permanently delete a field from the source data table
	Move back one form page
	Move forward one form page
	Automatically add a field to a form
	Help file

Add Fields to Table

A field is limited to eight alpha-numeric characters in length. If source data will be exported for using in a statistical program, a field name should never begin with a number.

1. On the Advanced Utilities window, click the **Add a New Data Field to Table** button. The Data Field window is displayed.

2. Enter the **Field Name** and specify the data type (**Text**, **Numeric**, **Date**, **Memo**, or **Yes/No-True/False**).
3. Specify the field size, if applicable.
4. Click the **Save Field** button.



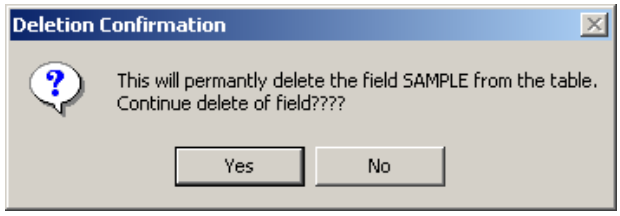
Note: A text field may contain no more than 255 characters. A memo field is not limited in size. To create categorical response items, create a numeric field. See page 48 for help on how to **Build Field Value Structure**.

Delete Fields from Table

This option permanently deletes the field and any source data stored in the study30.mdb data tables. Once deleted, a field cannot be retrieved. To restore fields that have been deleted from the data tables, the field must be recreated and data re-entered. A field can be deleted from the **Form**, without deleting the field from the source data tables. To only **Delete Field from Form**, see page 47 for help.

1. Click the **Delete Selected Data Field** button.

2. A deletion confirmation prompt will display. Click the **Yes** button to permanently delete the field. **No** will cancel the process.

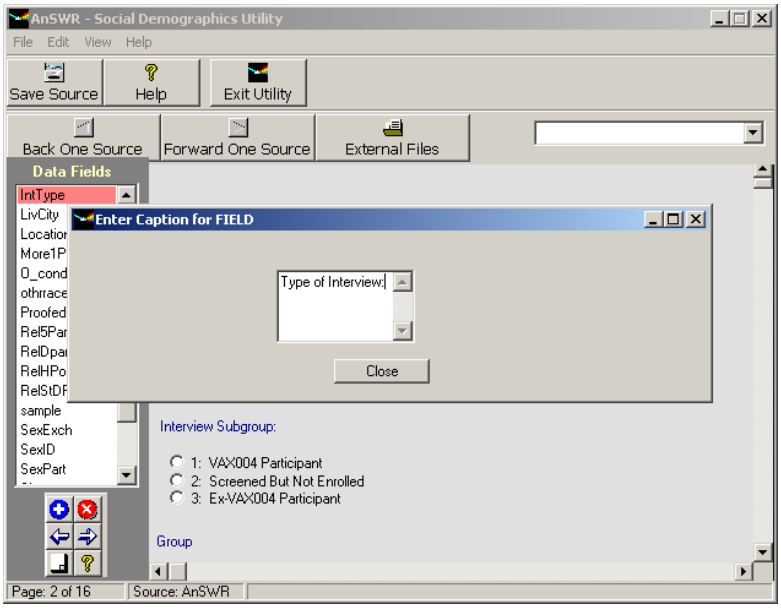


Add Field to Form

To add fields automatically:

1. Click on the data field to add to the form.
2. Click the **Add Field to Page** button.

3. The Caption window is displayed.
4. Enter the desired caption for field.
5. Click the **Close** button. The field appears on the last page of the form with the format appropriate to the type of field.



To add fields manually:

1. Select the desired field.
2. Right click on field and drag to page.
3. Drop field on desired position on page.

Delete Field from Form

1. Right click of the caption/label for the desired field on the form.
2. From the popup menu, select **Delete Field** menu option.

Change Field Position on Form

1. Click and hold down mouse button on the caption/label for the desired field on the form.
2. Drag field to desired position on page.
3. Release the mouse button to drop field in new position.

Note: Fields may not be moved from page to page.

Resize Field on Form

1. Right click on the caption/label of the field to resize.
2. From the popup menu, select **Modify Width** menu option. The Modify Field Size window is displayed.
3. Select to enlarge or reduce field and the desired percentage.
4. Click the **Apply** button.

Build Field Value Structure

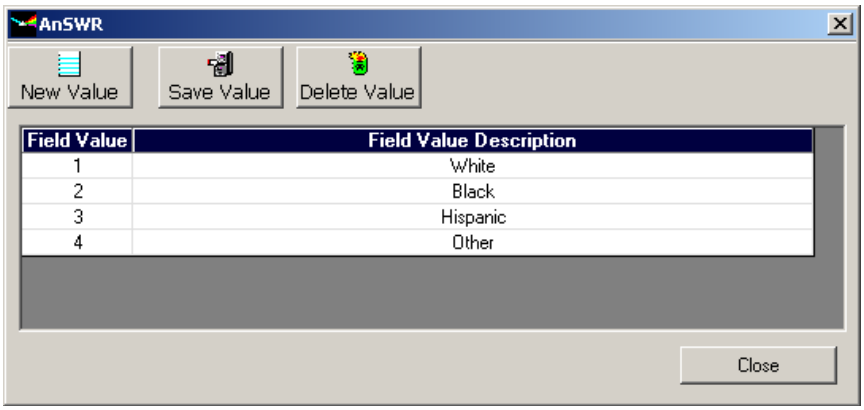
Numeric-type data fields may be assigned a value structure. **Important:** The value structure must be created before the field is placed on the Form.

For example, for a data field called Race, you may want to assign a value structure of:

1 = White 2 = Black 3 = Hispanic 4 = Other

Click a data field to select it and click the **Add/Edit/View Value list for [Field]** option from the Edit menu, or select field by double clicking on it. The Field Value Set window is displayed.

1. Double-click on the numeric field
2. Click the **New Value** button.
3. Select a value for the field from drop-down list.
4. Enter a value description.
5. Click the **Save** button.
6. Repeat for each value.



To edit an existing field value:

1. Click value to display dropdown list.
2. Select new value from list.
3. Click the **Save** button.

To edit an existing value description:

1. Click the description to highlight it.
2. Enter the new description.
3. Click the **Save** button.

To delete a field value:

1. Click the desired value.
2. Click the **Delete** button.

Note: Value structures already placed on the **Form** cannot be modified or deleted. Changes should be made before the field is placed on the **Form**. If changes need to be made, after they have been placed on the **Form**, they must be deleted and re-added.

Add Labels to Form

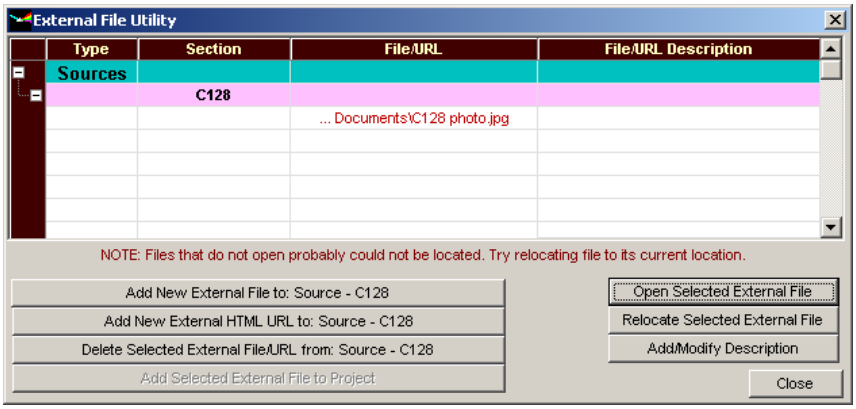
Labels such as form titles or instructions for a field may be added to a form.

1. Click the field item **Form Label**. The Caption window is displayed.
2. Enter the desired caption for field.
3. Click the **Close** button. The label appears on the last page of the form.

Associate External Files

You can store a list of related files with a Study or Project. External files can also be associated with a specific source. For example, you can link .WAV files containing a source's digitally recorded interviews, photograph, family tree, etc.

1. Click the **External Files** button in the utility toolbar. The External File Utility window is displayed.
2. Click the **Add New External File to: Source - AnSWR** button.
3. From the Open pop-up window, select the desired file.
4. Click the **Open** button.
5. Enter a description for the file.



To add a URL:

1. Click the **Add New HTML URL to: Source - AnSWR** button.
2. Enter the URL when prompted.
3. Click **OK**.

To open an associated file:

1. Click on the desired file to select it.
2. Click the **Open Selected External File** button.

To modify a file description:

1. Click on the file to select it.
2. Click the **Add/Modify Description** button.
3. Make the desired changes to its description.
4. Click the **Apply** button.

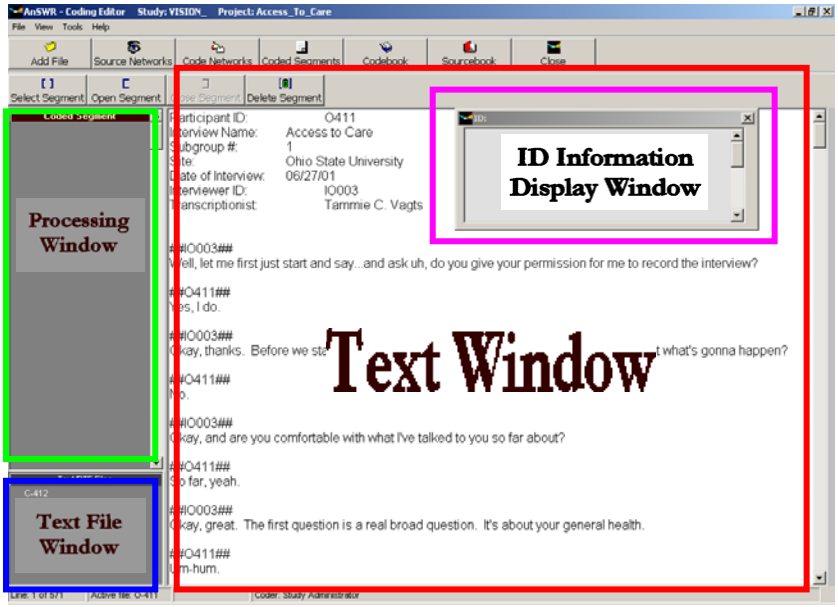
To delete an external file:

1. Click on the file to select it.
2. Click the **Delete External File/URL from: Source - AnSWR** button.

Chapter 8:
The Coding Editor

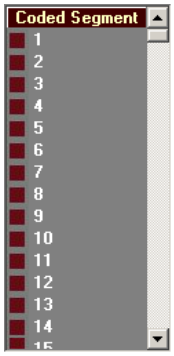
Layout

The Coding Editor Window contains the tools needed to code text and HTML files. The Coding Editor is divided into three permanent windows and a fourth window that can be closed and reopened at anytime.



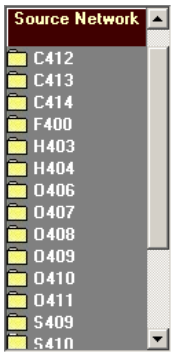
The three permanent **Coding Editor** windows are:

- The text window displays the active text file.
- The processing window. Depending on the process, this window's contents will change. Each process has an icon to activate the window's contents. The three processes are:



When a text segment is created, the system automatically assigns a **Segment ID**.

Segment IDs reflect the order in which the text segment was created rather than the text's position on the page relative to other text. Clicking on a **Segment ID** on the list opens the corresponding file and highlights the text segment. Alternatively, clicking on the text that has been coded will activate the text segment.



When you click on the **Source Networks** icon, the window changes to display a list of all source networks assigned to the Project.

When you select a text segment ID that has already been source coded, the source(s) applied to the segment are moved to the top of the list and displayed in a turquoise blue colored font.

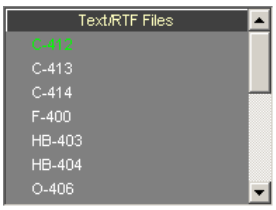
The folder icon next to the source network name indicates whether the source network has an underlying network. If the folder icon contains a (+) sign, then the source network has an underlying structure. Double click the source network to view the source network structure and assign source network items to the coded text segment.

When you click on the **Code Networks** icon, the window changes to display a list of all the code networks assigned to the Project.

When you select a text segment ID that has already been coded for content/topic, the code(s) applied to the text segment are moved to the top of the list and displayed in a turquoise blue colored font.

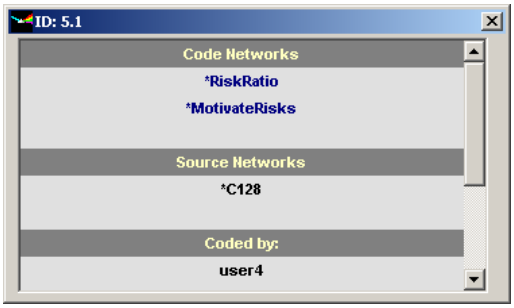
The folder icon next to the code network name indicates whether the code network has an underlying network. If the folder icon contains a (+) sign, then the code network has an underlying structure. Double click the code network to view the code network structure and assign code network items to the coded text segment.

- The text file window. All files associated with the Project are listed in this window. If alias names were assigned to text files, an alphabetically listing of these names is displayed. If no alias name was assigned to **Direct Text Input** files, an alphabetical listing of all of the textdata#.mdbs is displayed.



The fourth window is the **Family ID Information Window**, which contains coding information about the active text segment ID. The window displays code networks, source networks,

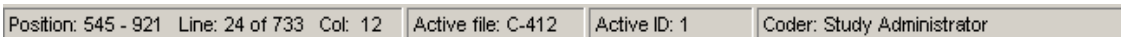
coder/analyst, and the unique ID number for the coded segment. The default view only displays source networks, coder/analyst and the unique ID number. Use the **View menu** options to determine which elements to display in the information window.



The top tool bar of the **Coding Editor** displays the active Study and Project.

The bottom tool bar of the **Coding Editor** displays the active file's alias name if different from the file name. It also displays the active coder and line information.

After a text segment is created, the tool bar displays position and active text segment ID information.



Other features available in the **Coding Editor** include:

- The Shortcut Key Window, which displays a list of keyboard shortcuts and symbol definitions used in the coding editor. Use the **View menu** option to display the window, or press **[CTRL]** + **[K]**
- Cue Cards, which provide quick directions for coding text segments. Cue cards are displayed each time the Coding Editor is accessed. To stop cue cards from starting automatically, uncheck the **Show Cue Cards at Startup** option in the Cue Card window. Cue cards may be opened at any time from the Help menu by selecting the **Cue Cards** option.
- Access to both the **Codebook Editor** and the **Sourcebook Editor**.

Preferences

The Preferences Utility is used to set the default text properties display of text files, to turn off selected system confirmation messages, and to set Word Count preferences.

1. From the Coding Editor Tools menu select **Preferences**, then **Editor Options**. The Coding Editor Preferences window is displayed.
2. To close the window, click the **Close** button.

General Preferences

General Preferences control whether selected confirmation messages are displayed. The system default is to display all messages.

To set general editor preferences:

1. Click the **General** tab to display the options.
2. Click the checkbox for any option you wish to select or deselect.
3. Click **Apply** to lock in any changes

Font Preferences

Font preferences set here are used to display all files. To set font preferences:

1. Click the **Font** tab to display options.
2. Click **Select Font** button to set font, style, and size.
3. Click the checkboxes for any option you wish to select or deselect.
4. Click **Apply** button to lock in any changes.

Note: To change font for the current session only, use the **Set Font** option under the Tools menu, **Preferences** option.

Word Count Preferences

To see whether Word Count is activated or to set the options Word Count should use:

1. Click the **Word Count** tab.
2. Click the checkboxes for any options you wish to select or deselect.
3. Click **Apply** button to lock in any changes.

Segmentation

Coding in qualitative data analysis involves carefully reading through the textual data; identifying ideas about viewpoints and things experienced, heard, or seen; and creating a code to help mark similar data, and then assigning a code to like data.

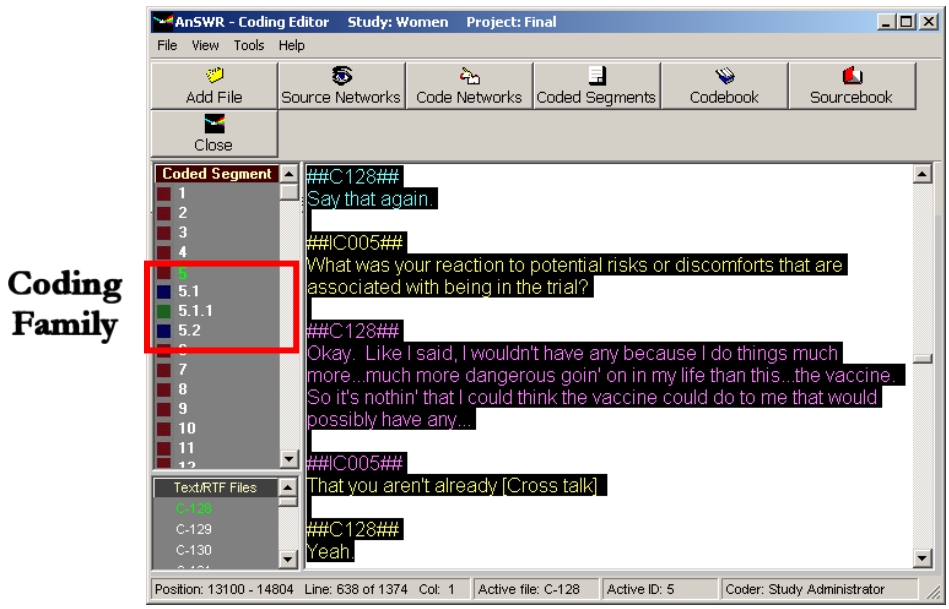
Before you can actually code the textual data, you must first identify what text to code. This process involves breakdown the text into meaningful chunks or segments (7). Text segments can be broken down into subunits, called embedded or nested text segments, provided that theoretically a distinct context and meaning is preserved.

A text segment is can be a word, phrase, sentence, paragraph, or an entire document. If a word or phrase is the unit of observation or the intent is to perform a traditional content analysis, it is recommended that the Word Count feature be used.

The boundaries of the text segments are defined by the coder/analyst. There are four types of text segments that can be created.

- Individual – stands apart from other text segments
- Nested/embedded – contained within a large text segment
- Overlapping – allows cross-over between two or more text segments
- Linked segments located in different parts of the text. See page 72 for help on linking coding family segments

To preserve the relationships between codes, text segmentation is based on a **Coding Family Structure.** Text segments may contain nested/embedded text segment, which in turn can contain nested segments of their own; thus, creating generations of segments for a given family. A parent segment is the largest, most inclusive segment. Each family has its own unique ID. All coding family members are assigned the same root ID as their parent segment (e.g., coded text segment 1). Nested segments are assigned a numeric generation value (e.g., coded text segment 1.1) to support greater flexibility in how coded data is analyzed and interpreted. Text segments can be examined as exclusive, self-contained units or as inclusive, relational items. Overlapping segments form new families; hence, they are assigned their own unique family ID.



There are two methods for creating text segments in AnSWR:

- Highlight a block of text and click on the **Create Segment** button. This technique works best when you have a relative smaller chunk of text to segment.

- Place the cursor where you want the text segment to begin and click the **Open Segment** icon. Scroll down to where you want the text segment to end and click the **Close Segment** button. This technique is optimal for larger text segments.

When a text segment is created, the system displays the parent segment in maroon-colored text. A different text font color is assigned each subsequent level of embedded segments.

Modifying Text Segment Dimensions

Modifying Dimensions of Coded Text Block

The text assigned to a coded text segment may be modified by expanding or decreasing the start and end positions of the text segment. When expanding a coded text segment, the new text segment may not overlap another coded text segment (i.e., have the same start and end positions). When reducing a coded text segment, the new text segment must still include all offspring/child text segments. If modification of text segment dimensions also requires modification of embedded segment, changes to the offspring/child segments should be made prior to changing the parent segment.

1. Select the desired coded text.
2. From Tools Menu – **Coding Tools** option, select **Modify Text Segment** or press **[F11]**.
3. Select new text segment.

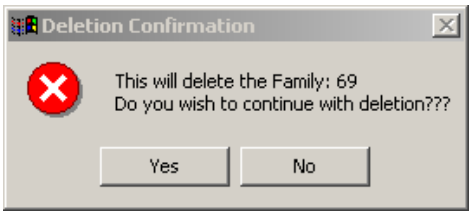
Note: To cancel the Modify Text Segment process, press the **[F12]** key.

Delete Text Segment

To permanently delete an existing text segment:

1. Click on the desired text segment ID or on the text to activate the segment ID.
2. Click the **Coded Segments** button.
3. Click the **Delete Segment** button.

4. A confirmation message will display.
5. Click the **Yes** button.



Source Coding

It is necessary to identify which source or set of sources is associated with the textual or image data. This process is referred to as source coding. Source coding can be performed at two levels: file-based and segment-based. Some Studies may involve use of both source-coding strategies.

In file-based source coding, an entire text file is attributed to a single source or a set of sources. Examples of files where file-based source coding might be completed include:

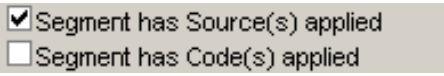
- Abstracts
- Published articles
- HTML documents
- Graphic images

In segment-based source coding, selected text is attributed to a source or set of sources. Examples of text files were segment-based source coding might be completed include:

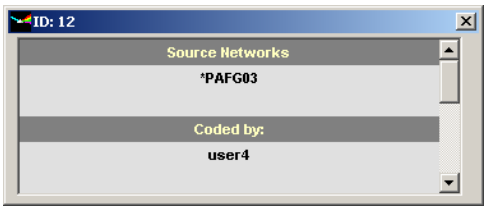
- Focus group interviews
- Individual interviews

Source coding can be performed manually by the coder/analyst using the drag and drop method, or completed by the system if default source coding has been activated. When default source coding is used, source coding is automatically performed as the text segment is created.

Important: AnSWR requires that each coded text segment be associated with at least one source. If no source has been applied to a coded text segment, the segment **will not** be included in analysis outputs. Verify that the checkbox for **Segment has Source(s) applied** is checked for each text segment. A ***Coding Assignment Report*** under the **Quality Assurance Reports** can also be used to identify text segments that have not been source coded.



You can also use the **Family ID Information Window** to verify that the correct source has been applied to a text segment.



Add Sources

To add source networks with no network structure:

1. Display the Source Network List by clicking the **Source Networks** button.
2. Select source network from source list.

3. Click on selected source network and hold down left mouse button.
4. Drag and drop source network over highlighted text segment.
5. Repeat until all source networks have been assigned.

To add source items from a network structure:

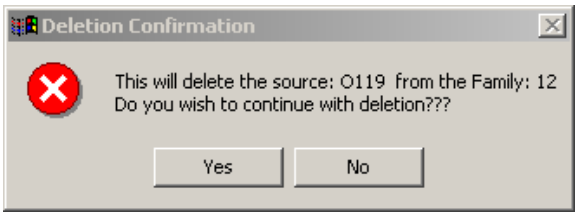
1. Display the Code Network List by clicking the **Source Networks** button.
2. Double click on desired source network. The network structure for the source network is displayed.
3. Select the source network item desired.
4. Click the **Add Network Item to Family** button.
5. Repeat until all source network items have been assigned.
6. Click the **Close Network Tree** button.

Delete Sources

To remove a source from an existing coded text segment:

1. Click on the desired text segment ID or the text to activate the segment ID.
2. Click the **Source Networks** button
3. Select the desired source to remove.
4. Click the **Delete Source** button.

5. A confirmation message will display.
6. Click the **Yes** button to permanently delete the source from the coded text segment.



7. Repeat until all desired sources have been removed.

Delete Sources from Network

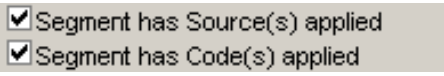
To delete source items from a network structure:

1. Click on the desired text segment ID or on the text to activate the segment ID.
2. Display the Source Network List by clicking the **Source Networks** button.
3. Double click on desired source network. The network structure for the source network is displayed.

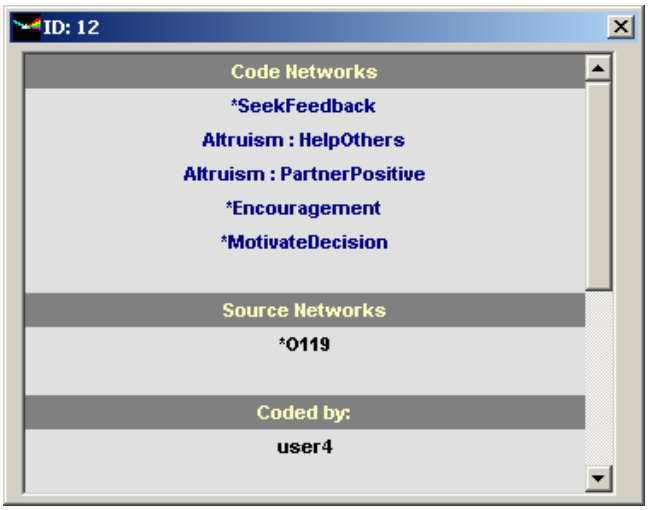
4. Select the source network item desired.
5. Click on the Delete Network Item to Family button.
6. Repeat until all source network items have been assigned.
7. Click the **Close Network Tree** button.

Text Coding

Text coding refers to the process of assigning codes to a text segment. A text segment may contain multiple codes. AnSWR requires that each text segment contain at least one code. If no code has been applied to a source coded text segment, the segment **will not** be include in analysis outputs. Verify that the checkbox for **Segment has Code(s) applied** is checked for each text segment. A ***Coding Assignment Report*** under the **Quality Assurance Reports** can also be used to identify text segments that have not been text coded.



Text coding can be added immediately when the text segment is created or by selecting an existing text segment. You can use the **Family ID Information Window** to verify that the correct codes have been applied to a text segment.



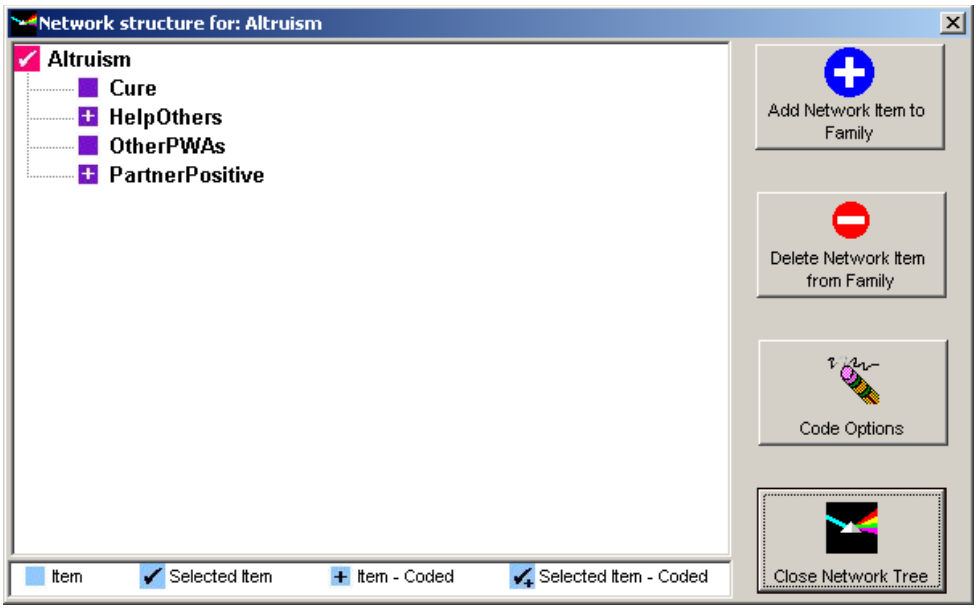
Add Codes

To add code networks with no network structure:

1. Select code network from code list.
2. Click on selected code network and hold down left mouse button.
3. Drag and drop code network over highlighted text segment.
4. Repeat until all code networks have been assigned.

To add codes from a network structure:

1. Double click on desired code network. The network structure for the code network is displayed.
2. Select the source network item desired.
3. Click on the **Add Network Item to Family** button.
4. Repeat until all code network items have been assigned.
5. Click on the **Close Network Tree** button.

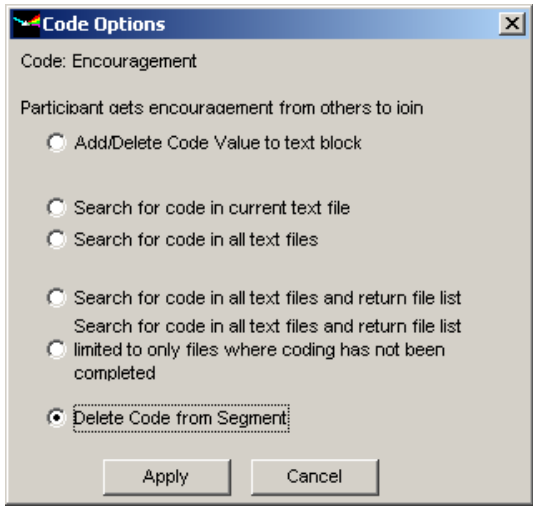


Delete Codes

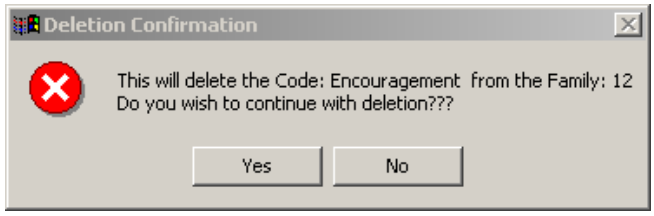
To remove a code from an existing coded text segment:

1. Click on the desired text segment ID or the text to activate the segment ID.
2. Click on the **Code Networks** button
3. Select the desired code to remove.
4. Click on the **Code Options** button.

5. Click on the **Delete Code from Segment** item.
6. Click on the **Apply** button.



7. A confirmation message will display.
8. Click the **Yes** button to permanently delete the code from the coded text segment.



9. Repeat until all desired codes have been removed.

Delete Codes from Network

To delete code items from a network structure:

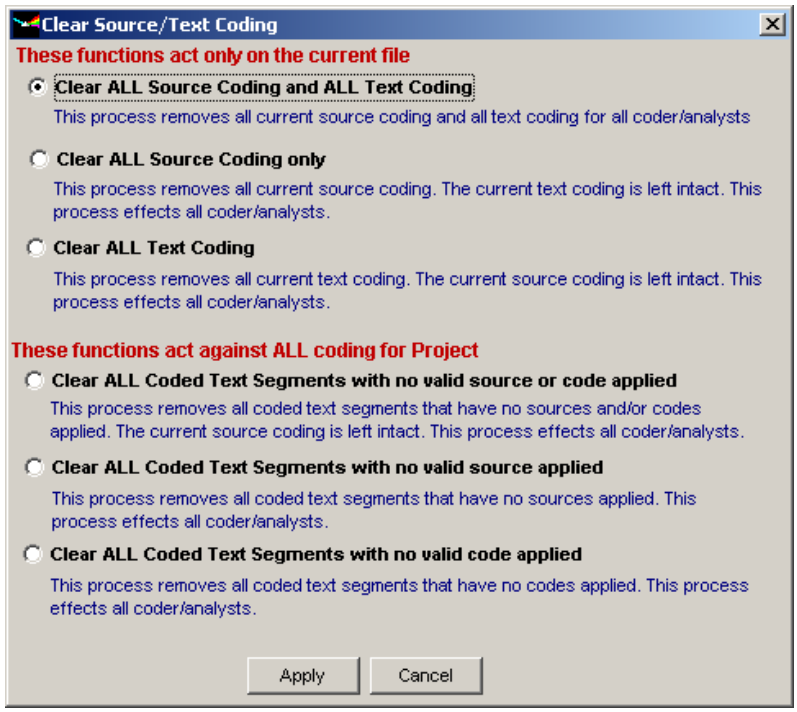
1. Click on the desired text segment ID or on the text to activate the segment ID.
2. Display the Code Network List by clicking **Code Networks** button.
3. Double click on desired code network. The network structure for the code network is displayed.
4. Select the code network item desired.
5. Click the **Delete Network Item to Family** button.
1. Repeat until all source network items have been assigned.
2. Click on the **Close Network Tree** button.

Clear Source/Text Coding

To clear coding for an entire file:

1. Display the text file.
2. From Tools Menu – **Coding Tools** option, click **Clear Source/Text Coding**. A Clear Source/Text Coding window opens.
3. Select desired option for clearing existing source and coding data

4. Click the **Apply** button.



Note: This is a permanent deletion. Source and/or text coding are removed for all coders/analysts in the active Project. Once sources and/or text coding are cleared, the system cannot undo the process.

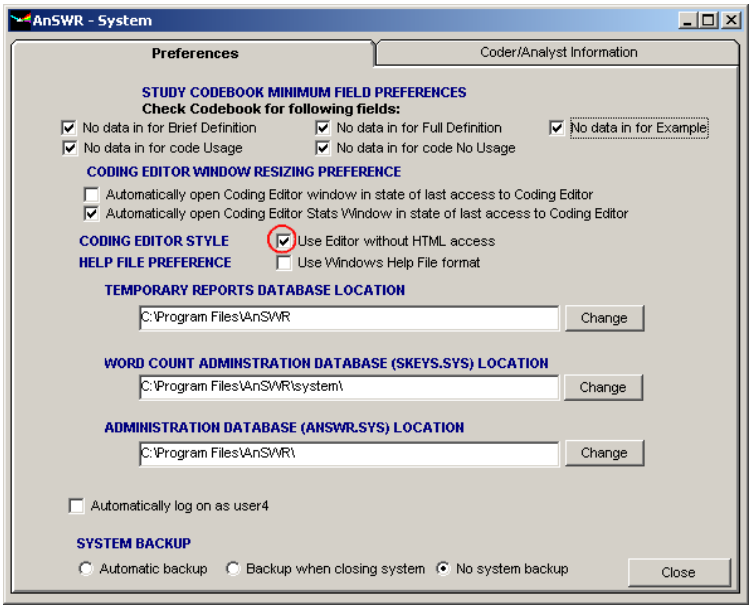
Adding Files to Project

TXT and RTF files can also be added in the Coding Editor. Click the **Add File** button on the toolbar to open Project Wizard.

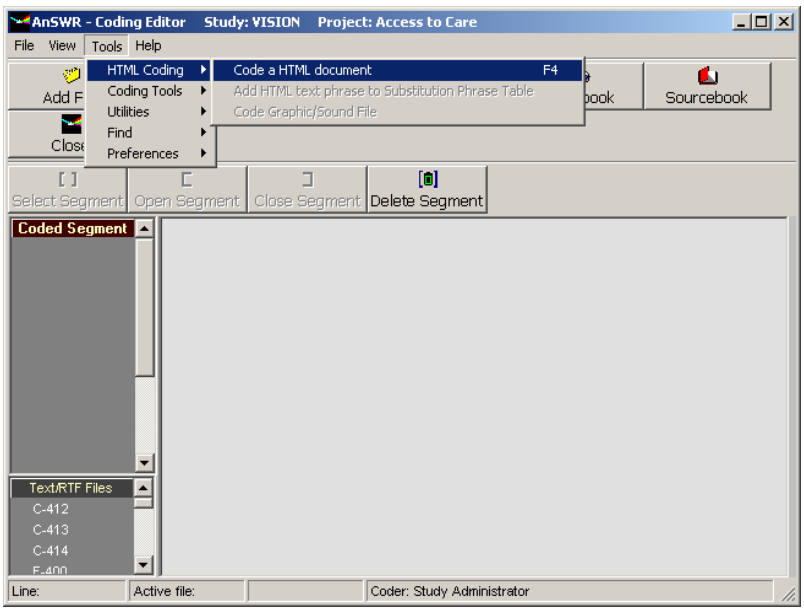
Note: HTML files are added using the Coding Editor browser window.

HTML Coding

When coding HTML documents, it is highly recommend that Direct Text Entry be utilized. By using direct text entry for HTML all of AnSWR's coding options are accessible and changes in URL addresses or website content do not negatively impact the analysis. To activate HTML go to the Main AnSWR Window and go to File/Preferences. Under the **CODING EDITOR STYLE,** remove the check mark from the **Use Editor without HTML access.**



In the Coding Editor, press the **[F4]** key to switch to HTML mode, or use the **HTML Coding** option under the Tools menu. Any type of file that can be opened under Microsoft Internet Explorer can be displayed and coded in the coding editor browser.



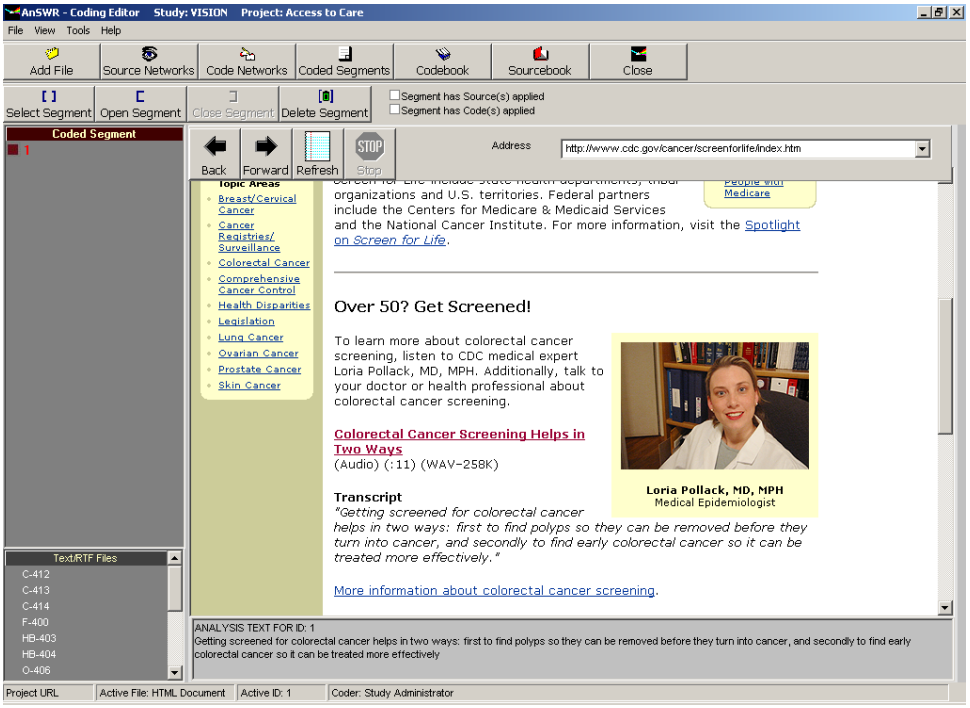
Enter the URL address and click on the **Add File** button. Open the Project Wizard to set Alias name or SPS status.

Note: The HTML mode requires Microsoft Internet Explorer 6 or greater.

Again, when coding HTML documents, it is recommended that Direct Text Entry be used so that all of AnSWR's coding options can be utilized. For better data control and analysis flexibility, use the direct text method to add data from Web pages (see below).

Directly Code HTML Documents

1. Go Tools/HTML Coding.
2. Click on down arrow in Address field to display URL.
3. Select the desired text.
4. Right click on selected text and click **Copy**.
5. Click the **Select Segment** button.
6. Add desired source network and code networks to be assigned to text segment.



Code HTML Documents Using Direct Text Entry

1. Open the desired HTML document in any Internet browser.
2. Select and highlight the desired text.
3. Right click on selected text and click **Copy**.
4. Open the Direct Text Entry window in the AnSWR Coding Editor by pressing **[CTRL]** + **[T]**.
5. Paste the captured text into the Direct Text Window by pressing **[CTRL]** + **[V]**.
6. Code as for any regular text file.

Code Graphics

Graphics are coded in HTML mode Graphics may be of any type that is recognized by the browser, such as JPEG or GIF format. Graphics may be coded a part of a HTML document or directly.

Graphic files must be saved locally in order to code them in AnSWR.

1. Right click on desired graphic in the HTML document and click.
2. Select **Code Graphics/Sound file** from Tools menu/HTML.
3. Locate the saved graphic file.
4. Add desired source networks and code networks to be assigned to the coded graphic file.

Code a File

Text Coding may be applied to an entire file. Text coding for an entire file may be applied only one time. Source coding for the file must be completed before file coding.

1. From Tools – Coding Tools menu, click **Code a File**.
2. Add Code Networks as you would for text coding.

Use Word Count

When word counting is active, the system automatically triggers the word count process when a top-level family is coded. Word counting process can be triggered on demand in two ways:

1. Select desired text segment and press **[CTRL]** + **[W]** to recount words.
2. Press **[CTRL]** + **[Y]** to display existing word count info for segment.

Word Counting for the Entire Study

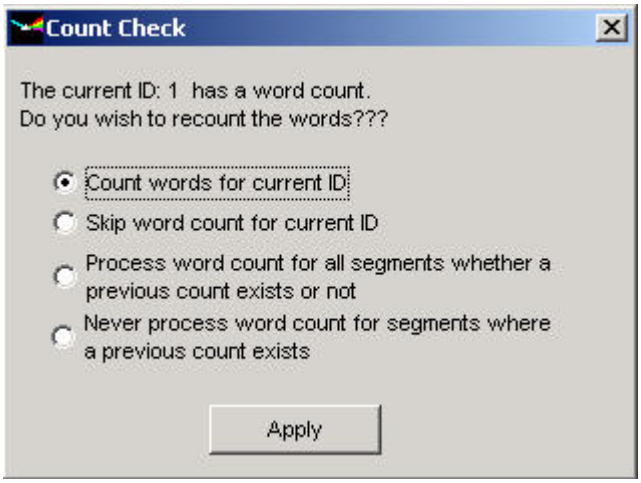
1. In the Main AnSWR window, go to the File menu, then select **Menu**.
2. Select System Administration and click on the Study Administration tab.
3. At the bottom of the Administration window, check the **Force All Projects to process Word Counts**.
4. If you wish to use the Word Exclusion or Word Alias Lists, select the checkboxes next to those options.
5. Click Apply Study Word Count Settings.
6. Click **Close**.

Word Counting for the Current Project Only

All coded segments in a Project may be word counted at one time. This process takes a long time to complete and requires user intervention. The process may be stopped and restarted later.

To start the process:

1. From the Coding Editor Tools menu, select **Word Count Tools**, then select **Project Word Count**. A dialog box opens, informing you that the process will take several minutes and asking if you wish to continue.
2. Click **Yes** to continue or **No** to abort.
3. During the word count, AnSWR identifies segments that have already undergone the word-count process. For each, you may see the decision box:



4. Choose an option and click the **Apply** button.

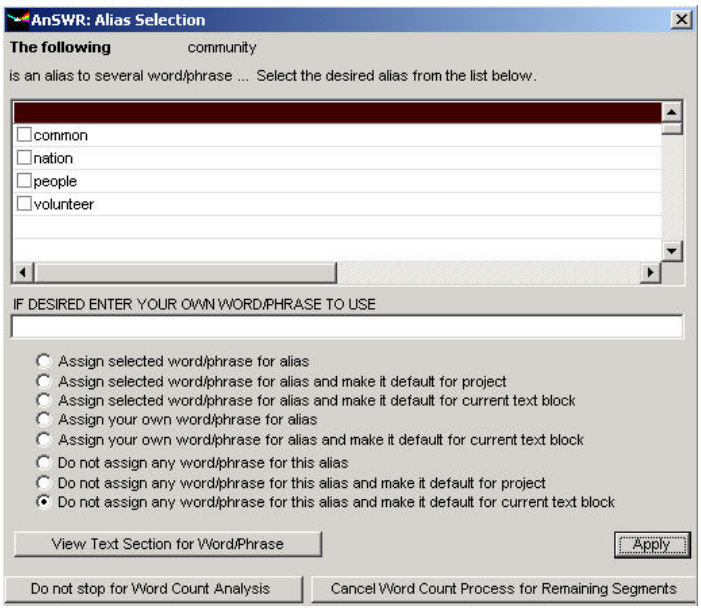
Note: When stopping a process, click the button only one time. The process will stop or restart after the completion of the current segment.

Word Counting Process

The word count process is automated but requires your input. During the process, AnSWR displays several dialog boxes.

Handling Alias Words

Words that are members of only one alias list are automatically assigned to the master word for that list. When the **Use Alias Word List** preference is turned on, the system stops when a word is in more than one alias list. Several options are possible for assigning the word in question.



1. Select the desired option.
2. Click the **Apply** button.

3. To view the text segment containing the word in question click the **View Text Section** button.

Word Count Results

When the system completes the counting process, the Word Count Results window is displayed. The window displays by source ID the words and the count for each word.

You can make adjustments to word count by deleting words or assigning one word to another word.

To delete a word, just uncheck the word.

To reassign one word to another word:

1. Select word to reassign.
2. Hold down mouse button until drag icon appears, then release.
3. Move cursor over word to assign to and click the mouse button.

Search Options

AnSWR allows you to search by text string, segment ID, code or source.

Text Search

1. From Tools menu, select **Find**, then select **Text Search** or press **[F6]**. The Text Search window opens.
2. Enter desired text and click the **Search** button.
3. Press **[F6]**.to move to next occurrence.

Unique ID Search

1. From Tools menu, select **Find**, then select **Unique Text Segment**, or press **[F7]**. The Unique ID Search window opens.
2. Enter desired unique ID and click the **Go** button.

Code Search

Find Code Network or Network Item with No Underlying Structure

1. Click desired code network from Code Network List.
2. Click the **Code Options** button.

Find Code Networks with Underlying Network Structure

Double click desired code network to display Network Structure window.

1. Select desired network item.
2. Click the **Code Options** button.

Find and Display Coded Text Segment

1. Click the whether to include all files or the current text file in the Code Options window.

2. Click the **Apply** button. The Code/Source Search Toolbar is displayed.
3. Use the Code/Source Search Toolbar to move between occurrences.

Find and Display File with Codes Applied

1. From Code Options window, choose whether to include files with coding not completed or all files.
2. Click the **Apply** button. The File Selection window opens.
3. Select the desired file and click **Open File**.

Source Search

Find Source Networks with No Underlying Structure

1. Click desired source network from Source Network List.
2. From Tools menu, select **Find**, then select **Source Search** or press **[F9]**.

Find Source Networks with Underlying Network Structure

1. Double-click desired source network to display Network Structure window.
2. Select desired network item.
3. Click the **Source Options** button.

Search and Display Coded Text Segment

1. Choose whether to include all files or current text file only in the Source Options window.
2. Click the **Apply** button to save your selection and display the Code/Source Search toolbar.

Use the Code/Source Search toolbar to move between occurrences.

Search and Display File with Codes Applied

1. Click the whether to include files with coding not completed or all files from Source Options window.
2. Click the **Apply** button. The File Selection window is displayed.
3. Select the desired file and click **Open File** button.

Quick Jump

To jump to a specific item on the Coded Text list, Code Network list, or Source Network list, use Quick Jump.

1. Press **[CTRL]** + **[Q]**. The Quick Jump window opens.
2. Select desired jump type and enter what to jump to.
3. Click **Quick Jump**.

Moving Around a Text File

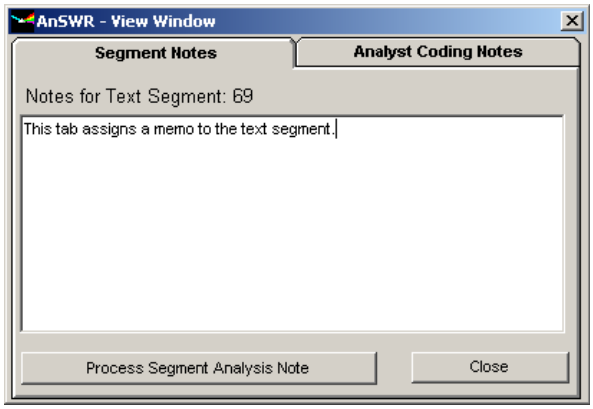
1. From Tools – Find menu, select **Go to Line** or press **[F5]**. The Line Select window is displayed.
2. Enter desired line number and click **Go to Line**.

Adding Notes

Coder/analyst notes or memos can be assigned to a coded text segment or to an entire Project.

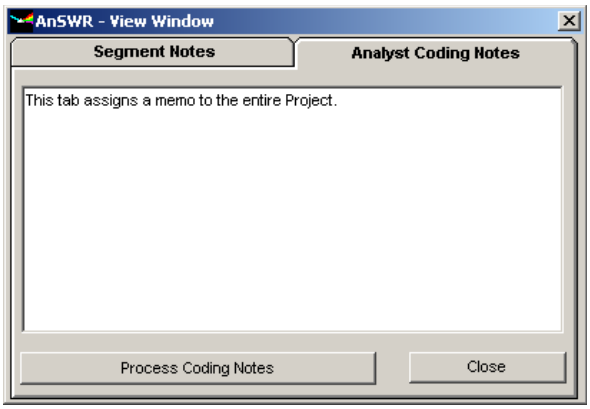
Add/Edit Segment Notes

1. Select coded text segment.
2. From the Tools menu, select **Coding Tools**, then select **Coding Notes** or press **[F2]**. The Notes Utility window opens.
3. Enter or modify the text notes in the **Segment Notes** tab.
4. Click **Process Segment Analysis Note** to save changes or **Close** to exit without saving.



Adding/Editing Coder/Analyst Process Notes

1. Select any coded text segment.
2. From the Tools menu, select **Coding Tools**, then select **Coding Notes** or press **[F2]**. The Notes Utility window opens.
3. Enter or modify the text notes in the **Analyst Coding Notes** tab.
4. Click **Process Coding Notes** to save or **Close** to exit without saving.



Printing Active File

1. From the Tools menu, select **Utilities**, then select **Print Active File** or press **[CTRL]** + **[P]**. The Print Preview window opens.
2. Use the buttons to scroll through the document.
3. When you are ready to print, click the **Printer** icon to open the Print utility.

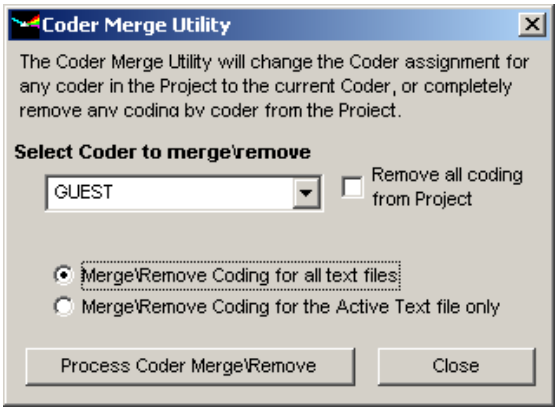
View Coding for All Coders/Analysts

If a Project contains coding from multiple coders/analysts, the **View Coding for All Coders/Analysts** option under the **View** menu must be active to display their coded text segments.

Coder/Analyst Merge Utility

The Coder Merge Utility scans the Project and reassigns the selected coder/analyst to your coder/analyst ID. This utility allows you to change the coder/analyst for all files in a Project or a selected file. This process is referred to adopting another coder's coding. The Coder/Analyst Merge Utility can also be used to remove a coder's coding.

1. From the Tools menu, select **Utilities**, then select **Coder Merge Utility**. The Coder Merge Utility window opens.
2. From the dropdown box, select the coder/analyst to change to your ID or to completely remove any coding that a coder/analyst has completed.
3. Check whether to change for all files or for the selected file only.
4. Click on the **Process coder Merge/Remove** button.
5. Repeat for any other coder/analyst.
6. When you close the utility, the Text Segment list is rebuilt with the coding now assigned to your ID as the current coder/analyst.

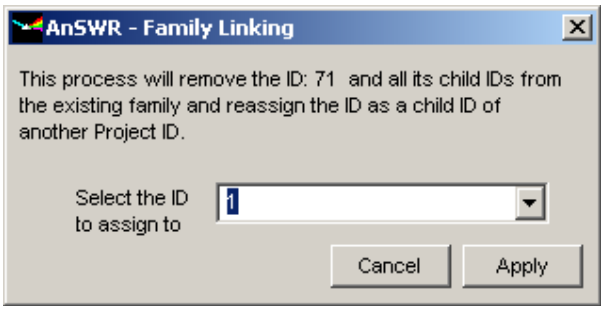


Note: When coding belongs to another coder/analyst, coded text segment IDs will display in a blue-colored font. While you can click on a text segment to view source and text coding applied by another coder, you cannot modify the text segment or coding that has been completed. When you adopt another coder/analyst's coding, the coded text segment IDs change to a white-colored font and make modifications to the coded text segment.

Linking Families

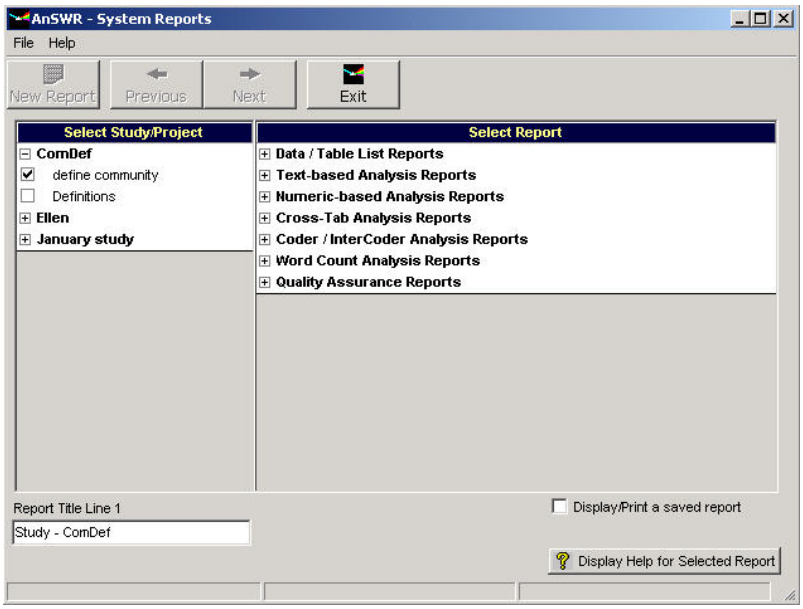
Any family may be reassigned to another family. This allows a family to contain coded segments across documents. Families may contain coded segments from both normal TXT/RTF files and HTML documents. When a coded segment is reassigned to another family, any of the coded segment's child segments will also be reassigned.

1. Select the desired coded text segment from the Coded Segment list.
2. From the Tools menu, select **Coding Tools**, then select **Assign ID to another Family**.
3. Select the segment from list to reassign to and click the **Apply** button. A confirmation box is displayed.
4. Click **Yes** to proceed with reassignment.
5. After the reassignment process is completed, a confirmation displays with the new segment ID.



Chapter 9:
The System Reports

To open the report utility, open a Study and choose **System Reports** from the AnSWR Main Window File menu or the Coding Editor File Menu. **[CTRL] + [R]** will also initiate the System Reports.



Seven categories of reports are provided:

- **Data Tables or List Reports.** Reports in this group provides output for items such as codebooks, direct entry text files, SPS data tables, and sourcebooks, including demographic data entered in the Advance Source Utility.

- **Text-based Analysis Reports.** Reports in this group fall into two categories: coded text reports and coder/analyst notes.

- **Numeric-based Analysis Reports.** Reports in this group include: code frequency tables, binary matrices, valued matrices, coding combination tables, and salient coding pattern reports.

- **Cross Tab Analysis Reports.** Reports in this group include a variety of two-by-two data tables: source data X source data; code X source data; and code X code outputs. Up to 40 codes may be displayed for code X code outputs.

- **Coder/Intercoder Analysis Reports.** Reports in this group in a variety of intra- or intercoder agreement reports: Kappa statistics at the file, source, or segment level; segment by segment coding comparisons for one or more coders; and a coder summary table.

- **Word Count Analysis Reports.** Reports in this group include alias and exclusion lists, segment-based word counts, and Project-based word counts.

- **Quality Assurance Reports.** Reports in this group provides summary tables for quickly identifying use of codes, sources, source data, text files, and text segments, including missing information.

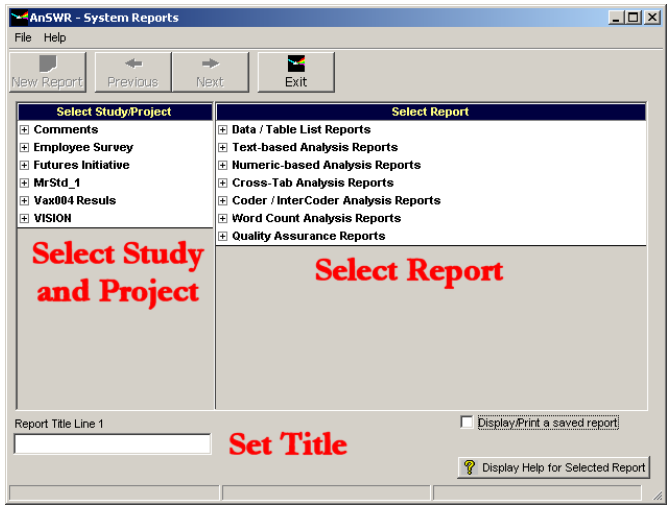
Set Up the Report

You can run a report at the Project level. The steps for setting up a report include:

- Select a Study and Project.
- Choose a report type.
- Set report criteria.
- Choose the file for the report.
- Run the report.

Select Study, Project, and Report

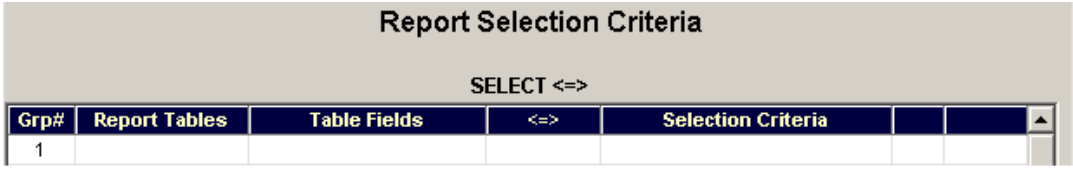
1. Choose a Study, and click on a Project to select it.
2. After selecting the Project, choose a report group and expand it by clicking on its plus sign. Reports are listed in seven groups.
3. Select a report by clicking its checkbox. To see detailed instructions for a report, select it, then click the **Display Help for Selected Report** button at the lower right corner of the screen.
4. Set Report Titles
5. AnSWR creates a default report title and subtitle based on the Study and Project names. You may edit these titles.
6. Click the **Next** button in the toolbar to continue to the Report Selection Criteria window.



Set Selection Criteria

The **Report Selection Criteria** Window is used to limit report output. If no selection criterion is to be used, click on the **Next** button to bypass this function.

The **Report Selection Criteria** Window displays a grid that is divided into **6** columns: Grp#, Report Tables, Table Fields, Select <=>, Selection Criteria, and a Group Operator. The Select <=> column is referred to as the operator specification column.



Note. The group operator column does not automatically display a column header. When selection criteria is set for Grp#1, the group operator column will display a **Select AND/OR.**

Build a Criteria Group

There are two types of criteria groups, standard and Boolean.

Standard criteria: runs a one-to-one comparison; each record must meet the criteria to be included in the report. Each report group may reference only one table/field combination.

Boolean criteria: runs various comparisons and allows "AND" and "OR" search and retrieval. The search examines each coded Family ID to see if all conditions of the group are met.

EXAMPLE:

A and B. Both A and B must be present (true) for the condition to be satisfied. This expression is used if only instances of co-occurrence between two or more criteria are sought.

A or B. Either A or B or both must be present (true) for the condition to be satisfied. This expression is used if any combination of two or more criteria is sought (i.e., both individual occurrences and co-occurrences).

A not B. A must be present (true), but B must not be present (false) for the condition to be satisfied. This expression is used if presence of one criteria item is contingent upon the absence of another.

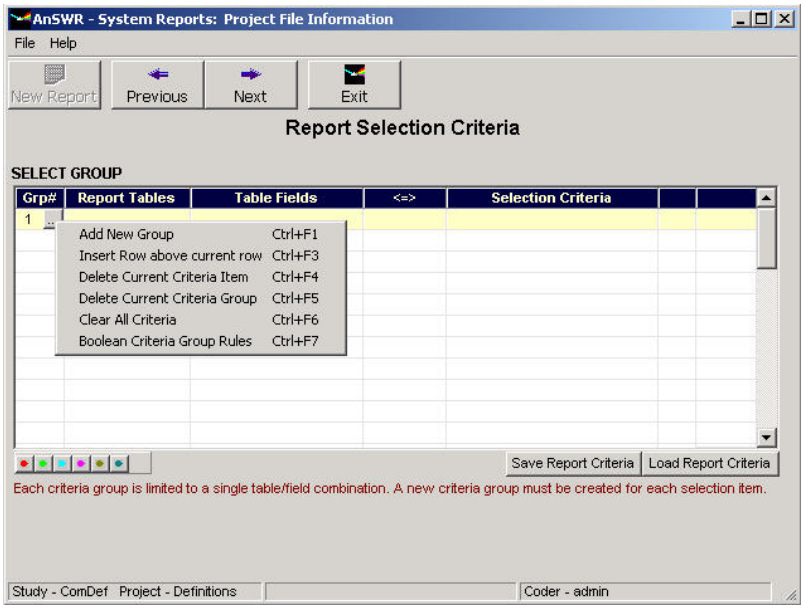
Set the criteria using the dropdown lists for each category in the Report Wizard. The system automatically uses the **Report Field** to determine if selection criteria will use **Standard** or **Boolean.**

The **Boolean Criteria Fields,** which will display in a blue colored font, are:

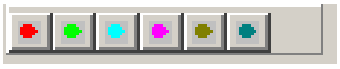
- Code
- Code Network
- Code Network Item
- Code Value
- Source
- Source Network

- Source Network Item

For the rest of the **Fields, Standard Selection** produces only those records that meet the specified condition (Gender = Female). A combination of **Standard** and **Boolean** selection criteria can be used if more than one conditional set of relationships is sought. Each set of conditions is introduced as a **Group**.



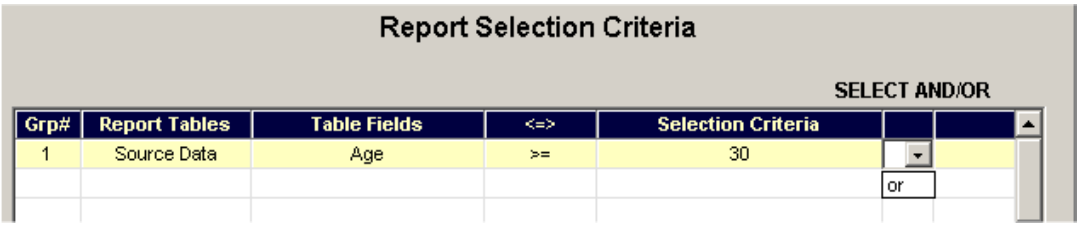
Set criteria line-by-line (i.e., each row represents a new criteria item). Click on the gray-colored square next to the number displayed in the Grp# column to set a group function. Group functions can also be run by clicking the colored buttons below the criteria table; roll your mouse over each button to choose a function.



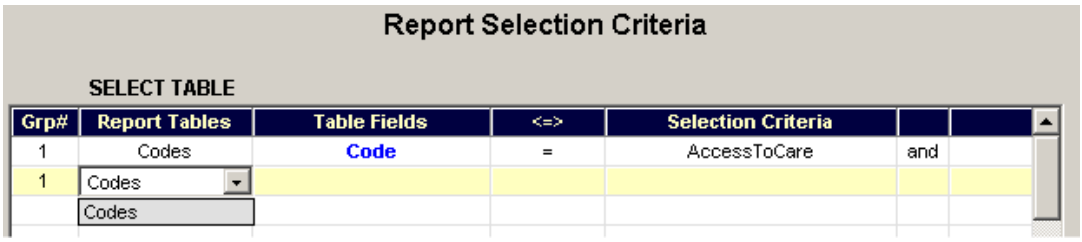
- The red dot creates a new criteria group
- The lime green dot inserts a new row between criteria items
- The turquoise blue dot deletes the selected row
- The hot pink dot deletes all criteria for the selected group
- The olive khaki dot completely clears **all** selection criteria
- The teal green dot displays the Boolean Group rules window

As you set report criteria, the next type of criteria becomes available to set. Click on the down arrow to view and select options.

Standard Selection criteria only allows an **OR** operator. A new group must be added to perform an **AND** operation.



For the **Boolean Criteria Fields**, only the **AND** operator is displayed in the **Select AND/OR** column. To make the **OR** operator available, a new criteria group must be added.



Set Boolean Group Rules

If the Boolean-based criterion contains more than one group, Boolean Group Rules can be applied. If no Boolean Group Rules are set, all conditions must be met for records to display. The Boolean Group Rules allows you to display records where fewer conditions are acceptable. For example, you may create Boolean selection criteria where the presence of three specific codes is required. With the Boolean Group Rules, you can then specify that it is permissible to display any record where a combination of any two of the three codes is present.

To set Boolean Group Rules:

1. Click on **Grp#** column to display the group functions or click on the teal green dot.
2. Select the **Boolean Criteria Group Rules** option.
3. Enter the number of rules to be met.
4. Click the **Apply** button once all rules have been set.

Save Criteria

The report criteria settings may be saved and reopened to rerun a report using the same criteria.

To save criteria settings:

1. Click the **Save Report Criteria** button. A browser window opens.
2. Select the location where you would like to store the criteria data file. It is recommended that you save the report criteria file under the default location (c:\program files\AnSWR folder).
3. Enter the name of the file.
4. Click the **Open** button to save the criteria data

5. Refer to Clearing Criteria and Loading Criteria (below) for information on how to clear criteria or load previously saved criteria.

Load Saved Criteria

To load saved criteria:

1. From the File menu, choose **Report Options**, then **Load Saved Criteria**.
2. Choose the criteria file from the browse window, and click the **Open** button, or **Cancel** to exit.

Clear All Criteria

To clear criteria:

1. Click once in the Group column to activate the dropdown list.
2. Choose **Clear All Criteria**.

Set Report Style

Report Style is applicable to only to the analysis reports (text-base, numeric-based, cross-tabs, and intercoder). The report style determines how report criteria will be processed and defines how the system creates the report output. The default report style is Segment-based.

There are five report styles.

- **Segment-based analysis.** Selection criteria groups are derived from the text segments. For example if is two codes are selected using an **AND** operator, both codes must be applied to a text segment for the record to display.
- **Source-based analysis.** Selection criteria groups derived from the Source Data Report Table take precedence over any other selection criteria groups. After AnSWR completes the source-based limitations specified, it processes the remaining criteria.
- **File-based analysis.** Selection criteria groups derived from the Files/Direct Input Report Tables take precedence over any other selection criteria groups. After AnSWR completes the file-based limitations specified, it processes the remaining criteria.
- **Code-based analysis.** Selection criteria groups derived from the Codes or Codebook Report Tables take precedence over any other selection criteria groups. After AnSWR completes the code-based limitations specified, it processes the remaining criteria.
- **Coder-based analysis.** Selection criteria groups derived from the Coder Data Report Table take precedence over any other selection criteria groups. After AnSWR completes the coder-based limitations specified, it processes the remaining criteria.

To set the report style:

Note: The system automatically opens the Report Style window at unless a default report style has been set.

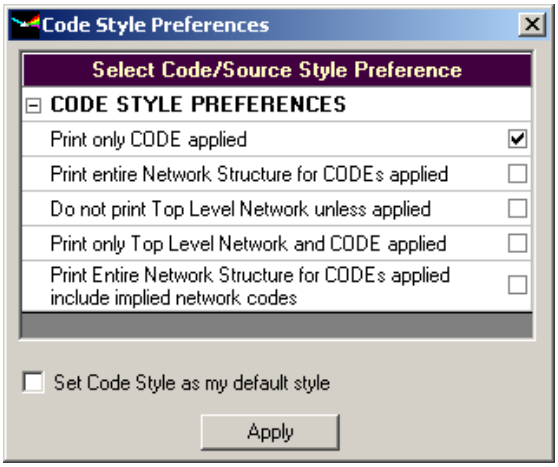
1. Click the **Report Style** button on the Selection Criteria window.

2. Select the desired report style. If you wish to set this as the desired default report style also, check the option **Set as default report style**.
3. Click the **Apply** button to save changes.

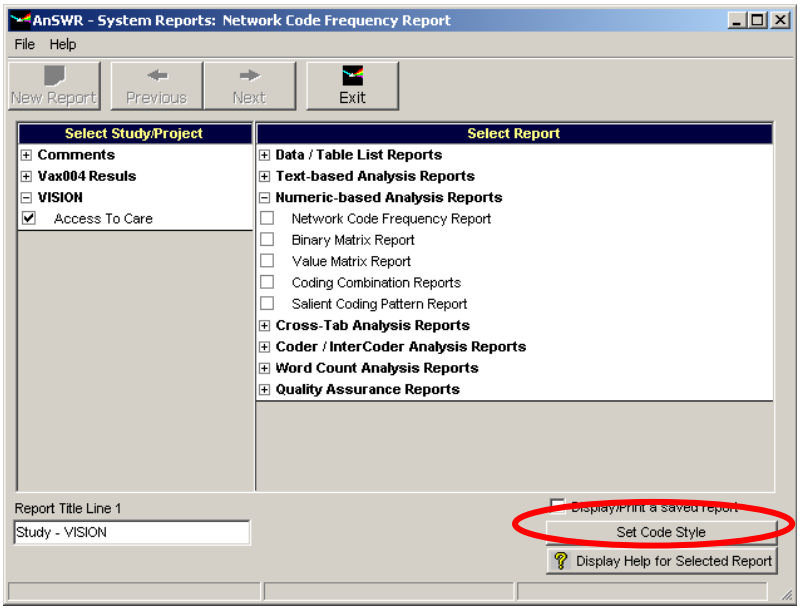
Set Code Style

Some analysis reports allow for selection of a code style. Code style determines which codes for a code network will be printed on a report. The default is to print only the network code(s) applied. By changing the code style, all codes for a network may be printed, even if they were not directly applied.

1. To open the Code Style window, click the **Set Code Style** button on the Selection Criteria window. The button is displayed only for reports that utilize code style setting.
2. Select the desired code style. If this is the desired default code style also check the **Set as default code style**.
3. Click the **Apply** button to accept the selected code style.



Note: The code style can also be set prior to creating selection criteria (or if no selection criteria is to be used) by click on the Set Code Style button after the Study and Project has been selected.

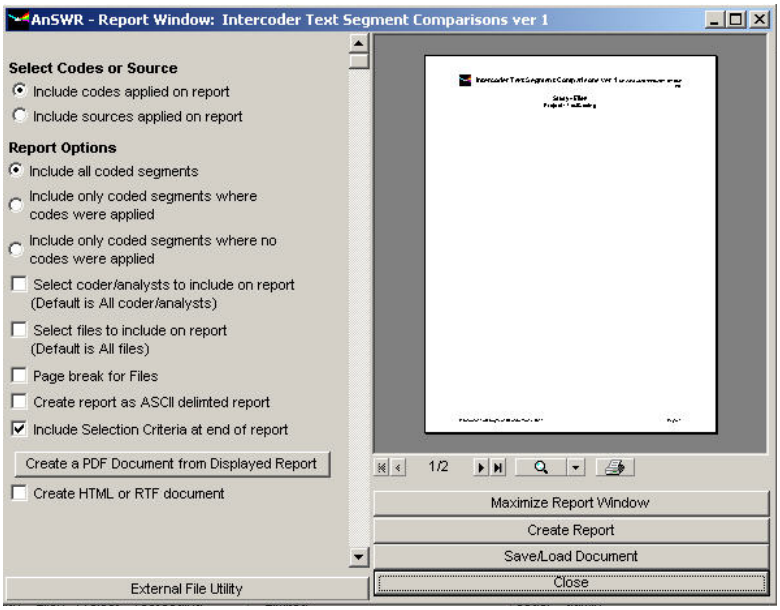


Display Report

After you set the desired criteria, click the **Next** button for additional options and to display the report.

Select Sort Option

Some reports allow multiple sort options. Click on a sort option to select it. If you change the sort option, you must run the report again.



Select Report Options

Many of the reports allow you to set or limit data to display on the report. Check the options to set them to print.

Create and View Report

The finished report is displayed on the right side of the report window. Use the report display controls at the bottom right corner of report window to zoom in on the report or change the displayed page.

Page buttons	Moves through the pages of the report
Zoom control	Zooms in or out on the report for easier viewing of report details
Print	Opens the print dialog box
Maximize Report Window	Displays the report at full screen
Create Report	Processes the report
Save/Load Document	Allows you to save the report or load a saved report
Close	Closes the report window and returns to the previous screen

For most reports, the default version of the report displays when the report window is open. The report must be recreated if you modify report options or request an HTML version or ASCII delimited version. Some reports display an additional window with more options for defining which data to include.

Save Report in Another Format

- **ASCII Delimited File.** Many reports may also be created in an ASCII delimited format. The first record of the ASCII delimited file contains the field names. The system uses the (^) character to separate data fields. Reports that can create an ASCII delimited file have the option to run an ASCII version of the report.

  To create an ASCII version of the report, select the **Create report as ASCII delimited Report** checkbox and follow the screen prompts to save the file.

- **PDF.** Every report can be presented as a PDF. A PDF can be opened or printed by any other user.

  To create a PDF, select the **Create a PDF Document from Displayed Report** option and follow the screen prompts to save the file.

- **HTML.** Every report may also be created as an HTML document. The HTML version of a report is similar to the displayed report except that it excludes graphics shows data left-justified.

  To run an HTML version of the report, select the **Create HTML or RTF document** checkbox and follow the screen prompts to save the file.

Close Report Window

Click the **Close** button to close the report window and return to the Report Wizard.

Other Reports

Some of the analysis reports can be processed with the same criteria and data as the current analysis report. The Report Wizard shows a list of these reports.

- Select any of the reports and click the **View Report** button.
- To create a new report, click the **New Report** button on the main toolbar.
- Click the **Finish** button to close the report wizard.

Set SPS Preferences

SPS Preferences determines how SPS phrase in coded text segments are displayed on reports. If SPS was applied in the Coding Editor, coders/analysts with SPS rights can print text-based reports with either the SPS phrase or the original text.

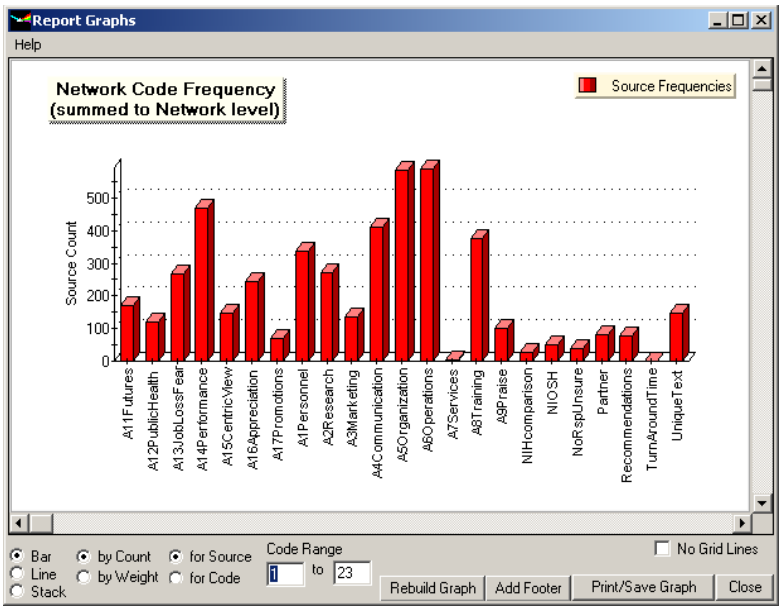
SPS report preferences are active only during the current report session. The system default is to print the SPS phrase.

To set SPS preferences:

1. From the File menu, select **SPS Preferences**. The SPS Report Preference window opens.
2. Select the desired option and click the **Apply** button.

Graphs

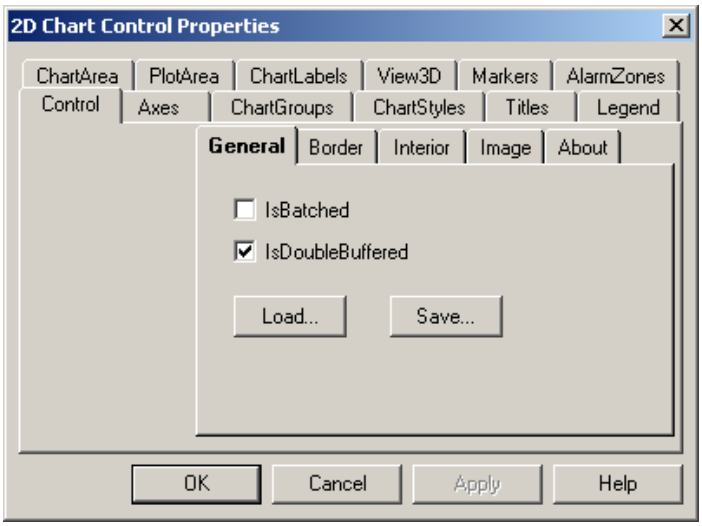
AnSWR offers an option to display graphs for many of the system reports. For reports that offer graphs, the default is to create the graphs. You may turn off the graph option. The types and contents of graphs depend on the reports. AnSWR produces bar, stacked bar, or line graphs. Most reports can create graphs based on data in various combinations. To change graph types, click the desired graph type. A new graph displays data in the selected graph type.



Advanced Graph Settings

AnSWR includes controls for more advanced graph settings.

To bring up the Chart Control Property window, click the graph once, press **[CTRL]** + **[F4]** and then right-click on the graph to display the Chart Control Property window.



The Chart Control Property window has a **Help** button for detailed information about advanced graph property settings.

Change Graph Data Options

When you change graph options, the graphs change automatically to reflect settings. To return to the default version, close and reopen the graph window.

Click on the tab for the data properties you wish to edit. Data options may also be selected from combo boxes or grids, depending on the report.

Change Graph Range

Enter the desired range. Note that if you change the range for the series that display along the X axis, the graph may be distorted. Click the **Rebuild Graph** button.

Set Maximum High Point On/Off

Most graphs keep a constant maximum high point, so changing graph settings keeps the displays in sync. Some graphs change the maximum high point based on the data being graphed; these have an option to set a constant maximum high point based on the highest value of all possible graph data combinations.

Turn Grid Lines On/Off

The default setting displays grid lines. To turn them off, select the **No Grid Lines** checkbox.

Add Footer

A footer of up to 80 characters may be added to any graph. To add or change a graph's footer:

1. Click the **Add Footer** button. The Footer window opens.
2. Enter the desired footer text or delete current text to remove footer from graph.
3. Click **OK** to save changes, or **Cancel** to exit without saving.

Print or Save Graphs

Clicking the **Print/Save Graph** button allows you to:

- Add the graph to the current report for printing.

  Note: You may add any number of graphs to a report.

- Save the graph as a JPEG or PNG file for use in other applications.

To print or save, click the radio button for the option you want, then click the **Apply** button, or **Cancel** to exit this feature without printing or saving. If you choose to save the graph, a Save As box appears. Give the graph a title, browse to the location to which to save, and click the **Save** button (or **Cancel** to abort). The default location is C:\Program Files\AnSWR.

Chapter 10
Sharing a Study or Project

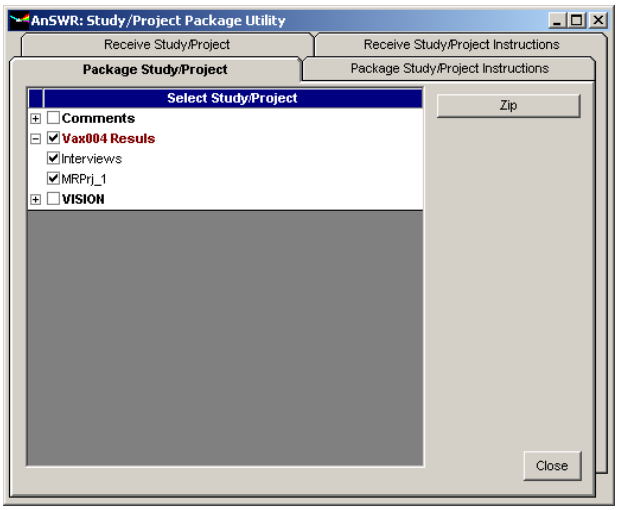
AnSWR Package Utility

We recommend that you use the AnSWR Package Utility to share a Study or Project. Before you share a Study or Project, it is always a good idea to compact the study30.mdb and the project 3.mdb.

Package Study and Project(s)

1. Exit AnSWR.
2. Go to **Start**.
3. Go to **Programs** and locate **AnSWR**.
4. Select the **AnSWR Package Utility**.
5. Click on the **Package Study/Project** tab.
6. Select the desired Study.

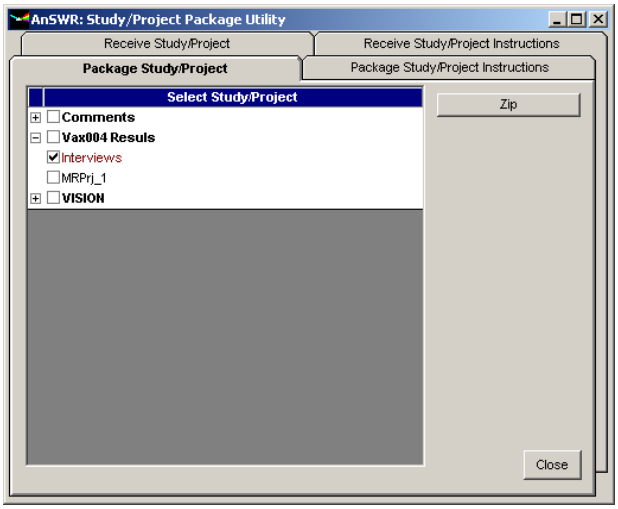
   Note: When selecting a Study, all associated Projects are automatically included.
7. Click on the **Zip** button. The Study/Project will be packaged into a .ZIP file and saved in under c:\program files\AnSWR.
8. Copy the .ZIP onto a diskette or CD from c:\program files\AnSWR.
9. A confirmation message will display indicating the file name and location. The .ZIP file should not be renamed.
10. Click on the **Close** button.



Package Only a Project

To package a single Project folder:

1. Exit AnSWR.
2. Go to **Start**.
3. Go to **Programs** and locate **AnSWR**.
4. Select the **AnSWR Package Utility**.
5. Click on the **Package Study/Project** tab.
6. Select the desired Project.
7. Click on the **Zip** button. The Project will be packaged into a .ZIP file and saved in under c:\program files\AnSWR.
8. Copy the .ZIP onto a diskette or CD from c:\program files\AnSWR.
9. A message will display indicating the file name and location. The .ZIP file should not be renamed.
10. Click on the **Close** button.

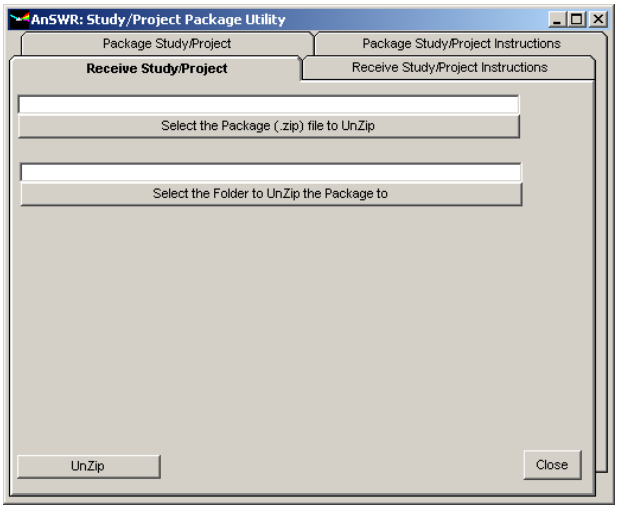


Receive a Shared Study or Project

To un-package a shared Study or Project you have received:

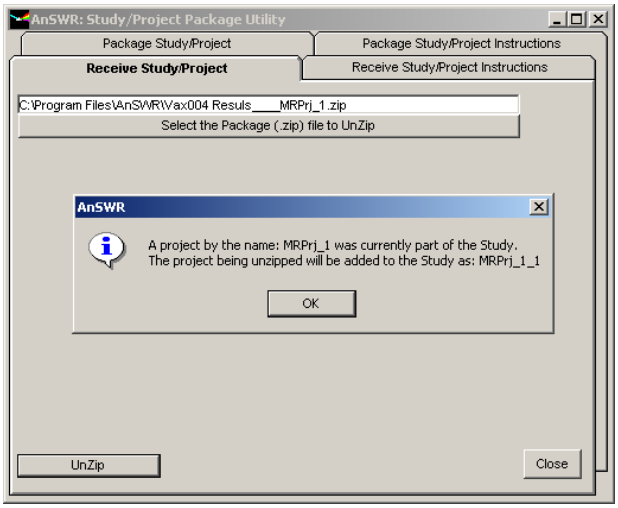
1. Open Windows Explorer or My Computer.
2. Copy Study or Project .ZIP file to **c:\temp**.
3. Make sure AnSWR is closed and go to **Start**.
4. Go to **Programs** and locate **AnSWR**.
5. Select the **AnSWR Package Utility**.
6. Click on the **Receive Study/Project** tab.

7. Click on the **Select the Package (.zip) File to Unzip** button. A browser window will display
8. Go to **c:\temp** to locate the Study or Project .ZIP file.
9. Click on the **Select the Folder to Unzip the Package** To button. A browser window will display.
10. Click on **c:**. **Important**: The pathname is written to the .ZIP file. **Do not** go to c:\program files\answr\ to unzip the Study.
11. A confirmation message will display indicating that the Study/Project has been unzipped.



Note: If the Study to be unzipped already exists on your computer/server, a message will display. You have the option to rename the Study you are unzipping or to overwrite the existing Study folder with the zipped one.

If a Project .ZIP file is to be unzipped, the **Select the Folder to Unzip the Package To** button will not display. The system will automatically write the folder to the correct Study. If a Project by the same name already exists, the system will save the Project under a new Project Folder. The Project name will now be followed by an underscore and a number.



Note: If another coder/analyst has provided a copy of his/her Project for intercoder agreement assessment, it will be necessary to use the Project Merge Utility to create a new Project containing your coding and their coding.

Manually Sharing a Study or Project

If you receive a Study from another coder/analyst that you have never created on your computer/server, it must be introduce to the system. This is done by creating a new Study using the exact name that the other coder/analyst gave it. Before this is done, however, you must use **My Computer** or **Windows Explorer** to manually copy the entire Study folder to your computer or network server. Below are instructions for copying AnSWR databases from one PC to another.

Copying AnSWR Study onto a Diskette

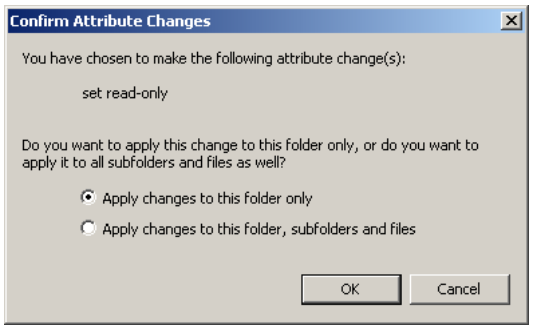
1. Open Windows Explorer.
2. Locate your Study. If the default location was used, your Study is in the C:\Program Files\AnSWR folder.
3. On the left panel of Windows Explorer, click your Study folder, then right-click and select **Copy**.

   Note: If your Study is large, it may be necessary to use one of the compression programs like WinZip, PKZip, or Windows Commander to compress your files so that they fit on a 1.44 or 2.0 MB diskette.
4. Insert a formatted diskette or CD into the appropriate disk drive.
5. Click on the disk drive containing the diskette or CD, right click, and select **Paste**.
6. When you open the Study folder, you should see a study30.mdb file and your Project folder. When you open the Project folder, you should see a project3.mdb, textdata.mdb, [Project name]wc.mdb.

Transferring Copied AnSWR Study onto Another PC

1. Open Windows Explorer on the other PC.
2. Click on the appropriate diskette or CD, click on the Study folder, right click, and select **Copy**.
3. Go to the same path in which the Study was originally located on your desktop. The default path is C:\program files\answr.
4. Right click and select **Paste**.

Important: If the Study folder was copied from a CD, it is necessary to right-mouse click on the Study folder name, and select **Properties.** Uncheck the **Read Only** box and click on the **Apply** button. A **Confirm Attribute Changes** window will display. Check on the radio button to **Apply changes to this folder, subfolders, and files,** and click on the **OK** button.



Authenticating Transferred AnSWR Study on Another PC

1. Start AnSWR and log in.
2. Click on **New Study** button and enter name of the Study that was transferred from your desktop. Make sure to type in the name exactly as it was entered originally on your desktop.
3. When the Project Wizard comes up, click on the **Cancel** button.
4. If AnSWR main window does not display the Project name:
    a. In the File menu, click **Open Project**.
    b. Locate the Study in the display window.
    c. Click on the option to synchronize the Project.
    d. Select your Project.

Once you have completed the coding on your other PC, repeat steps A and B to get the Study copied back to your desktop. A dialog box will appear, asking if you want to overwrite the existing folder. Click **Yes**.

AnSWR Hot Keys

AnSWR Main Window Hot Keys

[CTRL] + [N] Create New Project

[CTRL] + [O] Open Existing Project

[CTRL] + [M] Modify Active Project

[CTRL] + [D] Delete Active Project

[CTRL] + [W] Initiate Project Merge Wizard

[CTRL] + [C] Open Codebook Editor

[CTRL] + [S] Open Sourcebook Editor

[CTRL] + [T] Open Coding Editor

[CTRL] + [R] Initiate System Reports

[CTRL] + [E] Exit AnSWR

Coding Editor Hot Keys

[CTRL] + [A]	Highlight All Text for Active File
[CTRL] + [C]	Copy the Selected Text to the Clipboard
[CTRL] + [D]	Display/Set Default Source
[CTRL] + [E]	Close the Coding Editor
[CTRL] + [F]	Segment an Entire File (Entire File Is One Text Segment)
[CTRL] + [H]	Toggles Text Highlight On/Off
[CTRL] + [J]	Display/Print List of Short Cuts/Hot Keys in the CTRL/F5 Window
[CTRL] + [K]	Display Short Cut/Hot Key Window (Note: Not All Hot Keys Are Displayed In This List)
[CTRL] + [M}	Activate Coder Merge Utility (Merges/Removes Selected Coder's Coding)
[CTRL] + [P]	Prints the Active File
[CTRL] + [Q]	Quick Jump to ID, Code, or Source
[CTRL] + [R]	Open System Reports Module
[CTRL] + [S]	Display Coded Text Segment Summary Window

[CTRL] + [T]	Display Direct Text Input Window
[CTRL] + [V]	Paste Clipboard Text at Cursor
[CTRL] + [W]	Perform Word Count for Active Text Segment/File
[CTRL] + [Y]	Display Word Count for Active Text Segment ID
[CTRL] + [Z]	Activate External File Utility
[CTRL] + [F1]	Display the Source Networks
[CTRL] + [F2]	Display the Code list (Code Networks)
[CTRL] + [F3]	Display the Coded Segment Id List
[CTRL] + [F5]	Open the Sourcebook Editor
[F1]	Open Help File
[F2]	Display Code Notes
[F3]	Open the Codebook Editor
[F4]	Code HTML Document
[F5]	Go to Line/Position
[F6]	Perform Text Search
[F7]	Go To Unique Text Segment ID
[F8]	Display Code Options for Selected Code (Code Network Window Must Be Active)
[F9]	Perform Source Search (Source Network Window Must Be Active)
[F11]	Modify Text Segment Dimensions (Redefine Segment Begin & End Positions)
[F12]	Cancel Text Segment Dimension Change
[SHIFT] + [C]	Display Word Count for the Active Coded Text File
[SHIFT] + [F2]	Open/Begin Segment
[SHIFT] + [F3]	Close/End Segment
[SHIFT] + [F4]	Select Text Segment
[SHIFT] + [F5]	Display Family ID Information Window
[SHIFT] + [F6]	Display Text Segment Summary Window
[SHIFT] + [F7]	Display Sources for Active ID in Family ID Information Window
[SHIFT] + [F8]	View Coding Notes for Active Text Segment

[SHIFT] + [F9]	View Coding for All Coders/Analysts
[SHIFT] + [F11]	View Unique ID for Segment
[SHIFT] + [F12]	View Coder/Analyst for Segment
[CTRL] + SHIFT + 'KEY'	Moves to First Item on ID, Code or Source List Beginning with Key Entered

Codebook/Sourcebook Editor Hot Keys

[CTRL] + [A]	Add All Code/Source Networks to the Project
[CTRL] + [D]	Delete Code/Source from the Study
[CTRL] + [E]	Edit the Code Network Definitions
[CTRL] + [F]	Delete the Network Item from the Network Structure
[CTRL] + [H]	Make Code/Source a Network Holder
[CTRL] + [L]	Lock the Code/Source Network Structure
[CTRL] + [N]	Change the Code/Source Network Name
[CTRL] + [Q]	Close Codebook/Sourcebook Editor
[CTRL] + [R]	Set Relationships/Connections between Code/Source Networks
[CTRL] + [X]	Always Expand Code/Source Network Trees
[CTRL] + [Z]	Use the Change Analysis Process to Assign Code/Source Application to another Code/Source
[F1]	Open the AnSWR Help File
[SHIFT] + [F1]	View All Study Code/Source Networks
[SHIFT] + [F2]	View Project Code/Source Networks Only
[SHIFT] + [F3]	View Only Code/Source Networks Not in Active Project
[SHIFT] + [F4]	View Code/Source Networks Missing Required Data
[SHIFT] + [F5]	View Code/Source Networks Based on the Order They Were Added to the Codebook/Sourcebook

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{2} Constas M. Qualitative Analysis as a Public Event: The Documentation of Category Development Procedures. American Educational Research Journal. 1992;29:253-66.

{3} Lincoln YS, Guba E. Naturalistic Inquiry. Beverly Hills: Sage Publications, Inc.; 1985.

{4} Strauss A, Corbin J. Basics of Qualitative Research: Grounded Theory Procedures. Newbury Park, CA: Sage Publications; 1990.

{5} Miles MB, Huberman AM. Qualitative Data Analysis. Second ed. Thousand Oaks, CA: Sage Publications; 1994.

{6} Richards TJ, Richards L. Using Hierarachical Categories in Qualitative Data Analysis. In: Kelle U, ed. Computer-Aided Qualitative Data Analysis: Theory, Methods, and Practice. Thousand Oaks: Sage Publications, Inc.; 1995: 80-95.

{7} MacQueen KM, McLellan E, Kelly K, Milstein B. Codebook Development for Team-Based Qualitative Analysis. Cultural Anthropology Methods. 1998;10:31-36.