ATLAS.ti 7 Quick Tour

Revision 27

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Objectives

Perhaps you have just downloaded the trial version of ATLAS.ti 7 because you are generally curious about its possibilities. Or you are evaluating different software packages for qualitative data analysis. Or maybe you just purchased ATLAS.ti and are now eager to take your very first steps with the program.

The ATLAS.ti 7 Quick Tour was designed with users like yourself in mind!

Its main objectives are to provide an initial orientation for working with our software, quickly acquaint you with its most important features, and demonstrate some of its typical applications.

The tour begins with an overview of the ATLAS.ti user interface and demonstrates typical methods for working with the various file types supported by ATLAS.ti.

We will introduce the essential processes of coding, memo writing, data retrieval, working with variables, building networks and creating reports. Along the way, you will get to know some special options such as how to prepare and import survey data and how to work with associated documents.

This tour will provide step-by-step guidance through typical project phases, from project setup to coding, managing, and querying your data.
Basic Concepts

ATLAS.ti – The Knowledge Workbench

The image of our software as a “knowledge workbench” is more than just a lively analogy. Analytical work involves tangible elements: research material requires piecework, assembly, reworking, complex layouts, and some special “tooling”. A well-stocked workbench provides you with the necessary instruments to thoroughly analyze and evaluate, search and query your data, to capture, visualize and share your findings.

Software for Creative Analysis?

Your typical project deals with sifting through large sets of diverse documents, notes, and multi-media files, and examining and comparing such sources with regard to a specific line of inquiry.

While the technical side of selecting and organizing useful portions of your data might seem manageable when dealing with just a handful of source documents, it can tend to become overwhelming as the number of sources mount.

Enter a specialized software package like ATLAS.ti: It lets you extract, categorize, and interlink data segments from a large variety and volume of source documents. Based on your analysis, the software supports you in discovering patterns and testing hypotheses. With numerous output options and collaboration tools, your analysis is easily accessible to yourself and others.
Some Basic Terms and Concepts

To understand how ATLAS.ti handles data, visualize your entire project as an intelligent “container” that keeps track of all of your data. This container is the ATLAS.ti project file, called the Hermeneutic Unit or HU for short.

The HU maintains the pathways to your source data and stores the codes, code families, network views, etc. that you develop in the course of your work. Your data sources, except when explicitly working with embedded documents, are copied and stored in a repository. Different from Version 6, you no longer have to take care of document management yourself. The standard option in ATLAS.ti 7 is to manage the documents for you. Nonetheless, the option to link external documents is still available and recommendable if you work with larger video files.

Your source data can comprise text documents (such as interviews, articles, reports); images (photos, screen shots, diagrams), audio recordings (interviews, broadcasts, music), video clips (audiovisual material), PDF files (papers, brochures, reports), and even geo data (locative data using Google Earth).

Once your various documents are added or linked to an ATLAS.ti project, your real work can begin. Most commonly, early project stages involve coding different data sources.

Coding is the basic activity you engage in when using ATLAS.ti and is the basis of everything else you will do. In practical terms, coding refers to the process of assigning categories, concepts, or “codes” to segments of information that are of interest to your research objectives. We have modeled this function to correspond with the time-honored practice of marking (underlining or highlighting) and annotating text passages in a book or other documents.

In its central conceptual underpinnings, ATLAS.ti has drawn deliberately from what might be called the “paper and pencil paradigm.” The user interface is designed accordingly, and many of its processes are based on—and thus can be better understood by—this analogy.

Because of this highly intuitive design principle, you will quickly come to appreciate the margin area as one of your most central and preferred workspace—even though ATLAS.ti almost always offers a variety of ways to accomplish any given task.

* * *

Equipped with this basic knowledge, you are now definitely ready to get your feet wet and get acquainted with ATLAS.ti.
First Steps

To get acquainted with ATLAS.ti 7 quickly, you will be working with a sample project that we have already created for you to experiment with.

The sample project has already been copied to your computer during program installation. You’ll find it under the Help Menu. It is also available online for download at http://www.atlasti.com/samples.html

The Sample Project

When searching for suitable example data for this Quick Tour, we happened upon an article on the topic of children and happiness, written by Nattavudh Powdthavee in the journal The Psychologist. Nattavudh reports on a number of academic studies that repeatedly found a negative correlation between having children and the parents’ levels of happiness, life satisfaction, marital satisfaction and mental well-being. These are on the one hand provocative findings if you are a parent yourself; on the other hand they add fuel to the fire for people who have decided purposefully against parenthood (“I knew it all along.”).

In any case, no matter on which side of the issue you stand, the article and the various reactions to it (in the form of blog discussions) promised to be interesting material for a sample study. It will let you code the various blog posts and offers a variety of opportunities to try out many of the powerful analytic functions ATLAS.ti brings to the task.

Content

In addition to the journal article itself, two comments from bloggers and two blog discussions are included. The sample also contains a short video that lets you explore how ATLAS.ti 7 handles video data. The video is associated with a “transcript” to demonstrate the synchronized document feature. The images in the sample project were created as snapshots from the video file.

Furthermore, some fictional survey data are available via the Help/Open Quicktour menu. The survey data contains answers from 24 respondents to two open-ended questions: Reasons for having and for not having children. The socio-demographic characteristics of the respondents like gender and profession plus two answers to yes/no questions are represented via so-called primary document families after import. You will import the survey data yourself as part of the quick tour.

Starting ATLAS.ti

Start ATLAS.ti by going to Start/Programs and selecting Scientific Software/ATLAS.ti 7. Or double-click the ATLAS.ti shortcut on your desktop if you selected this option during installation.

![Figure 1: Starting ATLAS.ti Version 7](image)

If you open ATLAS.ti for the first time, the Welcome project opens. To load the welcome document, click on the drop-down arrow in the P-Docs list field and select the P1: welcome.png.

![Figure 2: Loading a primary document](image)
The welcome document explains the most essential features of the program at a glance to help you get started:

(You can also load the Welcome project manually: Go to Help / More Resources / Open Welcome Hu).

Now, it is time to get acquainted with the ATLAS.ti user interface. The best way to do this to follow a sample project that we have already prepared for you.

To load the sample project, go to the Help menu and select Quicktour / Load “Children & Happiness Stage I”:
The ATLAS.ti User Interface

The main area of the HU Editor displays the ATLAS.ti logo, a background image, and some licensing information.

At the top of the screen, you see the title bar where the name of the current project is displayed.

Immediately below the title bar are the main menu and the horizontal tool bar, which contains a number of shortcut icons. Below the icons are four drop-down lists for the four main object types in ATLAS.ti (from left to right):

- Primary Documents or P-Docs
- Quotes or Quotations refer to selected data segments
- Codes
- Memos.

On the right hand side, you see a plus sign that opens up three more regions for the display of documents. Thus, you can view (and work on!) up to four documents side-by-side.

You can view the objects listed in the drop-down lists by clicking on the small arrow to the right of the list. All primary documents are numbered consecutively, i.e.: P1, P2, P3, etc., followed by the name of the document.
Clicking on an item in the list will load a document’s content into the HU editor.

Click on the down arrow and select “P1: Powdthave's article ....” to load it into the HU editor.

To the right of the document, the margin area is visible. For now, the margin is empty; however, it will gradually fill up as your work progresses. To adjust the size of these two main panes (the document pane and the margin area), the window splitter can be moved from right to left as needed.
Working with the navigation pane

Open the side pane at the left hand side of the editor:

![Image of navigation pane]

*Figure 7: Accessing the navigation pane*

Since nothing is coded yet, you only see entries for primary documents and memos. Panes can be closed and opened as needed.

Double-click on a document entry to load it into the first document region. This replaces the currently loaded one.

![Image of document list]

*Figure 8: Working with the navigation pane*

Use the search field to search for a specific item. This is especially useful if you work with lots of documents or later have a long list of codes or other objects.

Switch to **View mode** by right-clicking on an object in the list to see preview images for each document. This provides a good overview if you work with different media types and is especially helpful when analyzing lots of image data (see Figure 9).
Loading multiple documents side-by-side

Drag a document from the navigation pane onto the region button at the right hand side of the HU Editor to load a second document. Or click on the region button first to open a new region and then drag a document in the empty region pane.
The PD bar is yellow to indicate the current active document. All inactive PD bars are gray. You can turn an inactive document into an active one by either clicking on the gray PD bar, or simply click inside the document pane of the inactive document.

If you only want to compare the documents without seeing the margin area, you can switch the margin area off by selecting the main menu option **VIEWS / MARGIN AREA**. This switches the margin area on or off for the currently active document only.

If you want to change the position of the documents, click on a PD bar and drag & drop it into the desired document region.
Viewing Your Files – The Primary Document Manager

In addition to the options provided by the navigation pane, you can also open a list of all documents in a separate window called the **Primary Document Manager**. This manager contains a number of additional functions.

To open the Primary Document Manager, select the main menu option **DOCUMENTS / PRIMARY DOC MANAGER** or click on the P-Docs button to the left of the drop-down list.

![Figure 12: Primary Document Manager](image)

On the left hand side, you see an optional side panel that shows the existing document families. Families are a device in ATLAS.ti that allows you to group objects. In Figure 13 above, you see three families: One that contains all documents that tell you something about happiness, one that groups the two blog discussions, and one that includes the research article and the two comments on it.

On the right hand side of the window you see the list of documents that have been added to the project. All documents that show a tilde (~) at the end of the name have been commented. For P1, for example, the bibliographic reference for the article has been put into the comment field.

If you double-click on a document, it will be loaded into the active region. You can also drag and drop documents from here onto the various region buttons.

If you click on a family, the list only shows the documents of that family. Note that the family is displayed in bold characters and the icon is emphasized:
Click on **Show all Primary Docs** to view the full lists of documents again. Let’s explore the **View** options a bit further.

You can activate or deactivate the side panel: **View / Show side panel**.

As already shown for the navigation pane, you can also view your documents as tiles: **View / Tiles**. The standard option is to see thumbnails. But you can also increase the size by selecting **View / Set image size**.

Set the size to **Extra Large (128 x 128)**.

Next to each tile, you find further information about the document; its type, the families it belongs to and the number of coded segments (quotations).

Play around with the various view options.
Associated Documents

Associated documents were first introduced in ATLAS.ti 6 and can be used for text, audio and video files. The purpose is to link a text document, e.g. a transcript of an interview, to an audio or video file via time marks. You can then listen to the original audio file or watch the video while you go through the transcript. Or you can select a piece of the transcript, e.g., a coded segment and immediately play the associated audio or video segment. You may also use the time marks to navigate through a document.

To make this option even neater, you can now view the two associated documents side-by-side. When you load a document that has an associated file, then a red circle is shown in the PD bar.

The P-Docs Manager should still be open on your screen. Load the video document “P6: Happiness proverbs of famous people” by double-clicking on it in the P-Docs Manager.

![Figure 15: Click the red dot to load the associated document](image)

Close the P-Docs Manager.

Deactivate the margin area so that the associated document will be loaded right next to it: **Views / Margin Area** (see page 14).

Click on the red dot; the associated document is loaded into the document region next to it:
Highlight one of the associated paragraphs, e.g. the one starting with *Happiness is a way to travel...* and use the shortcut option Ctrl+P to play the associated video segment (or select **Documents / Associated Docs / Play Selected Text**).

To get an overview of the association points that have been set, open the Association Editor: **Documents / Associated Docs / Edit Association.**
Change the display option so that the entire associated section will be highlighted: Select **Text / Highlight Section**.

Left click on the various association points. Notice that the play head moves to the associated point in the video and that the associated text segment is highlighted.

To find out more about how to associate documents and how to transcribe in ATLAS.ti, please take a look at the full manual.
We are now going to code our first document, in this case a text file. But following that we’ll also try coding video and image files, and you will see how fast and easy it is. While the principles of coding are pretty much the same for any type of document type, there are certain techniques and specialties specific to each type that you should be aware of.

Coding a Text Document

Close one of the two currently loaded documents; then load P3 into the editor by selecting it from the P-Docs drop-down list.

Activate the margin area again. This time by clicking on the margin area button in the vertical tool bar.

Use your mouse to highlight the first sentence beginning with “I was happy before I had kids....” and right-click on the selected text.

Select **Coding / Enter Code Name(s)** from the context menu.

Enter “no effect on happiness” and click on the OK button. The coded segment is displayed in the margin area. A bracket marks the size of the coded segment (= quotation) and the code name appears next to it.

*Figure 19: The coding menu*
Next highlight the remaining part of the paragraph starting at “However...,” and ending with “... irresponsibility.”

Here we find at least two issues to code. Right click again on the highlighted piece of text. Select CODING / ENTER CODE NAME(S). Now enter the following codes:

- parenting is hard work
- effects of parenting
- narcissistic culture

![Figure 20: Entering code names](image)

You can either use the down arrow to move one field down or click with the mouse into the next field. When you are done entering code names, click on the OK button.

The document and the margin area now looks like this:

![Figure 21: Coded data segment](image)

Take a look at the drop-down lists for quotes and codes. Some new entries are visible in each list.

![Figure 22: Quotation drop-down list](image)

The drop-down list for quotes shows that two quotations have been set. Each quotation has an ID which consists of the number of the primary document—in
this case, “3” for P3—and a number indicating that these are the first and second quotation, respectively, that were created in this document. For textual quotations this is followed by the first thirty letters of the quotation.

If you open the Quotation Manager with a click on the button “Quotes”, you find further information like the codes that have been applied, the document name, the position of the quote within the document, the coder who has created it, and so on.

![Figure 23: Quotation Manager – View in Details mode](image)

The drop-down list for codes shows the list of codes that have been created so far. The first number in the brackets indicates the frequency (how often a code has been applied); the second number, currently all zeros, shows the number of linkages between codes. The first number is also referred to as “groundedness,” the second as “density.”

![Figure 24: Code drop-down list](image)

As for quotes, there is also a Manager for codes (click on the “Codes” button), which provides more detailed information:
Coding an Image Document

Load an image document (e.g. P8 or P9), select a rectangular area, right-click inside the rectangle, and select **Coding / Enter Code Names** from the context menu. Enter a code name.

![Figure 25: Code Manager - View in Details mode](image)

To write a comment, right-click on the rectangle and select the option **Edit Comment**. An editor opens.

![Figure 26: Coded image segment](image)

Write something about your personal association with the image. Press **Ctrl+S** or click on the check-mark to save the comment. Close the editor.
The quotation number and comment bar are optional display features. They can be turned on and off via the context menu.

The look of the quotation bar in the margin area changes if a quotation has been commented. This applies to all media types.

To modify an image quotation, double click inside the rectangle so that you see the green lines and dots at the four corners. The dots act like handles and you can use them to resize the quotation.

Adjust the quotation to the desired size and then click on the “modify quotation” button on the vertical tool bar (see left).
Coding an Audio or a Video Document

Load the video primary document “P6: Happiness proverbs of famous people.”

If you move the cursor inside the video pane, the media controls appear and you can start, stop and pause the video, skip forward and backwards.

At the right-hand side, preview images are displayed. To create the images, one frame per second is selected. The size is up to 50 x 50 pixels. When you add a new video to a project, you do not see the preview immediately as the images first need to be created.

Next to the preview images you see the audio wave form.

If you right-click on the video preview, you can set a number of display options in the context menu.

Two orange sliders that appear when you move the mouse pointer over the full preview let you select just the section of the video that you want to see in the margin area (see Figure 30):

Figure 29: The various aspect of a loaded video document

Figure 30: Selecting the section of the video to be visible in the margin area.
To code a video segment, move your mouse pointer on top of the audio wave and mark a section by clicking on the left mouse button where you want it to start. Then drag the cursor to the end position.

If you want to preview your selection click on the “play current selection” button.
Right-click inside the selection to code the segment (**Coding / Enter Code Name(s)**), for example use the code name “how to achieve happiness”.

![A coded video segment](image-url)

*Figure 33: A coded video segment*

A new quotation will be listed in the Quotation Manager with the ID 6:1. The default name for audio and video quotations is the document name. Each quotation can, however, be renamed. Right-click on the quotation bar in the margin area or on a quotation in the Quotation Manager and select the option **Rename**.

If you want to move the play-head to the beginning of an existing quotation, hold down the Ctrl-key and click on the quotation bar.

![Moving play-head](image-url)

*Figure 34: Positioning the play-head at a beginning of a quotation*

### Adjusting the size of an audio or video quotation

To adjust or change the length of the quotation, drag the start or end position to the desired place and click on the “modify quotation” button in the vertical tool bar on the left hand side of the screen (see Figure 49).
You can also use the play-head to adjust the size of a quotation: Position the play-head at the desired position. Hold down the SHIFT-key and double-click on the area above the play-head if you want the start position to change. Double-click on the area below the play-head to change the stop position.

To modify the length of the quotation, click on the “modify quotation” button.
Coding a PDF Document

Load P1 by selecting it from the P-Docs drop-down list.

PDF documents can either be displayed in single page or in continuous mode. You can switch between the two modes by clicking on the Size pane in the status bar at the bottom right hand side of the window.

Here you also find further options to resize the PDF document, to enlarge and to shrink it or to lock it to the size of the Window.

Click on the right or left arrows to move one page back or forward.

Click on the Page button to jump to a specific page of the document.

Coding a PDF document is essentially the same as coding *.rtf, *.doc or *.txt files. Only, selecting a text passage in PDF documents does require just a bit more practice, and perhaps finesse. Placing your cursor too far to the left of the text, will result in the selection of a rectangular graphical image instead of the actual text segment. This particular technique is useful when you wish to code images or part of an image in a PDF document.

To select a string of text, place the cursor directly to the left of the first letter.

Try coding a few text passages in the PDF file.
Now experiment with selecting a graphical image in the PDF file: Select and code the picture of the inserted quote.

The green handles help you in adjusting the size of a textual or image PDF segment.

Assigning Existing Codes

By now you have entered a number of codes and may want to begin to assign some of your codes to other text passages. The easiest way to do this is by using the Code Manager.

Open the Code Manager by selecting Codes / Code Manager from the main menu. Or click on the Codes button next to the drop-down list for codes.

In the manager, you will see a list of the codes that you have already created together with some additional information (see Figure 48).

On the left-hand side you see a pane for code families. Since none exist, we can close this pane: View / Show Side Panel.

For the purpose of coding, it is best to use the single column view: Select the option: View / Single Column.

Position the document pane and Code Manager so that the text occupies about one third of the screen. Leave some space at the right to view your codes in the margin area. Position the Code Manager at the far right of your screen.
In this view, the names of codes are followed by two numbers just like we have already seen in the list field. A quick reminder: The first number tells you how often a code has been applied; the second number refers to the number of links between it and other codes. How to link codes is described in more detail in the section on network views below.

In order to assign an existing code, highlight a piece of text, select the appropriate code in the Code Manager, and drag & drop it into the document pane.
When you code text, there is no need to drop the code onto the highlighted area. You simply have to drop in on the left hand side of the windows splitter. Whatever is highlighted gets coded:

![Figure 41: Drag & drop coding II](image)

Just dropping the code without having to pay specific attention to the highlighted area is easier on your wrists and less tiring for your eyes, given that you may code for a longer period of time.

Retrieving Coded Data

To retrieve coded quotations, double-click on a code in the code manager that has been applied more than once. A list of the code’s quotations will appear and you can browse through the quotations and view them in their respective documents (simply click on a quotation to view it in its original context).
If a code has been applied only once, the coded passage will immediately appear highlighted in context; audio or video segments will be played automatically.
Comments and Memos

All objects in ATLAS.ti can be commented. As you have probably guessed, a comment is a short note.

Comments are always tied to other objects; they never stand alone. Memos, on the other hand, are independent objects that can be linked to other objects or used as free, stand-alone memos. Memos can also be assigned as primary documents.

Given these considerations, you can see that comments and memos serve clearly different purposes.

Comments can be written for all object types. Here are the most common types and their most typical uses:

- **Comments for P-Docs**: Meta information about the document, e.g., a source reference, comments on an interview situation, etc.
- **Comments for quotations**: Notes on a particular quotations, thoughts that occur during analysis, descriptions of video quotations, etc.
- **Comments for codes**: Code definitions, coding criteria for a particular code.
- **Comments for the HU file**: Comments for ATLAS.ti project files can contain project descriptions.
- **Comments for network views**: Network view descriptions.
- **Comments for “families”**: Descriptions of object groups.

More on memos below.

Writing Comments

Close the Code Manager.

Open the P-Docs Manager. There you will see that nearly every document has already been commented. Comments are indicated by the tilde symbol following each object title (~). You can read the comment in the bottom manager pane.

Browse through some of the comments and then close the P-Doc Manager.
Open the Code Manager, select a code and write a definition for this code. The comment is automatically saved if you click on another code in the list. Close the Code Manager.

Next, we will see how to write a comment for quotations. Select the video PD P6 and click on the code “how to achieve happiness” in the margin area, this will highlight the corresponding data segment in the primary document. Right-click on the highlighted blue area and select the option Edit Comment from the context menu.

This causes a text editor to appear in which you can enter a comment for the quotation. When working with video data, this might be a place where to transcribe the spoken text, or where to describe the video segment, write an interpretation for this data segment, or as in the case of the sample data, the text that is displayed in the video image.

Save the comment by clicking on the Save button or select Comment / Save from the editor menu and close the window. The quotation bracket in the margin will now appear with a triangle in its upper corner. If you open the Quotation Manager, the quotation’s name will be preceded by a tilde symbol.

You can create an output of all commented quotations or include objects’ comments in other output forms.
Finally, take a look at the HU comment written for this sample project by clicking on the speech balloon icon in the main tool bar.

Figure 45: Writing a comment for your project

Writing Memos

Open the Memo Manager and select the option **MEMOS / CREATE FREE MEMO**, which will cause the Memo Editor to appear.

Enter a concise, useful title in the first entry field to replace the default heading (e.g. Software Evaluation). Select an appropriate memo type in the second entry field, or add a new type as needed, e.g. “Analysis.”

To begin this memo, you can enter the current date and time by pressing Ctrl+D. Now, write a few sentences about what you have learned about ATLAS.ti so far:

Figure 46: The memo editor
Save your entry by pressing Ctrl+S or by clicking the Save button. Close the memo editor.

Now create a second memo. This time open the Memo Manager first. Select **MEMOS / CREATE FREE MEMO** from the Memo Manager’s menu. Enter a title such as: “Attitudes about parenting” and save the memo.

If this sample project were fully coded, you could call up all data segments where people talk about their experiences of parenting and what they think of it. Your analysis can be written up in a memo. Let’s pretend that this has already happened; you have written this memo and now want to link it to a quotation that supports your analysis. This means save your newly created memo and close it. It will then show up in the list of memos in the Memo Manager.

To attach this memo to a coded text segment: Open P3 and click on the code of the segment that we have coded with “parenting is hard work”. The corresponding quotation is now highlighted. Drag the memo over the windows splitter to the left hand side of the window. Drop it somewhere in the document area, just as you did to code data using the Code Manager.

*Figure 47: Display of memos in the margin area*
Grouping Documents, Codes and Memos

Depending on your data, you may want to include a comparison of different groups based on categories such as gender, profession, age, income, location, as well as data types and sources.

ATLAS.ti offers a feature that allows you to group your documents according to the criteria you specify: the “Document Family.” In similar programs, this goes by the name of “variables” or “data attributes.” Nevertheless, as we see it, the term “family” is a suitable analogy with regard to its functionality in ATLAS.ti; as in life, so in ATLAS.ti: Complex, multiple memberships are a reality. Thus, you can group a single document with multiple families. For instance: “Gender:: female” / “Profession:: teacher” / “Age group:: 31 - 40”, and so on.

Similarly, you can also group codes and memos by creating code and memo families. Families are not available for quotations, as codes are the grouping device for quotations.

In order to create families, you can either use the family managers, or the side panels within Managers. Below we will show you both ways.

Using the Family Manager to Create Families

Close all currently open windows.

To create a document family, select the option Documents / Edit Families / Open Family Manager from the main menu. To create a code family, select Codes / Edit Families / Open Family Manager. To create memo families, you find the same option under the main Memos menu.
The PD Family Manager already contains three families. Click on the first family “*about happiness” to see its five members.

If you double-click a family, you set it as filter. The family icon changes and shows the filter icon. All affected manager buttons are colored in yellow (see Figure 49).

Deactivate the filter by double-clicking on the family name again.

The three family names start with an * in order for them to be listed on top. A bit later we will import survey data and then many more families are created. Due to the asterisk in front of the name, the manually created families remain on top of the list.
Create a new family by selecting the option **Families / New family** or click on the button for creating a new object (see left).

Enter a name of your first ATLAS.ti family, for example “Belkin’s parenting blog” for starters. Click OK.

Highlight the newly created family. Then select P2 and P3 in the list of all documents at the bottom right of the Family Manager. Next, click the button with the arrow pointing to the left to add these documents to the Belkin’s parenting blog family.

As we have seen already, document families can be used as filters, for example to create an output of only a particular subset of your data. They are also very useful when used in combination with the query tool to hypothesize about your data. These features will be explained when exploring the ATLAS.ti analysis tools.

If you are not sure whether a filter is still activated somewhere, select the main menu option **Tools / Reset All Filters**.

**Making Use of the Side Panel to Create Families**

As above it has been explained how to create a PD family using the family manager, next it is explained how to create a code family using the side panel. All types of families can be created in both ways.

To create a new code family, open the Code Manager and activate the side panel: **View / Side Panel**.

Select the codes that you want to include in the family using common Windows selecting techniques (either by holding down the Ctrl- of Shift key).

Drag and drop the selected codes to the side panel, or right-click in the side panel area and select the option **New from Selected Items**. Enter a name for the new family and click ok.
Deleting a Family

You can delete families either in the Family Manager, or in the side panel.

To delete a family in the side panel, select it, right click and select the option DELETE FAMILY.

Figure 52: Side panel context menu
Adding Survey Data to a Project

These days a lot of surveys are conducted online. A positive side effect is that (a) all data is immediately available in digital format and (b) respondents often do write lengthy answers to open ended questions. But even if you work with surveys from the “analog” world, chances are, they will end up in an Excel™ spreadsheet at some point. Regardless how your surveys originate, ATLAS.ti can handle them once they exist in that format.

A typical work flow for working with survey data looks like this:

![Work flow for survey import](image)

Online surveys can be created using a number of tools. What most of these tools have in common is that the let you export your data as Excel™ file. And this is what you need to prepare for import in ATLAS.ti.

You can download an example Excel via the Help menu: Help / Open Quicktour / Open Quicktour Survey Data.
Preparing survey data for import

Based on specific prefixes that you add to your variable names, ATLAS.ti interprets the column headers and cells of the Excel™ table in different ways and turns them into primary documents, the content of primary documents, primary document families, quotations, codes, comments and code families. Sounds complicated, right? Not so – just follow along, it is actually very easy!

Data are imported case-based. This means each row of the Excel™ table that is imported from the online survey tool is transformed into a primary document.

In addition to the answers to open ended questions, socio-demographic information like age, profession, or age group, answers to single choice questions (yes/no, or offering more than two options) and answers to multiple choice questions can be imported. Within the framework of ATLAS.ti these are mapped in the form of PD families, one family per value.

- ! the name in the cells is used as primary document name
- ^ name used in the author field per document
- : a colon indicates to ATLAS.ti to turn the information in the cells into a family. As all families are dichotomous (0/1), a family is created for each value. For example, the information written in the column :Gender is turned into two families with the names: Gender::male and Gender::female. The information in the column with the header :has children is turn into the following to families: has children::no and has children::yes. The variable education is treated in the same way.
- . can be used for questions coded with 0 and 1. A PD family is only created from answers coded with 1. Thus, when importing the sample survey table, we get one family that includes all respondents who have answered the question: “Do you think that children bring happiness?” with yes, and one that includes all respondents who have answered the question “Do you think children bring fulfillment and purpose?” with yes.

Figure 54: Preparing survey data for import
Adding Survey Data to a Project

All entries without a prefix notation are interpreted as codes and the text in the cells as content for the case-based primary documents. In the example shown in Figure 55, the column headers 'SQ1: Reasons for having children' and 'SQ2: Reasons for not having children' are used as code names.

If the question is longer and a short form is not sufficient, then the full question content can be added as code comment. For example, when using the column header 'Question 1:: Please write down reasons why you want to have children', Question 1 is used as code name and the text after the two colons is used as code label.

You can import tables in xls or xlsx format. In case you experience a problem, save the table in .csv format and try again.
Importing Survey Data

If you haven’t done it yet, download the sample survey data via the following menu option: **Help / Open Quicktour / Open Quicktour Survey Data.** Save the file somewhere on your computer.

From the main menu select **Project / Add document(s) / Import Survey Data.** Select the Excel file to be imported and click the Open button.

Now the import procedure starts. ATLAS.ti informs you when the data import is finished—you will be surprised how quickly even large surveys are processed.

In addition to the information the user has put into the Excel table, special families are created for all imported survey documents and codes. These make filtering the survey material easy.

Open the P-Docs Manager and take a look at what has been added to the project:

![Primary Doc Manager after survey import](image)

**Figure 57: Primary Doc Manager after survey import**

To take a look at the precoded data, load P11.

In addition, open the Code Manager and double-click for instance on the code ‘**SQ1: Reasons for having children**’. A list of all coded segments opens and by clicking through the quotations in the list, you can read all answers to question 1.
If you want to output all answers to question 1, select the code and then the menu option **Output / Quotations for selected code(s)**. Send the output to: **Editor**. Review the output content and close the editor.

Further analysis options are discussed in the next section.
Exploring and Querying Your Data

To follow the Quick Tour from this point onward, now open the pre-coded sample project entitled “Happiness & children Stage II” via the Help menu.

There are a number of ways to query your data. Four are discussed below.

• Simple retrieval
• Complex retrievals with the query tool
• Codes-Codes Matrices (the Cooccurence Explorer)
• Codes-Documents Matrices (the Codes-Primary-Documents-Table)

In the Memo Manager you find a number of questions that could be asked about the sample data set.

Simple Retrieval

The classic approach is to use the categories created in the course of your analysis: The researcher might formulate different questions pertaining to a specific code. You are already familiar with this retrieval option: Double-click on a code in the Code Manager to call up a list of its quotations.

To create an output of coded quotations, select one or more codes in the Code Manager, for example select the code “def happiness: fulfillment”

From the Code Manager’s menu, select **Output / Quotations for Selected Code(s)**. In most cases, you have four options:

![Output options](image)
Select Editor to view the output in a rich text editor. After having reviewed it, you can still save it from there or print it.

Complex Retrieval

For more complex retrievals based on multiple codes, use the Query Tool: Select the main menu option **Analysis / Query Tool**.

For example, we can take a look at the code “*def happiness: fulfillment*” (respondents who define happiness as fulfillment) and inspect whether the responses are different dependent on whether someone has children or not.

Double-click on the family “*def happiness: fulfillment*”. Double-click on the code “*#fam: has children*”. Then select the COOCCUR operator.
The results for this query are shown in the result pane. The number of results is shown in the bottom left corner of the window. To display the results in context, click on each quotation.

To create an output of these results, click on the printer button. Try experimenting with the different output options.

Let’s enter the comparison query: Click on the button C (CLEAR) at the top of the query tool. Double-click on the family “def happiness: fulfillment”. Double-click on the code “#fam: no children”. Then select the COOCCUR operator. The result pane shows 1 quotation.

Comparison by Groups

The Scope button in the Query Tool allows you to combine code queries with variables. Let’s for example compare blog responses with survey responses:
Double-click on the code “reasons for hc: altruism” (altruism as reason for having children). This results in 16 quotations.

Click on the scope button in the query tool. This opens the Scope of Query window.

Position the Scope of Query window next to the query tool and double-click on the Primary Doc Family: *blogs*.

The filtered results, 13 quotations, are shown in the result pane of the query tool.

Now click on the Primary Doc Family: imported survey data. This time the result pane only shows 3 quotations.

Try another comparison, now comparing male and female responses from the survey: Double-click on the code "reasons for nhc: self-centered" (being self-centered as reason for not having children). Select as scope Gender::female and read through the resulting 7 quotations. Then select the scope Gender::male and read through the resulting 6 quotations.

Remember you can view the quotations in context by double-clicking on them in the result pane. Or create an rich text output by clicking on the printer button.

Are the responses similar or different?
**Code Cooccurrence Tools**

Close the Query Tool window.

The Cooccurrence Explorer allows to ask a different type of questions. Using this tool, you can ask ATLAS.ti to show you all codes that co-occur across all of your primary documents. The result is a cross-tabulation of all codes.

Instead of cross-tabulating all project codes, it is often more meaningful to apply filters for certain codes and documents in order to concentrate on a more specific set of concepts. The output of the Cooccurrence Explorer can be displayed in a tree view or as a data matrix.

Let’s take a look at the code-code matrix for this sample project. A special code family as been prepared for this exercise that helps us to gain an overview of the responses regarding the question why or why not having children voiced by parents and non-parents. The family contains the two attribute codes (#fam: has children and #fam: no children) plus all sub codes of the two categories “reasons for having children” and “reasons for not having children”.

First we need to set this family as filter: From the main menu select: **CODES / FILTER / FAMILIES**: “for Quick Tour: Cooccurrence Example”. After setting a filter, all effected fields are shown in a pale yellow color.

From the main menu select **ANALYSIS / CODE COOCCURRENCE TABLE**.

Next you need to select which codes should be displayed in the rows and which in the columns:
Select the #fam: don't have children / have children and the blog entry codes as columns and all other codes as rows.

Figure 65: Selecting row and column codes
If you double-click on a cell, then the list of coded quotations opens. In case of overlaps, the list shows two quotations for one cooccurrence.

Click on an entry to see the quotation displayed in context.

In addition to the co-occurrence frequencies, it is also possible to display a coefficient value alongside. This is a measure of the strength between two codes. The coefficient values lie between 0 and 1. This for example is a valuable option of you work with a larger number of cases, e.g., when analyzing survey data.
Click on the c-coefficients button to view the coefficient values (even though they do not make much sense for this small data set). For a detailed explanation on how the c-coefficient is calculated, see the full manual.

Quantitative Retrieval in Excel Format

A number of functions let you output their results directly in an Excel table. Two of them are shown below.

For example, you can export the Cooccurrence Table that you just created to an Excel file.

In the Cooccurrence Table toolbar, click on the button: “Export the table to Excel” shown in the figure above. In the next menu, select the output option FILE & RUN (this refers to running whatever application is necessary to open this new file, not for you to make a swift getaway). Enter a new file name or use the default title; save the file and wait for it to load.

Another Excel output provided by ATLAS.ti is the Codes-Primary Document table. It lists the frequency of codes or code families by documents or document families.

Before running such an analysis, we should remove the global filter that is still set: Select TOOLS / RESET ALL FILTERS.

Next, select ANALYSIS / CODES-PRIMARY DOCUMENTS TABLE. This time, we want to compare statements that express either a positive or negative effect of parenting across different groups.

For this purpose two code families grouping all codes about positive and negative parenting effects have been created. Select these two code families from the list.

The documents and document groups we want to compare are:
• P3: Belkin's parenting blog discussion
• P5, the New York magazin blog discussion
• survey respondents with children
• survey respondents without children
• survey respondents that answered the question about happiness with either: “children bring happiness” or “children bring fulfillment”

On the right hand side of the window, set the options as shown in Figure 84 below.
EXPLORING AND QUERYING YOUR DATA

Click on the button **Create Report**.

Before the table opens in Excel, you will be asked to convert the exported results. Confirm the message.

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Across all groups, we find more negative than positive statements. While coding the data, this was apparent. But at the same time, an other interesting observation was that explanations on the hard part of being a parent was almost immediately followed by a “but”. This resulted in the following four codes: hard work but: a worthwhile trade-off / fulfillment / joy / rewarding. These four codes were grouped to a code family called the “the BUT group”.

Looking at the above results, the immediate next idea is to compare those people who expressed negative effects and those who expressed positive effects on the “BUT” codes. The query tool allows to create document families based on the results of a code query. These have already been created in this sample project.
So, the next table you can run is a table based on the codes from the BUT group comparing respondents that have reported positive or negative effects of parenting. Overlaps may possible exists, but these can be dealt with in later stages of the analysis.

The result table shows no difference between the two groups. Now it is up to you to interpret the findings. You are already in the midst of the analysis. Based on the information provided in the Excel tables, you can go back to the data in ATLAS.ti, read the responses behind the numbers, begin your interpretation and start to write analytic memos.
Network Views and Linking

Visualization can be a key element in discovering connections between concepts, interpreting your findings, and effectively communicating your results. Network views in ATLAS.ti allow you to accomplish all three of these important objectives. These small segments of your larger web of analysis are modeled using the Network View Editor, an intuitive workspace that we also like to think is easy on the eye.

Exploring Network Views

The next exercise requires that we work with data in a later stage of analysis, i.e., a project file that already contains some codes. Thus, we once again work with the stage II project. If not still open, click Help on the main menu and select the project "Children and Happiness - stage II" from the Quick Tour submenu.

Click on the main menu option Networks / Network View Manager. Select the first Network View in the list “Children + Happiness”.

Network views contain a wide variety of features and options. Here is just a sampling to get you started:

- Depending on your screen size, enlarge or maximize the network view and adjust it to the size of your window: Layout / Fit to Window.
- Move an object by selecting it and dragging it to different locations in the network view.
- Right-click on a code or a link to view a series of options in the context menu.
- Explore different options from the Display menu.

After you have experimented with some of these features, close the network view. Select No when asked if you would like to save your changes.

You can also access saved network views from the network button in the main tool bar. Select for example the hyperlink netview example:
The PD nodes of the included image documents have been sized to hold the full image. If you do not see the images, select Display / Fill image for PDs from the network view menu.

Previewing Network Views

The network view manager offers different views. One of them is a Tiles view. With preview sizes set to Large up to Godzilla, the standard icon turns into images.

- Open the Network View Manager (Networks / Network View Manager).
- Select View / Tiles and then View / Preview size: Jumbo. Or try out other sizes.
Creating your Own Network View

There are several ways to create a new network view.

You can start by selecting a view codes in the Code Manager. Then click on the network view button in the tool bar of the Code Manager. The network view editor opens.

Or: From the main menu select **NETWORKS / NEW NETWORK VIEW**. Enter a name for your new network. The network view editor opens. From the menu select **NODES / IMPORT NODES**. In addition to codes, you can select a number of other objects to be imported (see Figure 74 below).
Select a few codes to import and if you like also a few other items. You can also drag and drop items from the various manager or the margin area into a network view.

If you select items that already have been linked somewhere in your HU, the linkages will show up immediately. The number of linkages for codes and memos are indicated by the second number in parentheses.

For the example below, the main category codes C_CHILDREN, HAPPINESS, REASONS FOR HC (having children) and HARD WORK BUT.... have been selected as they are not linked yet.
Select a code. A red dot appears on the top left corner of the node. Click on the red dot with the left mouse button and drag the mouse pointer to the code that you want to link.

![Linking nodes](image)

*Figure 76: Linking nodes*

Release the left mouse button on top of the node. A list of relation opens consisting of the default relations plus the relations of the currently open projects.

![Selecting a relation to link two code nodes](image)

*Figure 77: Selecting a relation to link two code nodes*

Select one of these relations. Now the two codes are linked.

Repeat this process to link the other nodes in the network view as well (see Figure 78 below).

Specific relations with definable properties can be used for code-code links and for quotation-quotation links, i.e. “hyperlinks.” All other object relations are simple links with no attributes and are shown as a plain line (see the full manual for further detail).
Right-click on a named link to view some additional options. For example, you can add a comment to the relation or flip the direction of the link. This of course only applies to non-symmetrical relations. For symmetrical relations, such as “is associated with,” flipping the link will not make a difference. It is also possible to select a different relation or to cut the link.

You can create any number of new relations and change the properties of the links. The links can be displayed in different colors and widths. You need to open the Relation Editor to create new relations and to define or change properties (the last option in the list of relations, see Figure 77 above). Please consult the full manual for a step-by-step instruction.

The nodes can be displayed with or without bitmaps (see the Display menu). In addition, node labels or boxes can be shown in user-defined code colors. Click on the color circle in the tool bar.

Code colors can also be set in the Code Manager (look for color button as shown on the left hand side).

Exporting a Network View

Network Views can be exported as graphic files and inserted into other applications. Or you can copy and paste them straight into MS Word or PowerPoint files.

To save a network view as graphic file, select NETWORK / SAVE AS GRAPHIC FILE.

To paste a network view into other documents, select NETWORK / COPY TO CLIPBOARD (then all nodes, or only the selected ones). In Word or another application, you need to select the PASTE SPECIAL option to insert it.
Creating Reports

ATLAS.ti offers a number of reports via flexible XML/XSLT style sheets. If you are skilled in XSLT, you can create any output you like based on the raw XML file of your ATLAS.ti project.

To create a raw XML file, click on the XML button in the tool bar and then select the option Export HU to XML.

For all others, we have put together a selection of useful reports. Click on the XML button, or select Project / Export / XML Explorer.

The Explorer divides the available style sheets into three groups: Reports, Viewers, and Programming/Demos:

• **Reports** offer a number of predefined reports sorted by Codes, Families, Memos, Network Views, Primary Documents and Quotations.

• **Viewers** include style sheets that offer various display forms for the HU.

• **Programming /Demos** provide style sheets that may inspire and help you to write additional style sheets on your own to create just the report you want.

![Figure 79: XML Explorer](image_url)
The following predefined reports are available:

![Available Reports](image)

If you click on a report, a short description is provided in the comment field at the bottom of the XML Explorer window.

**How to create a report**

Select one of the reports and double-click.

A window opens offering the following three export options:

![XML export options](image)

The last option (also include quotations contents (as plain text)) exports the full content of the HU. This is however not always needed.
For exporting a code book, for instance, you only need to export the code names and comments. Therefore, selecting the first export option: **Do not include Primary Documents** is sufficient. If you are unsure how much information you need, you are on the safe side selecting the third export option (Also include quotations contents). It may just take a bit longer than necessary to create the report.

### Creating a Code Book

Double click on the report: **Codes: Code Book**.

Select the first export option: **Do not include Primary Documents**.

Then wait for your browser to open (see Figure 82).

![Figure 82: Code book report](image)

Try out some of the other options, e.g. Families: List of code families and their members, or the report: **Quotations: by Code**.
Setting Up a New Project

If you click on the file loader button or the main menu Documents / New / .... you find a number of options to add documents to an ATLAS.ti project:

- Adding documents to either My Library or the Team Library (see the full manual for further detail).
- Adding documents from the library.
- Importing documents that you have transcribed using the transcription software F4 or F5 (Mac). The transcripts are turned into an embedded documents and the associated media file are added to the library (see full manual for further detail).
- Importing survey data based on an Excel spread sheet. Case-based data are imported as embedded documents.
- Creating a new embedded text document.
- Creating a new Google Earth PD.
- Creating a Google Earth snapshot from the currently loaded GoogleEarth location as image PD.
- Assigning external (linked) documents. Please see the V6 manual for a description of various project setup options.

Single User Projects

Team project scenarios are described in the full manual.

Open ATLAS.ti and select Documents / New / Add Documents (My Library).

Before documents are added to your project, a quality check takes place.

If you want to add large-sized files (> than 170 hundred MB) you are asked whether you want to link them to your project rather than to add them to the library.
If audio files are saved with a variable bit rate, ATLAS.ti offers to convert them into files with a constant bit rate. This increases the precision of the quotations.

![Figure B3: File quality check during import](image)

After you have added documents to your project, save your project file, the HU, to any location on your computer or a server: **PROJECT / SAVE (AS...)**.

**Project Backup and Transfer**

To save your entire project to create a backup or for project transfer, you need to save a copy bundle file: **PROJECT / SAVE COPY BUNDLE**

See also: [http://www.atlasti.com/nl201301_bundle.html](http://www.atlasti.com/nl201301_bundle.html)

If you work with large-sized video files, make sure that you have sufficient hard disk space or work with linked documents.
And That’s a Wrap!

Congratulations, you have now reached the end of the ATLAS.ti Quick Tour. After working through these exercises, you should now have a reasonable grasp of the central concepts and functions of ATLAS.ti 7. You should be able to assess how powerful a tool it is, and have a good idea how productively it can be put to use in your day-to-day work.

We thank you for taking the time to get to know our product and hope that this demonstration of its core functionality has convinced you that ATLAS.ti 7 is the right software for your needs.