

TAMS Analyzer Quick Start

1) To create a project:

Fill in a name for the project on the new project/working project dialogue. Use the browse button to pick a folder for the project. Click create.

2) To add existing or new files to a project:

Use the import and new buttons on a project window (workbench). Always save new open files immediately. TAMS will auto save changes to the project but not the documents you are coding.

3) To open a file in the project.

Double click the name of the file in the Files list on the project window. **Never open document files directly in finder!**

4) To add a series of new codes to a project:

Use the "Define codes" tab. Use the "Save/Clear" button after entering each code and definition. No spaces in code names.

CODING (DOCUMENT WINDOW) HELP

5) To add a new code while reading a document:

Select the text you want coded. Type in the code name into the box (no spaces) on the document window and press the *New* button. You'll be prompted for a definition and code color.

6) To code a selection of text with an existing code:

Select the text you want coded. Double click the code name from the code list on the left of the document window. **If the code is not showing, make sure that you are viewing all codes** (*Project*→*Code sets*→*View all codes*)

7) To find a code definition:

Select the code from the Code list on the document or project window and press the Def button OR select the code in the document and pick *Coding*→*Code definition from selected text*.

8) To color your tags:

Pick *TamsAnalyzer*→*Preferences...* and select the color for tags and metatags from the Coding tab. The colors of individual codes can be set in the "Define codes" tab of the workbench (aka project window).

9) To refresh the colors of your tags:

Pick *Coding*→*Recolor tags*.

10) To make a document button bar:

Add at top of document the !button metatag. This tag accepts a series of items separated by columns which indicates codes, text, commands, and separator bars, e.g. {!button opinions>positive,"{!end}" , |, cmd::findMate}. This will add in order a coding button for the code opinions>positive, a button to insert the {!end} metatag, a separator bar, and a button to find the mate of a tag. Finally, save, close and reopen the document.

11) To move the end (or opening) tag to a new location:

Click in the tag you want to move. Select *Coding*→*Find current code* [apple-shift-K], hold down the mouse button while pointing at the code, drag the code to its new location.

12) To diagnose problems in coding a document:

Pick *Coding*→*Check for pairs* and *Coding*→*Check for nested*.

SEARCHING (PROJECT WINDOW) HELP

13) To indicate which files to search through for themes:

Select the project window; select the files tab; select the the files you want to search through from file list on the left; use the *Add >* button to add these files to the search list. Repeat for additional files you want included in the search.

14) To search for all coded passages in your search list:

Select the project window. Make sure your search list on the Files tab includes the files

you want to explore. Select the Search tab. Press the clear button next to the search field. Select the “simple” from the pop up menu; , and press the search button. When asked for a file name, leave it blank; click okay, a temporary results window will be created for you.

15) To search for a specific code:

Select the project window. Make sure your search list on the Files tab includes the files you want to explore. Click the search tab. Press the clear button next to the search field. Type in the code you wish to search for in the search field. Select “simple” from the pop up menu ; press search. When asked for a file name, leave it blank; click okay, a temporary results window will be created for you.

16) To search for passages coded with two specific codes:

Use the + sign between the codes in your search criteria: codeA+codeB. Pick “non-simple” as the search type from the pop up menu.

17) To search for passages coded with either one code or another code:

Use a comma (,) between the codes in your search criteria: codeA, codeB.

18) To search for a code but not its entire family (codeA but not codeA>codeC)

Use a single quote (') before the code when entering your search criteria: 'codeA

19) To look for passages coded with codes that have a certain “phrase” in them:

Use an asterisk (*) before the phrase as your search criteria: *odeA. (This will return passages marked with codeA, modeA, lodeA and codeB>codeA).

20) To look for passages in which a code name appears at different levels:

Use a greater than mark (>) before the phrase: >codeA. This will return passages marked by codeA, codeB>codeA, but it wont return passages coded with codeB>MycodeA.

21) To search for specific text:

Follow the directions for 15 above, only type in the text you are searching for in the search box and pick String as the search type from the pop-up menu.

RESULTS WINDOW HELP:

22) To find the original context of a passage returned from a search:

Double click the row that shows the passage you're interested in, from the results window.

23) To find which records in a result window contain a certain phrase:

Select the _data column (click the word _data at the top of the column). Pick *Results*→*Select...*, type in the phrase into the dialogue, and press Ok.

24) To find all of the results records after selecting a few rows:

Select *Results*→*Select all*.

25) To add a comment to the currently selected record:

Select *Results*→*Recode*→*Add comment*.

26) To view comments:

Select *Results*→*Show comment*

27) To sort data:

Select the column to be sorted by clicking on its name. Press the sort button. More refined sorts involving multiple columns can be done through the *Results*→*Sort up and Results*→*Sort down* menus.

28) To “bookmark” (i.e., name) a group of records that have been selected so you can recall them:

With the selection showing, pick *Results*→*Result sets*→*Create named set...*

WARNING: Named sets are not remembered if you refresh your data. Use autosets to create persistent or project wide versions of named sets.

29) To copy data from selected records to another program

With the selection showing, pick *File*→*Export Data...* Rearrange the fields (columns) you wish to copy from the selection by dragging the column names. Check the boxes marked “Selected records only” and “Export to clipboard”. Press the export button.

30) To see all of my codes and data in a table:

From the results window, pick *Reports*→*Data comparison table*. Click the switch axes check box, and click generate table.