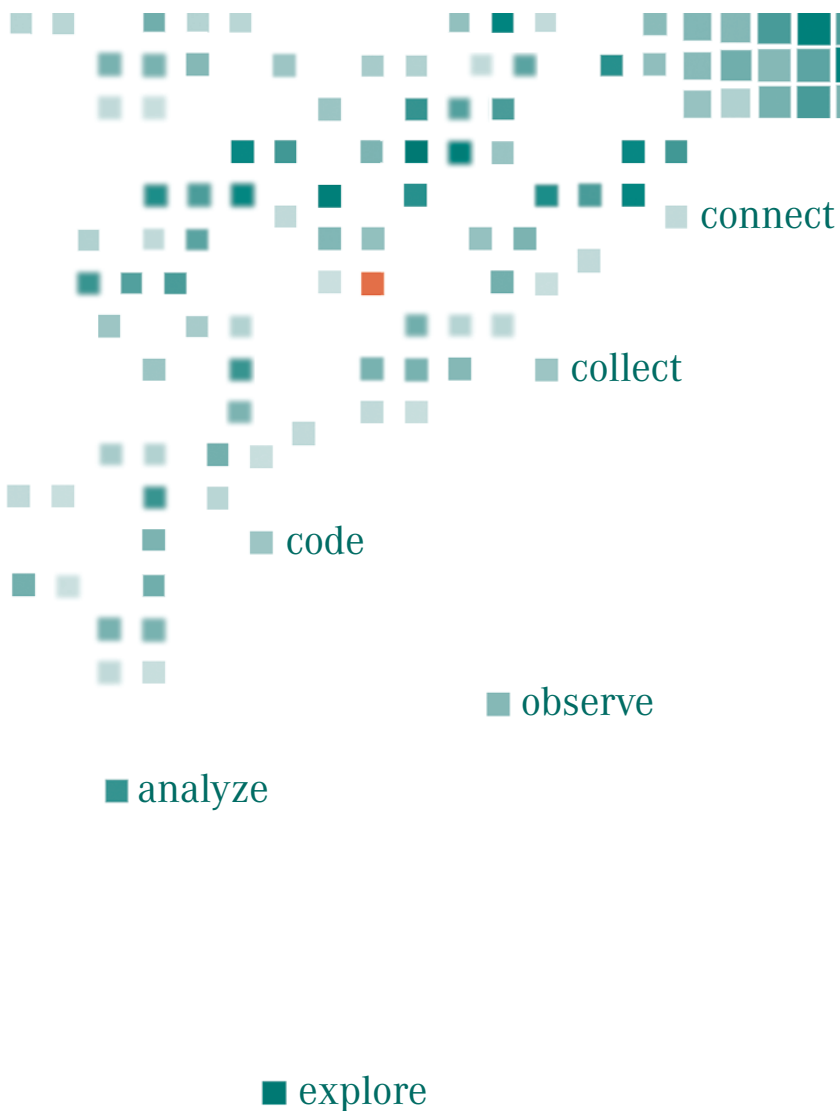


# V5.0 Quick Tour for Beginners



## **User's Manual for ATLAS.ti 5.0, 2<sup>nd</sup> Edition -Berlin, June 2004.**

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# A Quick Tour for Beginners

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## Objectives

The purpose of this Quick Tour is to guide you through some basic and some more advanced steps in working with an ATLAS.ti 5 project. The Tour repeats and/or simplifies descriptions of operations that are also explained in the full manual. However, you should be able to follow the instructions without having studied the full manual.

At first, we will inspect an already existing sample project. Then, you will create a new project using sample material provided by us. The sample project and the sample material were copied to your computer when installing the software. You will learn how to assign primary documents (PDs), select passages in a text document, create quotations, assign codes in various ways, modify codes, group codes, retrieve coded data segments, write memos, search text, build a simple network, click a query, and work with variables.

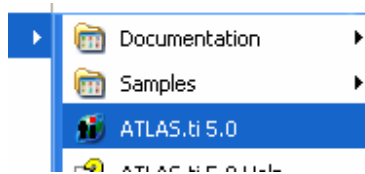
Not discussed in the tour are various advanced coding options, working with text and multimedia, Auto-Coding, the use of Regular Expressions in text searches, how to embed objects, how to create a network of codes, how to use filters, the Hyperlink function, the Relation Editor, User & Project Management, Multi-Authoring, individual settings, and SPSS, HTML, and XML conversion.

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## Inspecting an Existing Project

As an introduction to ATLAS.ti 5 (A5), we will look at one of the sample projects that was copied to your computer when you installed the software.

## Starting the System



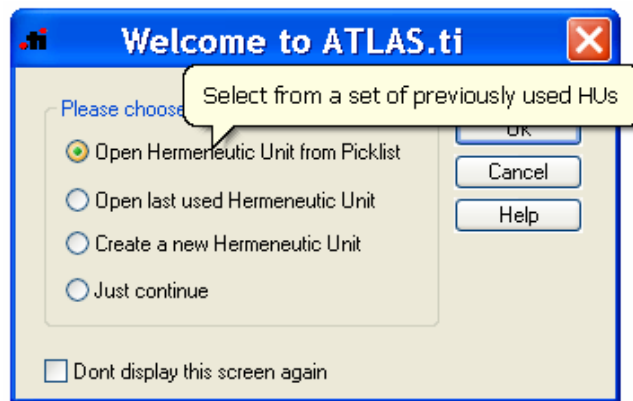
1. Start ATLAS.ti by selecting the **SCIENTIFIC SOFTWARE/ATLAS.TI 5.0** entry from the **PROGRAMS** menu.

You are greeted by the “Welcome Wizard,” which offers some options for beginning a session. In the background, you can already see the main workspace, the Hermeneutic Unit (HU) Editor.

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Note: If you do not choose anything from the Wizard, it will disappear after a while. You can always get it back by choosing **HELP/OPEN WELCOMEWIZ** from the HU Editor's main menu.

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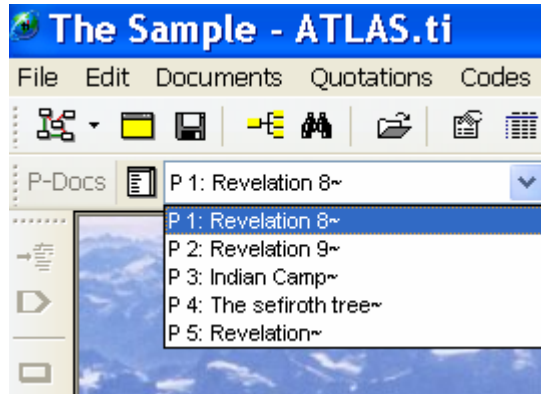


The Wizard offers four start options.

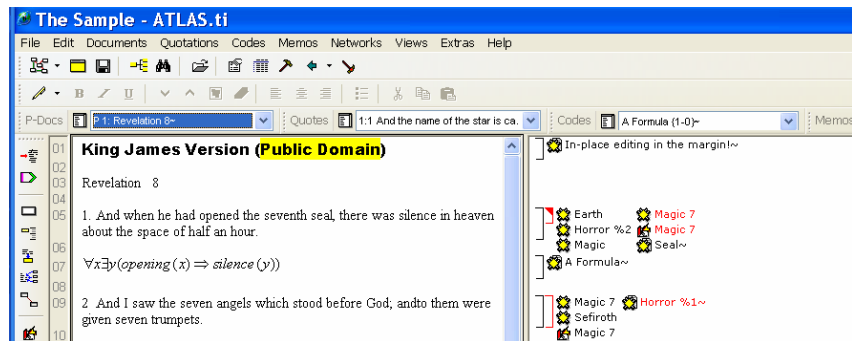
1. The first option, "*Open Hermeneutic Unit from Picklist*," is already checked. Click **OK**.  
You are now offered a selection of example projects (HUs). The purpose of these projects is to give you an impression of how ATLAS.ti 5 works. Don't take them as examples of good interpretative work!
2. Choose "The Sample" from the picklist. The Wizard disappears and the selected HU will be loaded.  
The 'Tip of the Day' window opens (unless disabled in General Prefs). After reading the tip, close the window.  
The main area of the HU Editor displays the logo, a background image, and some licensing information.


## Select a Primary Document

The PDs that are linked to an HU are managed in the first drop-down list on the left, below the main tool bar.



1. Click into the drop-down arrow to the right of the box and select the first document from the list. The file is loaded and displayed in the main area.



Next to the text, you see the margin area where all codes, memos and hyperlinks that are applied to the text (indicated by a bracket) are shown. If your margin area is not displayed by default, click the margin display button . You will find it in the tool bar to the left of the PD pane, below the button with the number 99. If you click the button with the number 99, paragraph numbers are shown.

What and how things are displayed in the margin area is configurable via the margin area context menu and the General Preferences dialog. You can open the margin area context menu by moving the mouse pointer to an empty space in the margin area and clicking the right mouse button. ATLAS.ti offers a lot of context menus. Most options are also available via other menus or buttons, but context menus are convenient to use as you simply need to click the right mouse button wherever your mouse pointer happens to be at the time. There is no need to move up to the main menu to access relevant menu choices.

## Display a Quotation

1. Now select the first entry in the drop-down list for quotations (second from left at the top). The selected quotation appears highlighted.

10 And the third angel sounded, and there fell a great star from heaven, burning as it were a lamp, and it fell upon the third part of the rivers, and upon the fountains of waters;

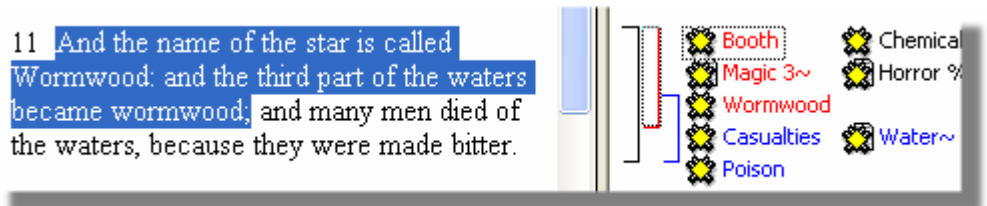
11 And the name of the star is called Wormwood: and the third part of the waters became wormwood; and many men died of the waters, because they were made bitter.

12 And the fourth angel sounded, and the third part of the sun was smitten, and the third part of the moon, and the third part of the

"Quotations" are segments of PDs (text, graphic, audio, or video) that you create by selecting a passage of interest. You will most likely code many (or all) of these selected passages.

## Display Codes for a Quotation

When you look at the margin area, you see that a number of codes are attached to this section of text:



To check which codes are attached to this quotation, move the mouse pointer over the highlighted selection and display its menu with a right mouse click. Select the menu item "Show Links." Three codes are displayed, which are all connected to this text passage.

References: 1:1 And the name of ..

CO: Booth {1-0}

CO: Magic 3 {16-1}

CO: Wormwood {1-0}

If you look at the margin area again, you also see that the red bracket is matching the height of the selected quotation. Attached to the red bracket are the three codes: Booth, Magic and Wormwood, also displayed in red. Codes that are attached to a certain quotation bracket are displayed in a matching color.

1. Click on one of the three codes highlighted in blue. Now a different quotation is highlighted. This is also reflected in the drop-down list for quotations. You should now see the entry: "1:7 and many men died of the water..."



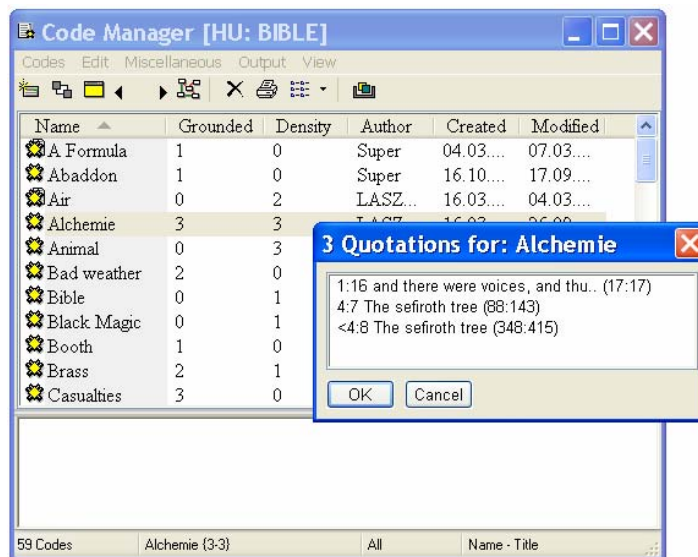
## Display Quotations for Codes

Retrieving coded text segments in context is easy. For this purpose, look at the third drop-down list, the drop-down list for codes.

2. This time click the button to the left of it.

This opens the Object Manager for Codes. In the column 'Grounded,' the number indicates how frequently a code was applied. The 'Density' column displays the number of links that exist to other codes. For example, in the figure below, the code *Alchemie* is highlighted. The numbers in the Grounded and Density columns tell you that three quotations are coded by this code, and that the code has links to three other codes.

*Object Managers are also available for PDs, quotations, and memos.*



1. Double click code "Alchemie." A list of quotations pops up showing the quotations coded with this code. If only one quotation was associated with the code, it will be displayed directly.
2. Click on the quotations one by one. You can browse through them in their respective contexts.

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**Note:** Some codes do not have any quotations at all. They serve as building blocks of a theory, as they are linked to other codes.

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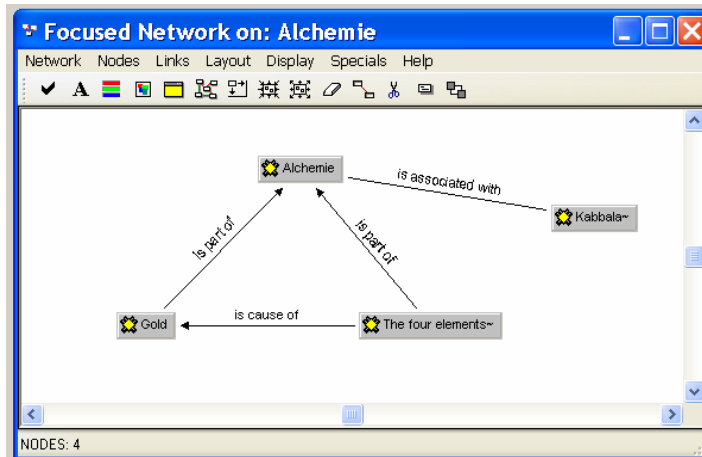
## A Quick Glance at a Network



1. With *Alchemie* still selected, press the network button in the tool bar of the Code Manager.

The Network Editor opens, displaying the selected code and its three "neighbors."





The Network View has many features and options. For instance:

3. Click with the left mouse button on a code in the network and move the code around. Right click on a code or a link and inspect the context menu.
4. Explore the Display options.
5. When closing the window, choose "NO" when asked if you want to save the network.

## Memos

The only drop-down list that we have not discussed yet is the one to the far right, the drop-down for memos. Memos are similar to codes, but their main purpose is to capture your (analytical) thoughts about the data or the project. They can also be attached to quotations and linked to other objects in networks.

1. Open the Memo Manager by clicking the button to the left of the drop-down list.
2. Browse through a few memos. With a single click, the memo content is displayed in the text pane below the list pane. If you double click on a memo, a separate editor window opens.
3. To activate and display the quotations that are linked to a memo, hold down the Alt-key when double clicking. The memos Big Star and Magic 7, for example, are linked to a number of quotations. If more than one quotation exists for the memo, a selection tool is offered.

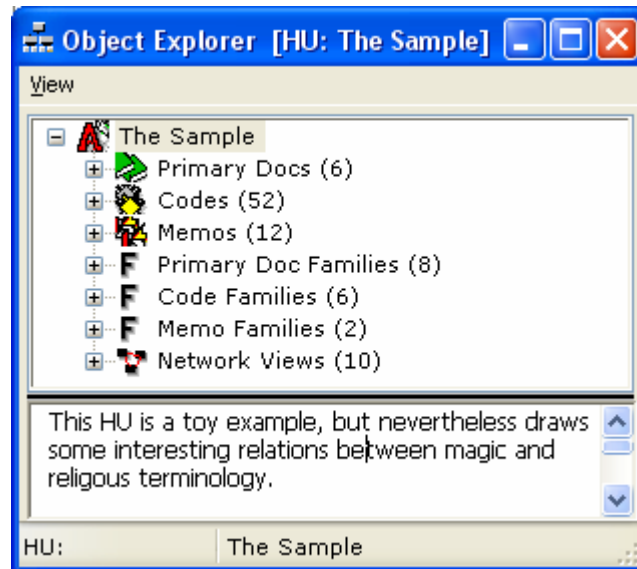
## The Object Explorer

The ATLAS.ti Object Explorer comes in handy if you want to browse the different kinds of objects contained in an HU all within one window. It offers a hierarchical view of all objects, with the HU as the

"root" object. The Object Explorer window is divided into two parts: the upper part shows the objects and the lower part displays the comment for the selected object (or the text body of memos).



1. Open the Object Explorer by clicking the Object Explorer button in the main tool bar.



The Object Explorer is quite similar in "look & feel" to the Explorer used by Windows. The hierarchy of objects can be expanded or collapsed using the little boxes to the left to an object. The "raw" list displays the main object types: PDs, codes, memos, "families," and Network Views.

2. Click on the root item "The Sample." In the text pane, the comment for this HU is displayed.
3. Click the expand box left of "Primary Docs" and then on P1. Now the commentary for PD 1 is displayed (NOT the contents of the PD itself).
4. Click through the tree to explore it. Every object type in the tree has its own context menu. If you right click on the objects, you can see the various context menus and the options they offer.

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## Creating a New Project

Browsing around in a given HU offers first impressions. Now let's create a new HU.

### To Start a New Hermeneutic Unit

1. Select **NEW HERMENEUTIC UNIT** from the main editor's File menu.


**2.** Click on **FILE/SAVE AS...** A file dialogue window opens. Enter a title for the HU. Something like: "This is a very, very new HU" may suit the current purpose. In a 'real life' project, titles should reflect the theme of your research.



**3.** Click the Comment button  (second to left button in the main toolbar) or select **EDIT COMMENT** from the **FILE** menu.

**4.** An editor opens. Type some text. For example, "This is my very first HU and I will promise to write a comment every time I create a new project."



**5.** When you are finished, save the comment by clicking the accept button , or select menu option **COMMENT/SAVE**.

**6.** Close the text editor.

## Preparing Textual PDs

ATLAS.ti 5 is built to handle documents in Rich Text Format (RTF). You may also assign Word and HTML documents as primary data. Whether this is possible depends on the kind of converters installed on your computer together with your version of Windows or MS Office. Plain text documents can, of course, still be used. If you want to be able to edit your documents within ATLAS.ti, however, they must be saved as rich text documents. Saving documents in rich text format is a standard feature that can be found in most word processing programs. In Word, for instance, this is an option that can be selected in the data type field when saving documents.

## Assign Primary Documents

After creating an HU, the next step in most cases is to assign documents. Assigning texts, graphics, audio, or video files to an HU is easy.

**1.** Click on the main menu option **DOCUMENTS/ASSIGN**. A file dialogue window opens. If you have not changed the standard settings, the user TextBank folder is shown. It does not yet contain documents.

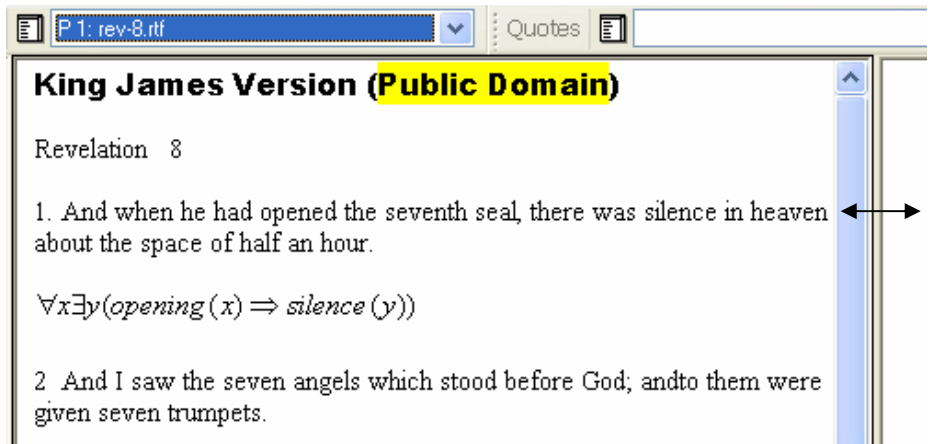
**2.** In order to work with the sample files, browse to the samples folder under C:\Program Files\Scientific Software\ATLAS.ti\Samples. The exact location may vary on your system. In order to find out the location of the folder, click on the main menu option **EXTRAS/EXPLORER/SAMPLES FOLDER**.

**3.** Select the following document: **rev-8.rtf**.

4. Load this newly assigned document **rev-8.rtf** by selecting it from the drop-down list as described earlier.

Move the split bar that separates the text area and the margin area to the right or left to adjust the size of the two window panes to your liking.

The four drop-down lists can also be resized. Move the mouse pointer to the dashed line between two boxes and then enlarge or reduce the size of the boxes.



## Creating a Quotation

Creating a "free" quotation is similar to what we do when reading a book or article: If we note something interesting, we make a mark of some sort in the margin, or highlight the text passage with a marker. Let's realize this activity electronically within ATLAS.ti.

The contents of the file **rev-8.txt** should still be visible on your screen in the PD pane.

Use the scrollbar to scroll to the section beginning with the number 7 ("The first angel sounded..."). We will now explore different selection techniques.

### **Semi-automatic selection**

1. Left click the mouse on the word "angel" (after "first"). This will move the text cursor into this word.
2. Double click on "angel." The word "angel" will be highlighted.
3. Double click on the highlighted word "angel." Now the sentence including the word "angel" is highlighted (up to the colon).
4. Double click on the highlighted sentence. Now the entire paragraph is selected.
5. One more double click selects the whole text.

6. If you double click again, you are back at step 1.

The advantage of this selection technique is that you can be sure that a paragraph is selected in a pure way, i.e. not a space is missing, and no extra period is selected. This facilitates an easier to read margin for those who work independently, and comparability for those working in teams.

### ***Manual selection***

You can also manually select text:

1. Move the mouse pointer to the beginning of the text you want to select.
2. Drag the mouse cursor (click and hold the left mouse button, then move it) to the end of the intended selection and release the mouse button.

Of course, you can also use the standard keyboard based selection techniques for text applications.

### ***To create a "free" quotation:***

1. Select the complete paragraph using one of the techniques that you just learned. Everything from "7" to "burnt up." should now be highlighted.
2. Move the mouse pointer into the highlighted text and pop up the context menu with the right mouse button.
3. Choose "Create Free Quotation." A bracket appears in the margin area, and a new entry is listed in the drop-down list for quotations.

You have just created your first free quotation! The structure of your HU is slowly emerging. (If you are curious, open the Object Explorer and see that one expand box already has a cross).

## **Coding**

Often when creating a quotation, you create or assign a code at the same time.

Three ways to code are described in the following: **Open Coding**, **Code by List**, and **In-Vivo Coding**.

### ***Open Coding***

4. The quotation "1:1 7. The first angel sounded, an.." should still be highlighted. Open the context menu again with a right mouse click. This time choose **CODING/OPEN CODING**.
5. Enter the code word "Musical Disaster" and click OK.

6. You have created your first code. The third drop-down list shows the code you have just created. Notice how the margin area shows your work.

It is also possible to combine the creation of a quotation and a code:

1. Highlight the paragraph starting with the “6”.
2. Open the context menu and select **CODING** again. All four coding options are now enabled.
3. Choose **OPEN CODING** again.
4. This time, type "Testing Trumpets | Seven Angels." Note the vertical bar “|” symbol between the two codes. With the help of this special character, you can create as many codes as you want in one turn.
5. Click OK.

### ***Code by list***

1. Highlight the preceding paragraph starting with "5. And the angel...".
2. Right click into the highlighted area and select the menu option **CODING/CODE BY LIST**. A list opens showing the three codes that already exist.
3. Select all three codes by holding down the Ctrl-key when selecting the codes, and click OK.

### ***In-Vivo coding***

When applying an in-vivo code, the selected text itself is registered as a quotation and used as code name. This technique is often used when wanting to capture a specific term used by a respondent or occurring in a text somewhere. Let’s create such a code:

1. Go to the section starting with the number 4 and select the word "smoke" with a double-click.
2. Select the option **CODE IN-VIVO** from the coding menu.

You have created a code name that is equal to the coded text itself. However, you might find that you did not place as much text in the quotation as you would like. When you wish to change the boundaries of a quotation:

1. Select and highlight the whole paragraph containing the word "smoke."



2. Go to the main menu and select **QUOTATIONS/MODIFY BOUNDARY**, or click the modify button in the tool bar to the left. This extends the length of the quotation without changing the code's name.

### **Reviewing your Codings in the Code Manager**

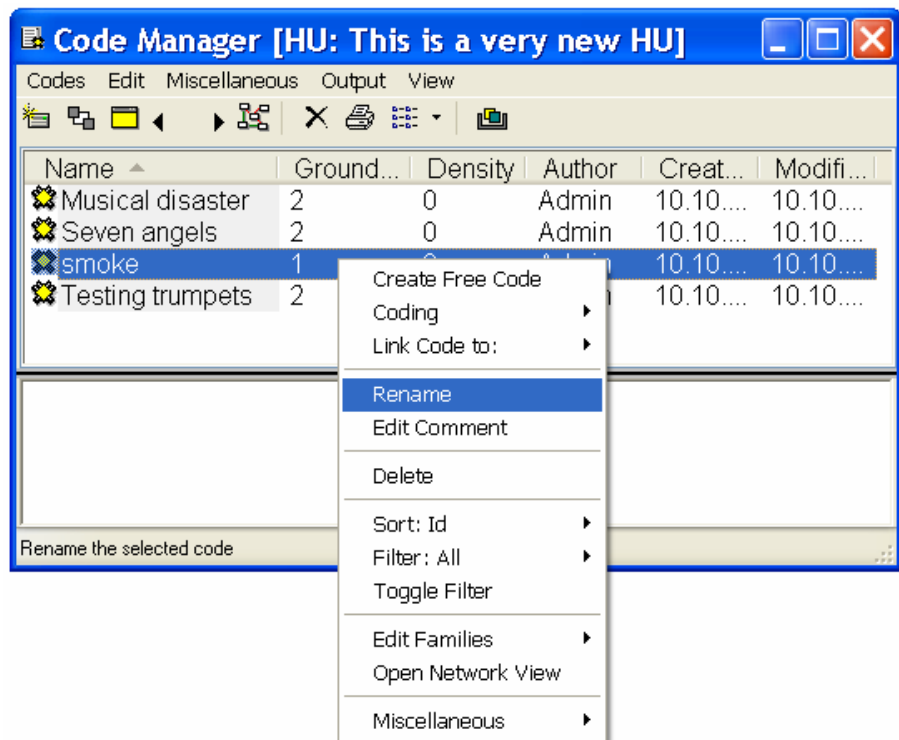
To review what you have done so far, open the Code Manager by clicking the button to the left of the code drop-down list. If you followed the above steps as described, the Code Manager should contain four codes.

### **Renaming a code**

Three of the codes reference two quotations each; the code “smoke” has only been applied once.

To rename code “smoke” to start with a capital letter as well,

1. open its context menu with a right mouse click and
2. choose **RENAME**.



3. Enter "Smoke" into the “prompter” and click OK. If the code word "smoke" was used in other codings, all of these would now be updated to the new name.

**Note:** You can also rename a code ‘in-place.’ Select the code with a left mouse click, wait a bit and click again. The display of the entry

field changes and you can modify the name of the code word – in place.

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## Retrieving coded segments

To review segments coded by a particular code word:

- 1.** Double-click on a code word in the Code Manager. If only one quotation is coded with this code, this segment is displayed in context. If the code is associated with more than one quotation, then you are offered a list from which to choose.
- 2.** Double-click code "Musical Disaster." A list with two quotations is presented. You can browse through these quotations by simply clicking on each. It is also possible to do some further work on the quotations like assigning more codes, deleting them, modifying them, etc.
- 3.** A click on a quotation in the list selects the quotation AND closes the list.

## Writing code definitions

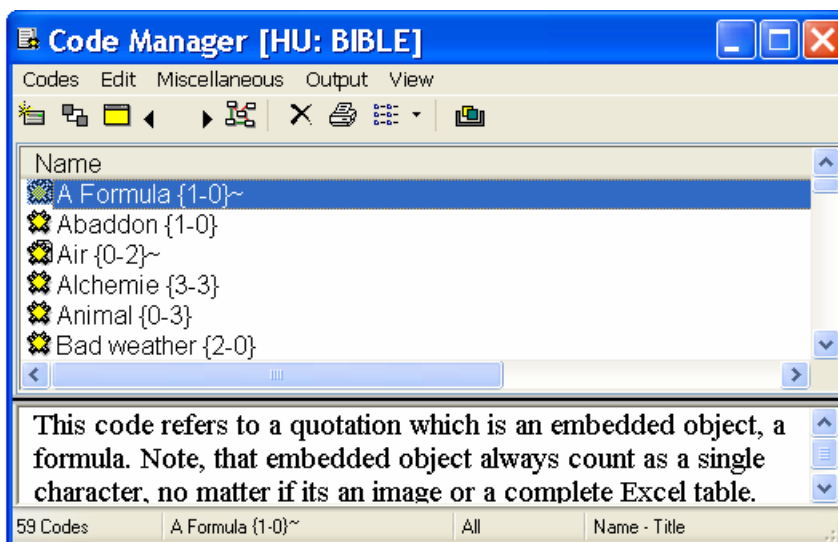
You can write code definitions within code comments.

To write a definition for a code,

- 1.** Select a code.
- 2.** Place the cursor in the text pane below the code list and type a definition for this code.
- 3.** To save your definition, click the right mouse button while in the text pane area and select the option **ACCEPT** from the context menu.

All codes that have a comment show a tilde sign (~) behind their name when displayed in list view/single column.





## A Little Drag & Drop

Drag & Drop can cut short many operations.



### To Code with Drag & Drop

1. Highlight the section starting with Number 2 ("And I saw..").
2. From the Code Manager, select (don't double-click) the code "Seven Angels" with the left mouse button and drag it into the PD pane. You do not have to aim at the selected passage. Any place to drop inside the pane will do.
3. Release the mouse button. This piece of text has been coded.

Look at the column *Grounded* next to the code "Seven Angels" to see how many quotes are coded to this code. It should now show a 3.

4. Double-click the code "Seven Angels" and browse through the three quotations.

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Note: You can also select more than one code before the dragging operation. Hold down the Ctrl-key when selecting the codes.

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### To code In-Vivo using Drag & Drop

1. Just under the Heading 'King James Version,' select the word "Revelation."
2. Move the mouse pointer inside the selected text and drag it into the code list.
3. Release the mouse button.

This is the quick way to do "In-Vivo coding."



### ***To modify codes using Drag & Drop***

Codes in the margin area can be sources and targets of drag & drop operations.

### ***To move a code from one quotation to another***

Moving a code means to unlink it from one quotation (source) and to link it to another quotation (target).

1. In the margin area, click on the code that you want to move.
2. Hold down the left mouse key and drag the code to its new target quotation.
3. Drop the code onto the bracket of this quotation.

### ***To replace a code for a given quotation***

Replacing a code is the same as erasing a code in the margin of a piece of paper and writing down another code name. This is how you do it in ATLAS.ti using Drag & Drop:

1. Select a code in the Code Manager.
2. Hold down the left mouse button and drag the code into the margin area and drop it on top of another code. This replaces the code in the margin area for the selected quotation.

### ***To move and replace a code***

1. Click on a code in the margin area.
2. Hold down the left mouse button and drag the code onto another code in the margin area, thereby unlinking the code from its original place and replacing the target code.

### ***To 'copy' a code***

This procedure does not really copy a code, but moves a code from one quotation bracket to another without unlinking the code from its original source.

1. Click on a code in the margin area.
2. Hold down the left mouse button and drag the code onto another code in the margin area. Hold down the Ctrl key when dropping.


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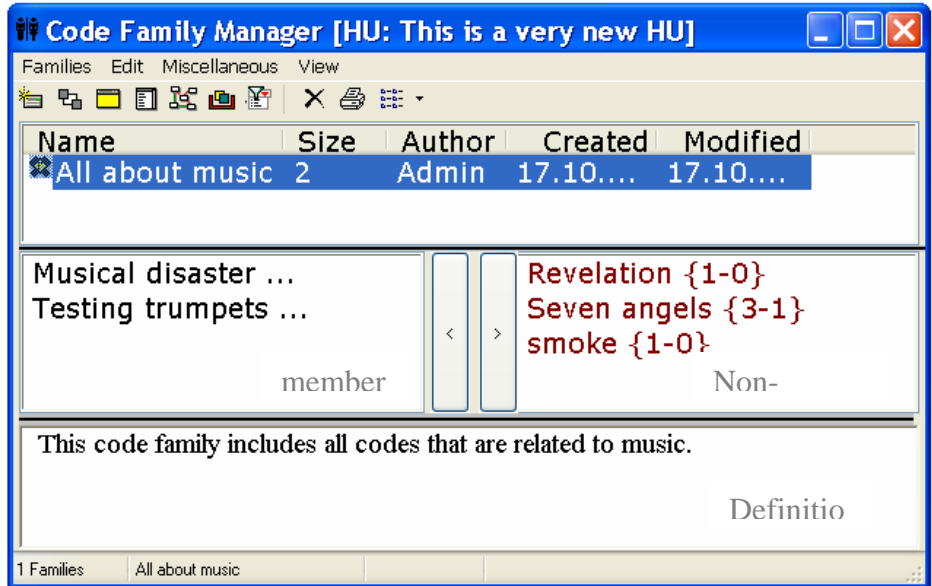
## **Grouping Codes**

As one way to group codes, ATLAS.ti offers the option to create Code Families. To group codes into a Code Family, follow these steps:



Family Manager button

1. From the main menu, select **CODES/EDIT FAMILIES/OPEN FAMILY MANAGER**. If the Code Manager is open, you may also click the Family Manager button . The Code Family Manager opens.



The top pane displays all families created by the user. The list on the left in middle pane displays all codes that are included in the family and the list to right in red shows all codes that are not (yet) included. The bottom pane is a text editor. Here is a description of how to create a family and how to assign members to a family:

2. Select the menu option **FAMILIES/NEW FAMILY**.
3. Enter a name when prompted and click **OK**.

Next you need to add members to this family.

4. Select one or more items in the list pane on the right and click the button with the arrow pointing to the left. You may also double click on a code to move it from right to left (or from left to right to remove it from the family).

Another way to add members is by dragging them from an Object Manager, the Object Explorer, or the margin area into the member's pane on the left side.

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Note: Family Managers are also available for PDs and Memos.

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## Writing Memos

Writing memos is an important task applicable in every phase of the qualitative analysis process. The **ideas** captured in memos are often the “pieces of a puzzle” that are later put together in the phase of report writing. **Theory building**, often associated with building networks, is also aided by writing.

### *To write a memo for a selected data section*

1. Select a PD.
2. Mark the part of the PD for which you want to write memo.
3. Select the memo button  on the vertical tool bar to the left of the PD pane.

If the selected data segment was not already a quotation, a new quotation is created and a memo is attached to it. At the same time, an editor opens and you can begin to type.

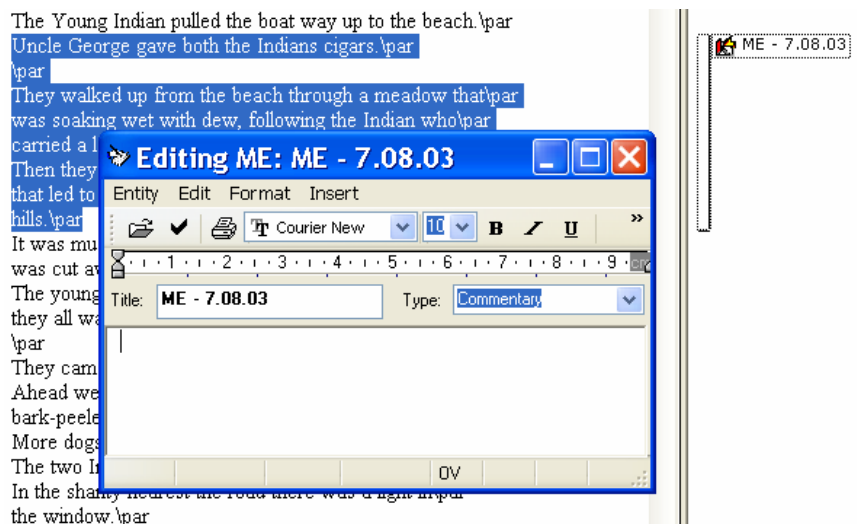



Figure 1 – Creating a new memo for a data segment

4. Adapt the automatically generated memo type and title according to your needs.
5. Before closing the editor, click the Save button  or select **MEMO/SAVE** from the menu.

Everything that you type into a memo is in rich text format. This offers the possibility to insert pictures, tables, and so on. Memos can become quite substantial in size this way.

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## Editing Primary Documents

You can edit PDs assigned as rich text (\*.rtf) or as plain text files (\*.txt). DOC and HTML files cannot be edited. The text document “ref-8.rtf” that you have assigned to your “very new” HU is a rich text document. Below the main tool bar, you see a second tool bar. This tool bar becomes active as soon as you enter Edit mode. In addition, an Edit menu is available.

If you want to play a bit with the editing options provided by ATLAS.ti:



1. Click the Edit button in the Edit tool bar. Now all the tools from the Edit tool bar become active. You are probably familiar with most of them from other word processing programs.
2. Highlight a piece of text and change its appearance (bold, italic, underlined).
3. Change the color of a piece of text by clicking the Set Color button, or highlight it using the marker.
4. Increase or decrease the size of the text by clicking the Grow or Shrink button.
5. Change the alignment or select bullet style for a selected piece of text.
6. When you are finished with editing the document, click the Edit button again and select the option **SAVE AND LEAVE EDIT MODE**.
7. Save the HU.

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## Searching Text

Text in PDs can be searched with the Text Search tool; text in all objects can be searched with the Object Crawler.

### The Text Search Tool

The Text Search Tool is used to search for the occurrence of specific text strings matching a search string or search pattern within primary texts.

The Text Search Tool offers three different methods named Standard Search, Category Search, and GREP Search to scan primary texts for specified text patterns. The functionality of the Text Search Tool is also fully integrated into the Auto Coding

Tool. In order to give you an introduction to the Text Search Tool, below the steps to initiate a standard search are outlined.


### To start a standard search

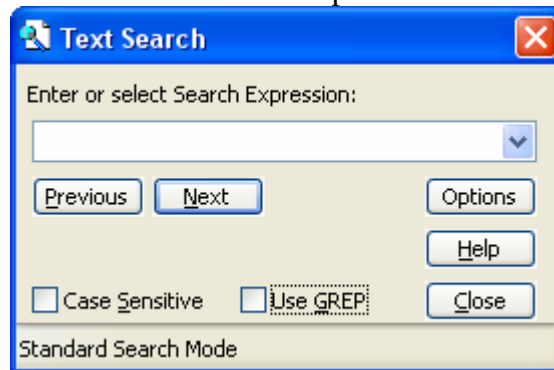


Click this button to activate text search

Short-cut: Ctrl-F

1. Load a primary text.

To open the text search tool, click the *text search* button  to the left of the PD pane.



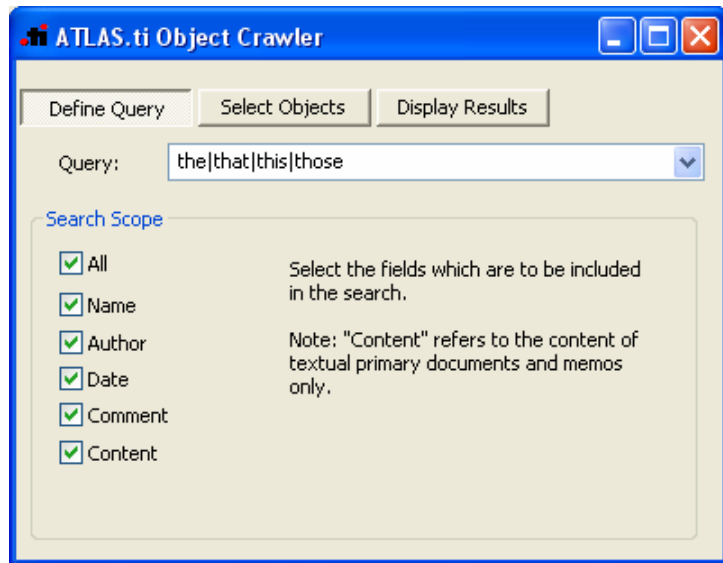
2. Enter a string (not containing the special character "|") into the entry field.
3. Make sure that **USE GREP** is not checked.
4. Set **CASE SENSITIVE** as needed.
5. Start the search by clicking the **NEXT** or **PREVIOUS** button.

### The Object Crawler

The Object Crawler can be used to search all text in an HU. In addition to primary text documents, the Object Crawler investigates the text of objects like codes, quotations, memos, and Network Views. If desired, the search can be restricted to certain fields such as name, author, date, comments, or content fields. In addition, regular expressions (GREP) can be used when formulating a search expression. This is how it works:

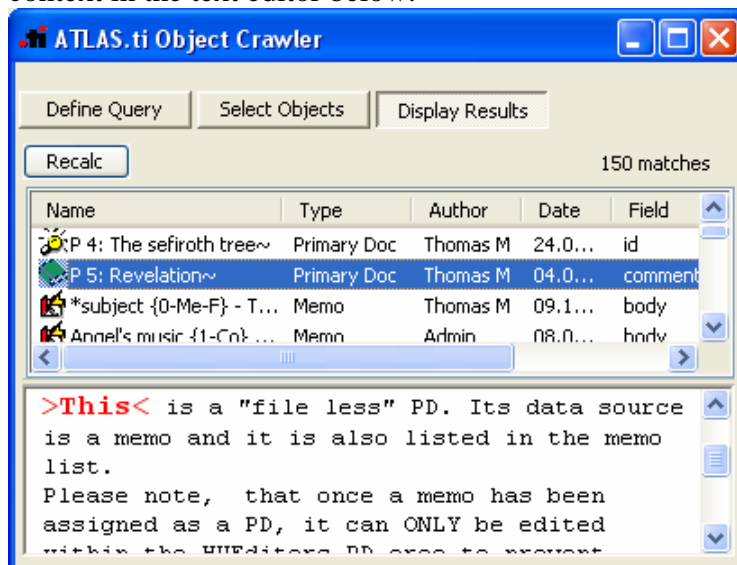


1. From the main menu, select **TOOLS/OBJECT CRAWLER**, or click the Object Crawler button underneath the main tool bar (see left). The following window opens:



*The Object Crawler window*

2. Enter a query word or “pattern like the|that|this|those“
3. Click the button **SELECT OBJECTS** and select the objects to be included in the search.
4. Click the button **DISPLAY RESULTS**. The objects that contain the search term are listed in the top pane, and are displayed in context in the text editor below:



## A Short Excursion into Networking

We already have collected some material that we can use for playing with the Network Editor. Networks are the main vehicle for constructing theoretical models within ATLAS.ti. The network function adds a heuristic "right brain" approach to qualitative analysis.



### To create a network in ATLAS.ti:

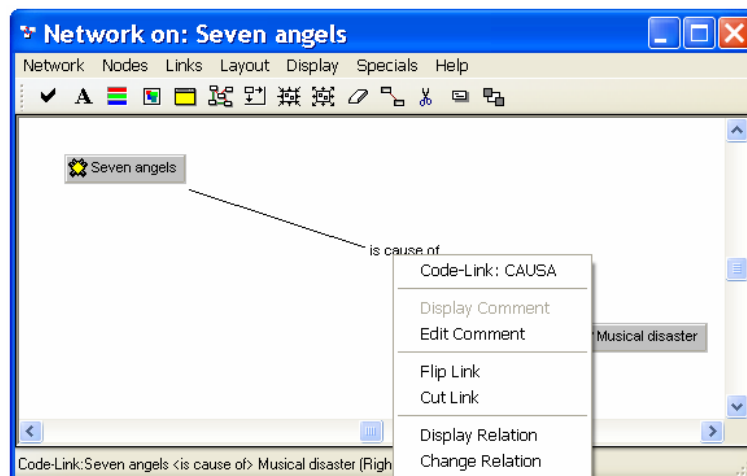
1. Select the code "Seven Angels" in the Code Manager.
2. Open a network view for this code by clicking the network button.  
One "node" is now displayed in the Network Editor (NWE).  
It needs some company.
3. Drag the code "Musical Disaster" from the Code Manager into the NWE. It is placed where you release the mouse button.
4. Just like list entries in a list, you can select nodes with a single click. Try it.
5. You can move the nodes around by dragging them to a different place (hold down the left mouse button and move). Place the nodes so that you have some distance between the two.
6. Nodes also have a context menu. Open it and explore the options.

But what a sad network with no connection between the nodes:

### To Link Two Nodes

1. Highlight the node "Seven Angels" by clicking on it.
2. From the menu, select **LINKS/LINK NODES**.
3. A red "rubber band" appears tracking the movement of the mouse. Move the cursor to node "Musical Disaster" and click node "Musical Disaster"
4. A selection of "relations" pops up. Choose the "is cause of" link.

You have created a network, your first "theory" (about music or about angels?).



5. Of course, even the links have a menu. Move the mouse pointer over the relation text "is cause of" and right click.



The connection between the two codes is saved in the HU. There is no need to save it explicitly. If you want to preserve the way you have placed the codes within the editor, you need to save the network. To do this,

1. select the menu option **NETWORK/SAVE AS...**. You will be prompted for a name.
2. Accept the default name or enter a new one.
3. Click the **OK** button.

If you don't save the network, you can always view the relations between the two codes again by selecting one of the two codes and clicking the network button in the Code Manager.

4. To open a saved network view, click the network button located in the main tool bar underneath the File menu (see figure below).



5. Now save the complete HU (**FILE/SAVE**).

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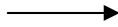
## Don't be Afraid of the Query Tool

This is a quick excursion to one of the most powerful yet somewhat complex tools on the workbench. You already "retrieved" quotations for codes in the simplest way: double clicking on one code. This translates into a query: "Give me all quotations for code X." Sometimes your questions are more complex.

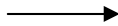


1. Open the Query Tool with a click on the binoculars button. Already created Code Families are listed on the top left, Codes appear in the list pane below. The windowpanes on the right are filled when clicking a query.

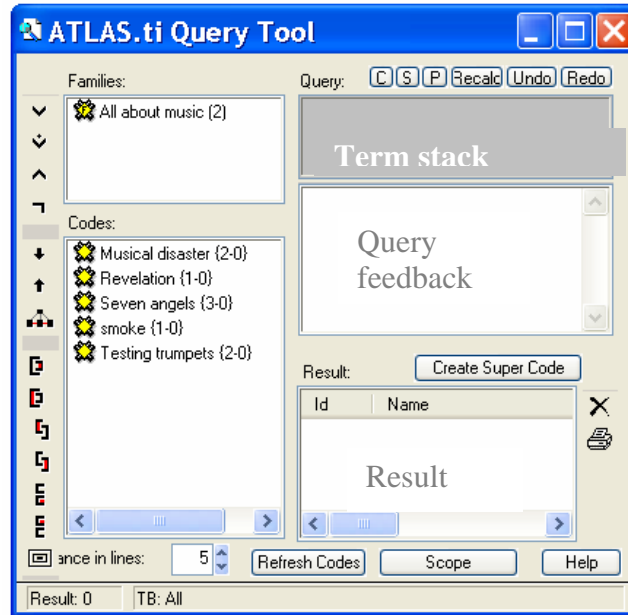
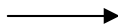
Boolean



Semantic

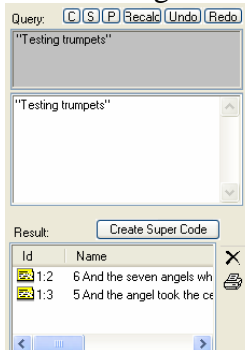


Proximity

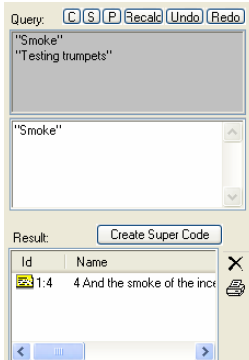


The Query Tool offers 14 operators to formulate a query. You may not need all of them for a given study, but depending on the kinds of questions you want to ask, many options are at your disposal. To give you insight as to how the Query Tool works, let's click a query together:

2. Double-click the code "Testing Trumpets." The upper right pane displays the current query. The lower right pane displays the two quotations coded with the selected code. This is not yet much different from clicking on a code in the Code Manager.



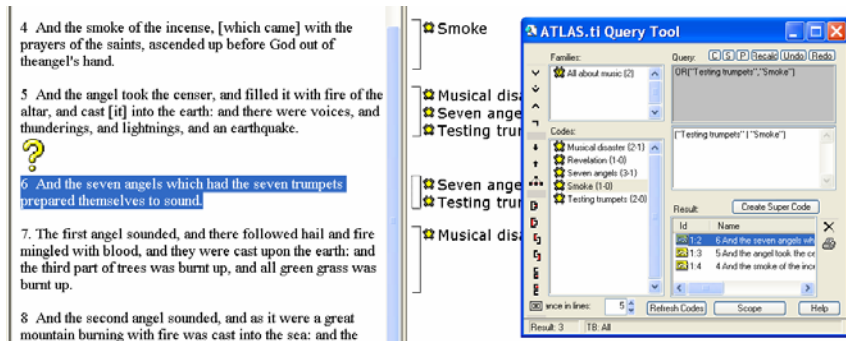
- Double-click the code "Smoke." The current query now is "Smoke" and one quotation is displayed in the result list. You now see two "terms" in the upper right list.



- Click the uppermost button on the left hand side. This is the OR operator (see left).

The result list now displays three quotations. This corresponds to the question: Give me all quotations coded with the codes “Smoke” OR “Testing Trumpets”.

- Next, click on an entry in the result list. The "hit" will be displayed immediately in the PD pane.



You can also output the results to WordPad, save it as a file, or print it. To do so,

- click the "printer button" located to the right of the result pane.

The query, however, can also be extended further. For instance, if you want to find all quotations that have *not* been coded with “Smoke” OR “Testing Trumpet”:

7

7. Click the fourth operator from the top (see left). This is the negation (or "NOT") operator.
8. What do you see? The query gets longer, and hit list shows all quotations excluding those coded with "Smoke" OR "Testing Trumpet". After you have inspected the results, close the Query Tool.

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## Working with Variables



*PD families as variables can be used in queries and SPSS jobs.*



*Use PD-Family tables to assign PDs and variables at the same time.*

### **Primary Document Families as Variables**

Besides sharing all the characteristics of code and memo families, PD families have some additional characteristics. They can be used to define the scope of a query when used as global attributes supplementing codes. For instance, if the PD families "female" and "under 25" were assigned to a number of interviews, one can then formulate queries like: "Give me all quotations from interviews with females under 25 coded with "coping" or "power."

In order to ask such a question, you need to create Document Families. As your 'This is a very new HU' project only contains three documents and only very few codes, it makes more sense to inspect the HU "The Sample" again.

1. Save your 'This is a very new HU' project (**FILE/SAVE**).
2. Open "The Sample" HU (e.g. click on the **FILE** menu and select it from the list displayed at the bottom of the menu).
3. Select **DOCUMENTS/EDIT FAMILIES/OPEN FAMILY MANAGER**.
4. A number of families are already listed. Inspect a few families by selecting them with a left mouse click. Their members are displayed in the bottom left window pane. For a few, a definition is also displayed.
5. Close the Family Manager and open the Query Tool with a click on the binocular button.
6. Double-click the code "Bad Weather," double-click the code "Casualties," and click the OR operator (the first one in the list).

The result pane should display five quotations. Now we want to combine this query with a document attribute. We could, for example, answer the following question: Give me all quotations that have been coded with Bad Weather OR Casualties, but only in textual documents (=attribute).

7. In the Query Tool, click the button **SCOPE**. A new window opens that looks similar to the Query Tool. It displays all documents families in the top left pane, and all PDs in the bottom left pane.
8. Place the Query Tool window and the Scope of Query Window next to each other
9. Double click document family “Textual docs.”

As a result all quotations of all textual documents are displayed in the Scope of Query Window. More interesting is the result pane in the Query Tool. Now only 4 quotations are displayed. Thus, only four of the five quotations occur in textual documents.

10. Next, double click document family “Graphical docs.”

As you can see, this is a very simple way to compare groups of documents based on certain attributes that describe these documents.

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## Creating Output

Each main object in ATLAS.ti has its own Output menu. The main objects are: documents, quotations, codes, and memos.

1. Click on the menus for each object type and check the Output options offered. The output submenu is the last item on the menu.

Output can be displayed internally in an ATLAS.ti editor, it can be sent directly to the printer, saved as data file in rich text, or saved as a file and opened immediately in Word or WordPad (external to ATLAS.ti).

Network Views can be saved as graphic files, or copied to the clipboard and inserted as images into Word documents.

Further output options can be found under the various Miscellaneous submenus. Under **DOCUMENTS/MISCELLANEOUS**, you find an option to export PD-Family Tables. The output can be saved as an Excel compatible file. Codes and memos can be exported in XML format (**CODES/MEMOS/MISCELLANEOUS**), as well as the entire HU: **EXTRAS/EXPORT TO: XML**. For your convenience, an XML Converter is provided in the menu option below.

If desired, all codings can be exported as a SPSS syntax file (**EXTRAS/EXPORT TO: SPSS**). After running the syntax file in SPSS, codes and code families are displayed as variables and quotations as cases in a 0/1 fashion: If a code is applied to a quotation, then 1, if not then 0. If codes have been grouped into code families, the values in the cells are aggregated.



### ***The Word Cruncher***

You can perform simple quantitative content analysis with this function. It creates a list of words for the selected or all PDs. If desired, a stop list can be used and a list of characters can be ignored by the count. The output can be displayed in Excel. The Word Cruncher option can be found under the **DOCUMENTS/MISCELLANEOUS** menu, or by clicking the Word Cruncher button in the main tool bar (see left).

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## **End of Tour**

Our Guided Tour for beginners stops here. By now, you should have a good overview of the functions that ATLAS.ti 5 provides. Don't expect to have mastered the software already, but this tour should serve as a good starting point.