ATLAS.ti 8 Mac Quick Tour
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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.

• Referrals to the full program manual are indicated in blue. You can download the full manual here.
• Also, throughout this document you find links to video tutorials and blog articles.

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 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.

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 project, 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://downloads.atlasti.com/library/Friese_2009-09_1.pdf)
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

- After downloading ATLAS.ti for Mac, look for the file 'ATLAS.ti Mac.dmg' using Finder. It is likely in your download folder.
- Double-click the file. You will see the red icon for the ATLAS.ti app.
- 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

- 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

See also the following video: ATLAS.ti Mac Overview

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

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:

Each entity is represented by a icon, so you can easily recognize and distinguish among the various entities. Pay attention to the entity color. It is used when setting global filters. For instance, a global document filter is blue, a global code filter is green, and so on.

You can access all entities via the Project Explorer on the left hand side in the navigator and via the entity lists. Each entity type can also be displayed separately in the navigator. Click for instance on the document tab to only see the list of documents.

On the right-hand side, you see an inspector. It shows the details for the currently selected entity.

By clicking on the blue boxes, you can hide or show the various interface areas like the inspector, the navigator, or the preview area.

Video Tutorial: ATLAS.ti Mac Interface
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.

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

![Creating a new project](image)

Figure 6: Creating a new project

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

Importing Projects

If you do not have your own data yet, you can download two sample projects from our website. The project is called "Children & Happiness". There are two versions. Stage I only contains documents; the stage II project is the coded version of the project. In addition to the documents in the stage I project, it also contains data from a survey import.

The sample projects can be downloaded from our website: [https://atlasti.com/manuals-docs/#Sample-Projects](https://atlasti.com/manuals-docs/#Sample-Projects)

To import the sample projects, select the option IMPORT AN ATLAS.TI PROJECT from the opening screen, or double-click the atproj file after you downloaded it. When you download the file, make sure that the downloaded file has the file extension atproj (and not zip)!

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...
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

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).

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.

If you want to back up the ATLAS.ti library where ATLAS.ti stores all project files and the imported documents, the default location is:

~:/Library/Application Support/ATLAS.ti

It is recommended to add this location to your routine backup (e.g., Time Machine). If you have selected a different location for your library, make sure that you create a regular backup of this folder.

NOTE: Never make any changes to the ATLAS.ti library! If you do, this may corrupt your projects and you lose data. This cannot be fixed and even our support cannot magically reconstruct your project data if this folder was manipulated.
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). Further you can import twitter data, data from reference managers and open-ended questions from surveys via a special survey import option.

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....

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).

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”.

Figure 7: Adding documents to a project

Figure 8: An alternative to the main menu option
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

If you don’t have a project yet, you can use the Children & Happiness sample project stage 1 and 2. The stage 1 project contains documents but not codes yet. Thus, you can use it to follow most descriptions until you get to “Tools for Basic and Advanced Analysis”. If you want to practice the tools for further analysis, we suggest that you work with the coded stage II project.

The sample projects can be downloaded from our website: https://atlasti.com/manuals-docs/#Sample-Projects

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.

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.

![Quotation from Selection](image)

Figure 11: Creating a quotation via the context menu

Figure 12 shows the margin of a video document. If you want to practice working with video data, please add your own video to the sample project. To create a video quotation, you only have to make a selection in the margin area where you see the audio waves. You see preview images, so that you know where you are in your video. The video quotation is created automatically.

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.

Figure 12: Working with quotations: modifying quotation names and writing comments.

Figure 13: The Quotation Manager showing a preview of a video quotation.
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).

![Figure 14: Modifying the length of a quotation in a text and video document](image)

Reviewing Quotations

Open the Code Manager: From the main menu select **CODE / SHOW CODE MANAGER**, or double-click on the Code branch in the Project Explorer.

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 in Code Manager](image)
The Code Manager

In the Code Manager you can add and delete codes, edit a code name, write code comments, add code colors, retrieve coded segments, create code groups or use the Manager for drag & drop coding. Further, you can review code frequency and density, group membership and all entities linked to a code. Additional options are:

**Creating Reports:** To create tabular reports in Excel format of the currently displayed content of the main window, or to build and export reports in Word or PDF format. This is described in detail in the section “Video tutorials: • ATLAS.ti Mac-Reports in Word • ATLAS.ti Mac: Creating Outputs of All Objects”.

**Filtering:** Another option is to query your codes. When clicking on the filter icon, you can select from a large range of options that allows you to filter your codes in a variety of ways. This is explained in detail in the full manual.

If you want the Code Manager to stay on top, click on the pin icon in the top right-hand corner.

The main window provides an overview of the main properties of a code:

- The first column indicates whether the code is a regular code (green diamond), or a smart code (diamond with a gray dot at the bottom left) and whether it has a comment or not (attached post-it). See the full manual for more information on smart codes.

- The second column shows the **code color** (see “Figure 17”).

- The third column shows the **code name**.

- The next two columns indicate the code frequency and density:
  - **Frequency** (indicated by the quotation icon): Number of quotations coded with the code
  - **Density** (Indicated by the code icon) is the number of linkages to other codes that the user has created.

- **Groups:** This column lists the code groups a code is assigned to.

- **Comment:** This column shows the code comment.

The remaining columns in the Code Manager show the creator and modifier (name of the author who created and last modified the code), the creation date and date of last modification.

The default order of the columns can be changed manually via drag-and-drop.

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.
Add Coding

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

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

After coding, the quotation name and the code label are displayed in the margin area (Figure 20).

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.

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

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 21).

Splitting A Code

Another common activity in building a code system is to split a code that you have applied many times. After coding for a while, you may realize that you can split this code into multiple sub codes.

- To split a code, select a code in the Code Manager, right-click and select **Split Code**.
The next step is to add the sub codes. Click on the **Add Codes** button. ATLAS.ti will automatically add the name of the code that you want to split as prefix. Therefore, you may want to rename the code that you intend to split before you begin the process.

When you entered all sub codes, click **Add**.

The sub codes are shown on the right-hand side of the quotations. Click on the first quotation, read the preview below the list of all quotations and select one or more fitting sub codes. If your categories should only contain mutually exclusive coding, as for instance necessary for ICA analysis, you can activate this option at the bottom of the screen. This means, you can only select one sub code per quotation.

When you add a quotation to one or more sub code it is automatically unlinked from the original code (recommended). If you come across a quotation that you no longer find suitable, just unlink it from the original by deactivating the box.
Once you are done, click on the **Split Code** button.

The result may look as follows. In the example, the code ‘effects positive’ was split. The original code was renamed after splitting using capital letters to indicate that it is now a category code. All codes of the category **EFFECTSPOSITIVE** were given the same color.

![Image](image1.png)

**Figure 25: Results after splitting**

**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 **REPLACE** option from the context menu.

![Image](image2.png)

**Figure 26: Replacing a code in the margin area**

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.

**Adding Code Color**

Open the Code Manager by selecting **Code / Show Code Manager** from the main menu, or double click on the Code branch in the Project Explorer.

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 27 below you see how code colors are displayed in the margin.
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
- etc.

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.

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
- etc.

The sort order is:

1) Special characters (* + # - __ : ; , etc.)
(2) numbers, and
(3) letters.
The two functions that are essential in building a coding system are merging codes and splitting codes. Both were described above.

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 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 entity to which they are attached. Memos can be associated with more than one entity and have an additional type attribute, e.g., theoretical, methodological, commentary, etc. They can also be free-standing and can have a comment of their own.

Video Tutorial: ATLAS.ti Mac: Working with Memos

Creating A New Memo

Open the Memo Manager by clicking on the memo branch in the Project Explorer, or select Memo / Show Memo Manager from the main menu.
Click on the + sign to add a new memo. Enter a name.

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 28).

![Figure 28: Open a memo, document or network in a new region](image)

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.

![Figure 29: Working with memos](image)

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 29).

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**Working With Groups**

**Video Tutorials:**
- ATLAS.ti Mac: Working with document groups
- ATLAS.ti Mac: grouping the project codes
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 differ across 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.

If you want to reproduce what you see in Figure 30, import the Children & Happiness stage II project.

Figure 30: Use document groups as filter in the Document Manager

Figure 30 shows how document groups can be used as filters. The manager only shows documents of married female respondents. The active filter is shown in the light yellow bar on top of the list of documents. The operator is set to “all” = all criteria must apply “gender::female” and “marital status::married”.

Figure 31: Filter entities in managers using the operators ALL or ANY

You can switch between the “all” and “any” operator: An example for the use of the ANY operator for example is the combinations of two age groups. Instead of comparing age group 1, 2, 3 and 4, you may want to combine the two youngest and the two oldest groups: ANY of age group 1 and age group 2.

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 workflow. 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 for instance the Document Manager. Select a few documents, right-click and select **GROUP DOCUMENTS**. Enter a name for the document group.

Alternatively, select some documents and drag-and-drop them into the group side panel on the left. Enter a name for the group.

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 30).

Click on – on the top right of the yellow bar to reset the filter.

Removing An Item From A Group

In a manager:

- Click on the item that you want to remove in the manager.
- Right-click and select **REMOVE FROM GROUP**.

Or:

- Select for instance a document and take a look at the inspector on the right. The inspector lists all groups where the document is a member.
- Right-click on the group that you don’t want the document to be in and select **REMOVE FROM GROUP**.

Figure 32: Creating document groups via drag-and-drop

Figure 33: Remove an item from a group in the inspector
WORKING WITH NETWORKS

Working with Networks

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”).

Video Tutorial:
• ATLAS.ti Mac: Working with networks
• ATLAS.ti Mac: Previews in Networks

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 entities. Therefore, creating and removing links should not be regarded as solely "cosmetic" operations. Links make permanent changes to your entire project.

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 an drop the line.

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 (see Figure 34).

Figure 34: Linking two code nodes using a named (strong) links
Another way to link either two quotations to each other or two codes is via drag and drop in the respective managers.

To create new relations to link codes, open the Relation Manager for codes under the main Code menu (CODE / SHOW RELATION MANAGER). To create new relations to link quotations, open the Relation Manager for quotations under the main Quotation menu (QUOTATION / SHOW RELATION MANAGER). See full manual for further detail.

**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:

**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 stage II sample project [here](#). It will be used below for illustration purposes.

**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:

Another option is to select a code in the side panel of the Quotation Manager and read all quotations there.

**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. Available are the two operators ALL and ANY. They have already been introduced in the section on groups.

Open the Quotation Manager.

Select two or more codes holding down the `CMD` key, e.g. the code ‘#gender: female’ and ‘children: > happiness’.

As operator select ALL. This finds all quotations that have been coded with both of the codes. The result list shows 5 quotations (Figure 39).

If you want to find quotations where only one of the selected codes or both have been applied, switch to the ANY operator in the yellow filter bar.
Building Queries In The Query Tool

- From the main menu select **ANALYSIS / QUERY TOOL**.

When you open it, an operator might already be selected. If not, click on button **UNDEFINED (EMPTY)** and you will see the list of operators that is available. For a description of all the operators, see the full manual.

If an operator is already entered, you can either continue with selecting some codes, or change the operator. Let’s build a query with OR:
Next select two codes:

Queries can be extended further, operators can be embedded and a number of different operators can be combined in one query. See example below. If you want to store a query, you can save it as smart code (see full manual for further detail).

Video Tutorial: ATLAS.ti Mac: Filtering and querying data
**Code Co-Occurrence Table**

The Code Co-occurrence Tools allows to ask a different type of questions. Using this tool, you can ask ATLAS.ti to show you all codes that co-occur across all of your documents. The result is a cross-tabulation of all codes.

You find the Code Co-occurrence Explorer and Table under the **Analysis** menu. In Figure 44 below you see an example query comparing the answers provided by respondents with 1 child and 2 or more children (column codes) with regard to positive and negative effects of parenting that were reported.

![Figure 44: Code Co-occurrence Table](image)

The first number in the cell is the number of times the row and the column code co-occur. The number in parantheses is the c-coefficient that indicates the strength of the association between the codes. It is a number between 0 and 1. The sample data set is too small to yield any meaningful results. The c-coefficient is especially interesting when working with larger data sets.

If you select a cell, you can read the quotations linked to the row or column code in the two preview areas below. In version 8.4 and higher you will be able to export the quotations. The table by itself can be exported to Excel.

*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 the reasons they mention for not having children.

To do so, the codes from the category REASONS FOR NHC (nhc=not having children) and the two document groups gender::female and gender::male were selected.
By default the table shows the frequency count for each code or code group (=number of coded quotations) per document or document group. As for the code co-occurrence table, if you click on a table cell, you can read the quotations. In version 8.4 and higher you will be able to export the quotations. The table by itself can be exported to Excel.

You have the following options:

- You can select to display row and column totals.
- In addition to the absolute frequencies, you can select to display relative column, row or table frequencies.
- If the documents are of unequal length of the document groups of unequal size, you can normalize that date (see below).
- You can count quotations, or the number of words that are coded.
- You can switch the orientation of rows and columns similar to the Pivot option in Excel.

In Figure 47 below, the data have been normalized because of unequal group size. They were 13 respondents in the document group female and 11 in the document group male. To facilitate the comparison between male and female respondents, relative row frequencies have been added.
Video Tutorial: ATLAS.ti Mac: Code Document Table

Data And Project Export

Video tutorials:  
- 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 a Word or PDF report:

1. 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.
2. 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.
3. Next click on the drop-down menu of the Export button and select the option: Export as Report.

![Figure 48: Report preview](ATLAS.ti B Mac - Quick Tour)
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 50 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 49: Report including quotation name and content

Figure 50: Report preview including more details

Figure 51 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 52).

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.

To export the quotations for one or multiple codes, open the Quotation Manager, select the code(s) in the side panel and click on the Export button.

Enter a file name or leave the default name. Select a location for the file and choose the desired format.
Note: The Excel report can only contain text, no images or frames of video data. For the later, you need to create a text report.

**Export A Code Book**

- Open the Code Manager
- Select the Table export option, select a file name and location.

**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 56 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 Details** to see all option as shown in Figure 56. 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 55.

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**Importing Survey Data**

These days a lot of surveys are conducted online. A positive side effect is that (a) all data is immediately available in digital format and (b) respondents often do write lengthy answers to open ended questions. But even if you work with surveys from the "analog" world, chances are, they will end up in an Excel™ spreadsheet at some point. Regardless how your surveys originate, ATLAS.ti can handle them once they exist in that format. A typical work flow for working with survey data looks like this:

Online surveys can be created using a number of tools. What most of these tools have in common is that let you export your data as Excel™ file. And this is what you need to prepare for import in ATLAS.ti.

- You can download an example Excel file [here](#).
- [This video tutorial](#) explains how to prepare and import surveys into ATLAS.ti.
- Learn more about how to work with survey data [from this video](#).

**Preparing Survey Data For Import**

A survey broadly consists of the name of the survey, the questions, and the answers for each respondent. Questions can be of different types:

- Single choice between two (yes/no) or more options
- Multiple choice
- Open ended
Within the framework of ATLAS.ti these concepts are mapped as follows:

<table>
<thead>
<tr>
<th>Survey Concept</th>
<th>ATLAS.ti Concept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open-ended question:</td>
<td>Code (and code comment)</td>
</tr>
<tr>
<td>question</td>
<td>Content of a quotation</td>
</tr>
<tr>
<td>answer</td>
<td></td>
</tr>
<tr>
<td>Single Choice 0/1</td>
<td>Document group</td>
</tr>
<tr>
<td>Single Choice &gt; 2 options</td>
<td>Document groups from question plus value</td>
</tr>
<tr>
<td>Multiple Choice</td>
<td>Document groups from question plus value</td>
</tr>
</tbody>
</table>

Based on specific prefixes that you add to your variable names, ATLAS.ti interprets the column headers and cells of the Excel™ table in different ways and turns them into documents, the content of documents, document groups, quotations, codes, comments and code groups. Sounds complicated, right? Not so –just follow along, it is actually very easy!

Data are imported case-based. This means each row of the Excel™ table that is imported from the online survey tool is transformed into a document.

In addition to the answers to open ended questions, demographic information like age, profession, or age group, answers to single choice questions (yes/no, or offering more than two options) and answers to multiple choice questions can be imported. Within the framework of ATLAS.ti these are mapped in the form of document groups, one group per value.

! the name in the cells is used as document name

^ name used in the author field per document

^ name used in the author field per document

: a colon indicates to ATLAS.ti to turn the information in the cells into a group. As all groups are dichotomous (0/1), a group is created for each value. For example, the information written in the column :Gender is turned into two groups with the names: Gender::male and Gender::female. The information in the column with the header :has children is turned into the following to groups: has children::no and has children::yes. The variable education is treated in the same way.

- can be used for questions coded with 0 and 1. A document group is only created from answers coded with 1. Thus, when importing the sample survey table, we get one group that includes all respondents who have answered the question: “Do you think that children bring happiness?” with yes, and one that includes all respondents who have answered the question “Do you think children bring fulfillment and purpose?” with yes.

All entries without a prefix notation are interpreted as codes and the text in the cells as content for the case-based documents.

If the question is longer, and a short form not sufficient, then the full question content can be added as code comment. For example, when using the column header SQ1:: Please write down reasons why you want to have children, SQ1 is used as code name and the text after the two colons is used as code label.

You can import tables in xls or xlsx format. In case you experience a problem, save the table in .csv format and try again.

If you import the same table repeatedly, rows with already existing documents are ignored. This way, you do not have to wait until the last respondent has filled out the questionnaire.

All prefixes are summarized in the following table:

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>l</td>
<td>this column defines the document’s name</td>
</tr>
<tr>
<td>-</td>
<td>this column defines the document’s comment</td>
</tr>
<tr>
<td>^</td>
<td>this column defines the document’s author</td>
</tr>
<tr>
<td>&amp;</td>
<td>this column defines the document’s date. Expects ISO8601 format</td>
</tr>
<tr>
<td>&lt;</td>
<td>Ignore this column. Use this to exclude stuff inserted by the survey tool</td>
</tr>
<tr>
<td>#</td>
<td>Document groups from field name plus actual cell value</td>
</tr>
</tbody>
</table>

Every column header that has no prefix is interpreted as code for an open-ended question and the content of each cell in that column as data content that will be added to the document for each case.
How To Import Survey Data

- If you haven’t done it yet, download the sample survey data here (or prepare your own).
- From the main menu select Project / Import Survey. Select the Excel file to be imported and click Open. The import procedure starts. You see a progress report and ATLAS.ti informs you when the import is finished.

The Excel file needs to be closed in Excel when importing it into ATLAS.ti.

During the import, one primary document is created from every row. Unlike "normal" documents that get their contents from files, these primary documents need to have their content (data source) created as well.

The creation of the textual contents is done as follows: Each row is scanned from left to right, column by column. Each cell’s content belonging to an open-ended question field is appended to the currently built document (case). In addition, each piece of appended text is also referenced as a quotation automatically coded with the current question.

Those columns defined as variables are turned into document groups (see Figure 57 above).

The answers to the open ended questions will make up the body of the data. Each answer is automatically coded. Depending on the information you have entered in the Excel table, the question number can the code and the full question entered as code comment (see A survey broadly consists of the name of the survey, the questions, and the answers for each respondent. Questions can be of different types:). Figure 57 shows both possibilities. For survey question 1, only the question number is the code (SQ1). For survey question 2, the question number and the question make up the code label. For further analysis, the first option is recommend.

If you import the same table repeatedly, rows with already existing documents are ignored. This way, you do not have to wait until the last respondent has filled out the questionnaire to begin your work in ATLAS.ti.

Video Tutorial: Importing Surveys

Analyzing Survey Data

In order to analyze survey data, you should get acquainted with the following features and functions of ATLAS.ti:

- Document Groups, especially their use as data attributes (see “Purpose of Creating and Working with Groups”).
- To gain a quick overview of your data and the words the respondents used, create a word frequency table using the Word Cruncher (not covered in the Quick Tour, see full manual)
• Basic coding techniques in order to add some additional codes to the pre-coded responses (see "Coding Data"). The auto coding feature might also be helpful when working with survey data, see full manual.
• The Code Document Table (see page 32).
• Creating and working with smart groups (see full manual).
• The Code Co-occurrence Table (see page 32).

And That’s a Wrap!

Congratulations, you have now reached the end of the ATLAS.ti Quick Tour. After working through this tour, you should now have a reasonable grasp of the central concepts and functions of ATLAS.ti 8. You should be able to assess how powerful a tool it is, and have a good idea how productively it can be put to use in your day-to-day work.