

# “ATLAS.ti 101: A Primer”

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## 1. Some Key Terms, Advice, and Warnings

- **Hermeneutic Unit (HU)** – A project file ending with the extension **.hpr6**.
  - Codes, Quotations, Memos, Families, and everything else integral to your project, *except* your Primary Documents (PDs), are all in the HU.
- **Copy Bundle** – A compressed archive, similar to a .zip archive, which contains your HU as well as your Primary Documents (PDs), ending with the extension **.acb**.
  - A copy bundle is a single file used to move your entire project from computer to computer.
    - **WARNING #1:** Never move an HU; always move Copy Bundles

Name	Date modified	Type	Size
Mercury Press Reports	11/26/2011 6:55 AM	File folder	
Coding News Articles.hpr6.lok	11/26/2011 6:45 AM	LOK File	1 KB
Coding News Articles	11/26/2011 6:55 AM	Hermeneutic Unit	7 KB
backup of Coding News Articles	11/26/2011 6:45 AM	Hermeneutic Unit	7 KB
Coding News Articles.acb	11/26/2011 6:55 AM	ACB File	47 KB

- **LOK File** – When you are viewing a project directory with an HU in that directory open, you will see an **.hpr6.lok file** (see above). This disappears when the HU is closed. According to ATLAS: “This file is the ‘gatekeeper’ that controls access to the data source. Every user on every ATLAS.ti workstation accessing a data source is registered in this LOK file. It also registers the name of the user, the name of the computer, and the time access was granted. None of this information is stored forever; all user-related information is removed when leaving the ATLAS.ti session.”

- **Primary Documents (PDs)** – The data to be coded, usually in .txt, .rtf, .doc, or .pdf format, though other formats can be handled by ATLAS.
  - Careful preparation *and* naming of PDs is critical.
    - **WARNING #2:** Never alter or move a PD after assigning it to a HU. You can break the document assignment links and make it hard to recover project integrity.
- **Families** – Document level attributes. Documents can belong to 0, 1, 2, 3, *j* families.
  - Families help you to create filters during your coding or analysis.
- **Codes** – Sub-document level attributes. Spans of text (“Quotations”), images, or other digital objects can be tagged with 0, 1, 2, 3, *j* of the available codes.
  - Codes are the intellectual, theoretical and conceptual core of your project.
- **Quotations** – Passages of text coded by one or more project analysts as belonging to one or more of the code categories.
  - ATLAS is essentially an electronic filing cabinet; quotations are the text you are filing.
- **Memos** – Analyst notes inside an HU, attached to a particular code, a quotation, or the HU itself.
  - Memos can focus on the coding process, theory-building and other important ‘ah-hah’ or decision moments in the life of a project.
    - **ADVICE:** Good memos are the key to reporting accurately and transparently on your methods, assumptions, choices and strategies. *Write lots of memos!* See Section 3 of this primer for more on the various types of memos.

## 2. Getting Started

- **Finalize your raw data and review it in hard copy format**
  - Warning #2 means that you should carefully review and finalize your PDs before assigning them to your HU.
    - You do not want to be fixing errors in your data during the coding process.
  - It is good qualitative practice to spend time with the data **away from computers** using pen & paper.
    - We often use hard copies with a **2-inch right margin** for note taking.
  - When you commence coding in ATLAS.ti, or with any software package, you rarely want to be looking at the data for the first time.
    - There is a lot to be said for learning the landscape of your data in a native format.
- **Create an ATLAS.ti project folder**
  - I usually stay away from the locations in the ATLAS “Textbank” folder defaults.
    - Instead create my own project folder.
  - It may make sense to have a Master Folder for all ATLAS.ti projects.
    - Then create a series of project and data sub-folders.

- **Warning #3:** Always pay attention to where you save HUs and unbundle .acb copy bundle files. Insufficient attention to this detail can be disastrous.
- Place all your PDs in one or more project sub-folders
  - These should be copies of your master copy original files (which should be stored and also backed-up elsewhere)
- **Create an HU with the project name in the project folder**
  - It helps to use standard naming conventions as the folder directories can be cluttered with many parts and sub-parts over the life of a project. For example, at QDAP, we use:
    - `<Project Name>_<Project Sub-part>_<Coder ID>_<date>`
      - E.g., **Mercury\_PT1\_QDAP36\_112611**
        - {ATLAS adds the .hpr6 extension}
      - Add `_complete` to file names when a sub-part is done
        - E.g., **Mercury\_PT1\_QDAP36\_112611\_complete**
          - {you add the `_complete` to the filename}
- **Assign Your PDs**
  - Click on “Documents” >> “Assign” >> [select all PDs] >> “Open”
  - Save your HU after assigning the docs and regularly throughout the work
    - **Warning #4:** It is easy to get lost in the data and forget. Hit “Ctrl S” regularly.

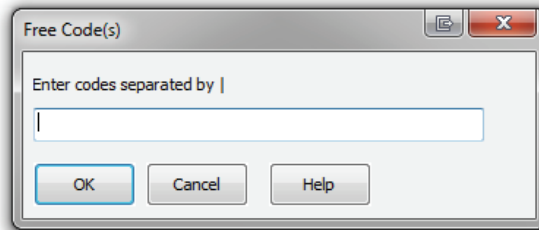


- **Create and Assign Document Families**
  - Click on “Documents” >> “Edit Families” >> “Open Family Manager”
    - Inside the “Family Manager”
    - Click on “Families” >> “New Families” >> [enter one name]
      - {repeat for each Family}
  - **A tip for making family assignments easier:**
    - Try to incorporate family attributes in the naming of PDs, where possible
      - Ex., WM1.txt, WM2.txt, WM3.txt = White Male 1, 2 & 3

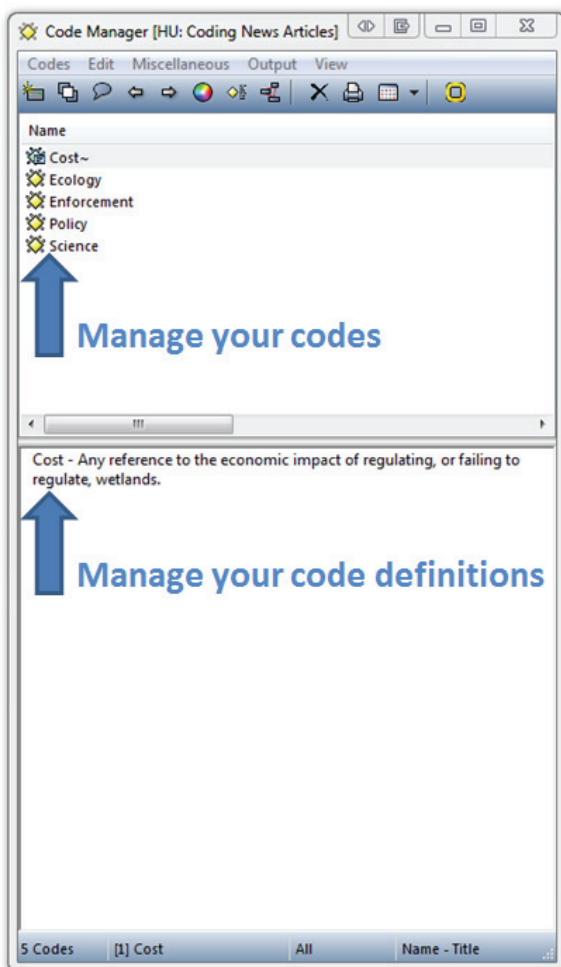
- **Create Your Codes**

- Click on “Codes” >> “Create Free Codes”
  - [enter all codes at once separated by |]
  - {‘pipe’ is the key above Enter with the Shift engaged}

- 1.0 Science
  - 1.1 Study
  - 1.2 Finding
  - 1.3 Generic
  - 2.0 Law
  - 2.1 Proposal
  - 2.2 Statute
  - 2.3 Enforcement

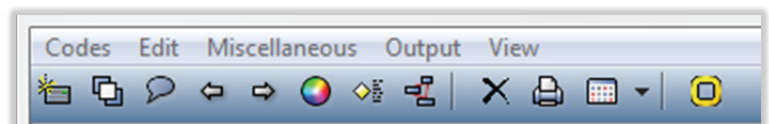


- **Code names matter** – Be sure to choose them carefully and rename them as needed. You may also merge and split codes during a project.
- **Alphabetical listing** is not always helpful; numeric prefixes can help you arrange your code list in a hierarchical manner.



### Key Function: The Code Manager

Use the **Code Manager** to create, edit, merge, split and annotate your code categories. The **Code Manager** can be positioned, adjusted and resized to suit your particular project needs and coding style. Use the drop down menus in the top half of the **Code Manager** to access a rich selection of feature sets:

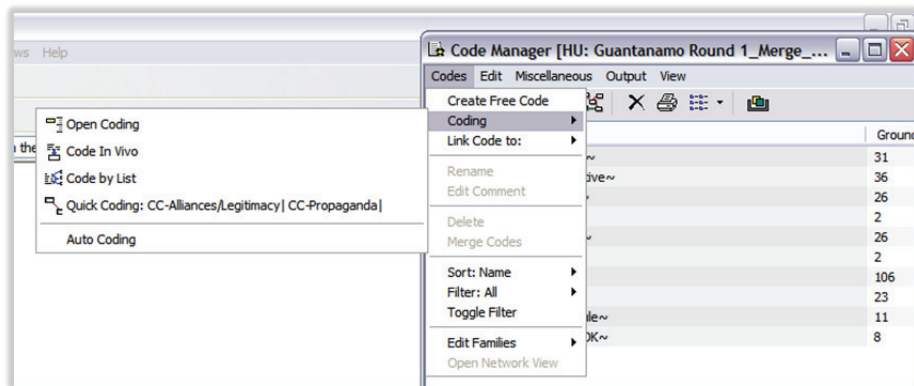


Single click any code to highlight it, then click once in the bottom half of the **Code Manager** and begin typing the memo that is linked to that code. This can be a verbatim codebook definition, or it can be an original definition that evolves over the life of the project.

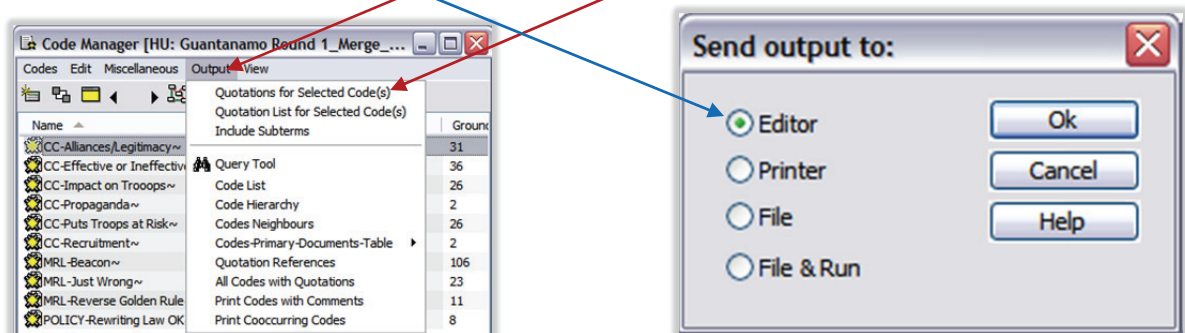
**Special Note:** This is just one of several places you might store running observations about the evolution of codes.

### 3. Experiment with the Coding Tools – Time to Blaze Away!

- The best way to learn software is to just start using it. Experiment with the different options for coding your data. Among the things you will want to try:
  - **Click-Drag-Release** – to highlight a non-standard span of text to be coded.
  - **Double double-clicks** – to highlight a sentence.
  - **Triple double-clicks** – to highlight a paragraph.
  - **Coding In-Vivo** – creates a quotation from the selected text AND uses the selected text (trimmed to 30 characters) as the code name.
  - **Open Coding** – assigns new codes with already existing or newly created quotations. You can create one or more codes in a single step.
  - **Code-by-List** – offers a list of all current codes from which one or more code can be selected and associated with the current data selection.

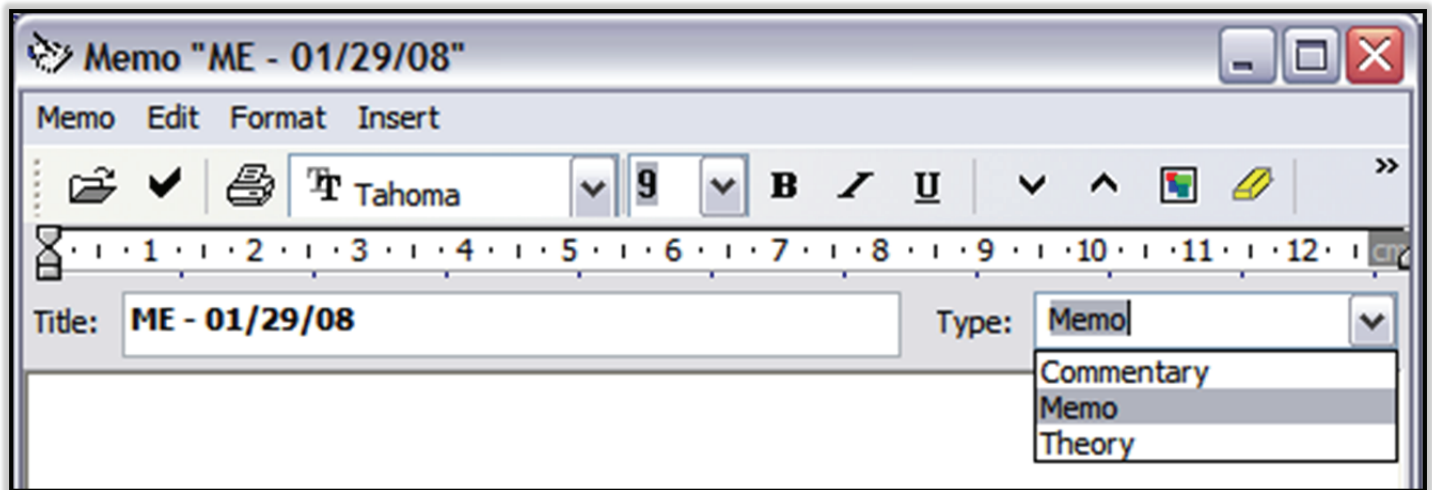


- **Reviewing Coding in Process – A “Constant Comparative Method”**
  - **On Screen Review** – Double-click the yellow icon in the “Code Manager” next to code category you wish to review. Click on the first item in the list that pops up and use your arrow keys to browse all the quotations in that category so far.
  - **Hard Copy Review** – Single-click the yellow icon in the “Code Manager” next to code category you wish to review. Select “Output” then “Quotations for Selected Code(s)”. Select the output function from 1 of the 4 radio buttons.

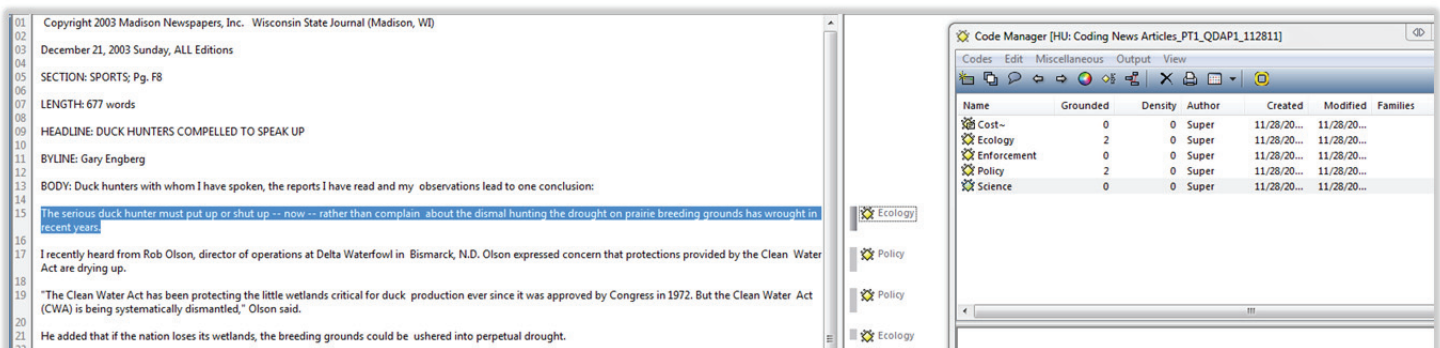


#### 4. Experiment with Memo Tools

- **On the Importance of Memos** – Keeping an extensive set of memos during the coding process is important. It helps you down the road to create a defensible case for how you get from A-Z, which in turn can translate to better external validity and reducing the black box effect.
- **Memo Types** – There are various ways to memo in ATLAS
  - **Project-Level Memos** – Reflections about the overall progress of the project
  - **Code Memos** – Reflections about the nature of a code (boundaries, exclusions)
  - **Quotations Memos** – The classic ‘ah-hah’ moments in qualitative research



The Project Level Memo



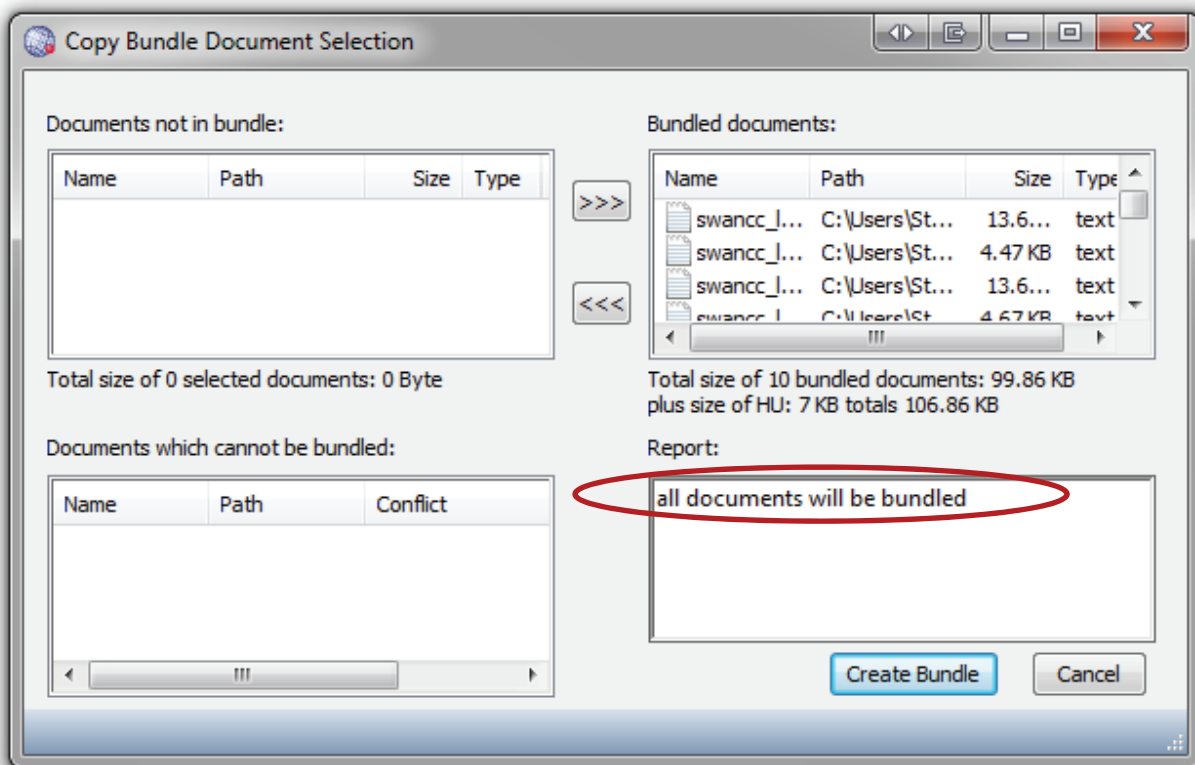
The Basic Coding Layout in ATLAS

## 5. Moving and Sharing Your Work – The Copy Bundle (.acb)

- Remember **WARNING #1**: Never move an HU; always move Copy Bundles (.acb files)
  - **WARNING #5**: Never move the only copy of your work
    - **Tip**: Take a look at synchronization software for backing up and moving work.
      - I am a fan of LapLink products like “PCSync”
    - Email attachments as backups are also an option
    - Use cloud services to back up projects

### Creating a Copy Bundle

- Start by ensuring you have saved the HU using a naming strategy suitable for your project.
- Click on “Tools” >> “Copy Bundle” >> “Create Bundle”
  - The **Copy Bundle Document Selection** window opens



- The salient element is the report indicating “all documents will be bundled” and hence it is alright to click the **Create Bundle** button.
- ATLAS will prompt you to select a location for the bundle.
  - Remember **Warning #3**: Always pay attention to where you save HUs and unbundle .acb copy bundle files. Insufficient attention to this detail can be disastrous.

- Keep the Save as type set to Copy Bundle and hit the **Save** button. Make sure the folder directory confirms this is the location is where you want to store your copy bundle. You may want a folder that is just for .acb files.

Name	Date modified	Type	Size
Mercury Press Reports	11/27/2011 5:29 PM	File folder	
Coding News Articles_PT1_QDAP1_112811.hpr6.lok	11/28/2011 9:34 AM	LOK File	1 KB
Coding News Articles_PT1_QDAP1_112811	11/28/2011 9:35 AM	Hermeneutic Unit	7 KB
Coding News Articles	11/28/2011 9:34 AM	Hermeneutic Unit	7 KB
backup of Coding News Articles_PT1_QDAP1_112811	11/28/2011 9:34 AM	Hermeneutic Unit	7 KB
backup of Coding News Articles	11/28/2011 7:32 AM	Hermeneutic Unit	7 KB
Coding News Articles_PT1_QDAP1_112811.acb	11/28/2011 9:49 AM	ACB File	47 KB
Coding News Articles.acb	11/26/2011 6:55 AM	ACB File	47 KB

- It is the .acb file that you want to attach to emails, or save (and back-up) onto a portable media, like a thumb drive, for transport or sharing.

## Opening a Copy Bundle

- Click on “Tools” >> “Copy Bundle” >> “Install Bundle” and browse to your .acb file and then click on the **Open** button. **Special Note:** You must be inside ATLAS.ti to open copy bundles.

