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Atlas.ti Basic Training

Qualitative Research

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Training Objectives

- Familiarity with the basic functions of Atlas.ti
- Practical, guided experience using Atlas.ti
- Ability to begin coding IDI transcripts using Atlas.ti

We hope that everyone will leave knowing how to:

- Open an HU
- Assign documents
- Create quotations and apply codes
- Change size of quotations
- Merge quotations
- Create comments
- Fix mistakes
- Basic File Management

What is Atlas.ti?

- It is a software program that allows us to organize our transcript data in preparation for analysis.
- Atlas.ti can not do analysis for us. It is a tool for indexing the data.

Getting to know the Main Functions of Atlas.ti

Atlas.ti Language

- **HU** – “Hermeneutic Unit” – The entire Atlas.ti project file. It contains the collection of all the codes, quotes, comments and memos.
- **PD** – “Primary Documents” – The IDI transcripts to be coded.
- **QUOTATIONS** – The unit of data analysis– any stretch of text from the IDI transcript that you highlight.
- **CODES** – the meaning applied to a quotation for analysis.
- **MEMOS** – a method to record your ideas and observations about codes, quotations, and the HU (we will not use this much).
- **COMMENTS** – another method to record your ideas and observations about codes, quotations, and the HU (we will use this a lot).

Atlas.ti Workspace

What do you see when you open Atlas.ti?

- Drop down menus at the very top
- Toolbar buttons on the left and across the top
- Primary document, Quote, Code and memo managers below the top toolbar buttons.
- An open workspace where your primary documents will be viewed.

PD Functions

- Primary function you will use is to “assign” IDI transcripts to your HU so that you can work with them.
- These documents are called “PDs” or “primary documents” in Atlas.ti language.
- Use the “Document” drop down menu at the top of the screen menu to “assign” some transcripts
- Try it.

Code Functions

- Your code book is stored here.
- Click on the Code Manager to see it.
- You can manipulate how it looks on your screen.
- Try different ways of viewing it.
- You will **NOT** create any codes, only use the codes that have been established.

Quote Functions

- You won't use this very often.
- It contains a list of all the quotations you have created.
- Use the Quote Manager to view any quote.

Memo Functions

- We won't use memos much at all.
- Click on the manager to see that there is one memo already created in this HU.

Creating Quotations and Applying Codes

Prepare your Workspace

- Open up a PD to work on
- Open up your code book and adjust its appearance to your liking.
- Adjust the margin areas so that you can see what you are doing.
- Now you are ready to code.

Create a Quotation and Apply a Code

- Use your mouse to highlight the lines of text you want to include.
- Now click on the code you want to apply from the code book and drag it across the center line
- A bracket will appear around the lines of text and you will see the code next to the bracket.
- Try it. Create several quotations and apply codes. Include overlapping quotations and quotes within quotes.
- TIP: To remove highlighting from text, move your mouse outside of the highlighted area and click, or press the “down arrow” on your key board.
- TIP: You can increase the width of your brackets by clicking “Views” at the top of your screen and then choosing “bracket width” from the drop down menu. The default setting is 10 but you can increase that as much as you want. A wider width bracket may be easier for you to manipulate.

Changing the length of a quote

- After you have created a quotation and coded it, you may decide it is too long or too short.
- To change its length do the following:
 - Click inside the bracket to highlight the quotation you want to change the length of. This alerts Atlas.ti as to which quotation you will be manipulating.
 - Now click outside of the highlighted area and see the highlighting disappear.
 - Now highlight the new quotation you want (expanding or shortening the original)
 - Click on the black “check mark” icon on the left of the screen.
 - You will see that the quotation has now changed size
- Try shortening and lengthening a quote.

Specialized Coding Procedures

- Remove a code from one quotation and add it to another:
 - Click on the code and drag it inside the bracket of the target quotation (the one you want to move it to).
 - You will see that the code disappears from the original quotation and appears next to the target quotation.
 - Note that this did not result in the original quotation being removed, it is still there but now it doesn't have a code assigned to it. You can apply a new code to it, or, if you no longer need the quote, you can delete it by right clicking on it and choosing “delete” from the drop down menu.

Specialized Coding Procedures, Con't

- Duplicate a code and add it to an additional quote
 - While pressing the Ctrl key, click and drag the code inside of the bracket of the target quotation.
 - Note that this did not remove the code from the original quotation, it only copied it and added it to the target quotation.

Special Coding Procedures, Con't

- Merge two quotations
 - While pressing the Ctrl key, click inside of the bracket of one quotation and drag it inside the bracket of the quotation you want to merge it with. Say “yes” to the warning message.
 - Notice that the two quotations have now become one. All codes originally applied to either of the original two quotations are still applied to the new larger merged quotation.

Creating a “Free Quotation”

- A free quotation is a quotation that you create but to which you DO NOT apply a code.
- Why would you want to do this?
 - You think the text is important but there seems to be no code that is applicable. You can create the free quotation and then instead of coding it, you can attach a **comment** to it with your idea of why it is important and why you can't decide which code to apply.

Creating a Free Quotation

- Highlight the lines you want to include in the quotation.
- Click on the Quotations Menu at the top of the screen and choose “Free Quotation”
- OR click on the “Free Quotation” icon on the toolbar on the left side of the screen
- OR right click on the highlighted area and choose “Free Quotation” from the drop down menu
- Try each way so that you can see how they work.

Attaching Comments to Quotations

- Right click inside the bracket of the quotation and choose “edit comment” from the drop down menu
- Or click on Quotations at the top of the screen and choose “edit comment” from the drop down menu
- Or open the Quotations Manager, click on Quotations and choose “edit comment” from the drop down menu
- A comment window pops up
- Type in your comment
- Close the window and say “yes” when prompted to save
- Notice that a small triangle has appeared at the top corner of the quotation bracket. This indicates a comment has been attached.
- To see the comment, double click on the triangle.
- Try it.

Fixing your mistakes

Don't Panic

- There is no “undo” button in *Atlas.ti*.
- But there are easy ways of correcting mistakes.

Disconnecting Documents

- You probably will never need to do this, but it is possible to disconnect a PD from the HU.
- Click on the PD Manager icon.
- Click on the PD you want to disconnect.
- Right click on that document and choose “disconnect” from the drop down menu
- OR click on “Documents” in the top toolbar and choose “disconnect” from the drop down menu

Unlinking Codes

- It will OFTEN happen that you apply a code to a quotation and then change your mind and want to erase the code from that quotation.
- To do this, you want to UNLINK the code from the quotation
- Note that you DO NOT want to “delete” the code because that will delete the code entirely from your codebook!
- To UNLINK a code from a quotation, right click on the code and choose “unlink” from the drop down menu.

Deleting Quotations

- Right click inside the bracket of the quotation you want to remove and choose “delete” from the drop down menu
- OR click on “Quotations” at the top of the screen and choose “delete”
- If you have codes attached to the quotation you are trying to delete, a warning message will pop up asking if you are sure you want to delete the quotation and all of its associated codes.
- Click yes if you are sure.

Closing and Re-Opening

- Save your HU as soon as you begin working on it each day by clicking on the “Save” icon at the top of your screen. Continue to save it frequently as you work during the day.
- If you find yourself in a terrible mess and want to go back in time, you can simply close the HU and when it prompts whether you want to save your changes, just say “No”. Your HU will close. When you re-open it, it will appear as it did the last time you saved it. This may take away some if not all of the mess.

Using Your Back-up

- Atlas.ti automatically saves your HU every 10 minutes. The backup is a separate document that will appear in your file folder as “back up of.....”
- You may want to revert to this back up if you find yourself in a terrible mess and can't solve the problem by closing and re-opening your live HU.
- In this case, go to your back-up, rename it, and begin using it as your “live” HU. Delete your messed up HU.

Save a Copy of your HU

- Each day when you start work on your HU, save a copy of your HU.
- Right click on your HU, choose copy.
- Paste the HU in your folder.
- Rename it “copy_date”
- In this way, you always have a copy of your HU as it existed at the beginning of the day in case you need to go back to it.

File Management

How the HU “thinks”

- The HU doesn’t “contain” the PDs, it only knows where they are stored. It knows this because when you assign a PD to the HU, you are providing the HU with the PDs “address” on your computer.
- The easiest way for the HU always find your PD is if you store both the HU and the PDs in the same folder on your computer. This will prevent most problems.
- If you move the PD to another location on your computer, the HU won’t be able to locate it and you will experience problems.
- Also, if you make any changes to the PD, the HU will no longer recognize it.

Therefore.....

- Do not edit your PDs at any time or in any way.
- Never move your PDs from location to location on your computer. Always keep your PDs in the same location on your computer and in the same file folder as your HU.

Data Management Notes for Coders

- When you begin coding a transcript, create a PD comment indicating that you are the coder.
- When you finish coding a transcript, go back to the comment and indicate the date on which you completed the coding.
- If you ever go back to the HU and change the coding on a previously completed document, go to the PD comment and indicate who revised the coding and when.

Merge Cycles

- Each coder will work in their own HU with the PDs they've been assigned to code. The Qualitative Supervisor will assign transcripts and organize the files and the HUs on each coders computer.
- Every 6 weeks, the Q.S. will gather up all the HUs and send them to Basant, who will merge them into one master HU.
- The Qualitative Directors will review the master HU and provide the coders with feedback.
- During the merge cycle, coding at the site stops.
- Coding resumes when the Qualitative Directors clear the site to continue.
- At this point, the coders continue coding using the merged master HU.

Notes for the Q.S.:

Data Management

- Choose a method for assigning transcripts. You can do this one by one or by batches.
- Create an assignment log to keep track of what transcript you have assigned to whom and when.
- When you send transcripts to Basant, he needs to have an easy way to name the file so the cover sheet is important, make sure it is complete.

Data Management Continued

- You can send transcripts to Basant in batches (for example, by community), zipped.
- When you get transcripts back from Basant, they will be named uniformly and write-protected, do a quick QA process to ensure they have all been named properly (i.e. make sure demographics on cover sheet match file name).
- Archive the original transcripts so you keep them separately from the documents Basant sends back to you. If you want to delete them, you can also do that. Just make sure your current docs are backed up.

Data Management Con't

- When you receive the re-named transcripts from Basant, create one folder on your computer in which you keep all transcripts and all HUs from each coder.
- Name your HUs with dates and indication of which merge cycle it was created from (for example original master HU, master HU merge cycle 1_1 Sept 06, etc.). You can choose your file naming convention but be sure you make it descriptive so that you can easily distinguish old HUs from your active ones (you might find it helpful to move old HUs into an archive folder when you are finished with them).
- When you receive a merged HU back from Basant, make a copy of the master merged HU for each coder, label with their initials and date. Create individual folders for each coder with their active HU and all the transcripts they have been assigned.

Data Management Trouble Shooting

- Problem: PDs are inaccessible from the HU.
- Solution: Make sure Atlas.ti is using the “HU path”. This means that the HU will always and only look for the PD in the same folder in which the HU is stored. Check to be sure it is using HU path, not the TB (text bank) path, or absolute path (a specific place you tell the HU to always look for documents). To check the path, go to PD manager, then to origin, if it doesn't say HU path, then you know that's the problem. To solve the problem, highlight the problematic PD, go to documents drop down menu, then choose data source management and then choose change path. Gives you the three path options. Select HU Path.

Data Management: Trouble Shooting

- Problem: You receive the merged HU back from Basant and there are problems with opening certain PDs.
- Solution: First check the path and make sure everything is okay (it is using the HU path). Next, check to be sure the transcript is stored in the same folder with the HU. If that is okay, then you know that probably in electronic transfer, the size of the transcript file has been changed ever so slightly, so the HU is no longer recognizing the document. You can then force Atlas.ti to recognize the transcript. Go to data source management, go to reset last access information, proceed despite warnings, you will now see the document will become accessible.

Double Coding

- Use a separate double coding HU for the second coding. Keep it very separate. Double coding HUs should never be sent for merging. This would create huge problems.
- Double code 10% of the transcripts
- Compare first and second coding
- Have coders list out discrepancies and resolve them.
- First coder goes back to PD and changes any coding necessary and writes in the PD comment that it was revised. Alert Basant about which PDs have been revised when you submit next merge cycle. This will allow Basant to reconcile any conflicts that arise in the merging.
- Each coder should be double coded by each of the other coders.