

# Vision Document for qualres

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# Contents

<b>1</b>	<b>Motivation</b>	<b>4</b>
<b>2</b>	<b>Key Features</b>	<b>4</b>
2.1	Categorical Analysis . . . . .	4
2.1.1	Graphical User Interface for Categorical Analysis . . . . .	4
2.2	Narrative Analysis . . . . .	5
2.2.1	Graphical User Interface for Narrative Analysis . . . . .	6
<b>3</b>	<b>Constraints</b>	<b>6</b>

# 1 Motivation

qualres helps the qualitative researchers analyze text.

## 2 Key Features

### 2.1 Categorical Analysis

The researcher works with Documents (text files), Categories, Sets, Analysis Diagrams, and Attributes. All these elements relating to a study are grouped into a Project.

The user defines Categories (which are part of a tree) and populates these Categories with contiguous text (with word boundaries) in the Documents and other Categories. Populating the Categories is known as *coding*.

Documents are displayed with user-specified formatting (font, justification, etc). The researcher can edit the text in the Document at any time without affecting the coding. For example, let category DESC contain only the phrase “the long, low house”. If the researcher edits the phrase in the Document to be “the low house”, then category DESC now contains only the phrase “the low house”. Documents can also contain marginal notes pointing to a location in a Document or Category.

Attributes consisting of a name and value can be created and associated with Categories and Documents. The value of an Attribute can be different for each Category and Document.

Documents and Categories can be grouped into Sets. Sets can also contain other Sets, and so have a tree structure. The subsets of a given Set are the Sets associated with the descendant nodes of the node associated with that Set.

The researcher can search for text in Documents and Categories. The user can specify which Documents and Categories to search, and can also include Documents and Categories in any Sets. The context is the sentence, paragraph, or Document containing the search string. The user specifies a Category in which to place the found text, its context, and location.

The researcher can create and edit Analysis Diagrams. These are diagrams with Elements (Documents and Categories represented by icons, Arrows, Textboxes, Ellipses, etc).

The researcher can create Memos, and group text in Memos together in Cross-references. Memos and Cross-references are analogous to Documents and Categories. Memos and Cross-references can also be Searched the same way that Documents and Categories can be Searched.

#### 2.1.1 Graphical User Interface for Categorical Analysis

The first window shown consists of Main Windows showing the Project Components, using an MDI interface of GTK. Left-clicking on a Project Component selects that Project Component. The user can then delete, edit/code, or edit

the properties of that Project Component. There are menu options for creating a new Project Component.

The Main Window for the Sets shows the Sets arranged in a hierarchy, and also the members of each Set (if that Set is open).

Left-double-clicking on a Document, Category, or Analysis Diagram component brings up a top-level MDI window for coding (Document or Category only) and editing. If the top-level MDI window is already present, then that Document or Category is either added or brought to the top.

Left-double-clicking on a Set or Attribute does nothing.

Right-double-clicking on any Project Component brings up the Properties window for that Project Component.

The Search window allows the researcher to select which Documents, Categories, and Sets to search, the search string, and the destination Category.

The Memo window allows the researcher to manipulate Memos and Cross-references, analogously to the way the `qualres` enables the researcher to manipulate Documents and Categories.

The Memo Search window allows the researcher to select which Memos and Cross-references to search, the search string, and the destination Cross-reference.

## 2.2 Narrative Analysis

The user works with Narrative Documents. A Narrative Document has a name, description, and text to be analyzed by the user. The text can be typed in through the keyboard, imported from a Categorical Analysis Document, or imported from a file. The text can be exported to a file, printed, and analyzed.

The analysis consists of the following actions:

1. Frame actions:
  - (a) Create Frame.
  - (b) Delete Frame.
  - (c) Cut/paste Frame.
  - (d) Make text Framed.
  - (e) Make text normal (unFramed).
  - (f) Modify Frame properties
2. Stanza actions:
  - (a) Make text into a Stanza.
  - (b) Make text normal (not a Stanza).
  - (c) Modify Stanza properties.
3. Summary actions:
  - (a) Make text into a Summary.

- (b) Make text normal (not a Summary).
- (c) Modify Summary properties.

4. Coda actions:

- (a) Make text into a Coda.
- (b) Make text normal (not a Coda).
- (c) Modify Coda properties.

### 2.2.1 Graphical User Interface for Narrative Analysis

A Narrative Document is displayed and analyzed using the Narrative Document window. The window displays the text in the center display, using the properties as specified in the Frames, Stanzas, Summaries, and Codas. The window also displays the names of the Frames and Stanzas in the right margin display. The properties of Frames and Stanzas can be changed by clicking on these names. The window also displays the names “Summary” and “Coda” in the right margin display where text is a Summary or Coda. The user can perform operations (such as make text normal) by clicking on one of these labels.

To make text Framed, the user specifies an existing Frame, selects the text to be Framed, and clicks an “ok” button. Making text normal is analogous. Frames have existence apart from Narrative Documents; text from different parts of a Narrative Document, or from different Narrative Documents can be Framed using the same Frame. When a text is Framed, it takes on the properties (font, foreground color, background color, etc) specified in the Frame properties.

To make text a Stanza, the user selects the text, and clicks an “ok” button. To make text normal, the user clicks on the stanza name in the right margin display, and selects “unStanza” (or some such) from the popup menu.

Making text a Summary or Coda is similar to making a text a Stanza.

## 3 Constraints

`qualres` runs under GNU/Linux, using GNOME.