Guide to the Basics of Atlas.ti
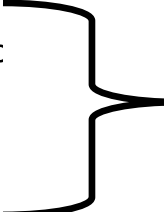
Atlas.ti Workshop II
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The following document is a hands-on, "how to" guide to Atlas developed by your workshop facilitators. In this second phase of the workshop will explore some of the most commonly used Atlas tasks. We will not cover everything in this handout. However, you can use the guide as post-workshop review as you begin utilizing Atlas for your own research projects.

ATLAS FUNCTIONS/TASKS

Not covered in workshop but available in text format in this guide (for your reference)

Starting a project

Foolproof method of starting a project
1. Create a new folder for a project (anywhere on your computer)
2. Move the original documents (they will be PDs) into the same folder
3. Create an HU file in the same folder
   File → New Hermeneutics → Save
4. Assign the PDs
   Primary Document Manager → Documents → Assign → highlight the documents and hit "OK"

Copy bundle

- Create a bundle
  Tools → Copy bundle → Create bundle → Save as _____.acb
- Open a bundle
  Tools → Copy bundle → Install bundle → Open (Use "Migrate" to move to new HU folder)

Playing around with primary elements

1. Opening HU:
   File→ Open → select the HU

2. Opening PD:

"~" means "with memo"

Comment

Backing up HU

- Setting the backup preference
  Extras → General Preferences → Storage → Check "Always backup copy when saving a HU"
- Every time you "back up" Atlas saves an HU and updates the backup. BUT it is not done automatically.
  → This is different from recovery backup, which is automatic.
- There's no UNDO button or function in Atlas, so you could make multiple HU copies to prevent a fatal error that could make you lose hours of work.

How the coding works

- Primary documents are broken into smaller units (quotations).
- Quotations can exist without codes or can be linked to multiple codes.
- Memos can be attached to any parts.

Opening Code Manager:

Double-click

Roll-up option

View → Single Column

Example:
"Marginal Space (52:1)~"
This code has links to 52 quotations, and is linked to 1 code.
It also has a comment ("~").

Comment on codes
When there is a comment, you can double-click to edit it.

Comment on quotation
When there is a comment, you can double-click to edit it.

Exploring the Code Manager

- Double-click on any code and it will open the list of all quotations linked to the code.
- When you click on any code, Atlas will take you to the quotation.

Quotation Comment

- Or, you can right-click on the code in margin area and select "List Quotation" to get the list.

Creating Codes: Coding Methods

1. Open Coding
- Create code based on the document you're coding
- You can enter more than one codes, separately by "|" (a pipe)

> **Open coding**: Create codes as you go

2. Free Coding
- Create codes in advance

3. Invivo coding
- Highlight words that you want to use as codes, and drag it into code manager. (Turn off the rollup option for this.)

> **Free coding**: Codes are created in advance

4. Creating codes in memo
- Create a new memo → List codes, one code per line (You can import from Word) → Miscellaneous → Create codes from selected memo → Delete the memo once codes are created

> **Invivo coding**: Making codes out of the PD text

5. Margin dragging
- Drag an icon for a code linked to a quotation to another quotation. It'll move to the new quotation

6. Copy codes
- Hold down Ctrl key and move code icon from one quotation to another quotation

> **Auto coding**: Search and code specific word or fragment of a word

7. Auto coding
- Look for a word (or fragment of a word) and code it automatically
- Code manager → Codes → Coding → Autocoding → Create a new code (It's a good idea to note that it's an auto-code)

- Select where to look for the auto-codes (e.g., Current PD, All current PDs, PD family…)
- Select the size of quotation
  - Single hard return = any paragraph mark will end the quotation.
  - Multiple hard returns = one or more lines will mark the end of the quotation.
- You can enter more than one "search expression," separately by "|" (a pipe). If you need the words to be searched under different forms, place * after each word that needs to be.
  e.g., *father → search will include "grandfather"
  e.g., *father* → search will include "grandfather-in-law"
- The best way to use auto code:
  Auto code → Manual code (to fix and clean up) → Delete the auto codes and spurious codes

Coding: How to code
- Highlight the text and then drag the codes from the code manager and drop it *anywhere* in text area.
- **To remove codes, Right click → Unlink**
  Note: **Do NOT delete the codes!**
- To replace codes you can drag another code over preexisting codes
- Two ways of renaming codes
  a. Click on it once → wait a second → click again → rename it
  b. Right click → rename it
- Code the current selection with the selected code

Tips on coding
- Highlight the document efficiently
  1 click = a word
  2 clicks = whole sentence
  3 clicks = whole paragraph
  4 clicks = whole document
  5 clicks = unhighlight everything
  - When you click the areas that are not highlighted it will unhighlight the quotation.
  - When everything is highlighted, shift+click to unhighlight.

- Teamwork: Placing a coder's initials on codes will help sort through the coding after merging multiple HUs
- Naming files and documents
  Identifying the codes (variables) in file will help make it easier to sort.
  When merging files documents must be in the same order. So, using numbers in front of the original documents will help ensure that everyone has the documents in the same order.
  e.g., P1: 001_M_RFM_120405.doc
      P2: 002_F_DFM_113005.doc
      P3: 003_F_RFM_112405.doc
- **Wrap tool bar**
  This will help prevent the shortcut buttons from disappearing when you narrow the code manager window.
  Code Manager → View → Wrap Tool Bar
- Making "Great Quote" code: use the query "AND" to find a great quote for a particular code

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Quotation

Increase or decrease the size of quotation
- Press down shift and extend or reduce the size of quotation to where you want to be, and then check to approve the changes.

Code managing and quotation managing

- It's always a good idea to work at the most detailed level (You can always merge them later).
- Using a symbol or a number to <u>sort</u> the codes is one way to organize them.
- <u>Merging codes</u>
    a. <u>Merge codes in code manager</u>
       Click on a code → Miscellaneous → Merge codes → Select the code to merge the original code with
    b. <u>Visually merge codes</u>
       Highlight codes inside code manager (Hold down Ctrl to highlight multiple codes)
       → Network button
       → Highlight the codes you want to merge (draw a square with the curser to include ones you want to highlight)
       → Nodes
       → Merge codes
       → Click on one that you want to keep the new code as
    Note: Keep in mind that you can also do supercode to keep the original codes (so merge only when it's clear that one of the codes no longer makes sense as a stand-alone code)
- <u>Merging quotations</u>
    - Highlight a quotation while holding down Ctrl → Drop the quotation onto the quotation that you want to merge the first quotation with <u>while</u> still holding down Ctrl (don't let go of Ctrl until you drop the quotation)
    Note: If you don't hold down Ctrl, then the two quotations will be hyperlinked.
- <u>Codings Analyzer</u>
    Tools → Codings Analyzer
    It allows you to check for the redundancy in coding (It's useful for team coding)
- <u>Concurrence Explorer</u>
    Tools → Concurrence Explorer → Codes → "<o>" signifies concurring codes

Writing Memos

- Click on memo manager→ memos→create free memo (or use the far right symbol of a memo with a yellow star in the top left corner)→ type your memo in the white space→ change the title of your memo if you like→ click the check mark to save and then close out of the memo.

Comments

- <u>Using code comments</u>
    You can leave notes on the meaning and definition of the codes.
    In teamwork, leaving a coder's initials and the date of the comment will help effectively maintain the integrity of the work.
- <u>Using quotation comments</u>
    Leave notes that explain why you coded it in certain ways or provide your interpretation of quotation.

Creating Families

- Open family manager
  a. Code Manager → Codes → Edit Families → Family Manager
  b. Code Manager → "Open Family Manager" icon
- Create new family
  - "Create new family" icon → Name a family → Double click codes on the right to move them into the family
    → Once you do this, when you double-click on the supercode, then the code manager will only show codes in the supercode
  Note: You can create ad-hoc families and later delete irrelevant families

Open Family Manager

Create New Family

Shaded means codes are filtered

Filtered by… (Click here to show all the other codes)

Total number of codes

Currently selected

Families: Filtering

a. Filtering codes by family
  - Code manager → Codes → Filter → Families → Select the family of codes you want to selectively show in the code manager
  - To undo, Code manager → Codes → Filter → All
  Note: In order to remind yourself that you have filtered the codes, change the Tool Tips shading of Windows.
  - Setting → Control Panel → Display → Appearance → Advanced → Tool Tips → Select the color you like for the shading (in below example it's light blue)
b. Filtering documents
  - Code Manager → Codes → Filter → Selected PD
  Note: You can filter documents where certain codes are used
  Note: A case in which it's useful to turn an entire document into a quotation: If you need to know that the characteristics matters permanently, and place it in supercode, then you must code the entire document as one big quotation (e.g., demographic information of the interviewee)

Hyperlinks

a. Hyperlinking part of a document to another
- Highlight a part of the document → Click on "Hyperlink start anchor" → Select another part of the document → Click on "Hyperlink target anchor" → Select the type of hyperlink
- After this, when you double click on the hyperlink icon, it'll show the linked text.

Note: Once you've hyperlinked the quotations, you could unlink codes from all but one quotation (i.e., all the linked quotations will be coded similarly)

Note: Hyperlinks are especially useful for videos and images.
Note: Hyperlinks are not an alternative to coding.

Queries

- TOOLS-→Query Tool (looks like binoculars)
- Double click on the codes you'd like to include in your query and select an operator by clicking on the operator of your choice from the list of symbols on the far left margin of the screen.
- Use the recalculate, undo, etc. buttons as needed
- Make your query into a **SUPERCODE** if it is particularly useful

> **Query**: Means to explore data efficiently

Retrieving a quotation with a query

- Double-click the code → It will give you a list of quotation linked to the code
- Purposes of Query Tools
  - Creating formula for exploring the data
  - Housekeeping
    i.e., check to see if I had coded the quotation properly
      e.g., Dichotomous codes both linked to a quotation? You can check to see if such cases exit (If you coded properly, then you shouldn't find any such cases).
  - Scope of query
    - You can limit where the query applies

- Useful query tool symbols
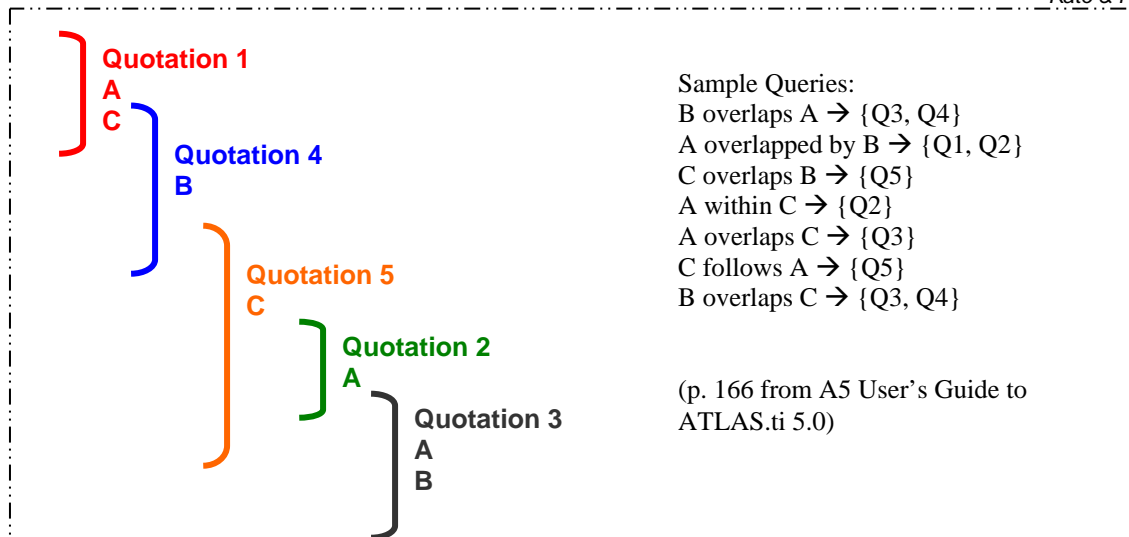 a. Boolean Operators
     - OR – "A or B" will find all quotations linked to <u>either</u> code A <u>or</u> code B.
     - AND – "A and B" will find all quotations linked to <u>both</u> of codes A and B.
     - NOT – "A not B" will find all quotations linked to code A <u>but not</u> code B.
     Note: When dealing with Boolean Operators, order of codes does not matter. But the tricky part is that you have to work backward to build query, and the query operator is always using the top two codes for constructing query.
     e.g., Double click on code A, then double click on code B (it will show code B on top of code A) → Click on "Follows" Query button → Query will be created for "A follows B"
  b. Proximity Operators
     - WITHIN – "A within B" will find all quotations linked to code A, and are contained within a quotation linked to code B.
     - ENCLOSES – "A encloses B" will find all quotations linked to code A that (partially or fully) contain quotations linked to code B.
     - FOLLOWS/FOLLOWED BY – "A followed by B" will find all quotations linked to code A that is followed by quotations linked to code B (You can set the distances between the two quotations).
   - CO-OCCURRENCE – "A co-occurring with B" will find all quotations linked to code A that co-occur with B.

Quotation 1
A
C

Quotation 4
B

Quotation 5
C

Quotation 2
A

Quotation 3
A
B

Sample Queries:
B overlaps A → {Q3, Q4}
A overlapped by B → {Q1, Q2}
C overlaps B → {Q5}
A within C → {Q2}
A overlaps C → {Q3}
C follows A → {Q5}
B overlaps C → {Q3, Q4}

(p. 166 from A5 User's Guide to ATLAS.ti 5.0)

a. Semantic Operators
   ↓, ↑, ↔ - Query for networking relationships visually

Constructing conceptual networks

- Selecting a code inside network windows
  - Double click the code icon
  - Draw a square around it
- Unselect a code
  - Ctrl + Click
  - Click inside the square area
- Remove a code from the network
  - Right click → Remove from view
  Note: Do not delete the code – it will delete it from HU!
- You can draw codes into the network from Code Manager
- You can add/change/remove the relationship among the codes
- Networks can be saved for future reference. Any time you change codes or quotations, it will be reflected in the network.
- Exporting the network
  - Network window → Network → Copy to Clipboard → Copy all nodes → Open MS Word, then Edit → Paste Special → Enhanced Metafile

An example of the exported network

Smoke {25-3}   Sit cars {13-1}

is associated with   is associated with

Marginal Space {58-2}~

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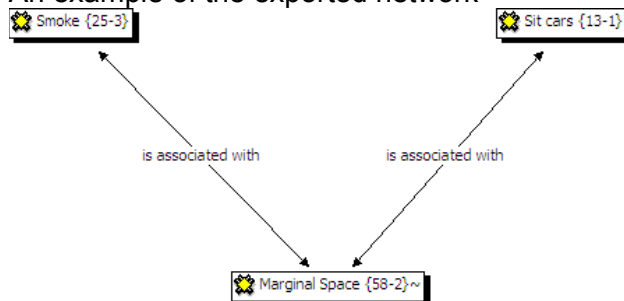
- Customizing network relations
  - Network window → Links → Edit Relations → Code-to-code Relation → Edit →
    New Relations
  - Internal ID means ID of the relationship
  - In addition, there are three other ways of labeling the relationship.
    - You can see the network by clicking on "Network button"
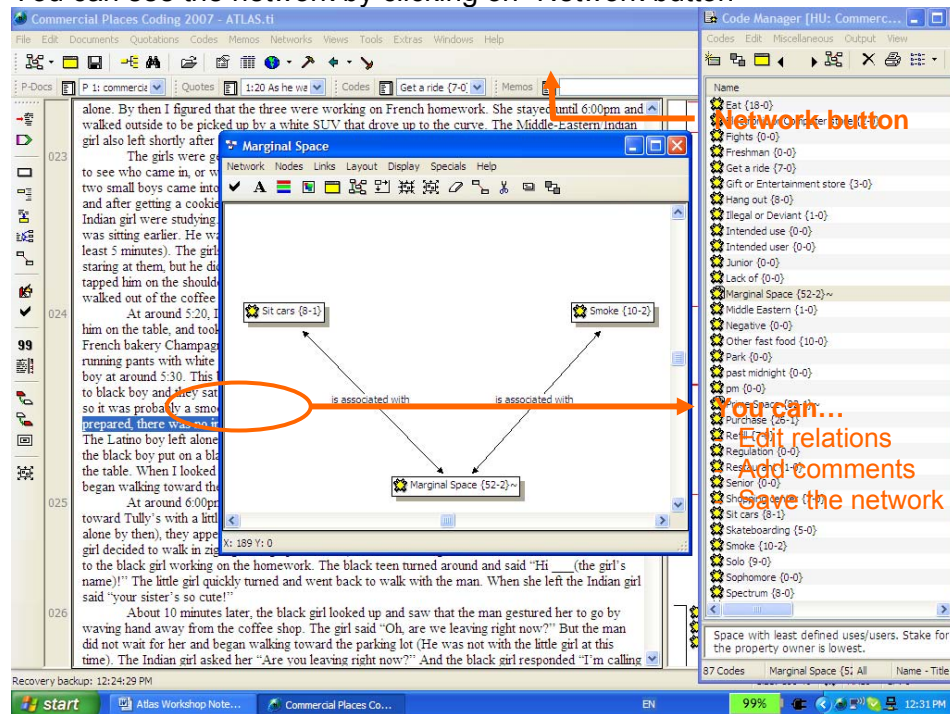
Network Links

Two ways of thinking about links
  - Grounded (How many quotations are linked to a code)
  - Density (How many codes are linked to a quotation)

Two kinds of links
  - Regular/automatic/low-power links: Code-code relationships
  - High-power links: Quotation-quotation relationships (e.g., hyperlink)
  → They are both the same mechanisms. They are just titled differently.

Linking codes in network
  - It is simply a cognitive exercise. There are no consequences to the rest of the HU.

Grounded: Number of quotations linked to a code

Density: Number of codes linked to a quotation

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Creating table of coding frequencies

- Tables created can be exported to Excel (then to SPSS)
- Steps to create the table [Optional steps]
  [Code manager → Filter code family] and/or [Primary Doc Manager → Filter document family] → Code Manager → Output → Codes-Primary-Documents-Table → Quotation Count (Excel) → File & Run → Ok
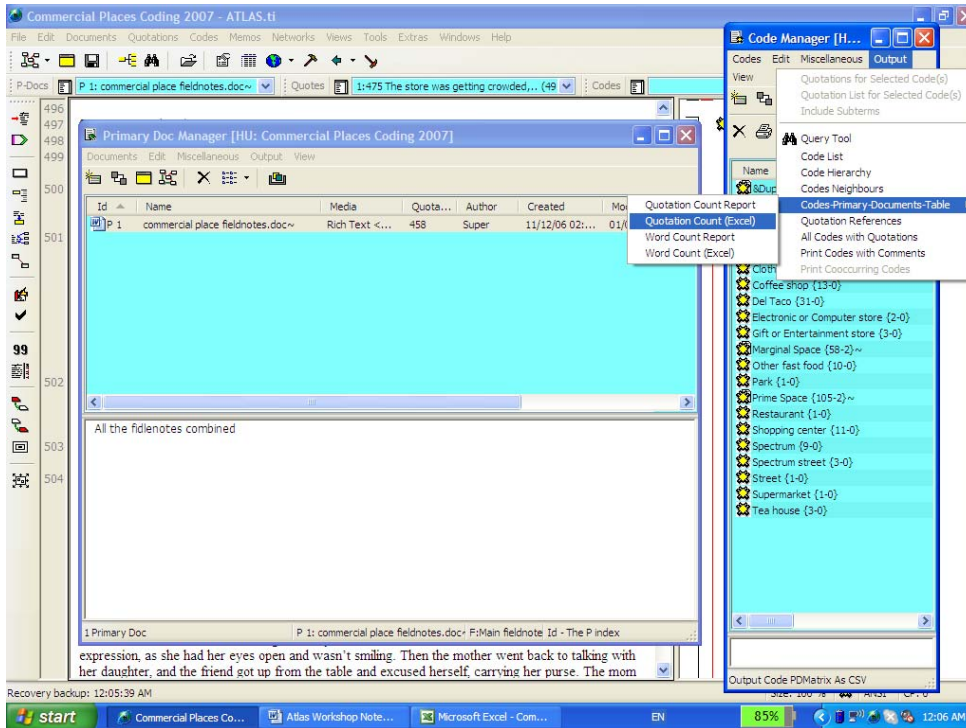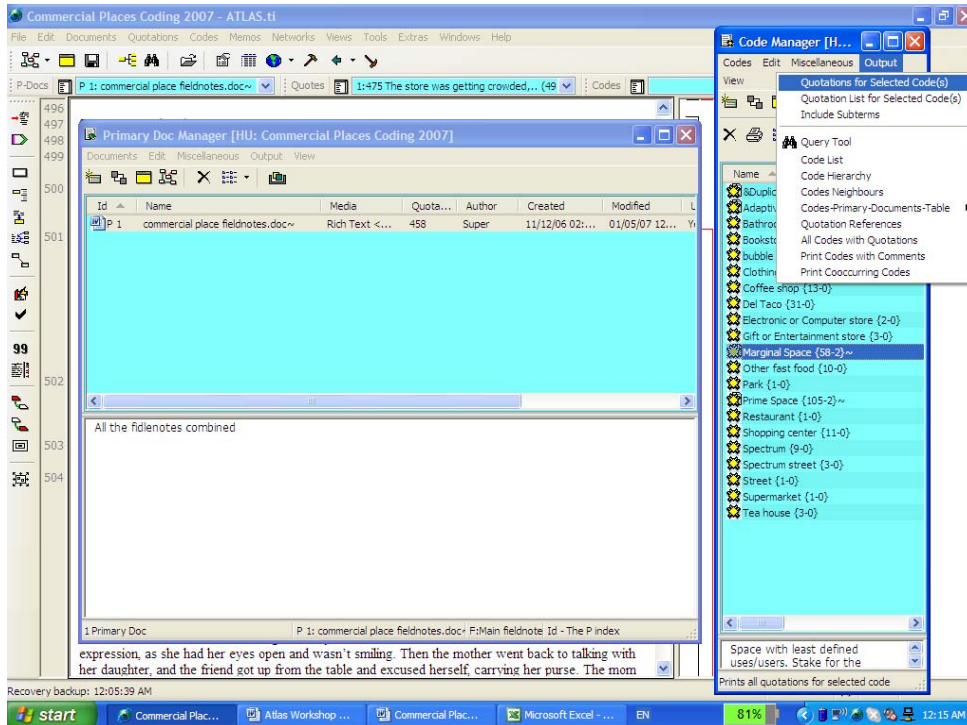

The example of the table created in Excel

Printing output of quotations
- Produce a list of all quotations linked to a code in Word.
- All of the quotations linked to a code:
  Code Manager → Highlight the code you want the quotations for → Output →
  Quotations for selected codes → File & Run → OK

Sample of the Word document produced
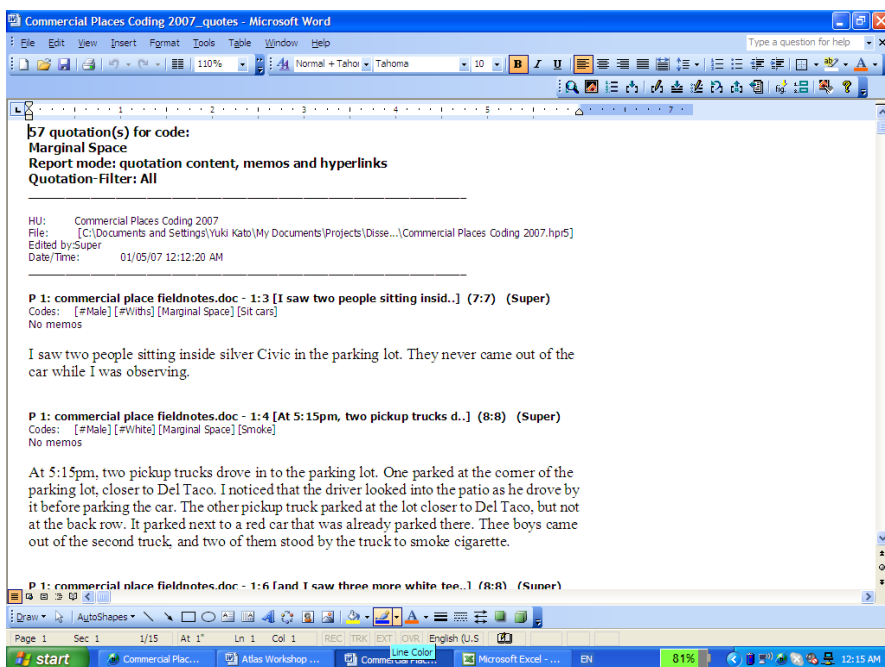
Coding Videos (and audio files, too)

- Creating quotation
    - Play the video (or audio file) by selecting the clip at the primary document (Video will play in another window, so click on it to show above the Atlas window) → Click "Mark Selection Start" at the beginning of the clip → Click "Mark Selection End" at the end of the clip
    - The quotation is created and you can see it in Quotation Manager
    - You can drag codes from Code Manager to code the quotation just like you would if it were text.

Play video by selecting it in PD

Mark Selection Start

Mark Selection End

Linked to one code

Video plays in a new window
Click to show above Atlas Window

Coding graphic images

- Creating quotation
    Right click text area → Selection - Display type → Inverted area
    Draw a square while holding down left click to create quotation (The selected area gets inverted like a negative) → Drag a code from code manager
- One way to effectively use the image is to hyperlink the text and graphic (to explain the text quotation using graphic presentation)
- You can also network the graphic images with hyperlink
- Two ways of expanding and contracting the graphic
    b. Ctrl+Wheel
    c. "Expand/contract images" button (Hold down Ctrl to contract)

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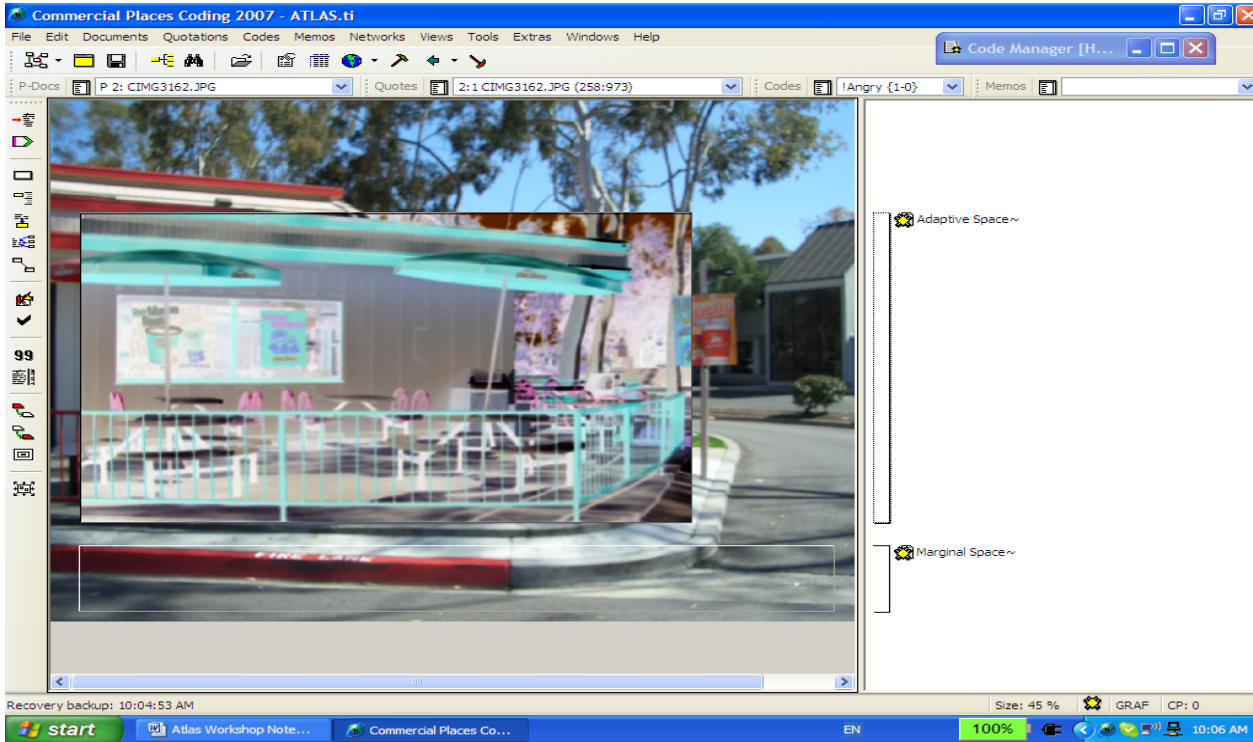
Navigating around projects

Object Crawler

- It allows you to search for a word (or any string of text) in one or all or any combination of objects.

Click on Object Crawler button → Define query (the word you're searching for) → Check everything in Search Scope, but uncheck GREP → Select Objects by checking specific objects

Note: It's case sensitive, so place "*" as the first character in search

Object Crawler: search for a word in any part of the HU

Object Crawler

Uncheck GREP
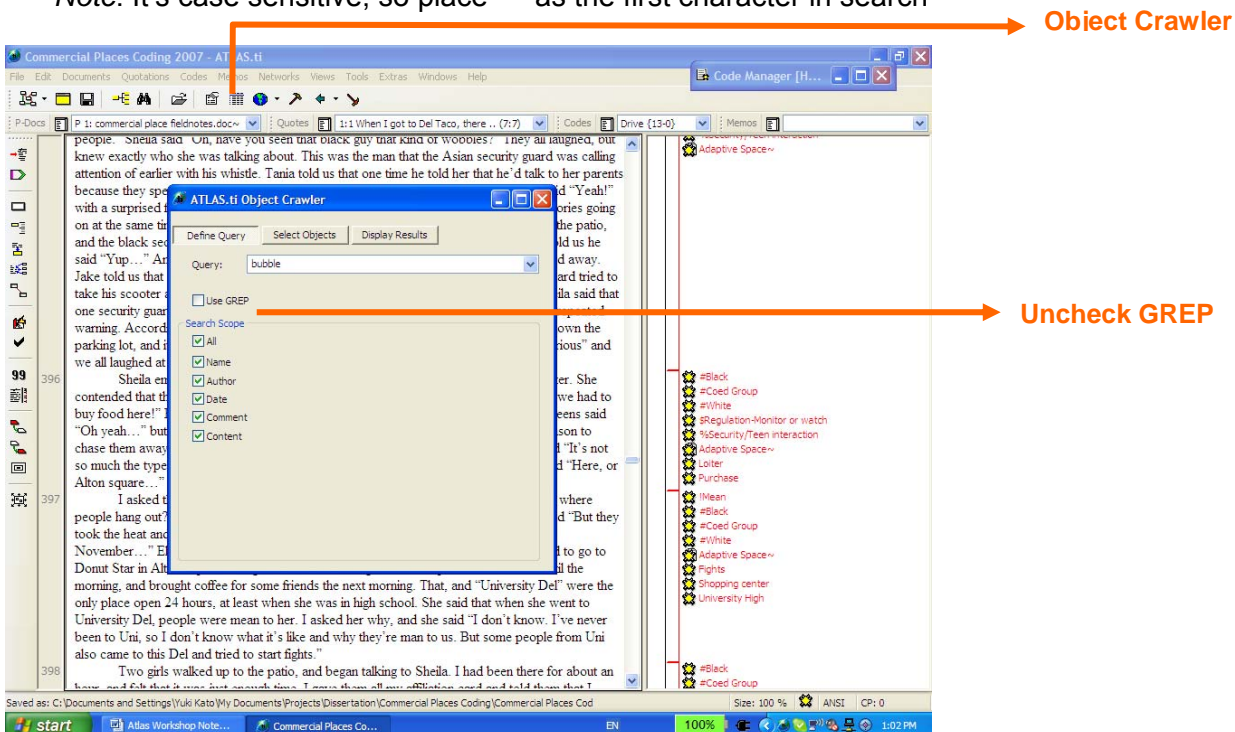
Object Explorer
- List of objects
- Graphic (Network) view of objects
- Outline lists

Sorting Codes
- Code Manager→ Codes → Sort: Name

Code Forest/Code Trees

- Code Manager → Miscellaneous → Code Forest or Code Tree

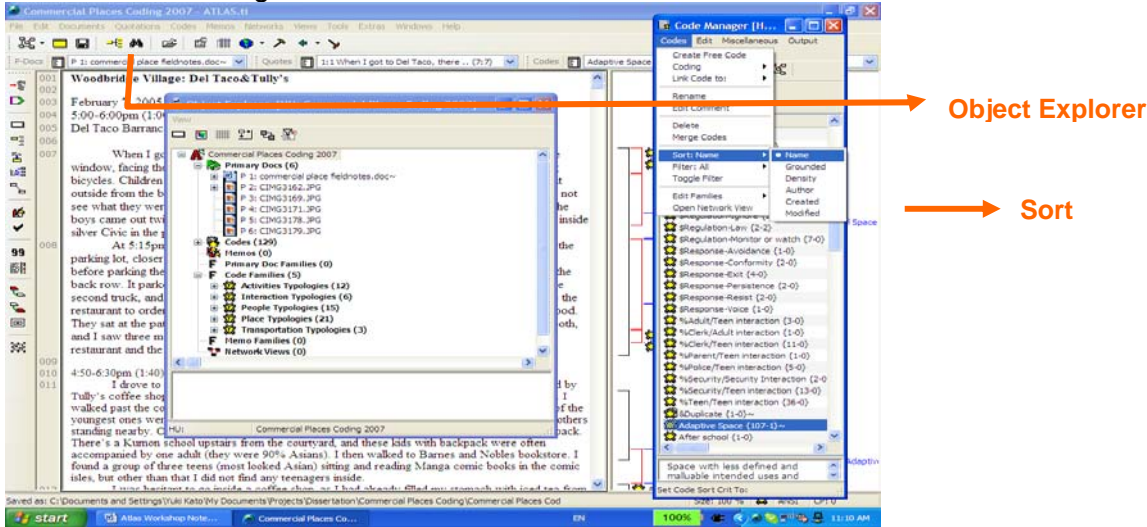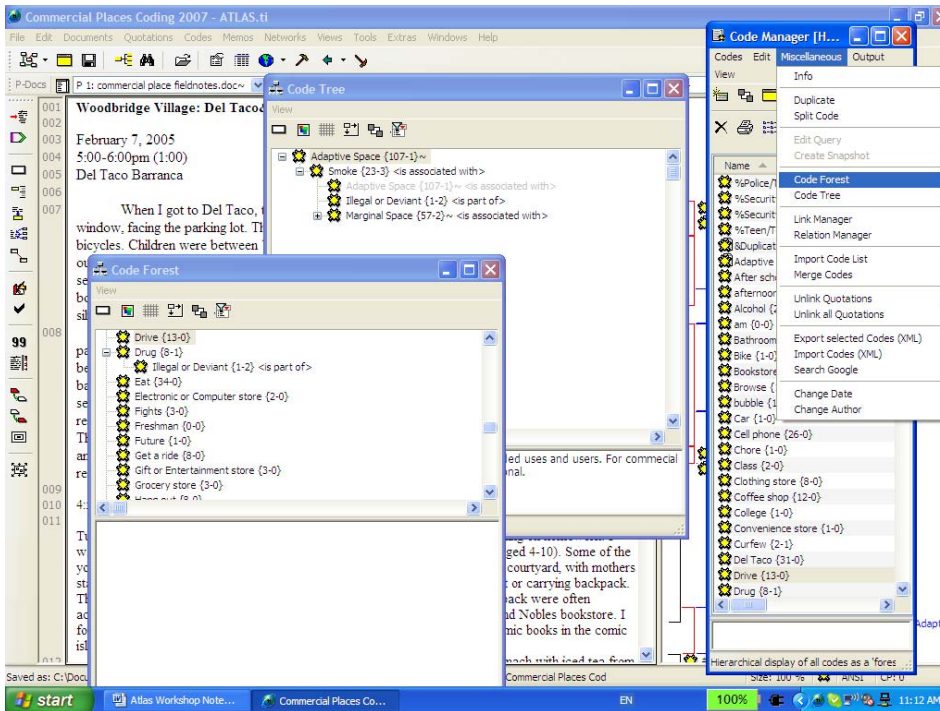**Code Forest**: List of all codes (shows links among codes)

Code Tree: Information about each code (shows links to other codes)

Trouble-shooting

- Creating details of HU for getting help from Atlas.ti support
    - Extras → System Report

Team Project

- Each person on the team has a version of HU (different names) to be merged periodically
    - An example of naming individual HU: *projecttitle.membername.date*
- Use fool-proof option in merging HU files
- Merging HU check list
    - All HUs has all PDs
    - All PDs are in the same order
    - Unify everything
  Tip: "Add" option (instead of "unify" or "ignore") is best in checking for coding liability across multiple coders.
- Ways to avoid confusion when working on a team project
    - Only one person assigns PDs (to all copies of HUs)
        - Each merge is a good occasion to clean-up any confusions and inconsistencies
    - Constrain what you do, when it comes to adding or deleting codes.
        - When creating a new code, add initial and comment with date and initial
    - Use comments heavily and initial and date each comment.

Data Source Management Menu

- Change path
  Documents → Data Source Management → Change path → Select the new location of the document
  (If you're using the foolproof method you won't need to do this)
- Edit primary document mapping
  Documents → Data Source Management → Edit primary document mapping → You can set alternative location for the HU to look for the document if it's not in the original location
- Reset last access information
  If the file sizes change Atlas will give you a warning. You can simply tell Atlas to ignore it (it sometimes happen with Word, even when you don't edit the file).
- Accessibility report
  If the document size changes Atlas will give you a warning. You can reset it and continue using the HU.

About the workshop facilitators
Yuki Kato and Danielle Rudes are both qualitative researchers who have used Atlas.ti for roughly two years. Together, Yuki and Danielle attended a two-day workshop with Woolf Consulting near Santa Barbra in December, 2006 to formally study Atlas.ti and all that the software has to offer. Since then, Danielle and Yuki have coded thousands of pages of data from their respective dissertation projects and have conducted several introductory and intermediate Atlas.ti workshops at the University of California, Irvine, George Mason University and the American Sociological Society's Annual Meeting in Boston, MA (didactic workshop) for interdisciplinary audiences. We welcome your attendance, participation and comments.

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Note **about copyright and licensing**
Yuki and Danielle contacted Atlas.ti's customer service division (in Germany) about copyrighted materials and to get their approval for our workshop. We received positive and encouraging responses from them regarding the workshop and our handouts.