

## Methodological Tips On The Use Of Memos

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QUARC specialises in methods and techniques of qualitative data analysis, especially in the area of computer-aided qualitative data analysis.

Susanne Friese has worked with software of such genre since 1992. In the US, she has worked with the developers of *The Ethnograph* at Qualis Research Associates. She has gained experience in training a number of qualitative software packages as a trainer in the CAQDAS networking programme at the University of Surrey in the UK between 1994 and 1996 (<http://caqdas.soc.surrey.ac.uk/>). Since 1996 she runs QUARC and provides software training and support. She has used ATLAS.ti in her own academic work at the University of Sussex, UK, at the University of Hohenheim, Germany, at the Copenhagen Business School and at present at the University of Hanover.

The purpose of memos in ATLAS.ti is to support you in your analytical work. This purpose is served best if memos, just like codes, are meaningfully structured and organized. Not infrequently, users ask us for advice about the best way to deal with their memos once they find their initial 500 pages of original data bloated by another 500 pages of memos.

This can be a problem, but it doesn't have to be--provided that you don't arbitrarily assign memos to data segments. "Arbitrarily" in this context means creating memos at will and at any time to record more or less thoughts of any kind.

### Tip #1

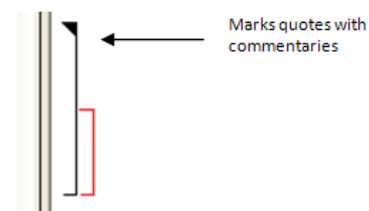
For example, you can create a memo for a text passage by selecting this passage and clicking on the memo symbol in the vertical toolbar. Technically speaking, this is one of several ways of creating a memo.

Methodologically, however, this is bound to quickly turn into a major pain. In all likelihood, this way of working results in a great many memos containing rather short texts over which it is easy to lose control and oversight. We therefore recommend:

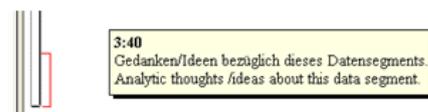
**Do not use a memo simply to comment on a data segment! Always utilize the "comment" field for quotations.**

For an idea or thought about a text passage which you would like to record, you should create a quote and add your idea or an analytical thought to the commentary field for this quote. Commented quotes are easy to retrieve and work on for the following reasons:

- They are marked by a tilde character ~
- The bracket marker in the margin area has a special special indicator (s. illustration).



- The annotation can be displayed by double-clicking on the bracket (s. illustration).



- All comments of quotes, including their annotations, can be output.

- The Object Crawler lets you target your search specifically to terms in annotations to quotes, i.e. in commentary fields of quotations.

### Tip #2

Give careful consideration as to which topics or questions you actually want to write memos on. Create these

memos, and only then link them to their pertinent data segments.

A typical way of proceeding would be, for instance, to create a memo for each individual research question (see illustration below). More comprehensive research questions should be broken down into more fractional ones. Once the data material has been coded, you can formulate specific queries in accordance with your individual questions. Information gleaned from these queries can then be written into the memo specific to this question.

Of course, insights about certain individual questions can also be gained during the coding phase. Temporal sequence is less important in this context than properly thematically assigning the various contents to the memos. The same holds true for data segments.

If you find data segments which in your view aptly illustrate the content of a memo and are possibly suited to become a direct quotation for the report, link these segments with the thematically pertinent memo (via Drag & Drop from the memo manager). Such a link prevents you from losing general overview. In this way, memos assume a „bundling“- or „container“-style function similar to those of codes. The name of the memo serves as a label or meta-title that represents the substance of the memo's subject matter. The memo content is what's important, while the linked data segments serve as illustrations.

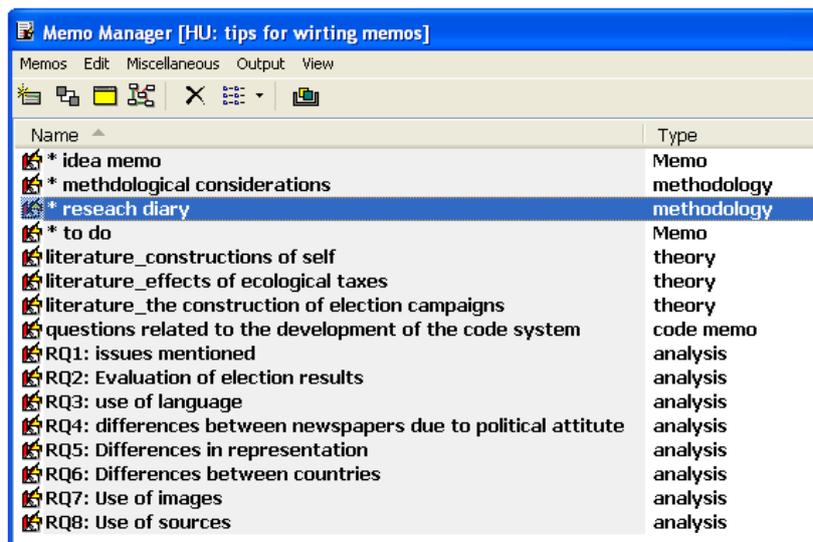
You can then output the content of the memo completely along with all supporting passages as an RTF file (Select OUTPUT / SELECTED MEMO WITH QUOTATIONS from the memo manager).

## Tip #3

**Utilize the letters and characters of the alphabet, and use abbreviations to structure organize and the list of memos.**

The illustration below shows the memo manager of „The Sample“ project. We have developed eight research questions for the sample project, each of which has been tagged with the letters „RQ,“ a number, and a brief description (e.g. “RQ1:Issues mentioned”). We created „analysis“ as a new memo type.

The illustration also shows a few examples of what types of memos might be particularly suited for being created as free memos initially. A suitable type was created based on the expected content.



We intentionally made use of the fact that the default sorting scheme of the memo list is by name, and thus made our research journal (“research diary”) appear in the first place of the list by marking it with an asterisk (\*).

We used abbreviations to keep memos with similar contents together. The ATLAS.ti memo function offers the possibility of sorting and filtering on the memo list by memo types. We also could have used the alphabet—same as

above--to the same effect of achieving structure, but a tad too much organization in this case is better than too little. The memo type does not lose its function in this case, as it serves not exclusively for sorting. It also provides us the opportunity to introduce an abstract level on which to conjoin memos with similar content. And it also can be used as a filter.

If, for example you wish to display and print only those memos that contain bibliographical reference, select the memo type as a filter that encompasses all bibliographical reference (here: MEMOS/FILTER/TYPE/THEORIE). Only memos of the selected type are being displayed, all other types hidden.

## Tip #4

**If the contents of a memo summarized the results of a search query, start the text of the memo with the actual query on which the following content is based. This greatly enhances the intelligibility of your analysis--to others and to yourself.**

Search queries can be based on the following functions:

Text search, either via the text search function or the Object Crawlers.

As a result of a simple retrieval in the Code Manager.

As a result of a complex search query in the Query Tool.

## Example

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Research Question 1: What were the formative experiences of the female respondents en route to achieving senior leadership status in multinational companies?

Query:

Codes: main category biography / filter set to PD Family "females"

In case your query is more complex than that, you may copy and paste the query from the query tool: ("b\_growing up" COOCCUR "b\_socialization") WITHIN "Support system\_general" / filter set to PD family "female"

It is important that you remind yourself of how you found the answer to your question AND to make it transparent to others reading or reviewing your research. Qualitative analysis does not all happen in a "black box;" we do ask real questions and query real data. We just have to remember to write down what we did.

## When Does It Make Sense To Create Memos For A Single Data Segment ?

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A code-and-retrieve approach can be combined with close analysis. In the course of such an analysis, only a few sentences or sequences are investigated very closely and in great detail. Sometimes the analysis of a single sequence takes up ten and more pages. In case like this we do recommend to create one memo per investigated sequence and to label this memo with a suitable name and type.

Information about the sequential analysis process in: Flick, Kardorff, Keupp, Rosenstiel and Wolff (eds.), *Handbuch Qualitativer Sozialforschung*, 1991.