Workshop: Qualitative Data Analysis with Atlas.ti

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D-Lab Follow-Along (dlab.berkeley.edu)
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Today’s outline:

→ Introductions and overview
  o Thinking about qualitative software
  o Thinking about coding

→ Organizing your data for analysis
  o Naming files
  o Using folders
  o Coding in QDAs

→ Walkthrough of the software layout
  o Starting a new project
  o Importing data

→ Organizing your data in families

→ Coding in Atlas.ti
  o Adding quotations and comments
  o Adding memos
  o Adding codes
  o View coding output

→ Preliminary analyses
  o Co-occurrence table
  o Code and primary document table

→ Queries
  o Using and, or, and not
  o Scope: Running queries by family
  o Checking your query results
  o Saving queries with super codes

→ Output
Walkthrough of Atlas.ti

These screenshots are to help you review the information in this training, as you go back and use the software on your own! There are also many tutorials and webinars online, as well as books in the UC Berkeley Library on coding and qualitative software.

Starting a New Project
Atlas always opens the last project you had open.
Or, create a new database (‘hermeneutic unit’) to collect and code your documents:
- Click on “Project”
- Select “New Hermeneutic Unit”
  - This will open a new Atlas window, which you have to then “save as…”

Importing Data
To add data to your Atlas.TI database:
- Click on “Project”
- Hover mouse over “Add Documents”
  - A menu opens on the right.
  - Select “Add Documents (My Library)” and browse for documents
  - Select more than one document by holding down the shift or control key
Organizing your Data with Families

You can organize your documents and codes into groups using families. To create a new family:

- Click “Documents” or “Codes”
- Move your mouse over “Families”
- Click on “Open Family Manager”
  - In the Family Manager, click on “Families” and select “New family”
    - Type name for new family

To add families to existing documents, codes, or quotations, you have options:

In the primary doc manager or codes manager,
  - Click on “Documents” or “Codes”
  - Move the mouse over “Families”
Option 1: P-Docs → Documents → Families → Open Family Manager
While the Family Manager is open, move items from bottom right (not in family) to bottom left (in family) – or move them back if you want to disown them from the family!

Option 2: P-Docs → Documents → Families → Assign Family
In the Family Assigner, select the document or code you want to assign Double-click red family (not assigned) to assign to this document
Adding a New Quotation
To add a quotation without assigning a code to that piece of text:

- Select / highlight the text you would like to create as a quotation
- Click the “quotation marks” button on the left side bar
- A new colored ribbon on the right shows where your new quotation is:
**Memos: documenting your reflections and process**

**To add a new memo to your project:**
- Select “Memo Manager”
- Click on “Memos”
- Select “Create Free Memo”

**Adding memos to quotes**
To add a memo to a new quotation:
- Highlight the text → Click “Memos” in header bar → “Create and Link to Selection”

To link an existing memo to an existing quotation:
- Select the memo in Memo manager → Click and drag to the relevant quotation bar on right
Adding a New Code
To add a new code to your database:
• Open the “Code Manager”
• Click on the “Codes” menu
• Select “Create Free Code(s)”
• Type in name of a new code
  o (You can press the down arrow to enter more codes!)
Coding a Selection
To code a passage within a document:

- Highlight the text or click on the corresponding quotation bar in the margin.
- Three options to code:
  - Click and drag a code from the Code Manager list
  - Click on the icon with a yellow diamond and text beside it
  - Right click and choose “Coding” then “Select Code(s) from list”

Can’t see your codes on the right?
Never fear! View the margin area again with Views → Margin Area
Output all Results for One Simple Code

To display passages with a code attached:

- Click **Codes** to open the “Code Manager”
- Select a code (or have one already selected in the document)
- Click **Output**
- Select **Quotations for Selected Code(s)**
- This outputs all quotations attached to this code into an .rtf file
Analysis with the Co-occurrence Table

Click on “Analysis” in header
Click on “Co-occurrence Table”
Select codes from the columns list and then click arrows to “Add”
Select codes from the rows list and then click on “Add”

First number is matrix is number of times codes co-occur (“1”)
Second number is a measure of how often the codes occur together (“~ 0.02” = not much)
Analysis with the Code and Primary Document Table

Select “Analysis” in header bar
Select “Codes-Primary Documents Table”
In the pop-up,
- Click codes or code families of interest → click on right arrows
- Next, click on the documents / document families of interest → click on right arrows
- Choose to output to excel or text
- Tick “Create Report”

Sample results:

<table>
<thead>
<tr>
<th>CODES</th>
<th>PRIMARY DOCUMENTS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>citizenship</td>
<td>P: 1: EN_2009_02</td>
<td>37</td>
</tr>
<tr>
<td>gender and decisions</td>
<td>P: 3: N_2009_05</td>
<td>54</td>
</tr>
<tr>
<td>gender and networks</td>
<td>P: 6: N_2009_04</td>
<td>48</td>
</tr>
<tr>
<td>Totals</td>
<td>15</td>
<td>131</td>
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Using Queries to explore relationships between codes

- Click on “Analysis” in header bar
- In drop-down, select “Query Tool”
- In the pop-up box, double click codes to add
- Use the symbols on the left side for or, and, and not
  - Hover to see what any of the buttons mean
- As you change the conditions of the query, the list of quotations will update.
- Click print to output resulting quotations

By default Atlas searches all documents; use Scope to search only selected documents:
- Optional: create a document family (p. 3-4) to run on this set of docs multiple times
- In query tool bottom right, select “Scope”
- Select the documents / families you want to run the query on
- Click “OK”

And if you want to save your query as a super code (new code):
- Click on “Super-Code”
- Enter name for the super-code, e.g. “sleep AND eat”
- All quotations matching your query are now attached to this new code
Output query results
You can print to file or an editor (MS Word)

- In Analysis → Query Tool, highlight the codes of interest
- For resulting quotations, click the Printer Icon
- Choose “Full Content – Include Comments”
- Results report query followed by all relevant quotations
  - Includes document title, all codes attached to that quote, memos, and full text you highlighted
Output coded primary documents to PDF

Open P-Docs manager (Documents → Primary Doc Manager, or P-Docs button top left)
Select Documents in header bar
Select document in view screen or go back to Documents menu
Select Output → Print with margin
Prints to PDF and you can view codes on right side alongside the full text
Can’t manipulate or query, but useful for saving in a less proprietary format

Sample PDF results