

## Working Effectively With Memos In ATLAS.ti

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Researchers sometimes set out to analyze a few hundred pages of source material and quickly find themselves bogged down in just as many pages of their own analysis and reflection. This can be a problem, but it doesn't have to be. ATLAS.ti is designed to allow you to record your thoughts. The purpose of memos is to support you in your analytical work. While it may be tempting to create memos to record a wide variety of ideas, their overall purpose is best served if they, like codes, are meaningfully structured and organized.

Users frequently ask for advice about the best way to deal with their memos in ATLAS.ti. Here are some useful strategies we've compiled based on our experience and in conversation with our users:

### Tip #1

When you come across an interesting passage, your first impulse might be to create a new memo and begin writing. And this is easy to do: You can simply select a data segment, click on the memo symbol in the vertical toolbar on the left-hand side of the screen, and a new memo will automatically be created, opened, and linked to that portion of your document. Technically speaking, this is one of several ways to create a memo. Methodologically, however, this strategy is bound to produce some frustration down the road. In all likelihood, it will yield a large number of short memos that deal with scattered topics of varying importance. To counteract this tendency:

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[Do not use memos to record ideas for individual data segments! Use the comment function for quotations instead.](#)

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When you want to jot down an idea about a text passage, create a quotation and insert your thoughts in the comment field for the quote. Simply right click on the highlighted quotation (either the text or margin bracket) and select the option "Edit Comment".

In the Quotation Manager, the names of commented quotes are preceded by a tilde symbol (~); in the margin area, a triangle is displayed in the upper corner of the quotation bracket. This sample project contains a number of commented quotations. Try finding a few examples.

A comment can be displayed by double-clicking on the bracket in the margin area. You can also output and print all your comments, e.g., when creating a report for a code. Open the Output menu in the Code Manager and select the option Quotations for Selected code(s). You will then be asked whether to include all associated comments, memos or hyperlinks in the report.

### Tip #2

Identify your central research questions. Create memos for these topics. As these memos evolve, they can then be linked to pertinent data segments.

In this case, a typical way of proceeding would be, for instance, to create a memo for each individual research question. More comprehensive research questions should be broken down into subtopics. Once your data has been coded, you can formulate specific queries according to these specific questions. The information resulting from these queries, in the form of relevant quotations, can then be included in the memo pertaining to the research question.

Insights about individual research questions can, of course, also be gained during the coding phase. In this context, the temporal sequence of these steps is secondary to the importance of the proper thematic assignment of various contents to memos. The same holds true for data segments: when you find data segments which in your view aptly illustrate the content of a memo and are possible candidates for a direct inclusion in your final report, they can be directly linked to the thematically pertinent memo, e.g., via Drag & Drop from the Memo Manager. These links allow you to maintain a general overview. Thus, memos assume a "bundling" or "container" function similar to that of codes. The name of the memo serves as a label or meta title that represents the memo's thematic substance. Ultimately, the memo's content is what counts; the linked quotations serve to illustrate the ideas it contains.

You can output the content of the memo completely, including all supporting passages as an RTF file (in the Memo Manager, select: OUTPUT / SELECTED MEMO WITH QUOTATIONS).

### Tip #3

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

## Tip #4

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If the contents of a memo summarize the results of search queries, start the text of the memo with a precise formulation of your research question, followed by the actual query. Then record your thoughts on the matter, which can be revised and expanded in order to fully develop your answer over time. This approach can enhance the intelligibility of your analysis - to others and to yourself.

Example:

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"

If you are working with a more complex query (i.e. one which includes further variables), you also have the option to copy and paste the query from the query tool:

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(("b_growing up" COOCCUR "b_socialization") WITHIN "Support system_general") / filter set to PD family "female"
```

When working with your memos in ATLAS.ti, keep in mind that it is important to record the analytical and technical steps you took to arrive at your conclusions AND to make your steps transparent to others reading or reviewing your research. This is true for qualitative analysis in general; researchers' conclusions do not emerge from an impenetrable "black box." We ask real questions and query real data, the analysis of which requires careful recording and reflection at all points of the research process.

## Tip #5

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When does it make sense to create memos for a single data segment ?

A code-and-retrieve approach can be combined with close analysis. In the course of such an analysis, only a few sentences or sequences will ultimately be investigated in great detail. At times, the analysis of a single sequence can even take up ten and more pages. For these data segments, we do recommend individual memos with suitable titles and type assignments.