ATLAS.ti Mac
Quick Tour
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Introduction

This guide was written for users with no prior experience of working with ATLAS.ti, but also for experienced users new to the Mac version. It contains an overview of main concepts and features.

It guides you through installing and updating the software and shows you how to transfer projects from the Windows version.

This is followed by a short description of the main steps that you are likely to go through if you analyze your data with ATLAS.ti.

After these more general thoughts, the step-by-step instructions begin starting with project setup, adding documents, identifying interesting data segments, coding, comment and memo writing, working with groups, creating networks and reports.

The deeper analysis tools are not explained in detail as it would go beyond a “getting-started” guide. We do, however, provide an overview of the available tools so that you get a general idea what types of analysis you can run after coding.

Throughout this document you find links to video tutorials and blog articles. Watch out for the green boxes.

Referrals to the full manual are indicated in blue. You can download the full manual here.
Main Concepts And Features

Documents, quotations, codes, and memos are the overall foundation you need to be familiar with when working with ATLAS.ti. They are complemented by a variety of special aspects such as groups, networks (=the main visualization tool), and analytic/data querying tools. All of these come together in the overall project container.

The ATLAS.ti Project

The most basic level of an ATLAS.ti project consist of the documents, followed closely by the quotations (= individual segments/selections from the documents).

On the next level, codes are attached to quotations.

Memos are essentially free texts you write in connection with your findings, observations, or methodological considerations.

A project can become a highly connected entity, a dense web of primary data, associated memos and codes, and interrelations between the codes and the data. To find your way through this web, ATLAS.ti provides powerful browsing, retrieval and editing tools.

Documents

Documents represent the data you have added to an ATLAS.ti project. These can be text, image, audio, video or geographic materials that you wish to interpret. When you add documents to an ATLAS.ti project, ATLAS.ti creates copies of these documents. Thus, your original documents do not become part of the project.

Document Groups

Documents can be grouped by any criteria that you need for your analysis. For instance, you might want to group them by gender: male and female, by age groups, education, family status, geographical region, document type, time aspects, etc. Such groups can later be used to restrict code-based searches like: “Show me all data segments coded with ‘attitude towards the environment’ but only for females who live in London as compared to females who live in rural areas.”

You can also use document groups as a filter, for example to reduce other types of output, such as a frequency count for codes across a particular group of documents.

Quotations

A quotation is a segment/portion of a document that is deemed interesting or important by the user. Think of it as something you would mark, circle, or underline in a printed document.

In textual documents, a quotation is an arbitrary sequence of characters ranging in length from a single character to a word, a sentence, or a paragraph, even up to the entire data file. In an image, it can be any portion of the image; in an audio or video clip a segment of a certain length, etc.: more on that below.

Free quotations resemble passages “scribbled” on the margin of a book.
Usually, quotations are created manually by the researcher. However, if repetitive words or phrases are contained in the text, the Auto-Coding tool can be used to automatically segment these quotations and assign a code to them.

See full manual for instructions on how to use the auto coding tool.

Although the creation of quotations is almost always part of a broader task like coding or writing memos, "free" quotations can be created that indicate interesting parts in the primary data for which a meaningful classification has not yet been found.

Quotations As Layers
Quotations can be thought of as a transparent layer on top of a document. Technically speaking, a quotation consists of the identifier (a number) and a pair of coordinates that specify the beginning and end of the quotation that describe its position in the document. The actual content of the data you analyze is therefore not altered by the creation, deletion, or modification of quotations.

Quotations are stored inside the HU, independent of the document to which they belong.


Codes

The term "code" is used in many different ways. First, we would like to define what that term means in qualitative research, and then in ATLAS.ti.

Coding Objectives
From a methodological standpoint, codes serve a variety of purposes. They capture meaning in the data. They also serve as handles for specific occurrences in the data that cannot be found by simple text-based search techniques.

Codes are used as classification devices at different levels of abstraction in order to create sets of related information units for the purpose of comparison (e.g., a concept like "Coping Strategy"). You can think of coding as similar to tagging.

Keep code names brief and succinct. Use their comment pane for longer elaborations.

From a "low level" tool perspective, codes are typically short pieces of text referencing other pieces of text, graphical, audio, or video data. Their purpose is to classify an often large number of textual or other data units.

The length of a code should be restricted and should not be too verbose. If textual annotations are what you want, you should use quotation comments instead.

Memos

Memos capture your thoughts regarding the text and are an important device for creating theory. A memo may "stand alone," or it may refer to quotations, codes, and other memos. They can be grouped according to types (method, theoretical, descriptive, etc.), which is helpful in organizing and sorting them. As compared to comments, memos can be linked to quotations, codes or other memos. A comment is always directly linked to
the object it refers to. In ATLAS.ti Mac, it is also possible to write a comment for each memo in addition to the memo content itself.

Additional reading:

**Groups**

Groups are a way to form clusters of documents, codes, and memos for easier handling. Document groups can be regarded as attributes or variables. Groups can be combined using logical operators. These are called Smart Groups.

See the full manual for detailed instructions on how to create smart groups.

**Networks**

Networks are a bit more sophisticated than groups. They allow you to conceptualize the structure by connecting sets of similar elements together in a visual diagram. With the aid of networks you can express relationships between codes, quotations, and memos. Document groups and even networks can also be “nodes” in a network. See “Working with Networks.”

![Figure 1: Example of a network](http://example.com/network_example.jpg)
Analysis

ATLAS.ti contains multiple powerful, dedicated analytic tools to help make sense of your data once it is coded. In the section "Tools For Basic And Advanced Analysis" you find an overview of available tools.

A step-by-step instruction is provided in the full manual.

Data Export And Reports

Each manager features an Export button. You can select between creating a table in Excel format or a report in Word / Open Office, or PDF format. Further you can print or save networks as graphic files, and your documents with the margin area showing all of your coding. You find these options under the Project/Print menu.
Installing And Updating ATLAS.ti Mac

Installing ATLAS.ti Mac

1. After downloading ATLAS.ti for Mac, look for the file ‘ATLAS.ti Mac.dmg’ using Finder. It is likely in your download folder.
2. Double-click the file. You will see the red icon for the ATLAS.ti app.
3. Drag the red program icon into the application folder. Start ATLAS.ti from there. If you drag the program icon from the application folder to your desktop, this will create a short-cut.

   Video tutorial: [Installing ATLAS.ti Mac](#)

Installing Updates

1. From the main menu select: ATLAS.ti / CHECK FOR UPDATES. Follow the instructions you see on-screen.

   Video tutorial: [Downloading Updates](#)
Main Steps In Working With ATLAS.ti

The figure below illustrates the main steps of working with ATLAS.ti, starting with the creation of a project, adding documents, identifying interesting things in the data and coding them. Memos and comments can be written at any stage of the process, whereas there is possibly a shift from writing comments like adding meta information to your documents, first code nodes that later turn into code definitions, initial thoughts about specific data segments (the ATLAS.ti quotations) to more extensive memo writing during the later stages of the analysis. Once your data is coded, it is ready to be queried using the various analysis tools provided. The insights gained can then be visualized using the ATLAS.ti network function.

Some steps must be taken in sequence. For instance, logic dictates that you cannot query anything or look for cooccurrences if your data has not yet been coded. But other than that there are no strict rules. Networks, in addition to presenting findings, also have an exploratory component and as such can help you to see your data from a different perspective. This may provide further ideas for coding, querying, or even further data collection.

The Process

There are two principal modes of working with ATLAS.ti, the data level and the conceptual level. The Data Level includes activities like segmentation of data files; coding text, image, audio, and video passages; and writing comments and memos. The Conceptual Level focuses on querying data and model-building activities such as linking codes to networks, in addition to writing some more comments and memos.

Data Level Work

Blog article: Data-level Work in ATLAS.ti: The Fluid Articulation of Segmentation, Writing, Coding and Diagramming
Data level research activities include segmenting the data that you have assigned to a project into quotations, adding comments to respective passages (note-making/annotating), and coding selected text passages or data segments, secondary materials, annotations, and memos to facilitate their later retrieval. The act of comparing noteworthy segments leads to a creative conceptualization phase that involves higher-level interpretive work and theory-building.

ATLAS.ti assists you in all of these tasks and provides a comprehensive overview of your work as well as rapid search, retrieval, and browsing functions.

Within ATLAS.ti, initial ideas often find expression through their assignment to a code or memo, to which similar ideas or text selections also become assigned. ATLAS.ti provides the researcher with a highly effective means for quickly retrieving all data selections and notes relevant to one idea.

**Conceptual Level Work**

Beyond coding and simple data retrieval:

ATLAS.ti allows you to query your data in lots of different ways, combining complex code queries with variables, exploring relationships between codes and to visualize your findings using the network tool.

ATLAS.ti allows you to visually "connect" selected passages, memos, and codes into diagrams that graphically outline complex relations. This feature virtually transforms your text-based work space into a graphical "playground" where you can construct concepts and theories based on relationships between codes, data segments, or memos.

This process sometimes uncovers other relations in the data that were not obvious before and still allows you the ability to instantly revert to your notes or primary data selection.
The Interface

Below you see the main features of the ATLAS.ti Mac interface:

Video Tutorial: ATLAS.ti Mac: Interface

Figure 3: Entity representation

Figure 4: The ATLAS.ti Mac user interface

Figure 5: Hide or show optional panes
Creating A New Project

Video tutorial: Creating a new project

When you open ATLAS.ti Mac for the first time, you are presented with two options: Create a new project, or import an existing one from other ATLAS.ti applications.

- Select **CREATE A NEW ATLAS.ti PROJECT** and enter a project name:

![Figure 6: Creating a new project](image)

- Another option is to select **PROJECT / NEW** from the main menu.

Importing Projects From ATLAS.ti For Windows

From ATLAS.ti 7.5+ Windows

Make sure your installation of ATLAS.ti for Windows is updated to version 7.5 or higher!

- Export your project(s) using the via **PROJECT / EXPORT / MAC TRANSFER BUNDLE**.
- Move the Transfer Bundle file to your Mac or to a location where it can be accessed from your Mac.
- On the Mac, simply double-click on the exported file, or select **PROJECT / IMPORT PROJECT**...

Video tutorial: Transfer project from ATLAS.ti 7.5 Win
From ATLAS.ti 8 Windows

- Export your project(s) selecting **FILE / EXPORT**. Create a project bundle file.
- Move the Project Bundle file to your Mac or to a location where it can be accessed from your Mac.
- **ON THE MAC, SIMPLY DOUBLE-CLICK ON THE EXPORTED FILE, OR SELECT PROJECT / IMPORT PROJECT...**

**Video tutorial:** ATLAS ti 8 Windows-Exporting the Project.

**Project Transfer, Duplication And Backup**

**Project Transfer**

In order to transfer a project to a different computer – either to another Mac computer, or a PC - you have to export it. You also need to export a project when you want to merge it with another project.

- Select **PROJECT / EXPORT PROJECT**. Save the file to your hard disk, an external or a cloud drive.
- You can open the project by double-clicking on the file (assuming that ATLAS.ti for Mac is installed on this computer), or select **PROJECT / IMPORT PROJECT** from the main menu.

This option can also be used to create a copy of your project as backup.

**Project Duplication**

- Select **PROJECT / OPEN**.
- Select a project and right click on the project name. Select the option: **DUPLICATE**.

The project that you want to duplicate needs to be closed.

**Project Backup**

One way to backup your project is to export it and then to store the copy of the project at a different location (see above Project Transfer). Currently you cannot determine yourself where ATLAS.ti for Mac stores your project files. By default, they are stored in the application folder for ATLAS.ti. If you want to add this location to your routine backup (e.g., Time Machine) this is the location:

~/Library/Application Support/ATLAS.ti.

**NOTE:** Never make any changes to this folder! If you do, this may corrupt your projects and you loose data. This cannot be fixed and even our support cannot magically reconstruct your project data if this folder was manipulated.
Remember: The fastest and most reliable way to create secure backups in case of computer failure is to export your projects regularly (via *PROJECT / EXPORT*) and to store the resulting single-file backups safely in a remote location.
Adding Documents To A Project

**Supported Formats**

ATLAS.ti Mac supports text (Word (doc and docx), RTF, Open Office (odt), PDF, image, audio and video files (all file formats that Quick Time supports, currently no Windows Media files). You can also import a new empty text documents, e.g. to enter fieldnotes directly into ATLAS.ti or to transcribe your data.

**Importing Or Linking Documents**

The standard procedure is that documents are imported. This means a copy of the document is created, converted into an ATLAS.ti compatible format and stored in an internal library.

For audio and video files you have the option to link them to your project. This avoids file duplication and saves hard disk space, as especially video files can be quite sizable.

**Importing Documents**

To import text, PDF or image documents to your project, select **DOCUMENT / IMPORT DOCUMENTS**.

![Figure 7: Adding documents to a project](image)

An alternative to using the main menu option to add documents is to click the **button** on the top left hand side of your screen (see below).

![Figure 8: An alternative to the main menu option](image)

You can also drag & drop documents or folders from the Finder into the Document Manager or the navigator for documents.
Linking Multimedia Documents (Audio / Video)

Audio and video files can be linked to a project as file sizes can be quite large. When you link a file to a project, it is not copied and imported into the project. It remains at its source location and ATLAS.ti opens it from there when needed.

This means that the file should remain at this location. You should not rename or move it to a different folder. If this happens, the file can no longer be displayed in the project. If there is the need to move or rename the file, you need to let ATLAS.ti know (see below).

To link audio or video documents to your project, select **DOCUMENT / IMPORT LINKED MULTIMEDIA DOCUMENTS** (or click on the + button).

When you open the Document Manager, you will see the location of the file in the column “Origin”.

**Modifying The Location Of A Linked Document**

If a linked file was renamed or moved, you need to let ATLAS.ti know about the new file name or location.

Open the Document Manager and right-click on the document. Select the option **Use DIFFERENT FILE** and select the renamed file, or point ATLAS.ti to the new location.

**Importing A Linked File Into The Library**

Another option that is available to you is to import a linked file at a later point in time (see Figure 9 above). If you do so, the file is copied and moved into the folder where ATLAS.ti stores all project related files and it will also be included in the bundled file when you export your project. Keep in mind that this might increase the file size of your project export file considerably.

**Loading Documents**

All added documents can be accessed via the navigator that you find on the left-hand side of the screen, or via tabs. Once you have memos and networks later on, they can also be accessed this way.
Adding Documents to a Project

Load one or more documents with a double-click on the document in the navigator (see Figure 10).

To close the selected document tab or all other loaded documents within a region, right click on the header area and select the appropriate option from the context menu: Close Tab or Close Other Tabs.
Identifying Interesting Data Segments

Creating Quotations

It is not always desired to start setting codes immediately. You can begin by identifying interesting segments in your data, mark them and comment on them. This is exemplified below based on a video document. If you prefer to start coding your data directly, continue reading under “Coding Data.”

In a video or audio document, you create a quotation simply by highlighting an area on the audio-wave form.

For all other document types, you can either click the button Quotation from Selection, or right-click directly on the highlighted segment and select Create Quotation from the context menu (short-cut: ⌘Q).

After creating a quotation, you can modify the default name and write a comment in the inspector:
To keep track of your data and your thoughts, open the Quotation Manager by clicking on the **Quotations** button, or select **Quotation / Show Quotation Manager** from the main menu:

Each quotation is automatically assigned an ID and a name. The quotation ID consists of the document number and a number indicating the chronological sequence when a quotation was created in the document. The quotation name for text quotations consists of the first 100 characters of the text; the name of multimedia quotations is “quotation + ID”

Video tutorial: [ATLAS.ti Mac: Creating quotations](#)

### Renaming Quotations And Writing Comments

In the inspector on the right-hand side you can modify the quotation name and review or edit quotation comments.
Modifying The Length Of Quotations

Just drag the start or end points to a different position. The quotation bar in the margin area automatically follows. This applies to all media types (see Figure 14).

Reviewing Quotations

When you select a quotation in the list, its content is displayed in the preview area. This applies to all media types. You can read text quotations, listen to audio quotes, view image and video quotations. This is a convenient way to browse through your quotations (Figure 15).
Figure 15: Quotation preview

It is critically important to distinguish between the sense of “fulfillment” in having accomplished...
Coding Data

ATLAS.ti offers several ways to code your data: Adding codes while you read/listen to or view the data, going through and using the last used code again (quick coding), using the words in the text as codes (in-vivo coding), coding with already existing codes via drag & drop, or using the auto-coding feature. All of these options are explained in detail below.

Video Tutorials:
- ATLAS.ti Mac: Coding
- ATLAS.ti Mac: Auto-Coding
- ATLAS.ti Mac: Renaming Codes
- ATLAS.ti Mac: Coding a set of quotations at once

Add Coding

To code a data segment, highlight it with your mouse and select the **Add Coding** button (short-cut: `⌘J`).

An alternative is to right-click on the highlighted segment and select **Add Codes** from the secondary menu.

Figure 16: Coding a selected data segment

Figure 17: Add coding option in the secondary menu
After coding, the quotation name and the code label are displayed in the margin area (Figure 18).

Figure 18: Display of code label and quotation in the margin area

Coding image, audio or video data works in the same way: Highlight the desired segment with your mouse, click the Add coding button (or right-click and select Add Coding), and enter a code. When coding audio or video data, highlight a segment on the audio-wave form (see Figure 14).

Unlinking / Merging / Replacing Codes

Unlinking Codes

Right-click on a code in the margin area and select the option Remove from Quotation.

Merging Codes

When developing a coding schema, it may happen in the course of the analysis that two or more codes essentially mean the same thing. One cause could be the import of code lists with different names but similar meanings.

ATLAS.ti offers a procedure to merge synonymous codes into one resulting “target” code. This target code replaces the merged codes and “inherits” all of their references, i.e., quotations, links to other codes or memos, and their comments.

There are two ways to merge codes: A list-based method, and one that works from within the Network Editor.

1. In the Code Manager select the code that you want to merge with another code.

2. Drag-and-drop this code to the “target” code that you want to keep. A window opens. Select the first available option: Merge code A into code B. The quotations are added to the target code, and the merged code is removed from the list of codes.

3. If the merged code has a comment, the comment is added to the target code. If both codes have a comment, an audit trail is provided (see Figure 19).

Figure 19: Audit trail after merging

Figure 20: Merging two codes
Replacing A Code

To replace one code with another in the margin area, drag and drop a code (either from the Code Manager or the navigation pane) on top of another code in the margin area. Select the **SWAP** option from the context menu.

![Figure 21: Swapping (replacing) a code in the margin area](image)

If you drag-and-drop a code from the margin area on top of another code in the margin area, the code you drag is unlinked from its prior location and replaces the code that it is dropped onto.

![Figure 22: The Code Manager](image)

Adding Code Color

Open the Code Manager (**CODE / CODE MANAGER**) and click on the circle in the "color column" just before the code name and select a color for each code. Code colors can also be set or modified in the inspector (see below).

In Figure 24 below you see how code colors are displayed in the margin.
Reviewing Coded Quotations

At the bottom of the main window, all quotations coded with the currently selected code are shown including references. Click on the right-arrow on the right-hand side to view a selected quotation in context.

Figure 24: Previewing quotations coded with a selected code
Building A Code Hierarchy

Blog article: Theme and category development

A frequent question is how to add a structure to the otherwise flat code list in ATLAS.ti. The easiest way to work with higher and lower order codes is to structure your codes alphabetically in the Code Manager, e.g., according to the basic pattern below:

category A_sub 1
category A_sub 2
category A_sub 3
category B_sub 1
category B_sub 2
category B_sub 3
e tc.

As a means to visualize the beginning of a category, you can enter a free code that is not linked to any quotation, as shown below. Such a main category code might initially be empty, but may prove to be quite handy during further coding work. You may come across some data that fits the category but there is no fitting sub code yet, or you are unsure where to put it. Then you can use the main category code to collect these instances. Once a number of instances are collected, you can review them and think some more about them. By reading through or viewing/listening to a couple of examples it becomes often easier to decide how to code it. You may decide to create a new sub code or decide that an existing sub code fits after all. Adding colors will also help you to distinguish between different types of level of codes.

cATEGORY A
category A_sub 1
category A_sub 2
category A_sub 3

CATEGORY B
category B_sub 1
category B_sub 2
category B_sub 3

A further possibility is to sort codes by numbers (or numbers and letters):

1 CATEGORY A
11_A_sub 1
12_A_sub 2
13_A_sub 3

2 CATEGORY B
21_B_sub 1
22_B_sub 2
23_B_sub 3

e tc.

The sorting order is:
(1) Special characters (* + ' # - : ; , etc.)
(2) numbers, and
(3) letters.
Therefore, it is not a good idea to use prefixes like 1, 1.1, 1.1.1, 2, 2.1, 2.1.2 etc. Such a numbering scheme will necessarily wreak havoc with your intended sorting order ("10" will be sorted before "2"). When using numerals, always use "01," "02," "03," or and so on.

All terms preceding a colon (:) indicate the main category name; the terms following the underscore or colon constitute sub codes. Other projects may require additional sub levels. But don’t overdo it!

As main category code and sub code names may contain more than one word, an empty space is not sufficient to separate the two levels of coding. Therefore it is best to use one of the special characters that you find on your keyboard to visually separate levels of coding.

Beginners often stuff lengthy treatises into a code name, blurring the distinction between codes, comments, and memos and thereby mistaking codes for their more appropriate siblings.

If you find yourself using more than a few words as a code, consider using quotation comments or the code comment instead.
Working With Memos

Memos are explanatory and descriptive texts that may be associated with other "objects" like quotations, codes, or other memos. Memos can also "stand alone" – simply as part of an HU. They can contain methodological notes; they can be used as a bulletin board to exchange information between team members; you can use them to write notes about the analytic process, keeping a journal of to-dos. Memos may also serve as a repository for symbols, text templates, and embedded objects that you may want to insert into documents or other memos.

Difference Between Memos And Codes

Code names are—or should be—succinct, dense descriptors for concepts emerging during the stage of closely studying the data. They often reduce complex findings to crisp placeholders and/or theoretically relevant concepts.

Like codes, memos have names. These names, or titles, are used for displaying memos in browsers, and help to find specific memos. Just like code names, a memo's title should be short and concise. Don't confuse the name with its content!

How Memos And Comments Differ

Memos are very similar to comments in that both are intended to hold lengthy texts, as opposed to codes that simply name a concept. Comments exclusively belong to one entity.

Comments are not displayed in browsers separately from the object to which they are attached. Memos can be associated with more than one object and have an additional TYPE attribute, e.g., theoretical, methodological, commentary, etc. They can also be free-standing—unlike comments.

Creating A New Memo

1. Open the Memo Manager by clicking on the Memos button or select MEMO / SHOW MEMO MANAGER from the main menu.
2. Click on the + sign to add a new memo. Enter a name.
3. Double-click to open it. It will open as a new tab.

Loading Memos

You can also open a memo into its own region, so that you can see both the memo and your data. To do so, drag the memo tab to the right, left, top or bottom edge of the document area. Once you see a blue band, you can drop it (see Figure 25).
To link a memo to a data segment, drag & drop it from the Memo Manager onto a quotation, or select a memo in navigator and drag & drop it from there.

When selecting a memo in the margin area, the inspector on the right-hand side is displaying the detailed information for this memo (see Figure 26).
Purpose Of Creating And Working With Groups

Partitioning objects into groups reduces the number of "chunks" requiring the researcher’s attention. Groups are often used for filtering purposes. The navigators in the managers offer a convenient way to create them and to set them as filters. The “grouped by” option also makes use of groups and you can use them to display your data in different ways.

Example: When conducting an interview study with respondents from various backgrounds and locations, document groups can be created to classify the respondents into:
- Female / Male
- Marital status
- Age Group 1 (20-30), Age Group 2 (31-40), Age Group 3 (41-50)
- Educational level, etc.

Once implemented, you can use document groups to compare and contrast answers of different groups of respondents, or check whether they are differences between locations, across time or type of documents. For example, you can ask for all quotations coded by Code_A and Code_B that occur in documents of white-collar female respondents from location B. Thus, document groups in effect can be used as variables. Figure 27 shows how document groups can be used as filters: The manager only shows documents of married female respondents.

Figure 27: Use document groups as filter in the Document Manager
Common Procedures

In the following, the general procedures for working with groups are described.

Groups can be created in both the Group Manager and the navigator of the respective managers. The navigators are better integrated into the regular work-flow. Thus, for daily regular activities it is easier to use the navigators.

Creating Groups In The Navigator

If you are familiar with an older Windows version of ATLAS.ti, groups are the equivalent to “families.” Groups can be used for sorting and organizing purposes, and to set filters.

Open one of the Managers. Click on the plus sign at the bottom of the Groups pane or right-click inside the Groups pane and select NEW GROUP. Enter a group name.

Add members to the group via drag and drop from the list of documents / codes / or memos in the respective manager.

Filtering By Group In A Manager

If you click on a group, the items in the manager are filtered and only the members of the selected group are listed (see Figure 27).

Click on SHOW ALL (OBJECT NAME) to reset the filter.

Removing An Item From A Group

In a manager:

Click on the item that you want to remove in the main window.

Right-click on the respective family in the inspector on the right hand side and select the option Remove from Group.
ATLAS.ti allows you to establish named links to more clearly express the nature of the relationships between concepts.

With named links, you may express a sentence like "a broken leg causes pain" by two nodes (the source node "broken leg" and the target node "pain") connected with a named link ("causes" or "is-cause-of").

Creating A New Network

To create a new network, select **NETWORK/New Network**. This opens a tab with now content. The name network 1 / network 2 / network 3, etc is generated automatically. If you decide that you want to keep a particular network, you can rename it later in the network Manager (**NETWORK/Show Network Manager**).

Drag and drop items from the Managers, margin area, or the navigator into the view.

The node types (document, quotation, code, memo, network) can be recognized by their entity specific icon.

Linking Nodes In Networks

The links between nodes in a network are real connections between the objects. Therefore, creating and removing links should not be regarded as solely "cosmetic" operations. Links make permanent changes to your entire project.

Creating Strong Links

To link, for instance, two codes to each other, select a code node. A circle appears at the top left corner of the node. If you begin to drag starting from the circle, a line appears. Drop the line on top of another code node. A list of relation opens. Select the one that best fits the relation between the two codes.
Creating Weak Links

To link for instance a code to a memo, select a code node. A circle appears at the top left corner of the node. As you begin to drag, an arrow appears. Drop the arrow on top of the memo node and drop the line.

Another way to link either two quotations to each other or two codes is via drag and drop in the respective managers.

Printing Networks

Open the network you want to print or save as external file first.

Select PROJECT / PRINT. If you click on Show Detail, you have the following options:

Figure 31: Code to code link

Figure 32: Printing networks
Tools For Basic And Advanced Analysis

The following options are at your disposal:

- Simple retrieval by code in the Quotation and Code Manager
- Code Cooccurrence Table
- Codes Documents Table
- Complex retrievals by a number of criteria, Boolean, semantic and proximity operators in all Managers
- The creation of smart codes also offering the full range of operators (Boolean, semantic and proximity operators).

For most of these options some basic knowledge on the available Boolean, semantic and proximity operators is necessary. Therefore, we recommend that you consult the corresponding chapters in the full manual before you start working with the analysis tools. Below we only provide a very brief overview, so that you have an idea what is available.

If you want to try out the various option but do not have a fully coded project yet, you can download the sample project [here](#). It will be used below for illustration purposes as well.

Simple Retrieval In The Code Manager

Full quotation preview:

Select a code in the Code Manager. The full content of all quotations is shown in the preview area at the bottom of the main window:

![Figure 33: Preview quotations by code in the Code Manager](#)
Simple Boolean Queries In The Quotation Manager

Boolean operators are explained in detail in the full manual.

The simple retrieval option in the Quotation Manager can be extended to include also more than one code:

1. Open the Quotation Manager. At the bottom of the screen you see a VENN diagram. You can set it to AND (= All must apply) or OR (any selected apply).
2. Select two or more codes holding down the cmd key.

Figure 34: Simple retrieval in the Quotation Manager – select one or more codes in the navigation pane on the left

Figure 35: Running an AND query in the Quotation Manager
Building Queries

Video Tutorial: ATLAS.ti Mac: Filtering and querying data

General Principles

You start building any query by selecting the filter icon and adding one or more rules by clicking on the + button:

- Open the Quotation Manager and click on the filter icon.
- Click on the + button to begin adding rules.

To remove a rule, click on the minus (-) button.

<OR> Query In ATLAS.ti Mac

1. Set the rule in the first line to ALL.
2. Click on the + button to add a new line (= rule).
3. Select the operator “OR: Any of the following are true”. Two new lines are added automatically.
4. Enter Code A and Code B into the third field of these two lines receptively.

A More Complex Query In ATLAS.ti Mac

…..looks as follows:
Code Cooccurrence Table

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

You find the Code Cooccurrence Table under the Analysis menu. In Figure 39 below you see an example query comparing the answers provided by respondents with and without children (column codes) with regard to a number of different issues (row codes):

![Code Cooccurrence Table](image)

Figure 39: Code Cooccurrence Table

The operators that are used to calculate code cooccurrences are enclosing / being enclosed / overlapping at start / overlapping at end / All of the following are true.

For further information on these operators see the full manual.

Code Document Table

The table contains either a frequency count for each code or code family per document or document family, or a word count of the coded segments per code and document.

A useful application is a comparison across different groups of documents for a particular category of codes. Thus, you are likely to create such a table if you have a certain question in your mind. This will guide you to create the code and document groups you need to construct your query.

Based on the Happiness Stage II project that can be downloaded from our website: [Download](#), we can compare for instance the view of males and females regarding their
attitude about parenting or reasons for having or not having children. For this purpose the four code groups on effects of parenting and reasons for having / not having children were selected and the two document groups gender::female and gender::male.

Figure 40: Code-Document Table

The table can be exported to Excel.
Data And Project Export

Video tutorial:
- ATLAS.ti Mac-Reports in Word
- ATLAS.ti Mac: Creating Outputs of All Objects

Export As Report (Word/PDF)

You find an export button in each of the managers (object managers and group managers). If you click on the Export button and open the drop-down menu, you can select between Export as Table and Export as Report.

If you want to create Word or PDF reports:

The first step is to select, what you want to export in form of a report. The report contains all items listed in the manager.

If you want to create a report of selected items, either select the items you want in the list, or set a filter. This means, you either select an item in the navigator, e.g. a code in the Quotation Manager or a code group in the Code Manager, on the left hand side, or by clicking on the filter button. Filtering the items in the list means you formulate a query, e.g. all quotations coded with codes of a particular code group; or all quotations containing a particular word.

Next click on the drop-down menu of the Export button and select the option: Export as Report.

A preview window opens. It shows the list of items as contained in the manager. On the right-hand side, you can make further selection to extend the content included in the report. Further you can specify how the items should be grouped in the report.

The preview above contains quotation names of the code "ex: self-delusion" and was created by the user “ATLAS.ti team” in April 2016. This information is contained in the report header on top.
In order to include the full quotation content, select content on the right-hand side under Report Options. The preview changes and now also shows the full quotation content:

If you want the report to contain more detail, you can continue to select more options. All options with an arrow in front of them can be extended further and more options become available. In the addition to the quotation name and content, the preview in Figure 43 below also shows the other codes linked to the same quotation, the creating and modifying user & date, the list of documents where these codes are contained and the linked codes:

Figure 42: Report including quotation name and content

Figure 43: Report preview including more details
Figure 44 shows about half of the options available for creating reports for quotations. Basically, you are pretty much free in building the kind of report that you want and need for various purposes.

After you have made your selection and checked it in the preview, click on **Save** or **Print**. The Print option allows you to save the report in PDF format as well. When you select the Save option, you can save the report in doc, docx or odt format (Figure 45).

You can export the content of all four managers (document, quotation, code and memo) to Excel or OpenOffice Calc. If you make no selection, all items are exported. If you only want to export selected items, you need to filter the content of the managers. The simplest option is by selecting a group in the navigator and possibly combine it with a “grouped by” view; or you formulate a more complex query by clicking on the filter icon (see left).

Click on the Export icon. Enter a file name or leave the default name. Select a location for the file and choose the desired format.
Export Documents With Codes

You can print the documents with the codes on the right-hand side as you see it on your screen. The report creates a WYSIWYG printout of coded documents (What You See Is What You Get). Instead of printing the document, you can also save it as PDF file, mail the PDF file or add it to iBooks, etc. See Figure 47 for available options.

The print documents with codes option is available for textual documents, PDF and image documents.

The printout resembles the screen display at the time of creating the output. Only those margin objects are included that are currently displayed in the margin. If not everything that you want to be visible is included, adjust the margin area. To change the type of objects that are displayed, right click on a white space in the margin area to open the context menu and select the objects to be included in the output.

Load the document that you want to print.

Select **PROJECT / PRINT** from the main menu.

The printer dialogue window opens. Select **Show Detail** to see all option as shown in Figure 47. Make your choices. Select landscape view if your codes spread over several columns. If you change the settings the preview adjusts automatically. If you do not want to print the entire document, select start and end page. The pages are shown in the preview.
Prior to printing the document, you can also open a PDF preview or select other options. See Figure 48.

Figure 47: Print with margin settings

Figure 48: Print with margin options