WORKING WITH PDF FILES IN TAMS ANALYZER

TAMSZINE #9
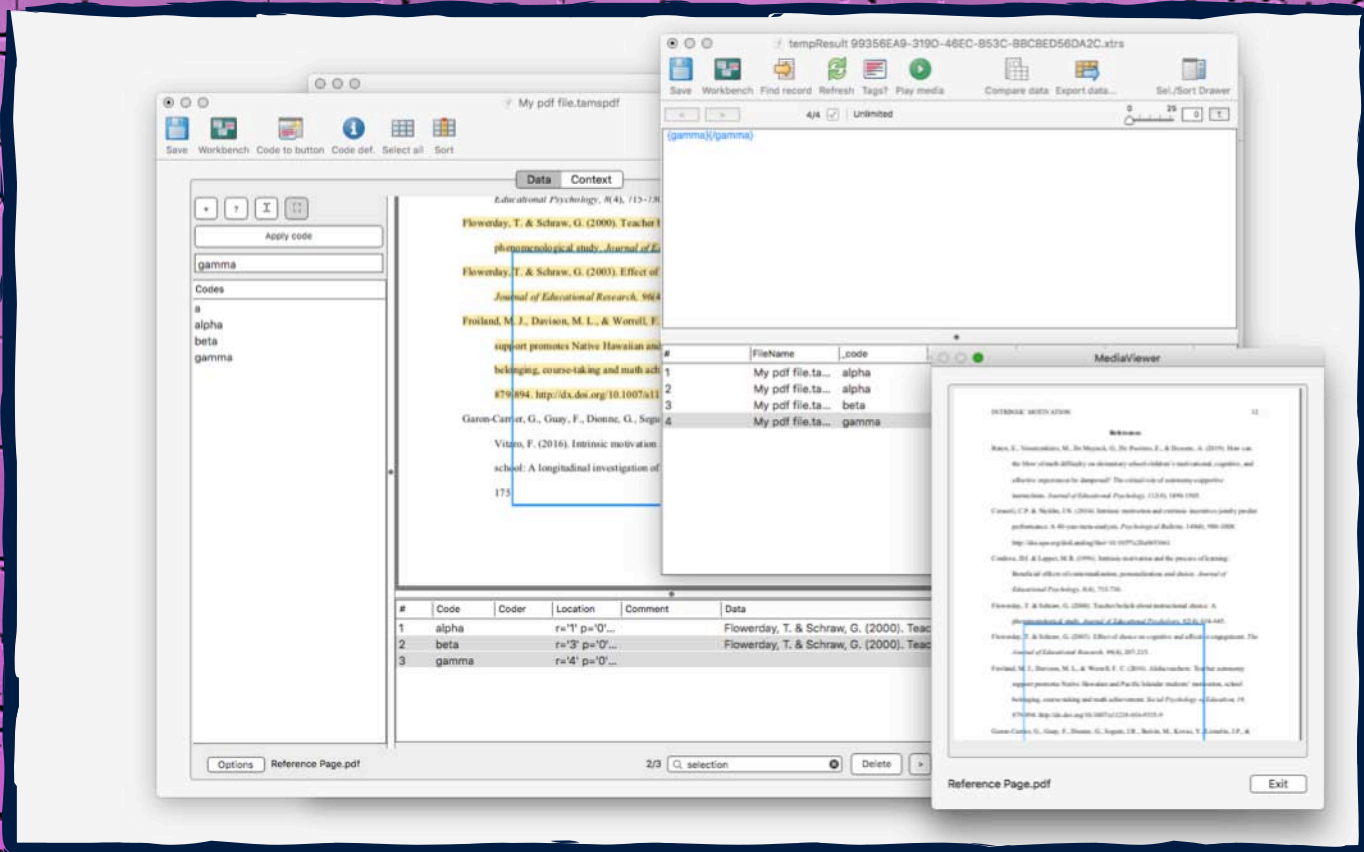
This is based on TA 4.52b8

PART 1: IMPORTING PDF FILES INTO TAMS

WITH TEXT FILES, RTF FILES, AND DOCX FILES THE CODES ARE ACTUALLY INSERTED INTO THE FILE YOU ARE ANALYZING.

WITH PDF, VIDEO, AND IMAGE FILES YOU HAVE TO CREATE A "WRAPPER FILE" THAT HOLDS THE CODES AND OTHER TAMS SPECIFIC INFORMATION.

THE WRAPPER FOR PDFS HAS A FILE TYPE OF .TAMSPDF

WE ARE GOING TO EXPLORE TWO WAYS OF IMPORTING FILES.

IN THE FIRST WE CREATE THE WRAPPER, AND THEN ATTACH THE PDF FILE TO THE WRAPPER.

IN THE SECOND WE CAN BULK IMPORT PDFS AND TAMS WILL AUTOMATICALLY CREATE THE WRAPPER FILES.

APPROACH #1

TO ADD THE PDF WRAPPER CLICK THE "NEW" BUTTON ON THE "FILES" TAB.

PICK "PDF" FROM THE POP-UP MENU

FILL IN A NAME FOR THE FILE WRAPPER

THEN CLICK OK

THIS IS THE EMPTY FILE WRAPPER WINDOW

CLICK THE "+" BUTTON TO ATTACH THE PDF FILE TO THIS WRAPPER. AN OPEN FILE DIALOGUE WILL APPEAR. OPEN THE PDF YOU WANT TO ANALYZE.
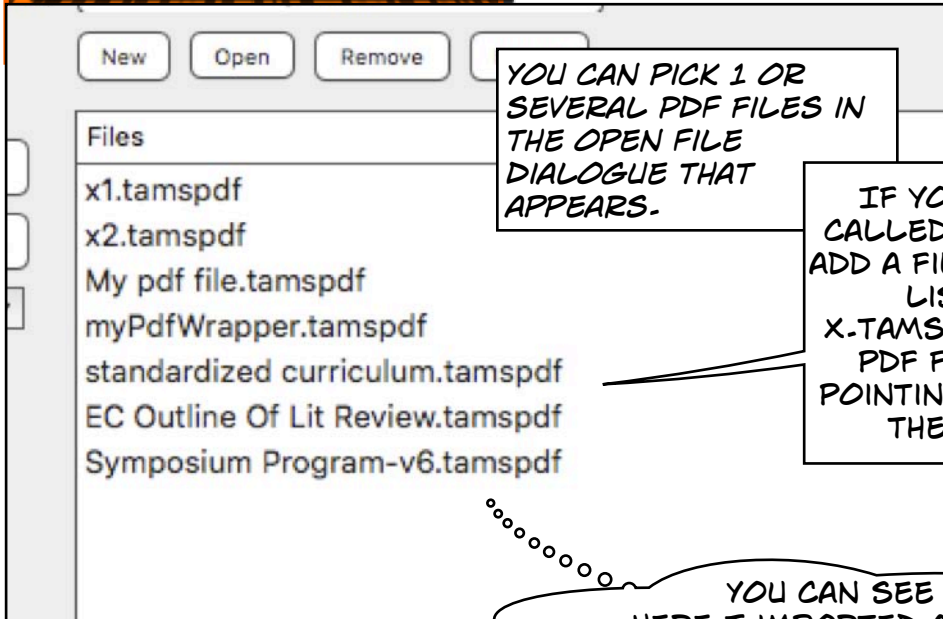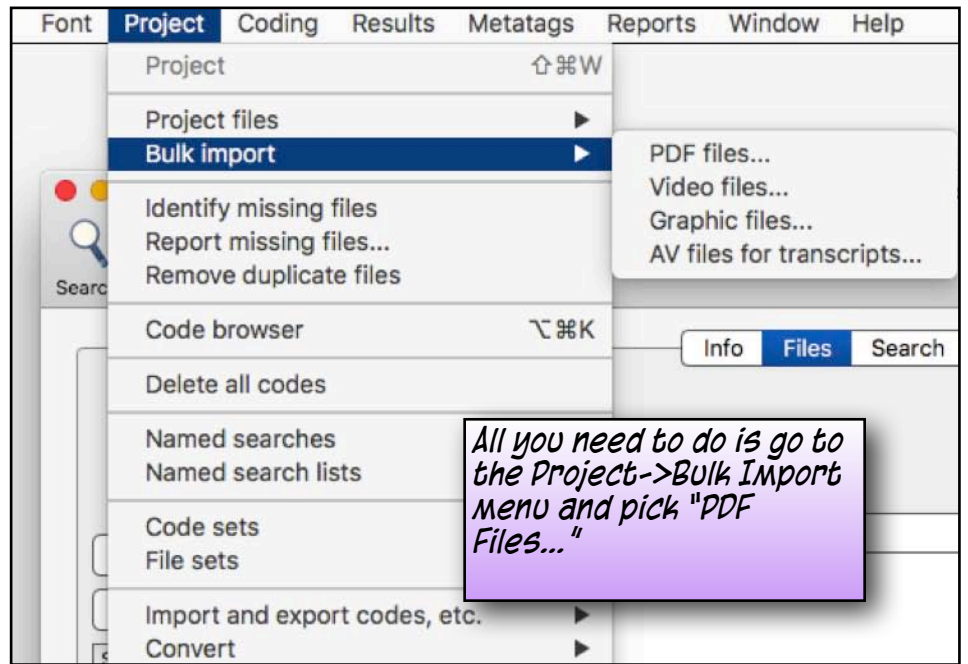
NOTE THAT A COPY OF THE PDF WILL BE PLACED IN THE MEDIA FOLDER INSIDE YOUR TAMS PROJECT SO THAT THE ORIGINAL IS LEFT ALONE.

VOILA! YOU SHOULD SEE YOUR PDF IN THE PDF VIEWER OF YOUR WRAPPER WINDOW (SEE PAGE 4)

THE SECOND WAY TO IMPORT PDFS IS ACTUALLY EASIER...

BUT IT'S IMPORTANT TO UNDERSTAND THIS IDEA THAT YOU ARE BOTH IMPORTING THE PDF FILE AND CREATING THE WRAPPER FILE, AS THE LATTER PROCESS IS DONE AUTOMATICALLY.

AS THE FIRST APPROACH DEMONSTRATED THE WRAPPER AND FILE CAN HAVE VERY DIFFERENT NAMES, BUT IN THIS APPROACH THE WRAPPER HAS THE NAME OF THE PDF FILE

| Font | Project | Coding | Results | Metatags | Reports | Window | Help |

Project ⇧⌘W

Project files ▶
Bulk import ▶   PDF files...
   Video files...
Identify missing files   Graphic files...
Report missing files...   AV files for transcripts...
Remove duplicate files

Code browser ⌥⌘K

Info   Files   Search

Delete all codes

Named searches
Named search lists

Code sets
File sets

Import and export codes, etc. ▶
Convert ▶

All you need to do is go to the Project->Bulk Import menu and pick "PDF Files..."

New   Open   Remove

Files
x1.tamspdf
x2.tamspdf
My pdf file.tamspdf
myPdfWrapper.tamspdf
standardized curriculum.tamspdf
EC Outline Of Lit Review.tamspdf
Symposium Program-v6.tamspdf

YOU CAN PICK 1 OR SEVERAL PDF FILES IN THE OPEN FILE DIALOGUE THAT APPEARS.

IF YOU PICK A FILE CALLED X.PDF; IT WILL ADD A FILE TO YOUR FILE LIST CALLED X.TAMSPDF; WHICH IS A PDF FILE WRAPPER POINTING TO A COPY OF THE FILE X.PDF

TO OPEN THE WRAPPER AND VIEW AND CODE YOUR PDF, JUST DOUBLE CLICK THE WRAPPER FILE NAME!

YOU CAN SEE HERE I IMPORTED A FILE CALLED "SYMPOSIUM PROGRAM-6.PDF"

SO THIS HAS WALKED THROUGH BOTH CREATING THE WRAPPER AND ADDING THE FILE AND BULK ADDING THE FILES WHICH AUTOMATICALLY CREATES THE WRAPPER.

BEFORE LOOKING AT THE PROCESS OF CODING PDFS LET'S EXAMINE THE ANATOMY OF THE PDF WINDOW; WHICH IS REALY THE PDF WRAPPER WINDOW!
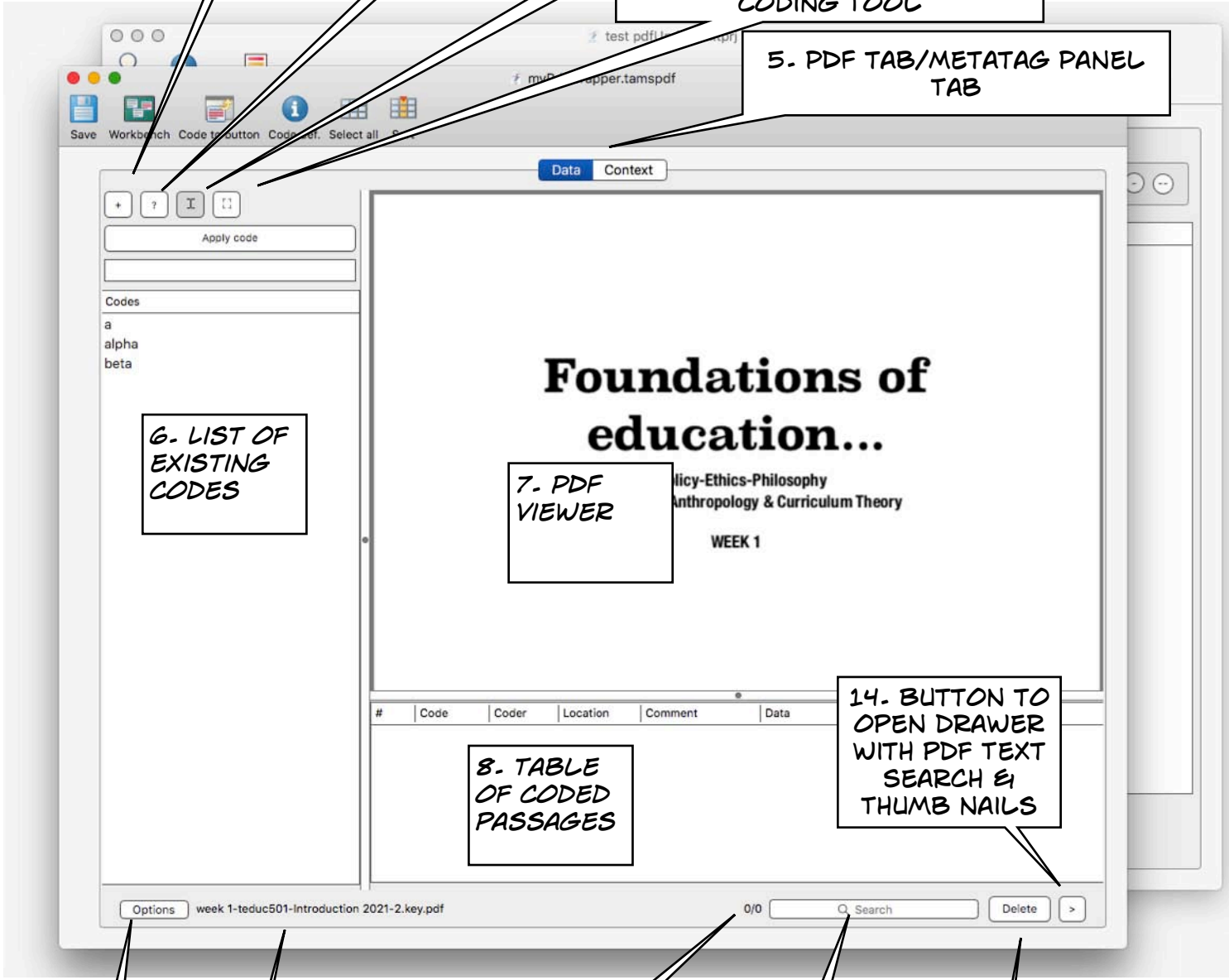
1. ATTACH DOCUMENT BUTTON

2. SEARCH FOR CODED RECORDS USING SELECTION BUTTON

3. TEXT SELECTION FOR CODING TOOL

4. RECTANGLE SELECTION FOR CODING TOOL

5. PDF TAB/METATAG PANEL TAB

test pdfU...prj

myPDFwrapper.tamspdf

Save Workbench Code to button Code ref. Select all

Data | Context

+ | ? | I | []

Apply code

Codes
a
alpha
beta

6. LIST OF EXISTING CODES

Foundations of education…

7. PDF VIEWER

Policy-Ethics-Philosophy
Anthropology & Curriculum Theory

WEEK 1

#	Code	Coder	Location	Comment	Data

14. BUTTON TO OPEN DRAWER WITH PDF TEXT SEARCH & THUMB NAILS

8. TABLE OF CODED PASSAGES

Options | week 1-teduc501-Introduction 2021-2.key.pdf | 0/0 | Q Search | Delete | >

9. SEARCH OPTIONS

11. COUNT OF VISIBLE CODED PASSAGES IN THE TABLE OVER TOTAL # OF CODED PASSAGES IN THE DOCUMENT

12. SEARCH THE TABLE OF CODED PASSAGES

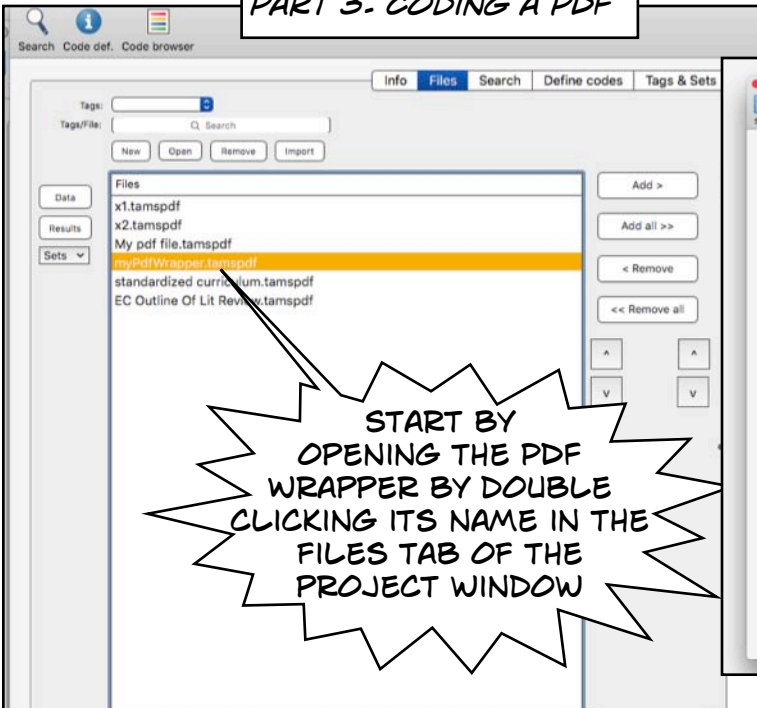13. DELETE THE SELECTED ROWS FROM THE TABLE OF CODED PASSAGES

10. NAME OF THE PDF FILE

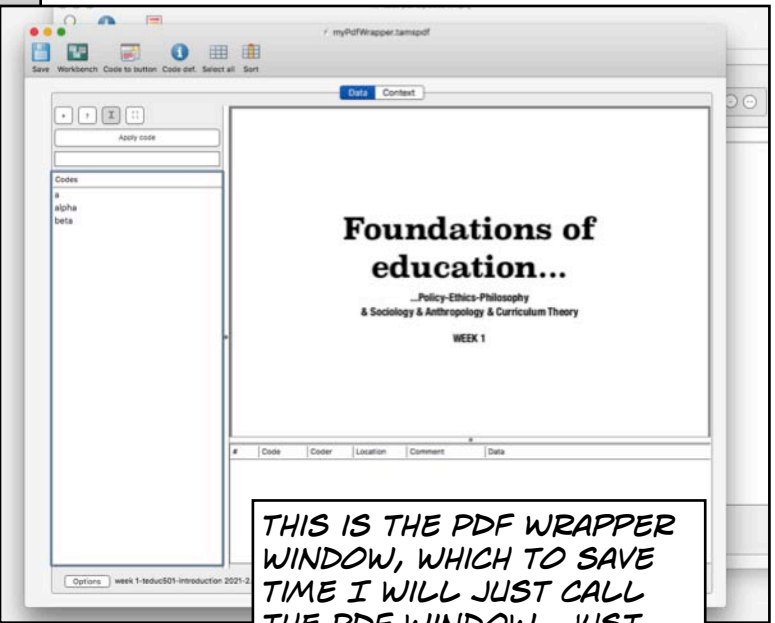Save Workbench Code to button Code def Select all Sort

15. REVEALS ALL ROWS OF THE TABLE OF CODED PASSAGES AFTER USING THE SEARCH FEATURE (12)

16. SORTS THE SELECTED COLUMN OF THE TABLE OF CODED PASSAGES.

PART 3. CODING A PDF

Search Code def. Code browser

Info Files Search Define codes Tags & Sets

Tags:
Tags/File: Q Search
New Open Remove Import

Data
Results
Sets

Files
x1.tamspdf
x2.tamspdf
My pdf file.tamspdf
myPdfWrapper.tamspdf
standardized curriculum.tamspdf
EC Outline Of Lit Review.tamspdf

Add >
Add all >>
< Remove
<< Remove all

START BY OPENING THE PDF WRAPPER BY DOUBLE CLICKING ITS NAME IN THE FILES TAB OF THE PROJECT WINDOW

myPdfWrapper.tamspdf

Save Workbench Code to button Code def. Select all Sort

Data Context

Apply code

Codes
a
alpha
beta

Foundations of education...

...Policy-Ethics-Philosophy
& Sociology & Anthropology & Curriculum Theory

WEEK 1

Code Coder Location Comment Data

Options week 1-teduc501-introduction 2021-2

THIS IS THE PDF WRAPPER WINDOW, WHICH TO SAVE TIME I WILL JUST CALL THE PDF WINDOW. JUST KNOW, I NEVER TOUCH THE PDF AFTER MAKING A COPY IN YOUR PROJECT FOLDER. INSTEAD ALL CHANGES ARE HAPPENING IN THE TAMSPDF WRAPPER FILE!

Panel 1:

Save   Workbench   Code to butt

+   ?   I   [ ]

Apply co

Codes
a
alpha
beta

CODING WORKS IN A FAIRLY INUTITIVE WAY. YOU WILL SELECT A SECTION OF YOUR PDF. IF YOU HAVE A CODE ALREADY IN YOUR SYSTEM YOU CAN JUST DOUBLE CLICK THE CODE FROM THE CODE LIST.

LIST OF EXISTING CODES

TO USE A NEW CODE, FILL IN THE CODE HERE AND CLICK "APPLY CODE"

Panel 2:

video

Be kind and patient with

WHEN YOU DO, TAMS WILL ADD A NEW ROW TO THE **TABLE OF CODED PASSAGES**

#	Code	Coder	Location	Con
1	a		r='1' p='2'...	

Panel 3:

+   ?   I   [ ]

Apply code

a

Codes
a
alpha
beta

TAMS HAS TWO WAYS TO SELECT PORTIONS OF A PDF PAGE: A TEXT SELECTION TOOL ON THE LEFT, AND A RECTANGLE SELECTION TOOL ON THE RIGHT.

HERE I AM USING THE RECTANGLE SELECTION TOOL

HERE I USED THE TEXT SELECTION TOOL

Open the chat and participants windows!!!

If I get kicked off again just hang on; I'll be

If we get zoom bombed; I'll kill the meeting; module today for a new link

Remember we are recording!

Panel 4:

Code	Coder	Location	Comment	Data
a		r='1' p='2'...		Be kind and pa

key

THE TABLE OF CODED PASSAGES INCLUDES THE TEXT THAT YOU SELECTED (IF IT CAN FIGURE IT OUT-- PDFS ARE REALLY DIFFICULT OFTEN TO EXTRACT TEXT FROM), THE CODE, THE CODER, A PLACE FOR COMMENTS, AND A LOCATION FIELD.

YOU CAN REMOVE THE ROW BY SELECTING THE ROW(S) AND CLICKING THE DELETE BUTTON AT THE BOTTOM OF THE WINDOW.

Panel 5:

Code def.   Select all

YOU CAN EDIT THE ROW'S INFORMATION BY DOUBLE CLICKING THE ROW!

Row: 1   Record: 1
Code: a
Coder:
Comment:
Data: Be kind and patient with me

Prev   Next   Ok   Cancel

Key
to m

dern Schooli
(1900-?)

Modern schooling

Conte

PART 4. SEARCHING INTERNAL TO A DOCUMENT

The pdf window has numerous ways of searching for information inside the document. You can search the pdf, you can search the coded record table, you can use the pdf view itself to search for coded passages.

TO SEARCH THE PDF DOCUMENT FOR TEXT, YOU NEED TO OPEN THE "DRAWER" AND THEN FILL IN THE TEXT YOU ARE LOOKING FOR.

PDF THUMBNAILS FOR NAVIGATING

CLICK HERE TO OPEN AND CLOSE THE DRAWER

SEARCH FOR TEXT IN THE PDF

FILL IN THE WORDS YOU ARE LOOKING FOR

THE PAGES CONTAINING THOSE WORDS ARE LISTED HERE

CLICK THE PAGE...

AND TAMS WILL SCROLL TO THE THAT PAGE AND SELECT THE TEXT YOU ARE LOOKING FOR

TO SEARCH THE TABLE OF CODED PASSAGES

YOU CAN PICK THE FIELD (COLUMN) TO SEARCH, OR SEARCH THEM ALL FOR PARTICULAR TEXT

USE THIS SEARCH FIELD AT THE BOTTOM OF THE WINDOW

CLICK THE MAGNIFYING GLASS TO PICK THE COLUMN TO SEARCH

THE SEARCH WILL REDUCE THE NUMBER OF ROWS IN THE TABLE. THE FRACTION BY THE SEARCH SHOWS THE NUMBER OF ROWS VISIBLE IN THE TABLE OVER THE TOTAL NUMBER OF ROWS.

TO SEE ALL ROWS OF THE TABLE, CLICK THE X IN THE SEARCH FIELD

OR CLICK THE "SELECT ALL" ICON IN THE TOOLBAR

YOU CAN USE THE "SORT" BUTTON IN THE TOOLBAR TO ORDER THE DATA. FIRST SELECT THE COLUMN BY CLICKING THE HEADING FOR THE COLUMN. AND THEN CLICK THE SORT BUTTON.

SORT THE # COLUMN TO ORDER THE ROWS BY THE ORDER THEY WERE CODED ORIGINALLY.

THE # COLUMN WILL SORT BY THE ORDER YOU ACTUALLY CODED THE DOCUMENT. SORTING THE LOCATION COLUMN WILL SORT FROM FIRST TO LAST PAGE.

NORMALLY THE SORT WILL BE FROM A TO Z. HOLDING THE OPTION KEY WHILE CLICKING THE SORT BUTTON WILL SORT FROM Z TO A.

FINALLY, YOU CAN SEARCH YOUR TABLE OF CODED PASSAGES BY SELECTING PORTIONS OF THE PDF.

THIS WORKS WITH EITHER SELECTION TOOL

TO FIND OUT IF A CERTAIN PORTION OF THE PDF IS CODED SELECT THAT PORTION WITH THE APPROPRIATE TOOL (TEXT OR RECTANGLE)

THEN CLICK THE QUESTION MARK BUTTON (THE QUERY BUTTON).

CLICK HERE...

THE TABLE WILL SHOW ONLY THOSE CODED ROWS THAT INTERSECT THE SELECTION

THE SELECTION WILL CHANGE TO THE COMBINATION OF THOSE ROWS

THE NUMBER OF ROWS (OVER THE TOTAL) IS SHOWN AT THE BOTTOM OF THE WINDOW

TO SHOW ALL THE ROWS OF THE TABLE, JUST CLICK THE SELECT ALL BUTTON ON THE TOOL BAR...

OR CLICK THE "X" IN THE SEARCH FIELD

SO I'VE SHOWN MUTLIPLE WAYS OF SEARCHING WITHIN A SINGLE DOCUMENT. BUT PDF DOCUMENTS ALSO WORK IN WORKBENCH SEARCHES.

PART 5. TAMS SEARCHES

TAMSPDF FILES (THE WRAPPERS) CAN BE ADDED TO THE TAMS SEARCH LIST ON THE WORKBENCH!

AT PRESENT TAMS VERY INEFFICIENTLY CONVERTS YOUR CODED RECORDS (THE ROWS OF THE TABLE) INTO A TEXT STRING THAT TAMS WILL THEN PARSE AND ANALYZE IN THE RESULTS WINDOW
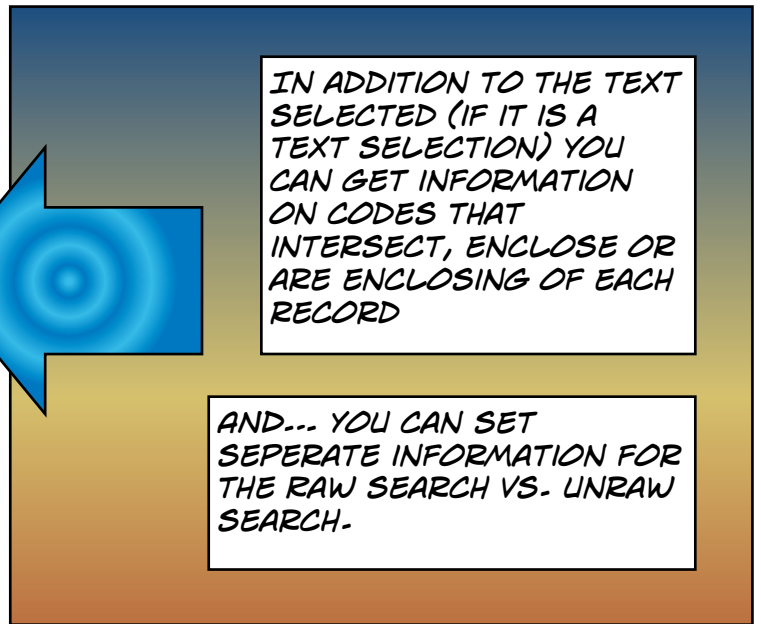
FOR EACH PDF DOCUMENT YOU CAN SET OPTIONS ON WHAT IS ACTUALLY RETURNED IN A TAMS SEARCH.

THE OPTION BUTTON
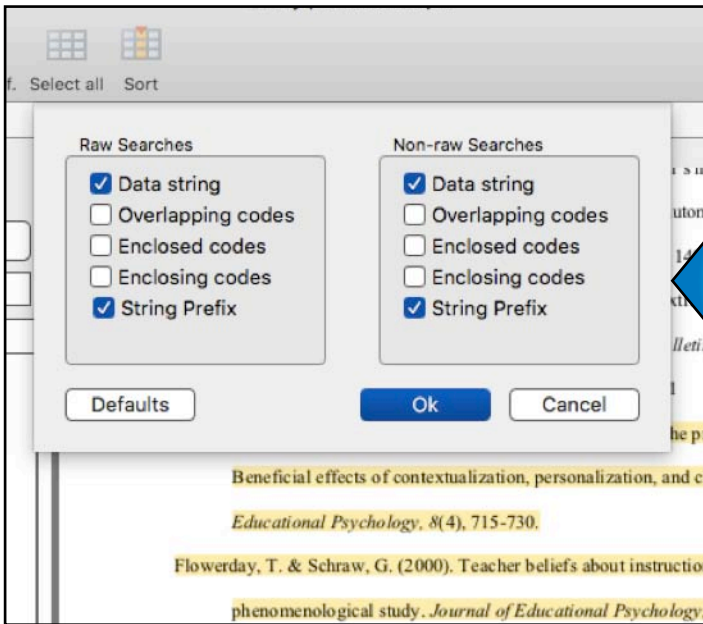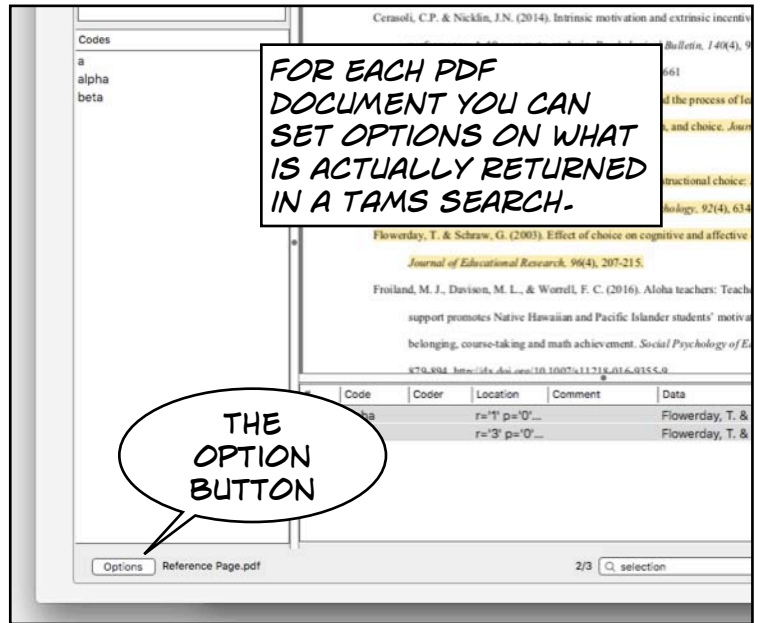
IN ADDITION TO THE TEXT SELECTED (IF IT IS A TEXT SELECTION) YOU CAN GET INFORMATION ON CODES THAT INTERSECT, ENCLOSE OR ARE ENCLOSING OF EACH RECORD

AND... YOU CAN SET SEPERATE INFORMATION FOR THE RAW SEARCH VS. UNRAW SEARCH.
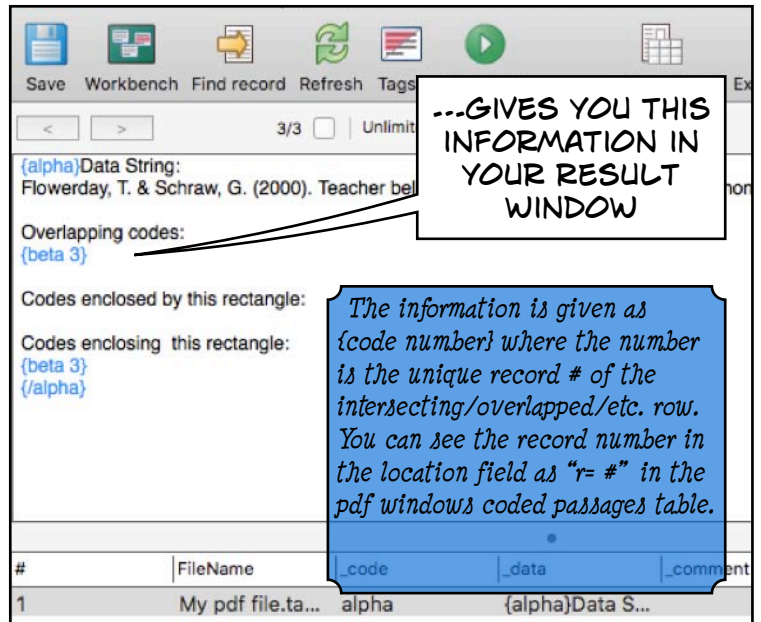
(This is the workbench search tab)

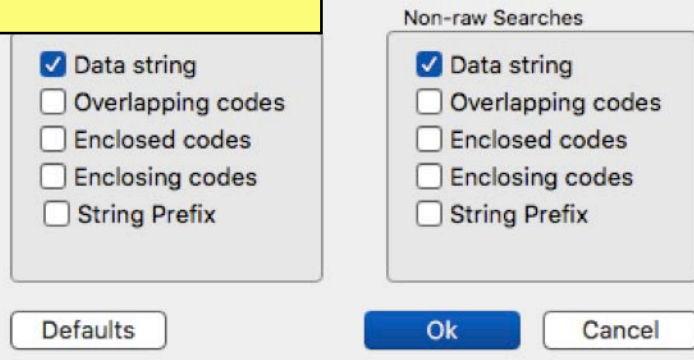SO EXECUTING A RAW SIMPLE SEARCH WITH THIS FILE IN THE SEARCH LIST, AND ALL THE OPTIONS CHECKED...

---GIVES YOU THIS INFORMATION IN YOUR RESULT WINDOW

The information is given as {code number} where the number is the unique record # of the intersecting/overlapped/etc. row. You can see the record number in the location field as "r= #" in the pdf windows coded passages table.

10

THE ONE THING YOU MIGHT WANT TO DO IS ELIMINATE ALL THE EXCESS INFORMATION SO THAT THE SEARCH ONLY RETURNS THE RELEVANT SELECTED TEXT— FOR RECTANGULAR SELECTIONS YOU'LL JUST GET THE OPEN AND CLOSE CODE TAGS.
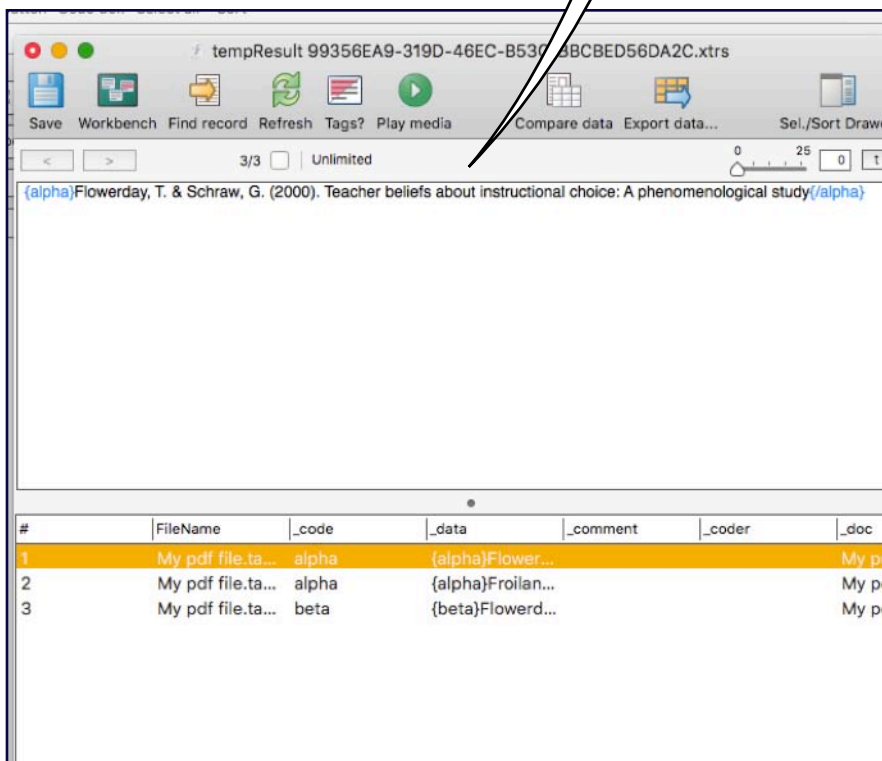
GO BACK TO YOUR DOCUMENT AND CLICK THE OPTIONS BUTTON...

Non-raw Searches

☑ Data string
☐ Overlapping codes
☐ Enclosed codes
☐ Enclosing codes
☐ String Prefix

☑ Data string
☐ Overlapping codes
☐ Enclosed codes
☐ Enclosing codes
☐ String Prefix

Defaults   Ok   Cancel

JUST TURN OFF ALL OF THE OPTIONS EXCEPT DATA STRING... MAKE SURE "STRING PREFIX" IS UNCHECKED AS WELL.

WHEN YOU RE-DO YOUR SEARCH, THIS IS WHAT YOU WILL GET...

NOTICE THAT THIS LOOKS LIKE IT COULD HAVE COME FROM A TEXT FILE!

tempResult 99356EA9-319D-46EC-B530-BBCBED56DA2C.xtrs

Save   Workbench   Find record   Refresh   Tags?   Play media   Compare data   Export data...   Sel./Sort Drawer

<   >   3/3   ☐ Unlimited   0 ___●___ 25   0   1

{alpha}Flowerday, T. & Schraw, G. (2000). Teacher beliefs about instructional choice: A phenomenological study{/alpha}

#	FileName	_code	_data	_comment	_coder	_doc
1	My pdf file.ta...	alpha	{alpha}Flower...			My p...
2	My pdf file.ta...	alpha	{alpha}Froilan...			My p...
3	My pdf file.ta...	beta	{beta}Flowerd...			My p...

TO SEE BOTH TEXT AND RECTANGULAR SELECTIONS IN THE PDF FROM YOUR SEARCH RESULTS, YOU WILL NEED TO CLICK "PLAY MEDIA" (OR PICK RESULTS→SHOW MEDIA... FROM THE MENU) AND A LITTLE WINDOW WILL POP UP SHOWING THE CURRENT ROW'S SELECTION!

MediaViewer

Reference Page.pdf

11
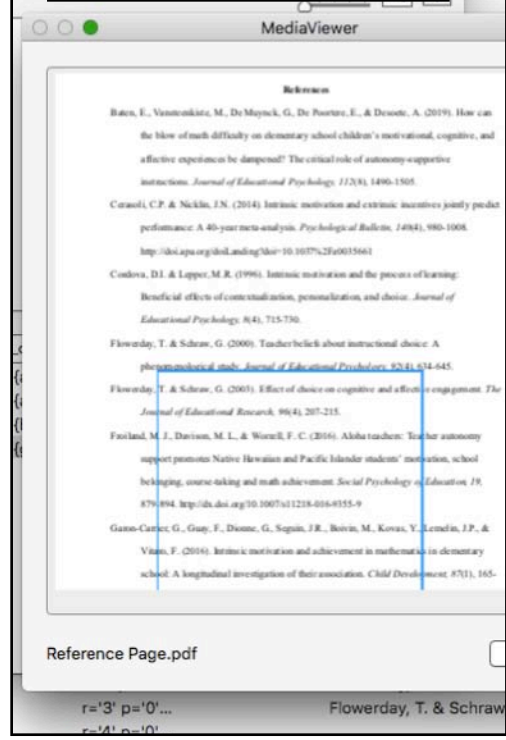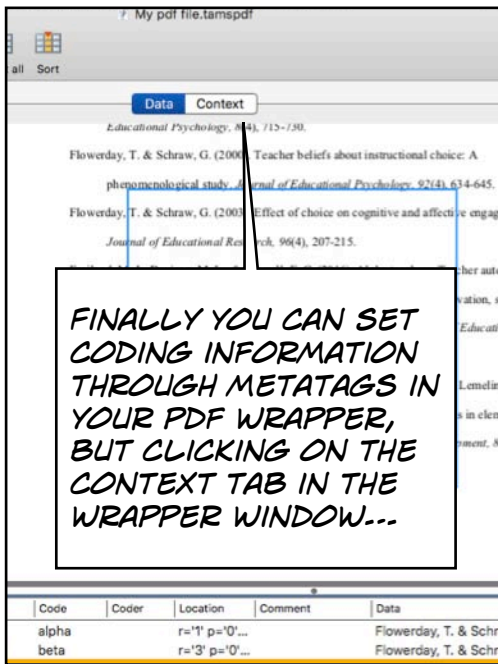
FINALLY YOU CAN SET CODING INFORMATION THROUGH METATAGS IN YOUR PDF WRAPPER, BUT CLICKING ON THE CONTEXT TAB IN THE WRAPPER WINDOW...
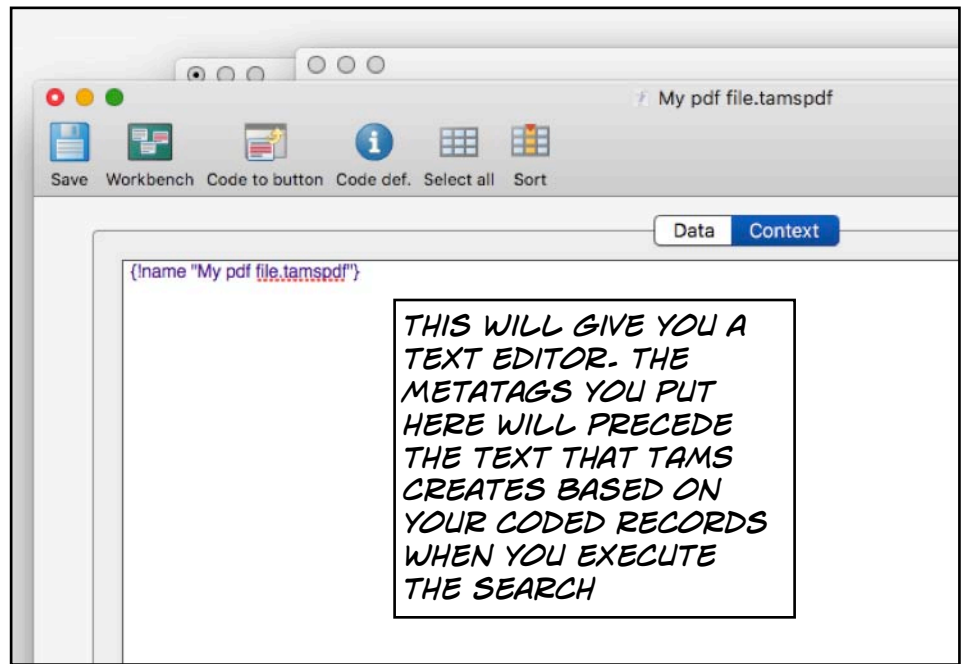
THIS WILL GIVE YOU A TEXT EDITOR. THE METATAGS YOU PUT HERE WILL PRECEDE THE TEXT THAT TAMS CREATES BASED ON YOUR CODED RECORDS WHEN YOU EXECUTE THE SEARCH

THIS TAMSZINE HAS COVERED 90% OF ALL YOU NEED TO KNOW ABOUT WORKING WITH PDFS IN TAMS.

THERE'S ONE ADDITIONAL ADVANCED TOPIC WORTH EXAMINING: SECTION CODING IN PDFS

YOU CAN REFER TO THE RELEASE NOTES FOR TAMS 4.45B1 IN THE TA4 UPDATE NOTICES (PP. 56–59) FOR A DETAILED DESCRIPTION OF THAT PROCESS.

I HAVE ATTACHED THE RELESE NOTES HERE AS AN APPENDIX

ALL DOCUMENTATION CAN BE FOUND AT: HTTPS://TAMSYS.SOURCEFORGE.IO/OSXTAMS/DOCS/

YOU CAN GET YOUR QUESTIONS ANSWERED BY REACHING OUT TO ME ON THE FACEBOOK GROUP:

HTTPS://WWW.FACEBOOK.COM/TAMSANALYZER

Appendix I

Section searching AV/PDF/Image files.

(From Release Notes for TAMS Analyzer 4.45b1)

> Short Version: AV/PDF/Image files allow you to specify a code project wide or in each document that serves to mark sections. Section searches will return all records that intersect this "section code."

Starting with TA 4.45 you can define a code (a code family actually) that signifies sections. This code can be specified in the project preferences, or in each individual PDF/AV/Image file. When you ask for a section search, TA will return a single record for each use of the section code in your file, listing all the records that overlap that section. Double clicking a section result row will pull up and highlight just those data rows that intersect the section represented by that result row. You can sub-code the section code so you could have mySection designated as the section code, and then use mySection>top; mySection>bottom, etc. You can also fill in the data and comment fields to give additional information about the section you coding.

To set a project wide section code use the **Project->Preferences** menu option with your workbench up front. You should see a menu and a check box. To specify a section code check the box and pick the code you wish to designate (it must be added to your code dictionary). See Figure 1. To remove the section code from the project, uncheck the box.
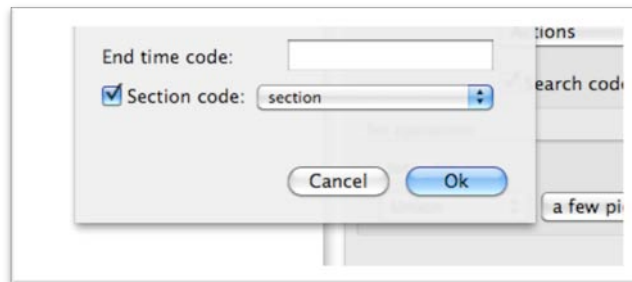

Figure 1. Project-wide specification of a section code on the **Project->Preferences** pane.

To over-ride this code in a particular file, open that data window and pick **Coding->Define section code…**

The options for each type of window are slightly different.

For image files you have the option of using the rectangles specified on the description tab, the inherited (from the project preferences) section code, or a unique section code for that window. See Figure 2.
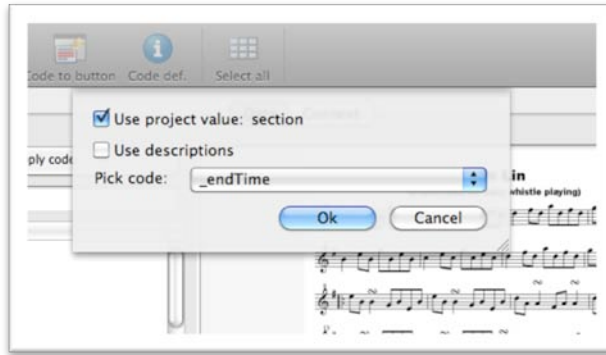
Figure 2. Image file section code preferences

Checking **Use project value:** will use the specified value (here "section") as the section code. Clicking the description box will use the description tab rectangles as section markers. Or, you can specify a code that will mark sections in this document (and only this document, unless you specify this code in other documents).

For PDF files the choices are very similar only instead of "use descriptions" you will have the option to "use pages." See figure 3.
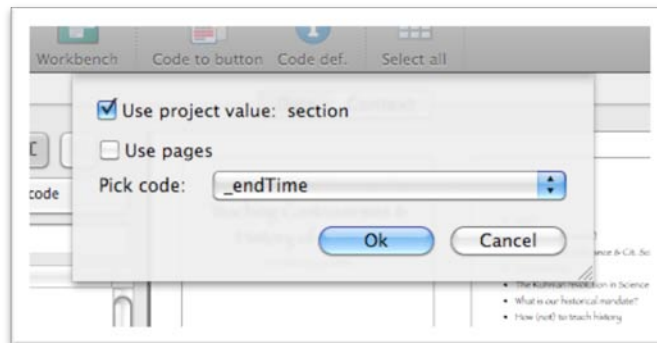

Figure 3. PDF file section code options.

Clicking "use pages" will separate your codes by page in your results window. Otherwise the options are the same as above.

For audio-video files there are only two options. Use project value and Pick code. When coding audiovisual sections make sure you specify a start and stop time.

Files will default to using the section code.

Once your documents have been coded with your section code you can find what records intersect those sections by doing a section search from the workbench, as shown in figure 4. If you limit your search to a code, or codes, only those sections containing that code will be returned (though all codes in those sections will be listed). Double clicking these rows will open the data window and select only those rows overlapping that section.
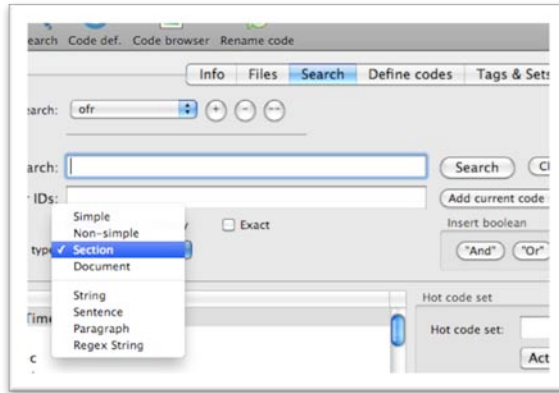
Figure 4. Section Search

If you limit your search to a code, or codes, only those sections containing that code will be returned (though all codes in those sections will be listed). Double clicking these rows will open the data window and select only those rows overlapping that section. See figure 5 for a view of a results window and the effect of double clicking one row of a section search.
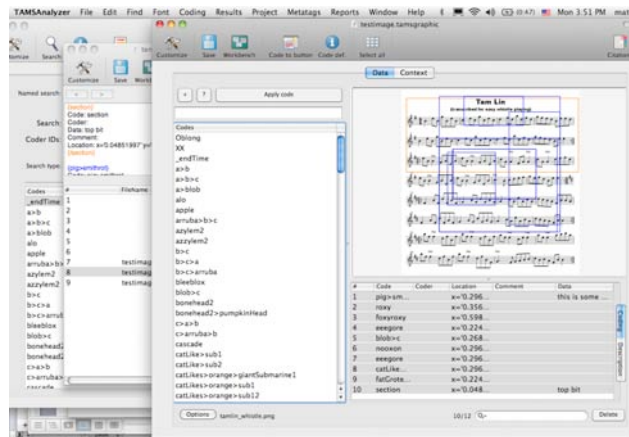

Figure 5. Double-clicking a row from a section search

In figure 5, the window behind the front window has one row selected which has been double-clicked. That has opened the relevant window and selected only those rows overlapping that section (the section code is coded in a different color). Not easily readable is that only 10 out of 12 records are showing. The researcher will need to click "Select all" on the toolbar to make all of her records visible.