

# INSIDE ATLAS.ti – The QDA Newsletter

We welcome you to the first issue of *INSIDE ATLAS.ti* in 2016. This issue contains news and an overview of our training activities. In the *Best Practices with ATLAS.ti* section, we share an article by Dr. Susanne Friese, in which the author discusses strategies to identify themes and categories using the software. In the *Case Studies with ATLAS.ti* section, Dr. Steve Wright, from Lancaster University in the UK, describes the incorporation of ATLAS.ti into the CAQDAS in science and technology studies, seeks to explore how software affects, changes and mediates the way qualitative research is done.

We hope you enjoy this new issue of *Inside ATLAS.ti*!

Jörg Hecker  
Chief Operations Officer, ATLAS.ti





## News

### ATLAS.ti Moves its Headquarters

ATLAS.ti has recently moved its Berlin-based headquarters to a larger location in order to accommodate continuing significant growth within the company; especially in the Research and Development department. The former headquarters, located on Hardenbergstraße next to the Technical University of Berlin, had exceeded its capacity limit.



ATLAS.ti's new base of operation is still located near the university, but is closer to Berlin's city center. A great advantage of the new facility is its spacious roof terrace which offers a pleasant and relaxing atmosphere for the staff. Moreover, numerous gyms, cinemas, restaurants, shops and other Berlin-offerings are now much closer, making the new headquarters both a work and leisure paradise. The address of the new headquarters is Fasanenstraße 77 and is located directly opposite the famous luxury Hotel Kempinski, which was opened in 1952 as the first hotel of the world-renowned Kempinski-Group.

### Intensive Workshop at the Tecnológico de Monterrey Campus Guadalajara

In early January, The ATLAS.ti training staff taught a three-day workshop at the *Tecnológico*

*de Monterrey Campus Guadalajara*. Participants were marketing faculty, specializing in qualitative methodology, from several of the regional campuses of the university.



It was a highly enthusiastic group of researchers doing very interesting work. We are grateful to our Mexican colleagues for the opportunity to teach this workshop and wish them the best in their endeavors

### New Look of the ATLAS.ti Training Website Pages

You will notice a few changes on the ATLAS.ti Training website pages. Now, it is easier to find the free webinar that best fits your schedule ([webinars.atlasti.com](#)). Just select the date, time and region of your choice and, following, register for the webinar of your preference. Additionally, face-to-face courses are now displayed together by date and organizer. You will be able to select from a list of courses offered by the ATLAS.ti Training team and by our experienced partners, all of whom are certified trainers. Just click on 'Registration and Information' to access the course websites.

### New Learning Opportunities: Self-Paced/Asynchronous Courses

We are now offering self-paced/asynchronous courses that allow users to learn ATLAS.ti 7 Win-



dows at their own pace (ATLAS.ti Mac courses will be available soon). Each registered person has 30 days to complete the course by watching lecture videos, reading learning guides, completing a set of guided exercises, and taking a few examinations. The Spanish language courses teach ATLAS.ti from project set-up to analysis and outputs, and they can be taken in two modalities: Unlimited Support (email and web-conferencing) and No Support.

We offer two self-paced/asynchronous courses in English: 'Fundamentals of ATLAS.ti: From Project Set-up to Coding and Outputs' and 'Advanced Features of ATLAS.ti: Beyond Coding into Analysis and Outputs'. The Fundamentals course is available now while the Advanced Features course will be available on March 1st. All of these courses can be accessed on our website by clicking [here](#).

## ■ New Teaching Partners in the United States

ATLAS.ti has new teaching partners! We are now collaborating with the [Center for Ethnographic Research \(CER\)](#) at the University of California, Berkeley; the [Odum Institute for Research in Social Science](#), The University of North Carolina at Chapel Hill; and the [College of Education at The University of Georgia](#). Dr. Corey Abramson teaches ATLAS.ti courses at CER, Paul Mihás at the Odum Institute and Dr. Trena Paulus at the University of Georgia. All of these courses are open to the public. We encourage you to contact the organizers for information. All courses are listed [here](#).

## ■ ATLAS.ti is Sponsoring the 12th National Colombian Sociology Conference

ATLAS.ti is a sponsor the the [12th Colombian National Sociology Conference-Conflict, Peace and Region](#). The event will take place at the University of Nariño, Colombia, on April 21st, 22nd and

23rd. Sociologists from Colombia and other Latin American countries attend this important professional meeting. ATLAS.ti will have a booth at the conference, where our Latin America sales manager Mr. Luis Alfredo Loaiza will be demonstrating the software and answering inquiries. Additionally, Mr. Loaiza will be teaching an introductory workshop to conference attendees. For more information on this event, visit the [conference website here](#).

## ■ ATLAS.ti Trainer Certification Programs: Developing an International Network of Trainers and Consultants

ATLAS.ti certifies the knowledge and experience of students and professionals who want to provide training services in ATLAS.ti. The Certified ATLAS.ti Student Trainer program (CAST) provides certification to those students who are using the software in their theses and dissertation projects, so they can introduce their peers to the basics of the program. To apply, click [here](#). Our Certified Professional Trainer program (CAPT) provides certification to those seasoned academics and researchers who are using ATLAS.ti in their research projects and can demonstrate a high level of expertise in the use of the software. To apply, click [here](#).

## ■ Case Studies in ATLAS.ti

Are you using ATLAS.ti in interesting projects and would like to share your experience with the international community of users? If so, we invite you to contribute to our Case Studies section of *Inside ATLAS.ti*. To do so, simply [complete this questionnaire](#). We will contact you soon after receiving your submission. Thank you!



## Learning Resources

ATLAS.ti offers a variety of resources that facilitate the learning of the software. These include a complete library of video tutorials, weekly webinars, varied workshops, as well as a set of manuals and how-to documents.

For more information on our learning resources please contact the staff of our training center. They will be happy to assist you. In the United States and Canada, you may call us toll free at 1-866-880 0231. If calling from other countries, dial +1-541-286-4391. You may also write to us at [training@atlasti.com](mailto:training@atlasti.com) and access all of our training resources on our website by clicking [here](#).

### Free group introductory webinars

If your organization is evaluating ATLAS.ti, or if you want to introduce it to your students or at a professional meeting, schedule a presentation with one of our instructors. We will be happy to tailor the presentation to your needs. To schedule a presentation, please [complete this registration form](#). For group demo webinars in Spanish, [complete this form](#).

### Free overview webinars

Our free overview webinars in English and Spanish and are offered at different times to meet the needs of users worldwide. The English language webinars are offered at times convenient to the EST (New York) and SGT (Singapore) time zones. The Spanish language webinars are offered at times convenient to the CEST (Madrid) and ART (Buenos Aires) time zones. To see our schedule, and to register, [click here](#).

### Premium Training

Our [premium training activities](#) include online synchronous courses taught through web-conferencing as well as online asynchronous or self-paced courses. The synchronous courses are taught in three sessions of 2.5 hours (English) and 2 hours (Spanish). In these courses, students have the opportunity to interact with the instructor in real-time. To participate, you need to have a high speed Internet connection. The asynchronous courses require that participants learn ATLAS.ti by watching a set of pre-recorded lectures, completing exercises, and reading complementary learning material. These courses must be completed within a period of 30 days. In both types of course, participants need to have ATLAS.ti (full or demo versions) installed on their computers. All information about both synchronous and asynchronous online courses can be found [here](#).

Additionally, the ATLAS.ti company training staff as well as our highly experienced training partners are offering introductory and advanced courses in the United States, Germany, Spain, the Netherlands and the United Kingdom. In the next few months, we will also be offering courses in Malaysia and Argentina. To see the complete schedule, and to register, [click here](#).



# BEST PRACTICES WITH ATLAS.ti

## Theme and Category Development in ATLAS.ti

Dr. Susanne Friese

In principle there are three ways to begin coding. You either start with a list of codes or you develop your code list from scratch - or use a mixture of the two. Initial ideas for coding might directly emerge from the data you read, or can be derived from research questions, theoretical models, literature or from an interview guideline. When you start coding, the how descriptive or abstract a code is does not play a role; codes may be descriptive or already conceptual. The important point is to mark those things that you find interesting and to name them.

Reading further, you will very likely notice a few things which are similar to some issues you have noticed before. These may either fit under an already existing label, or you may need to rename a label to subsume the already coded and the new data segment. Even if the term is not yet the perfect code label, it does not matter. You can continue to collect more similar data segments and later, when you review them, it will be easier to think of better and more fitting code labels. At first you will generate lots of new codes; in time you will reuse more and more of those codes that you already have. If this is the case, you have reached your first saturation point. In technical terms, you will drag and drop existing codes from the Code Manager or Navigator onto the data segments. As soon as you reach this point, it is time to review your coding system.

### Developing categories

Based on the codes shown in Figure 1, we would like to demonstrate how an initial list of codes can

be sorted and structured. The code list is based on the children and happiness sample project (see [here](#)). The version of the project we are using here contains 46 codes related to positive and negative effects of being a parent. These code labels are partly directly taken from the words the respondents used and thus are very close to the data. The frequency of each code word is very low.



Figure 1: Building categories from the bottom up

What often happens at this stage is that analysts use code families to collect descriptive code labels *without* further conceptualizing. This is not a good idea. It leads to endlessly long code lists that are of no use in querying the data in the next phase of the analysis. Below we will make use of code families (code groups) as little helpers only.

If we look through the list of codes in the Code Manager, it can quickly be noticed that there are positive and negative effects of parenting. Therefore, all positive effects are grouped into a code family called 'positive effects'. Now we can apply a global filter with a right click on the code family (Win version) to focus on the reduced list of 22 codes. In the Mac version, just click on the code group to filter the list of codes.

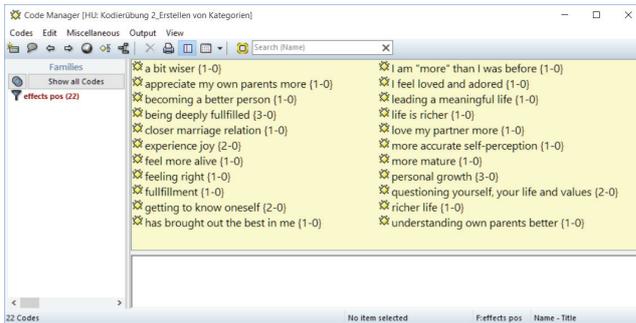


Figure 2: Presorting the list of codes / code family set as global filter (Windows version)

Looking at the reduced list of codes, it is now easy to see that a number of codes refer to personal growth. Personal growth already exists as a code. So we can merge those codes that are similar into this code. For this, do as follows:

Right click on the code 'personal growth' and select **Merge Codes**. From the list that pops up select all codes that relate to personal growth. This reduces the list to 14 codes. The personal growth code now contains 8 quotations. In the Mac version drag the codes to 'personal growth' and select the **merge** option. You do this for one code at a time.

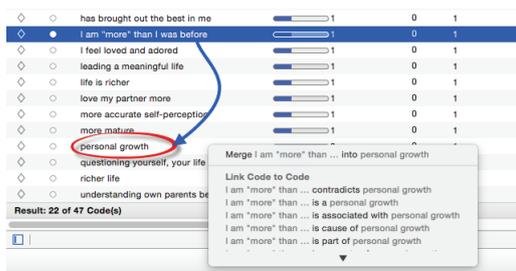


Figure 3: Merging codes in the Mac version

Look at the remaining codes. Other codes you can merge are those related to fulfilment, richer life, positive emotions and improved relationships (parental and marital). If the more conceptual name does not yet exist, rename one of the codes with the conceptual term and then begin the merge process. This reduces the filtered list to 5 codes.

As these code labels would still appear all over the place in the alphabetic code list, we need to

add a prefix to all of these labels, so that they are united under a common heading. I suggest to use the prefix 'effects pos' and for the second list 'effects neg', so that the effects of parenting codes are sorted underneath each other later in the complete list of codes. The last thing that is missing is the main category label. As we built the category from the bottom up, it does not yet exist.

- Create a new code with the name EFFECTS POS. Highlight all codes and give them a color.
- Take out the global filter (Win version): right click on the code family, select **Remove global filter**. Click on the button **Show all Codes**.

Voilà, there is your new category with sub codes:

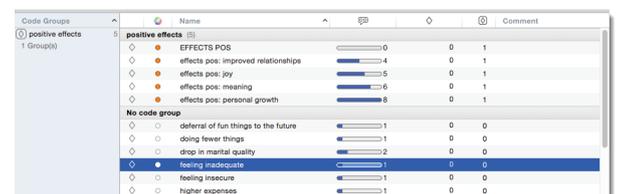
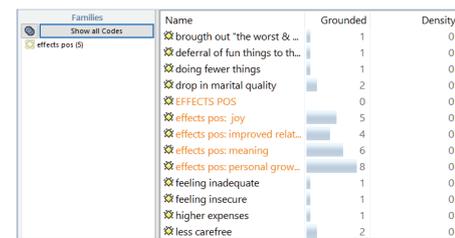


Figure 4: Building a category from the bottom up (Windows and Mac versions)

## Developing sub-codes

The goal in developing subcategories is to achieve a good description of heterogeneity and variance in the data material. We will again use an example based on the children and happiness project (LINK). This time, the data segments have been "lumped" under only a few codes. No attempt has yet been made to separate the various aspects.

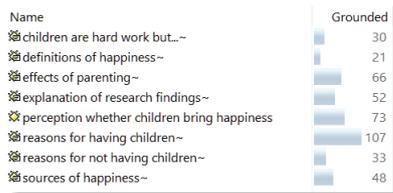


Figure 5: What do to if you are a “lumper”

When you begin to code, you may not know which aspects are salient and provide good reasons for forming a group of their own, so it is easier to collect the various aspects under a main theme first. But before there is too much coding, you need to begin to sub-divide it. I will explain the procedure based on the code “children are hard work but...”.

Double click on the code “children are hard work but...” and read through the quotations. In the Mac version, select the code in the Code Manager and read the quotation in the pane below the code list. If you prefer reading the quotations in an editor, select the code and then the option **Output / Quotations for Selected Code (s)**. Your task is to develop subcategories based on the major theme.

After reading through a few quotations, you are likely to notice quotations that refer to the same aspect and others that describe another facet of the main theme. When you are at this point, start collecting these aspects. One option is to write them down on a piece of paper and run a tally. Figure 6 shows my notes. Given sufficient enough screen space, another option is to type your ideas into a memo and use this memo later on to create the list of sub codes (Windows version, see: ‘importing codes’ under Help).

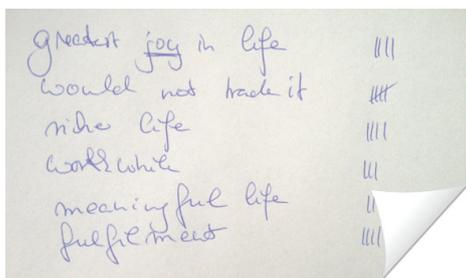


Figure 6: Noticing and collecting in the process of developing subcategories

Looking at the extracted terms helps to conceptualize them further. ‘Greatest joy in life’ might be subsumed under ‘richer life’. Would not trade it for anything, worthwhile and rewarding could be summarized under ‘worthwhile trade-off’; life is meaningful, I feel fulfilled can be integrated into fulfilment, and so on. The aim is to look at the bandwidths of issues mentioned and to come up with a label that best describes the most similar ones.

After you have decided which subcategories you want to use, you need to enter them into ATLAS.ti and then recode the data. In order for the subcodes to show up under the main code, we need to add prefixes again and rename the main category name, as follows:

- HARD WORK BUT...
- Hard work but: fulfilment
- Hard work but: richer life
- Hard work but: worthwhile trade-off
- Hard work but: positive emotions

Click **F5** to resort the list (Windows). Now it is a good time to colour the codes of this newly developed category. All quotations are still contained in the main category code. The next step is to distribute them to the sub codes (Figure 7).

Double click on the main category code HARD WORK BUT... and select the first quotation.

Read it and decide into which subcategory you want to move it. Select the appropriate sub code in the Code Manager and drag it onto the main code in the margin area, thus replacing it. Another option is to use the code list from the navigator pane.

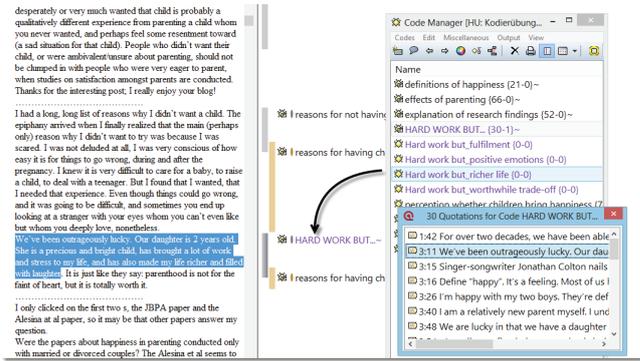


Figure 7: Coding on: replacing the main theme code with the sub code (Windows)

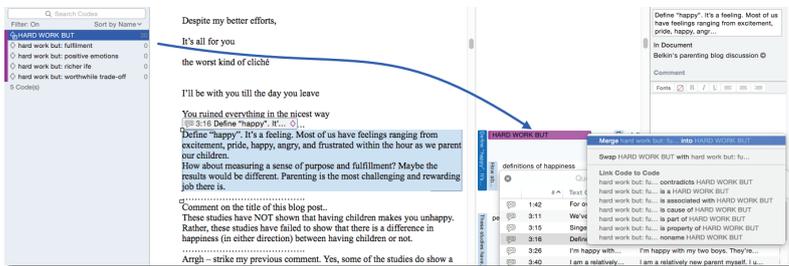


Figure 8: Coding on in the Mac version

There is no need to leave the main category code attached to the segment. It just clutters up the margin. It is easy to collect the quotations in one main category via a code family / code group later. For now the aim is to empty the main category code and fill the subcategories with content (see Figure 9). You may need to adjust the length of some quotations or create new ones. If you come across a quotation that you find difficult to sort into any of the existing subcategories, leave them in the main category.



Figure 9: Sub codes filled with content

## Conclusion

In this article, I have shown the process of building categories and sub codes when approaching analysis inductively. The process is different if you chose a deductive approach. Knowing how

an efficient code system looks like – efficient in terms of being able to utilize the more advanced analytic tools of the software, you can name known categories and sub codes already in the same way as for instance shown in Figure 9. If you need to complement the code list, you can apply the procedures as described above. The structure of the final code list will be the same, no matter whether you start inductively or deductively. As a reference example, please take a look at the Children & Happiness sample project and open the Code Manager.

## Additional resources

ATLAS.ti Mac and Windows sample project. [Download from here.](#)

Video tutorial on building an efficient coding system (11 minutes). [View here.](#)

Video tutorial on building categories (18 minutes). [View here.](#)

## About the author

Dr. Susanne Frieze started working with computer software for qualitative data analysis in 1992. Her initial contact with CAQDAS tools was from 1992 to 1994, as she was employed at QualisResearch in the United States. In following years, she worked with the CAQDAS Project in England (1994–1996), where she taught classes on The Ethnograph and Nud\*ist. Two additional software programs, MAXQDA and ATLAS.ti, followed shortly. Susanne has accompanied numerous projects around the world in a consulting capacity, authored didactic materials and is one of the principal contributors to the ATLAS.ti User's Manual, sample projects and other documentations. In 2012 (Second edition in 2014) her book "Qualitative Data Analysis with ATLAS.ti" was published by SAGE Publications.



## Case Studies in ATLAS.ti

**In this issue of Inside ATLAS.ti, we interview Dr. Steve Wright, a Learning Technologist from the Faculty of Health and Medicine at Lancaster University - a leading research-intensive institution in the North West of England. He has been using ATLAS.ti for more than three years and is proficient on the Windows and Mac versions of the software.**

### **Could you tell us something about your professional background and research interests?**

I work at Lancaster University in the across the Faculty of Health and Medicine where I develop materials and provide support on both learning and qualitative research technologies to staff and students both in the faculty and across the University.

I run blended-learning training sessions at Lancaster University which are both face-to-face and online (via a live stream and subsequent recording of the f2f session along with webinars and forums). These cover choosing and using a CAQDAS package, and then build on that through introductory, advanced and bring-your-own-data sessions for both ATLAS.ti and NVivo. I am a certified ATLAS.ti professional trainer and have provided bespoke consultancy for teams using ATLAS.ti on a number of research council funded projects. I have recently established a consultancy business to work with ATLAS.ti across the UK building on these skills and this experience.

As a learning technologist I work to ensure that the we deliver a quality program and support for our distance learning programs, I'm also keen to experiment with and assess the potential of new technologies and systems to support learning and research.

I completed my PhD in E-Research and Technology Enhanced Learning in 2014, and made extensive

use of ATLAS.ti in my thesis research work [1]. I can honestly say I couldn't possibly have worked with the data in the way I did without the unique features ATLAS.ti has (my forthcoming paper from the ATLAS.ti user conference explores that). I am interested in mobile work, mobile methods and developing theory around the use of technologies in complex, fluid mobile environments and research methods for exploring these. I draw extensively on actor-network theory, ethnomethodology and ethnographic methods. I have undertaken small-scale research projects into mobile learning in informal learning communities.

Prior to working at Lancaster I worked during the dot.com boom as a web designer and user interface designer for an internet security startup and then contracting in the UK, South Africa and Australia for a diverse range of companies. With the burst of the dot.com bubble I moved into education - gaining an English Teaching qualification and then teaching English in Mexico at a private language school and then at Universidad Autónoma de la Mixteca. I studied for an MSc in Computer Applications for Language Learning at Stirling University in 2003-4 and then worked with at a BBC Learning Centre on developing sites and software for digital literacy and adult skills.

### **In what study are you using ATLAS.ti? Tell us something about it.**

My current project with Dr Ibrar Bhatt (in Educational Research at Lancaster): CAQDAS in Science and Technology Studies, seeks to explore how software affects, changes and mediates the way qualitative research is done.

The capabilities of computer assisted qualitative data analysis software (CAQDAS) have massively increased since the 1990s, usage is far more



pervasive, and the costs and pressures for institutional licensing have grown. Concomitantly the approaches to researching social life have become more complex, digital and mobile. In this context the relative lack of systematic research on CAQDAS use since Fielding, 1998 [2] is striking – there has been a lot of published work, however, the data informing these publications is largely composed of single-person or single-project case-studies.

CAQDAS is often strongly associated with particular approaches to engaging with qualitative data such as coding data and retrieving the codes, abstracting and reducing data to themes and relating data to fixed locations. Books, training courses and marketing materials for these packages actively position and promote them as being supportive but largely transparent in the qualitative analysis process. Such simplistic positioning is challenged by scholarship in science and technology studies (STS) and practices in mobilities research that explore the mediating effects of software on work practices. The methodological concerns of these interdisciplinary research areas also pose significant challenges to conventional CAQDAS approaches – for example the idea of “following the actors” is different from identifying theme, as are explorations and concerns with movement and mobility. We believe that at their intersection there is substantial potential for exploring, reformulating and better understanding what CAQDAS does, can do, and could potentially do. Through exploring the experiences, practices, uses, and the theorization of the software by researchers working in STS and mobilities research we’re working to explore and intervene in that area.

The research proposal seeks to investigate the following research question:

How do social scientists studying science, technology and mobility in their research consider, engage with and account for the effects of using CAQDAS on their investigations and analysis?

Specific sub-questions then guide the methods and analysis:

- What influences choice of software?
- Which tools and options within CAQDAS are adopted, and how are they used?
- How is the use of software accounted for in public research outputs?
- How is the use of software accounted for in private research outputs?
- How are breakdowns, limits and workarounds understood, drawn on, incorporated or theorized?

### **What methods are you using?**

This project uses web-based screen-capture interviews of around an hour with 13 researchers working in STS or mobilities. We’ve tested several different webinar platforms (including testing Webex, Zoom, GoToMeeting and Adobe Connect) to engage with distributed researchers across the UK, Europe, Australasia and the Americas. These systems enable recording on-screen software use and an experiential, demonstrative interview approach to explore software use and issues. By using that method we’ve generated a rich view of the layering of research activity and interaction between the software, research work and writing practices. Of course, it’s also substantially reduced fieldwork travel costs and time. Additional data has been collected through participants sharing documents and notes they have made about software use in their written memos, notes, blog posts or similar reflective writing.

The reflexive, iterative, technology-mediated development of our data analysis procedures is also a significant part of the research project. How it is proceeding is being shaped by the practices, suggestions and approaches of the participants. The automatic analysis using code-and-retrieval is forming a one component of this, as are networked and



hyperlinked explorations of the connections between elements of the interview accounts, documentary evidence and literature. How, precisely, this continues to develop is therefore a key part of the research process and project rather than just a means to a conclusion.

The transcripts have been synchronized with the screen recordings (with the processes of doing so documented – see Figure 1 below) and initial analysis of that data together with additional documents from participants and relevant literature are being analyzed using several software assemblages. These include the software used by participants - primarily ATLAS.ti on PC and NVivo on PC.

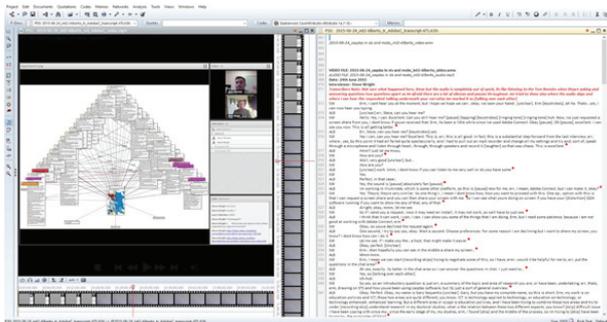


Figure 1. Synchronized transcript and screen recording

The ATLAS.ti iPad app is also being used extensively for working with the literature for the project as well - enabling the development of a literature-informed coding system and working with literature for the project while mobile. See Figure 2 below.

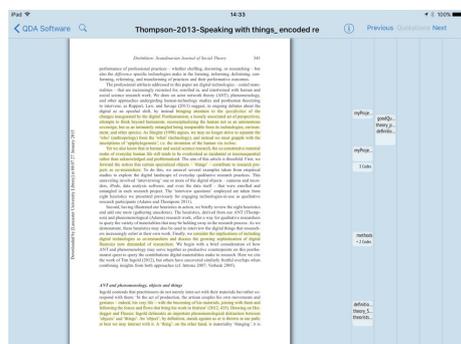


Figure 2. A document on the ATLAS.ti iPad app

For the project development analysis is also being undertaken in the Mac versions of these packages (Figure 3). Further possibilities and approaches to analysis are also being explored through other software packages that form part of participants practices such as the Actor-Network Text Analyser (ANTA), Gephi (seen in figure 3) and the AI-based document organization system DEVONthink.

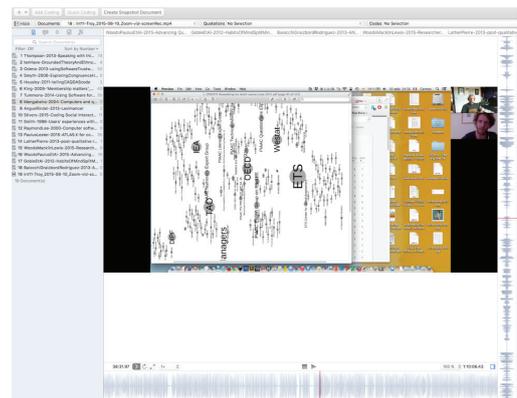


Figure 3. The project in ATLAS.ti Mac

A core principle of this research is that the data should be re-usable for secondary research and in the training of highly skilled researchers - with a shared dataset across several packages to support better comparison of software rather than a beauty contest between interfaces or disciplinary taste-test in response to the topic of discipline of example projects. By including data which discusses real world researchers' experiences with software use selections from this should help build a useful and relevant dataset for those learning to use software.

The research is at an early stage but working comparatively between Mac and PC versions of ATLAS.ti and making live comparisons with the processes in NVivo is proving very enlightening. I am really excited about the new possibilities that will come with version 8 having seen an early beta at the ATLAS.ti user conference and building that into the project.



### **Any final words?**

I am particularly interested in the interactions and challenges of methods and their epistemological and ontological assumptions with software and how different traditions and approaches can challenge these. In my research work I draw extensively on ideas from Actor-Network Theory (which isn't a theory) and ethnomethodology (which isn't a methodology) and find these a productive set of ideas and tools with which to explore and unpack the agencies and effects of software use on the research process. The most influential book thus far in this is John Law's "After Method: Mess in Social Science Research"[3] which I would highly recommend for those seeking to rethink and reimagine ways that the diverse and powerful tools in ATLAS.ti could be used to creatively explore and work with data outside of conventional approaches of identifying themes.

### **Thank you!**

### **References Cited**

- [1] Wright, S. 2014. *Accounting for taste: Conversation, Categorisation and Certification in the Sensory Assessment of Craft Brewing*. PhD thesis in Educational Research – Lancaster University. <http://eprints.lancs.ac.uk/71741/>
- [2] Fielding, N. 1998. *Computer Analysis and Qualitative Research*, London: Sage
- [3] Law, J., 2004. *After method: Mess in social science research*. London: Routledge.

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