

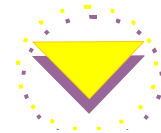
# Qualitative Data Analysis with ATLAS.ti



## Workshop Booklet ©

prepared by

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**Qualitative Research & Consulting**

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Toolbar descriptions taken from the ATLAS.ti short manual used with the author's permission.

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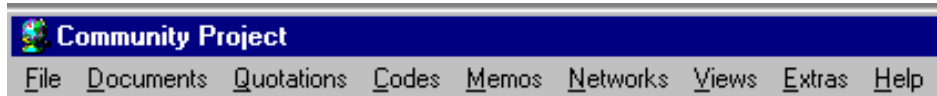
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## The ATLAS.ti Interface

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### The Main Menu

The main menu bar underneath the title bar offers access to the different kind of objects that populate a Hermeneutic Unit.



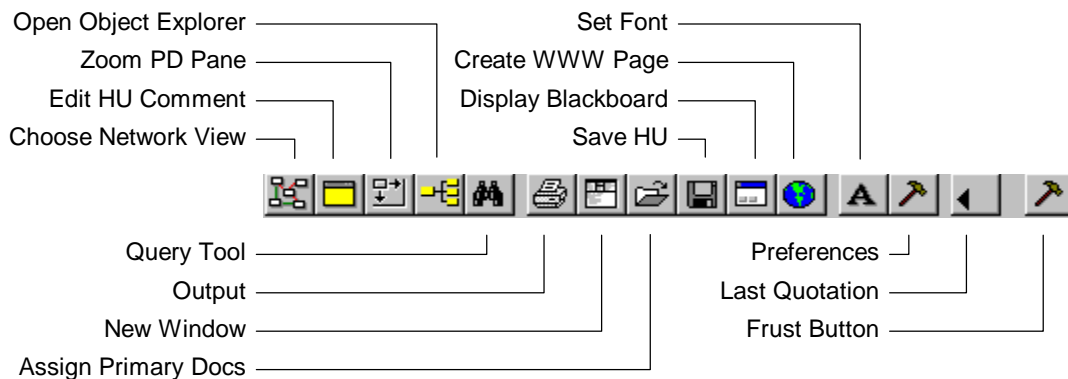
The main menu (and also the tool bars) are the central repository for all other tools in the work bench.

### The Tool Bars

Toolbars offer functions that are generally also available as menu commands. A short help text is displayed when the mouse pointer rests on a tool button. This "tool tip" can also be displayed with a click on the right mouse button.

#### *The Main Tool Bar*















Underneath the menu bar is the **main tool bar**.



*ATLAS.ti 4.1 Short User's Guide, p. 14, © Copyright 1997-2002 Scientific Software Development*

### *The Primary Document Toolbar*

The **primary document toolbar** is on the left side of your screen. Note, that it is disabled and will not even displays help information unless a document is loaded.

	Go to Line	<b>Go to Line</b> displays the text at a specific line number.
	Search	<b>Search</b> activates the text search tool.
	Free Quotation	<b>Free Quotation</b> creates a free quotation.
	Open Coding	The four <b>coding buttons</b> allow easy access to the most common coding functions.
	In-Vivo Coding	
	Code by List	
	Quick Coding	
	Create Memo	<b>Create Memo</b> attaches a newly created memo to the current text selection.
	Modify Quotation	<b>Modify Quotation</b> resets the size of a quotation
	Line numbers	The next two buttons toggle the display of <b>Line Numbers</b> and <b>Margin Area</b>
	Margin Area	
	Hyper Source	<b>Hyper Source</b> and <b>Hyper Target</b> make the text selection part of a hypertext structure
	Hyper Target	
	Show Quotations	<b>Show Quotations</b> displays the list of all quotations surrounding the current text cursor position.

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### *Object Drop-Down Lists*

Under the main menu bar, you will find the following four drop-down lists (or combos):



The combos will 'come to life' as soon as you start working with the program.

## Preparing your data files

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Before you can begin working with ATLAS.ti, you need to prepare your data files. The current version of ATLAS.ti can only handle text files. Thus, you first need to save your Word documents in the required format. It is also advisable to leave a large right margin of about 7 cm in order to have room for other operations within ATLAS.ti. Before reformatting all of your documents, it is a good idea to try out the settings with one document first. Depending on your computer screen, a right margin of 7 cm might be too much or too little. Try to produce a document that takes up only about half the size of your screen.

Further, you need to think about how you should transcribe your data in order to best utilise the ATLAS.ti features. ATLAS.ti offers you the possibility of auto coding your material, which for some data makes sense. For that you need to know that you have the possibility to search for a string of characters in the text and then let the programme auto code the full sentence, the line or the entire paragraph. A paragraph in ATLAS.ti is defined by 2 hard returns (see below and page 10). In other words, there should be one blank line between paragraphs. ¶

¶

You can find further tips for transcribing your data, on text searches and auto coding on the following web site: [http://www.quarc.de/tipstricks\\_e.html](http://www.quarc.de/tipstricks_e.html)

After you have formatted your documents, you need to save them as: 'text only with line breaks'. The line breaks are important; otherwise you see only one long line on the screen.

It is advisable to create a subfolder for your project data under the ATLAS.ti / TEXTANK folder. The Textbank folder is the default directory where ATLAS.ti looks for your documents. In addition to that always keep a backup copy of both your Word and your text documents somewhere else.

## Creating a Project

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- Double-click on the ATLAS.ti icon on the desktop **or** select the ATLAS.ti entry from the start menu.

You will be greeted by the Welcome "wizard" which offers some options for beginning a session. In the background you can already see the main work space, the editor of the Hermeneutic Units.

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**Note:** *If you do not choose anything from the "Wizard" it will disappear after a while. You can always get it back by choosing HELP/OPEN WELCOMEWIZ from the HU Editor's main menu.*

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The "wizard" offers four options to start (you can display a short help text by clicking on the HELP button).

- Select "Create a new Hermeneutic Unit" and click OK.
- A new window opens. Enter a title for your project (*Titles generally should reflect the theme of your research in a concise way.*)

It is a good idea and good style to further elaborate the short title with a longer abstract. This is especially useful when working in multi-author settings, or when generating HTML documents, or when displaying information on a Hermeneutic Unit in the HU Browser. To write a comment for the new HU:

- Click on the second to left button in the main toolbar  **or** select DOCUMENTS/EDIT COMMENT from the main menu.
- A text editor opens. Write a comment like "This is my very first HU and I will promise to write comments every time I create a new one."
- Save the comment (FILE/SAVE) and close the text editor.

It is a good idea to save the Hermeneutic Unit at this point:

- Select FILE/SAVE AS from the main menu.
- Accept the default name and click on SAVE. Your Hermeneutic Unit will now become an entry of the quick loader pick list.

You are now ready to assign data files (or *primary documents* as they are called in ATLAS.ti) to your project. Before you can however assign documents, you have to prepare your data first.

## Assigning Primary Documents

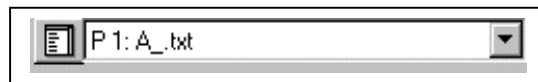
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- From the main menu, select DOCUMENTS and then ASSIGN.

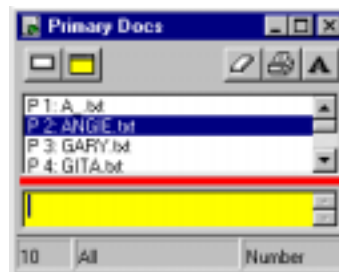
A new window opens showing you the contents of the Textbank folder.

- Select all data files that are contained within your project folder by clicking on the first document in the folder, then hold down the SHIFT key and click on last document in the folder).
- Click on OPEN.

You now see an entry in the first list box.



- If you click on the little black arrow of the combo box, you see the list of all entries.
- If you click on  nbol 'Extra Lists' on the left side of the combo box, a separate window opens up showing you the list of entries (see below). 



The yellow area at the bottom of the window is reserved for writing comments. How to write comments will be explained later. For now:

- Double-click on the document P1:...text. The file will be loaded and displayed in the main area of the HU Editor.


## Creating Document Families

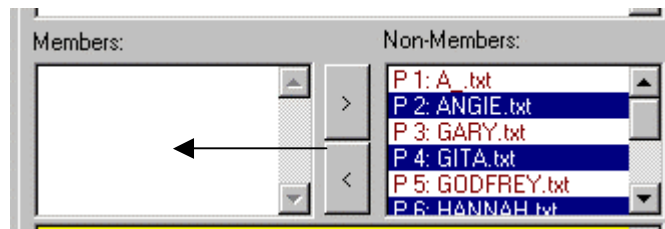
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You can use document families to organize your data files according to certain criteria. These can be used as filters for example to concentrate only on certain parts of your data when coding or later in a search operation.

Possible criteria might be demographic variables like gender or age groups. Let's practice the procedure by following an example:

Open the Family Browser (DOCUMENTS/FAMILY BROWSER, and choose the option OPEN FAMILY BROWSER).

- Click on the symbol for creating a new family: 
- An entry window opens. Type: "Female respondents" and click OK.
- Now select all relevant data files in the little field for non-members (in this case: Angie, Gita, Hannah, Marje and Veena). You can select them all at once by holding down the Ctrl-key. Then click on the button with the arrow pointing to the left and move them over to the member field.



- Repeat the same procedure for the male respondents, so that you end up with two document families.

## Creating Quotations

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In order to see what happens during the creation of quotations and codes,

- Activate the margin area by clicking on the 'margin symbol' in the document tool bar to the left (in case it is not yet activated). If you click symbol 99, line numbers will be displayed.



To follow the descriptions below, the contents of a primary document should be displayed on your screen. We will first explore different selection techniques:

### Semi-automatic Selection

- Move the cursor to one word in your document. Double-click the word to highlight it.



- Double-click on the highlighted word. Now the entire sentence will be highlighted.
- Double-click on the highlighted sentence: Now the entire paragraph is selected. (*A paragraph is any text enclosed with at least one empty line above and below.*)
- One more double-click selects the whole document.
- The fifth double-click brings you back to step 1.

The advantage of this selection technique is that you can be sure that a paragraph is selected in a unique way, not a space missing, not a period too much.

## Manual Selection

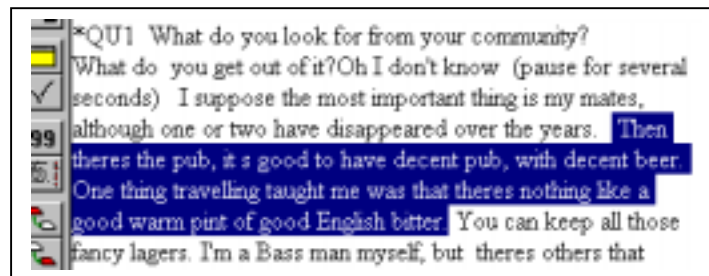
Of course you can also select words manually in the same way as you are used to from other Windows programmes.

- Move the mouse pointer to the beginning of the text you want to select.
- Drag the mouse cursor (click and hold the left mouse button, then move it) to the end of the intended selection and release the mouse button.

## Creating "free" Quotations

Creating a "free" quotation is similar to what we do when reading a book with a pencil: you make a mark of some sort in the margin or you underline what you find significant.

- Select one sentence in your document using what you just learned.



- Move the mouse cursor into the highlighted text and click on the right mouse button. A context menu pops up.
- Choose the option CREATE FREE QUOTATION. A bracket appears in the margin area (see left), and a new entry appears in the quotation's combo box.

You have done it, your first self-made quotation! The structure of your Hermeneutic Unit is slowly emerging.

- Just to practice a bit, look for a few more interesting text passages within the document and create a few more quotations.

## Coding

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Often you do two things simultaneously: You create a quotation and assign a code to it. In the following, five ways of coding are described: Open Coding, Code by List, In-Vivo Coding, coding with drag & drop and automatic coding.

### Open Coding

- Highlight a text passage you would like to code.
- Click on the right mouse button (or go to the main menu under Codes) and select CODING and then OPEN CODING.
- An entry windows open. Enter a code word name and click OK. The a immediately visible in the margin area and in the second and third con



You have now created a quotation and a code at the same time. It is also possible to code a text passage with two codes simultaneously:

- Highlight a text passage.
- Click on the right mouse button and select CODING and then OPEN CODING from the pop-up menu.
- Enter: "CodeA | CodeB" and click OK.
- Select a few more text passages to practice the open coding procedure.

### Code by List

- Select a text passage.
- Click on the right mouse button and select CODING and then CODE BY LIST **or** click on the 'Code by List' symbol in the left tool bar:



A new window opens showing you all codes you have entered so far.


- Select one or more codes from the list and click OK.

## In-Vivo Coding

In-Vivo coding means that the text passage you select for coding will be used as the code. The maximum number of characters you can use as an in-vivo code is 40.


- Highlight one or more words in your text that reflect the kind of code word you would like to assign to that text passage, e.g. an emic perspective of a respondent that reflect an important idea and can also be applied to other text passages.
- Select CODE IN VIVO from the coding menu.

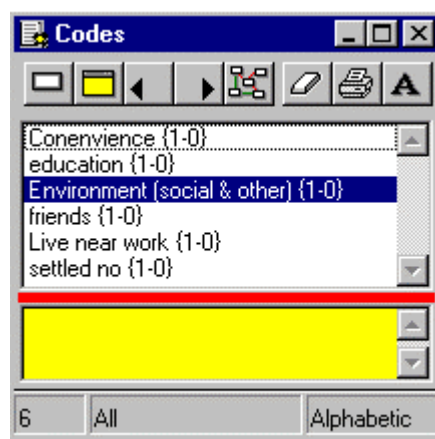
You now have created a code with the same name as the coded text itself. Quite often it is the case that you want to capture the word, but at the same time you also want the actual quotation to contain more text. In order to do this:

- Highlight the entire sentence containing the word(s) you used as in-vivo code plus the sentence before and after.
- Click on the 'modify quotation' symbol in the left tool bar. 

The text passage coded by the in-vivo code now becomes more meaningful.

## To Code with Drag & Drop

- Select a text passage.
- Open the code extra list by clicking on the 'extra list' symbol next to the combo box for  :



- Highlight the code you want to use for coding and drag (don't double-click) it into the primary documents pane. You do not have to aim at the selected passage.
- Release the mouse button and voilà, the selected piece of text has been coded.

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*Note: You can select more than one code before dragging using the standard Windows selection technique.*

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## To Code In-Vivo using Drag & Drop

- Select one or a few words in your text.
- Move the mouse pointer inside the selected text and drag it into the code list. Release the mouse button. This is the quickest way to do "In-Vivo" coding.

## Auto Coding

Let's assume a quite structured data set that contains four open-ended questions QU1 to QU4. Every interview contains answers to QU1 - QU4. The data have been transcribed in a way that there is no empty line between the questions and the answers. This allows us to search for QU1 to QU4 and to let the program automatically assign the code "Question 1" "Question 2", etc. to both the questions and the answers (see example document below)

QU1: So what would you look for in a community, this one for instance? ¶  
 Do you mean what would make me move here?...Yes. Well I don't; know ..... my boyfriend had a lot to do with me living here. ....¶


¶  
 QU2: So you don't feel you are settled here particularly? ¶  
 God no! I want to feel there's something round the corner. me and my boyfriend may go traveling, or my girlfriend will do it with me if he doesn't. ¶

¶  
 \*QU3: OK so what changes might you make here, in this community if you had the choice? ¶  
 Oh I don't; know that I'm particularly interested ..... you're making me think though.... my Gran lives round the corner in a sheltered housing thing.....¶

¶  
 \*QU4: OK so to finish up, what do you think the role of Government is in the neighborhood, in this district? ¶  
 Now you're asking. (laughs) well they could do a lot more to make peoples lives nicer, maybe that would make them nicer

people!. .....¶  
¶

At first, we need to create the four codes we want to use to auto code the data:

- Select the first document and move the cursor to the first line of this document. This way you can be sure that ATLAS.ti will search in all documents.
- In the extra list for codes, click on the symbol for 'Creating a new code':
- Create  w codes (Question 1 to Question 4).
- Start the auto-coding procedure by selecting CODES / CODING / AUTO CODING from the main menu.
- Enter or select the following options:
  - Selected Code word: Question 1
  - Search Expression: QU1
  - Case sensitive
  - Scope of search: All PTs
  - Select as quotation: paragraph



- Click on Start. All primary documents are now searched and coded.
- Repeat this process for Questions 2 to 4.
- After you are finished, close the auto-coding window.

## Further Coding Operations

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The extra list for codes should still be opened on your screen. If not, open it again. You may already have wondered what the numbers behind the codes mean. They can be interpreted as follows:

The first number in the parenthesis indicates the number of text passages that have been coded with a particular code. This is also called the *groundedness* of a code. The second number after the hyphen shows the connectedness or *density* of the code, which refers to the number of other codes that are linked to a code.

For example: {3-0} would mean that three text passages are connected to the code, but no other codes are yet linked to this code. As we have not yet created code-code links, all codes in your window should have a density of 0.

### Renaming a Code

Let's say we want to shorten the codes Question 1 - 4 to Q1, Q2, Q3, Q4 in order not to clutter the screen too much:

- In the extra list for codes, highlight the code "Question 1" and click on the right mouse button.
- Select RENAME from the context menu.
- Rename the code "Question 1" to "Q1" and click OK.

Even if the code "Question 1" was used in a few hundred codings, all of these would now be updated to the new name.

- Repeat the process for the codes Question 2 - 4.

### Defining a Code

You probably have noticed the yellow area in the extra list. This area is reserved for writing comments of code definitions.

- To write a definition for a code word, simply highlight the code, left click into the yellow area and start typing.

The definition is automatically saved. Only if you close the extra list directly after you have entered a definition, you see a prompt asking you whether you want to save the current changes. All codes (and all other entries) that are commented are marked by the following sign: ~

- Write a definition for a few codes and then save the Hermeneutic Unit again.

- Close the code extra list.

## Unlinking Codes and Deleting Quotations

- To unlink a code, right click on a code in the margin. A context menu pops up. Select Unlink.

This action only "deletes" the code at this particular position in your document. If you want to get rid of both, the code and the quotation (= the bracket),

- Right click on the bracket and select Delete from the context menu.
- You very likely will see the following message: References exist. Still want to delete quotation? Answer either with Yes or No.

OR

- Click on the code in the margin you want to delete. This highlights the coded text passage. Right click on the highlighted text passage and select DELETE. This action unlinks the code word and deletes the bracket.


## Writing Memos

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Memo writing is similar to writing code definitions. At first the memos have to be created and then a definition for them can be written in the yellow area of the extra list for memos.


Like codes, memos can either be "free" or they can be attached to particular segments in the text.

### Creating a Memo for a Particular Text Passage

- Select a text passage for which you want to create a memo.
- Click on the 'create a memo' symbol in the primary document tool bar on the left:
 
- An entry window pops up. Enter a memo title and click OK.

You now see an entry in the memo combo box. If you open the extra list for memos, you can now enter a memo text into the yellow comment area.

## Creating a "free" Memo

- If you click on the 'create a memo' symbol without highlighting a text passage you can create a "free" memo.
- Alternatively, in the extra list for memos, you can click on the 'create new' symbol  and a new memo title.

This is the same procedure as described above for creating the new code words.

## Displaying Quotations for a Code

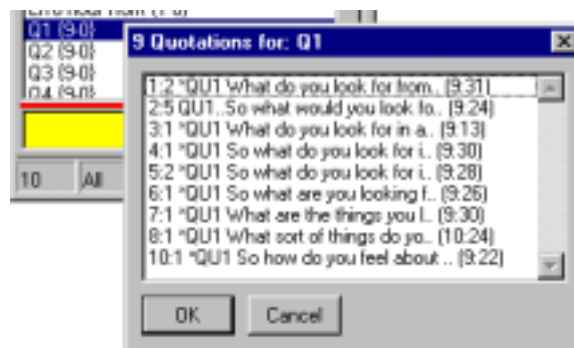
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Retrieving coded text segments in context is easy.

- In the code extra list, double-click on a code.

This has the following effect: The code is selected and the coded segment is displayed in context.

If a code is associated with more than one quotation, then you are offered a list to choose from (see below).



- You can browse through these quotations by simply clicking on each. A double-click selects the quotation AND closes the list. As this "chooser" is not modal (thus, it is not blocking anything else), you can do something with the quotations that are displayed in context, e.g., assign more codes, delete them, modify them, etc.



## Creating Network Views

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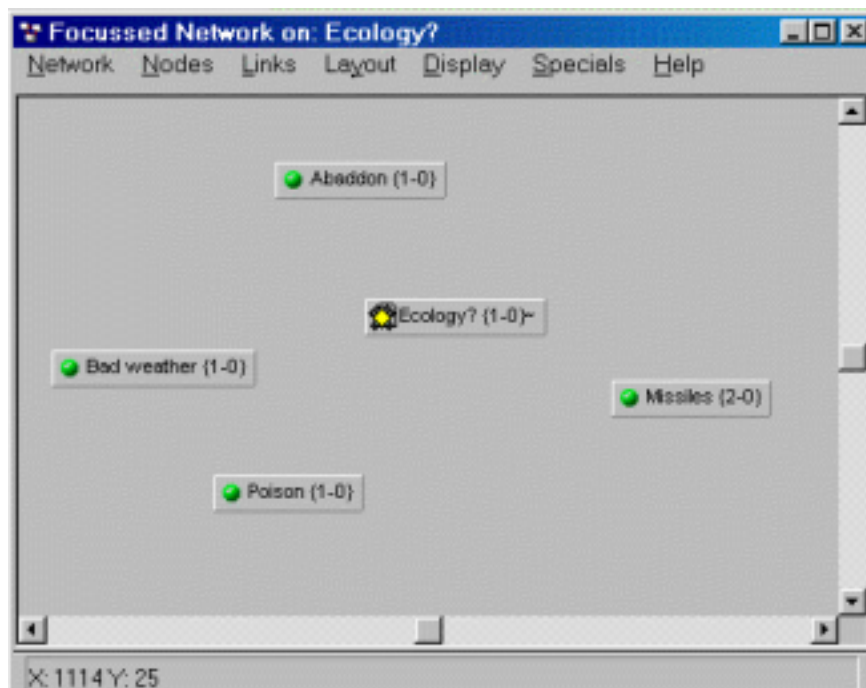
There are two ways to open a network view. You can go to the Networks menu and select the option 'New network view', or you can open a focused network for a code. To open a focused network for a code,

- Select a code in the code extra list and click on the network symbol.



One lonesome node is now displayed in the network editor (NWE). We need some company.

- Place the network editor and the extra list for codes next to each other on your screen.
- You can now just drag other codes from the code list into the NEW (hold the left mouse button and move them). They will be placed where you release the mouse button. *To select codes in the extra list, you can just key in the first letter (e.g, E) and the cursor will jump to the first code word that starts with the letter E.*
- Within the network view, you can move the nodes around to any place by dragging (objects in NWV are called nodes). Just like list entries in a list you can select nodes with a single click. Try it.
- Place the nodes so that you have some distance between them.



## Linking two Nodes

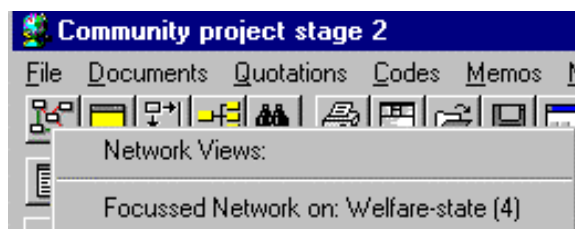
- Move the mouse pointer onto a node.
- Hold down the shift key.
- Hold down the left mouse button and move it onto another node, just as if you wanted to move the node. A "rubber band" tracks the movement of the mouse.
- If you have reached the second node, release the shift key.
- Release the mouse button. A selection of *relations* pops up. Choose for example the "is part of" link.

## Linking more than two Nodes

- Select two or more nodes by holding down the Ctrl-key.
- From the network editor's menu, select LINK / LINK NODES.
- You now see two or more red "rubber bands". Move the mouse pointer onto the node you want to link the other nodes with and click on the left mouse button.
- Now you are prompted as many times as you have nodes to link for a relation type.

You now have created your first network. If you want to save it:

- Select SAVE from the Network editor's menu. You can accept the default name or enter a new one. Then click OK.
- Now save the complete Hermeneutic Unit again.
- If you click on the network symbol underneath the main menu FILE, you will now find 1 entry similar to the following:




## The Object Explorer

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The Object Explorer is quite similar in "look & feel" to the Explorer used by Windows 95 or 98. The hierarchy of objects can be expanded or collapsed using the little boxes left to an object. The "raw" list displays the main object types quite nicely: primary documents, quotations, codes, memos, the "families" and the Network Views.

The ATLAS.ti Object Explorer (Extras menu) comes in handy if you want to browse the Hermeneutic Unit's different kind of objects using only one window. It offers a hierarchical view of the objects with the Hermeneutic Unit itself as the "root" object. Like the extra list window, it is also divided into two parts, the upper part showing the objects and the lower displaying a comment for the selected object.

### To open the Object Explorer:

- Click on the Object Explorer symbol in the main tool bar: 
- Click on the root "your project name". The commentary for this HU is displayed in the lower text pane.
- If you click on the plus (+) signs, the sideways tree will expand and if you click on the minus (-) sign, it will shrink.

If you click on a code, the definition that has been written for that code is displayed in the lower text pane.

- Click yourself through the codes so that you become familiar with the structure of the object explorer.

Towards the lower end of the Object Explorer, you find the entry for *code families*. Code families are created in the same way as document families. You will find the option for creating code families under the Codes menu: Codes / Edit Families.

Every object type has its own context menu associated with it.

- Try it out by right clicking on an object.

It is also possible to use the Object Explorer for coding:

- Highlight a text passage, click on a code in the Explorer and drag it over into the text area. Release the mouse button.

After you are finished with your exploration, close the Object Explorer.

## The Query Tool: Asking questions, findings answers

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The **Query Tool** is used for the retrieval of quotations, which can either be coded text, graphic or audio segments. The codes that are linked to these quotations are used for the process of retrieval. Thus, retrieving quotations is different from *text* searches.

Above, you already have "retrieved" quotations for codes in the simplest way: double-clicking on one code. This translates into a query: "Give me all quotations for code X". Sometimes, however you need more complexity.

➤ Open the Query Tool with a click on the binoculars:



The Query Tool opens in a separate window. You only see some entries on the left side, the code families and the codes. The right side is reserved for formulating queries and for displaying the results. The toolbar on the outer left side contains the operators you can use to formulate a query.

### Operators

Three sets of operators are available:

**Boolean** operators allow combination of keywords according to set operations. They are the most common operators used in information retrieval systems.

**Semantic** operators exploit the network structures that were built from the codes. In other information systems these operators are often referred to as "Thesaurus Operators".

**Proximity** operators are used to analyse the spatial relations (e.g., distance, embeddedness, overlapping, co-occurrence) between coded data segments.

#### Boolean Operators



OR : A or B

XOR: Only A or only B, exactly one of the terms matches

AND: A and B must co-occur exactly, all terms match

NOT: None of the search term matches

#### Semantic Operators










SUB: All A including sub-groups, (works only for transitive relations!)

UP: All A including super-ordinate codes

SIB: All A including all the quotations from codes that are linked to A

### Proximity operators

	WITHIN:	A within B
	ENCLOSES:	A encloses B
	OVERLAPPED:	A overlaps B
	OVERLAPPED:	B overlaps A
	FOLLOWS:	A follows B
	PRECEDES:	A precedes B
	CO-OCCURRENCE:	All A that co-occur with B, the boundaries do not have to match exactly

### Clicking a Query

The query tool works on the basis of the **Reversed Polish Notation (RPN)**. This means that you first need to select the operands and then the operators. Let's consider the following equations:

$3 + 5 = (\text{result: } 8)$        $(3 + 5) \times 4 = (\text{result: } 32)$

This is how we would normally enter the equation into a calculator. Using the RPN, we would key in the following:

$3\ 5\ +\ (\text{result: } 8)$        $3\ 5\ 4\ \times\ (\text{result: } 32)$

Thus, the RPN works without the use of parentheses. Translating this into an ATLAS.ti query, this could look like the following:

**Give me all quotations that are either coded by CodeA or CodeB:**

CodeA CodeB OR

**Give me all quotations that are coded by CodeA or CodeB but not Code C:**

Code A CodeB OR CodeC NOT AND

**Give me all quotations that are coded by CodeA and all of its sub terms (this requires that one has linked the sub terms via transitive relations to CodeA) that are embedded within segments that are coded by CodeD.**

CodeA SUB CodeD WITHIN

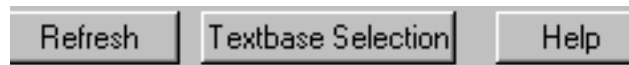
As one might see from the examples that there are operators that require two operands and a few that only require one operand like the NOT operator and the three semantic operators. The semantic operators work only on the basis of transitive (directed) links that one has created between codes. The 'isa' or 'is part of' relation for example are transitive relations.

More example queries can be found in the small ATLAS.ti handbook on pages 85 and 86.

## Using Filters

In order for example to assess whether **gender or any other variable** has an effect on the questions your are interested in, you can make use of the document families you have created:

- At the bottom right of the Query Tool you find a button called TEXTBASE SELECTION.



- Click on it. This opens a window with the title: Define scope of query.
- If you double-click on either the primary document family "female respondents" or "male respondents" (or any equivalent you have created), the quotations in the result pane of the query tool will change accordingly to reflect the filter you have set.

## Outputting Results

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- To output results from the query tool, click on the icon on the bottom right of the query tool that shows a printer. You will then be asked whether you want to just see a list of quotations (i.e. the first 32 characters of the text segment) or the full quotations. You then have the option to send the output to an editor, the printer or a disk. The output will be in ASCII text format.



It is also possible to save all of the network views you have created as graphic files, or you can copy them to the clipboard and insert them into a Word document.

All text that is written in a text editor (e.g. the memos, all comments, or the output of search results) can be copied and pasted into other applications.

You can also output your coding schema as SPSS syntax file.

As some of these options are not ATLAS.ti specific or would go beyond the scope of an introductory workshop, they are not detailed here. As it is however very simple to create an HTML file as a summary output of your project, we will do this as a last exercise.

- From the main menu, select EXTRAS / EXPORT TO and then HTML.

After the html file is created, the file will immediately opened in the Web Browser on your computer, if the correct path to the Browser is entered in the HTML preferences box.

- If the path is wrong, go to EXTRAS / HTML PREFERENCES and change the path.



- Another option is to start your Web Browser and to open the file from there by browsing to the ATLAS.ti / HTML folder.

In order to also make the network views part of the HTML document, you need to save them as GIF files and copy them into the ATLAS.ti / HTML folder.

I hope you have enjoyed this introduction to ATLAS.ti. You should now have a basic working knowledge of the program. And with a bit of an adventures spirit, you will probably also be able to figure out some of the more advanced functions. There is always the ATLAS.ti mailing list if you get stuck somewhere. So join the list:  
<http://www.atlasti.de/joinlist.html>