atlas.ti
QUALITATIVE
DATA ANALYSIS

ATLAS.ti Mobile for iPad Manual

ATLAS.ti Mobile User Manual

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Author: Dr. Susanne Friese (QUARC Consulting)
Programming/Design/Layout: www.hypertexxt.com

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Introduction

ATLAS.ti, the powerful workbench for the qualitative analysis of large bodies of textual, graphical, audio, and video data has now received a companion–ATLAS.ti Mobile for the iPad. With the app you can begin to collect and analyze data wherever you are and can take your iPad along. Perhaps you want a work on a document while on a long train, plane or boat ride. Email it to yourself so it is available on the iPad. Add it to an ATLAS.ti Mobile project, read it, write comments, and perform coding work. You can later merge the result with your existing ATLAS.ti desktop project.

Supported file formats are text, PDF, images, audio and video files (for details, see “Adding Documents “ on page 11 below)

Main Concepts And Features

ATLAS.ti Mobile utilizes the same concepts as you know them from your desktop application: Primary documents, quotations, codes and memos. If you are not familiar with them yet, please read this section.

The most basic level of an ATLAS.ti project consist of the **documents** that you want to analyze.

Quotations are your selections from the documents.

On the next level, **codes** (equivalent to "tags" or keywords) are applied to quotations.

In addition you can write down your thoughts and ideas in **comments** and **memos**. Comments are always attached to a specific object; in ATLAS.ti Mobile that would be either quotations or codes. Memos are independent objects; think of them as pages of a note pad for writing more extended text.

Documents

ATLAS.ti mobile supports the analysis of text, PDF, image, audio and video files. These documents are always stored independently of your ATLAS.ti project file. This becomes relevant when importing the mobile project to your desktop version. In the desktop version, the term primary documents or P-Docs is used. The two terms, however, refer to the same thing–the documents you are analyzing in your project.

Quotations

A quotation is a segment from a document that is interesting or important to the analyst. In textual documents, a quotation is an arbitrary sequence of characters that can range in size from a single character, to a word, a sentence, a paragraph, up to the entire data file.

Usually quotations are created by the researcher. However, if repetitive words or phrases are found in the text, the auto-coding feature can be used to automatically segment these quotations and assign a code to them. Auto-coding is not yet implemented in ATLAS.ti Mobile, but may well be in the future.

Although creation of quotations is almost always part of a broader task, "free" quotations can be created that indicate interesting parts in the primary data for which a meaningful classification has not yet been found. Free quotations resemble notes "scribbled" in the margin of a book.

Quotations As Layers

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

Quotations can be regarded as a transparent layer overlaid on top of a document. From a technical standpoint, a quotation consists of a name and a pair of coordinates that specify the beginning and end of the quotation. The content a document is therefore not altered by the creation, deletion, or modification of quotations.

Read more about the basics of quotations:
http://downloads.atlasti.com/library/Maietta_2009-05_6.pdf

Codes

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

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.

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 a frequently large number of textual or other data units.

In the realm of information retrieval systems, the terms "tag," "index," or "keyword" are often used for what we call "code" or "coding."

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

For practical purposes, 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 your data and your project and are an important device for project management and writing up analysis.

In ATLAS.ti Mobile, memos are 'standalone' objects. Once you transfer your mobile project to the desktop version, you can link them to quotations, codes, and other memos. You can sort them according to types (method, theoretical, descriptive, etc.) and group them into families.

The following library articles are available on memos:

- http://downloads.atlasti.com/library/Friese_2009-09_1.pdf

Project

Your ATLAS.ti project consists of two things: A project file plus the documents you add to a project. Thus, the project file itself (in most cases) does not actually *contain* your documents[1]. You will notice this when exporting your mobile project; there will be a project file plus a folder that contains your documents. ATLAS.ti will know what to do with this file and folder. Thus, you do not have to be concerned about it – the only thing you shouldn't do is to delete the additional folder. If you are already familiar with the desktop version of ATLAS.ti, the exported project is similar to a copy bundle file.

For those already familiar with ATLAS.ti: In the desktop version, project files are called "Hermeneutic Unit," HU for short.

1 The only exception is if you add text files as internal documents. In this case your project file also contains these documents.

Main Steps In Working With ATLAS.ti

The diagram below illustrates the main steps of working with ATLAS.ti Mobile, 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.

Once your data is coded, it is ready to be queried. ATLAS.ti mobile offers simple queries based on a single code. For more complex queries, you need to import your mobile project to the desktop version. The insights gained from working with and querying your data can then be visualized using the ATLAS.ti network view function in the desktop version.

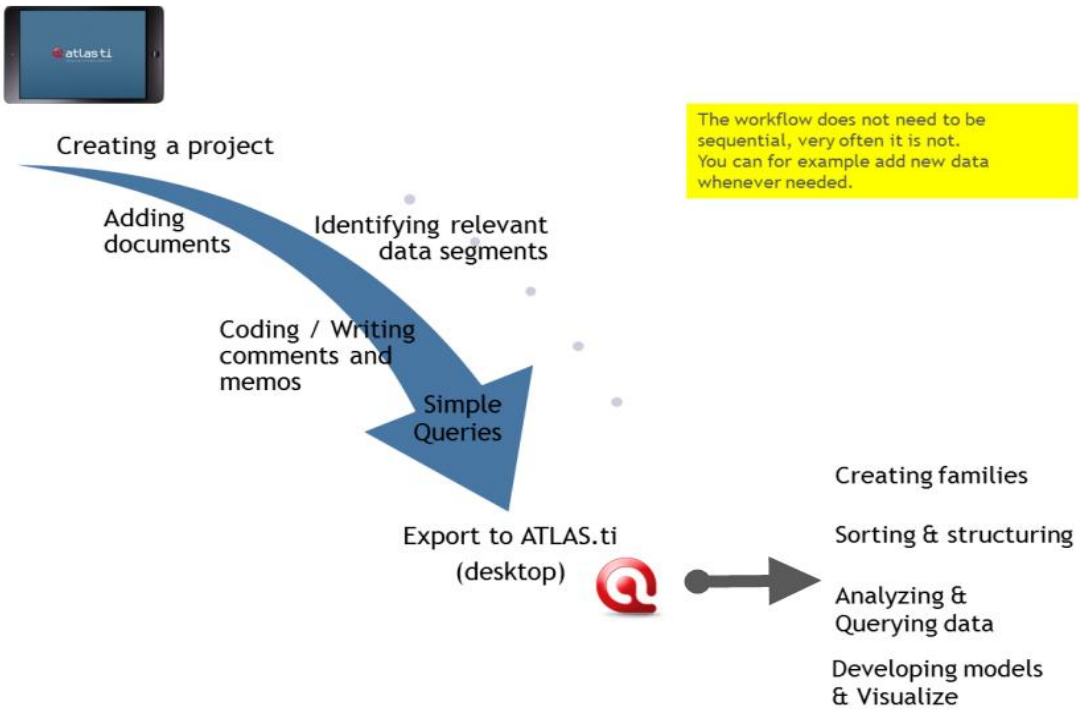

Figure 1: Workflow when working with ATLAS.ti mobile

Some steps must be taken in sequence, like creating a project first, adding documents, and noticing interesting things in your data that you comment on or code.

But other than that there are no strict rules.

General Steps

The following sequence of steps is, of course, not mandatory, but describes a common "script:"

- Create a project (see “Creating A New Project “ on page 11). It serves as an "idea container," and encloses your data, all your findings, codes, memos, and structures under a single name.
- Next, add documents, text, PDF, graphic, audio and video files to your ATLAS.ti project. See “Adding Documents “ in page 11.
- Read and select text passages or identify areas in an image or select segments in your audio or video file that are of further interest, assign key words (codes), and write comments and memos that contain your thinking about the data. See “Working With Quotations“ on page 18 / “Working With Codes“ on page 25 / Working With Memos on page 34.
- Compare data segments based on the codes you have assigned; possibly add more data files to the project. Review your data and retrieve coded segments. See “Retrieving Coded Quotations“ on page 31.
- Export your mobile project to do further work in the desktop version, like grouping objects by families, sorting and structuring your codes list, asking more complex questions using the various analytical tools, and build semantic, prepositional or terminological networks from the codes you have created. See “Project Export And Import“ on page 36.

Start A New Mobile Project

Creating A New Project

- Open ATLAS.ti Mobile and press the **Add Project** button.
- Enter a name and press **Done**.

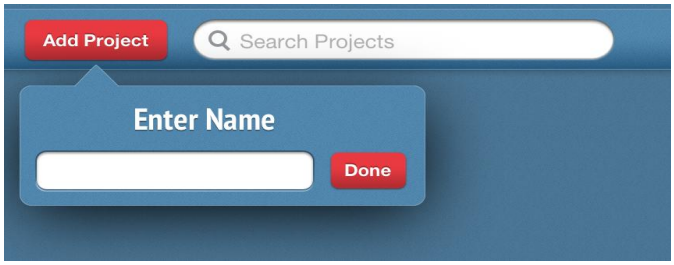

Figure 2: Add a new project

Adding Documents

ATLAS.ti Mobile supports the following document formats: Text, PDF, image, audio, and video. There are three ways of adding documents to your ATLAS.ti Mobile projects:

- Via the **Add Documents** button in the app. The **Add Document** button offers you to select a photo or video from your camera roll, photo stream or any of your albums; to record a new audio or video, to take a new photo, or to create a new text document.
- Via the "**Open it...**" button from other apps.
- Sending yourself a document via **Email** (text and PDF only)

Add Documents Via The Add Documents Button

Press the **Add Documents** button.

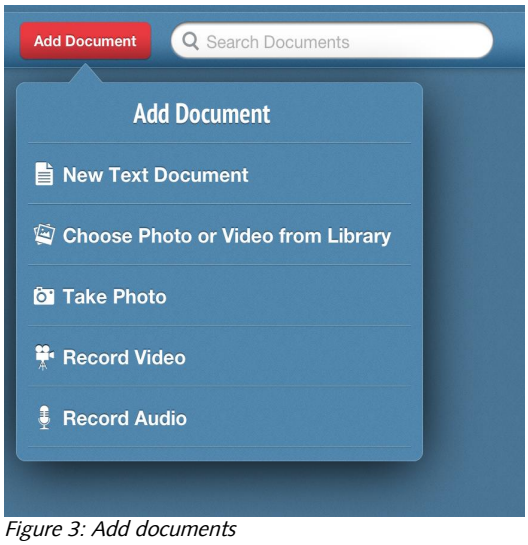

Figure 3: Add documents

Adding An Existing Document

For instance, select the option '*Choose Photo or Video from Library*'.

Select a photo. You will be prompted to enter a name. Then press **Add to Project**.

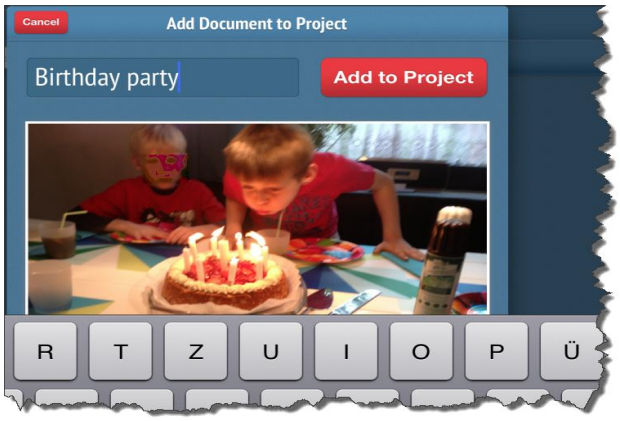

Figure 4: Adding an existing photo

The photo will immediately be loaded and you can begin to make selections or to code it.

If you want to add further documents, press the return button that shows the project name. Then press **Add Documents** again.

Adding A New Image, Audio Or Video Document

Select either of the three options: '*Take a Photo*', '*Record Video*', or '*Record Audio*'.

Take a new photo or make a new recording. If you like what you got, press the **Use** button, enter a name and press the **Add Project button** again.

Adding A New Text Document

Let's copy some text first before we create the new document. You may find some interesting data on the internet using Safari or any other browser on your iPad. You may previously have written some notes using any of the note apps; or you may have some text stored in Evernotes.

Anywhere you already have or come across interesting text, highlight the section you want to add to your ATLAS.ti project and copy it (press and hold a word, then choose "Select All" from the menu, then select "Copy").

Go back to your ATLAS.ti Mobile app and select **Add Document / New Text Document**.

Enter a name for your new text document and press **Add to Project.** The document will be loaded immediately.

Hold down your finger on the top left corner in the new text document and wait until you see the Paste button. Press the **Paste** button to insert the text.

Editing Text Documents

When you load a new text document for the first time, it will be loaded in edit mode. If you do not want to make any changes accidentally, press the **Keyboard Lock** button. This is especially important when you begin to code the document. If you want to make changes unlock the button. This automatically activates the keypad.

Searching Documents

Enter a search term into the search field. The first hit is highlighted.

Tab the next and previous icon to navigate through the document from one hit to the next.

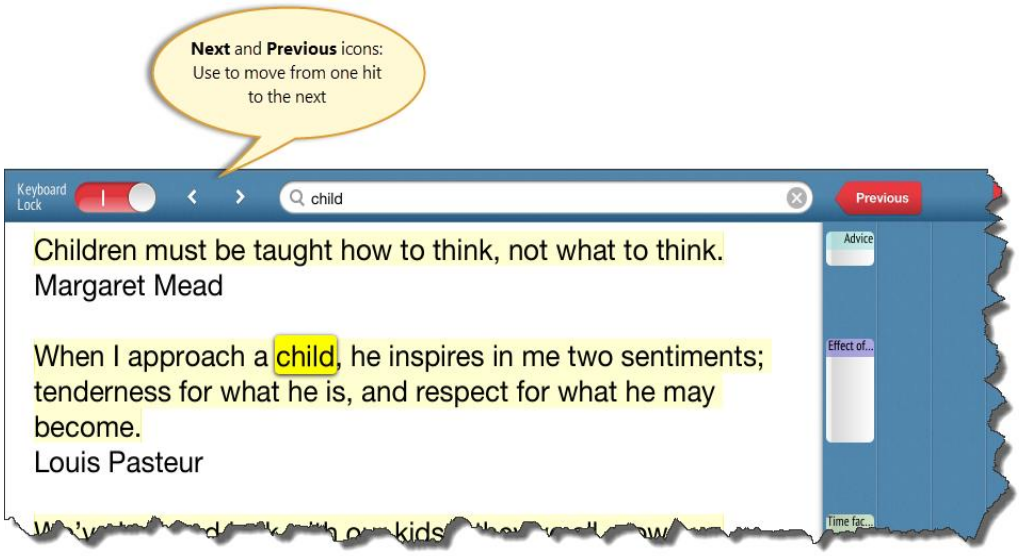

Figure 5: Text Search

Adding Documents From Other Apps

You can add PDF, text, audio, video, and image documents from other apps to your ATLAS.ti Mobile projects.

To do so, open the app that contains the document you want to add, and locate the 'Open in...' button by tapping on the top right corner of the document.

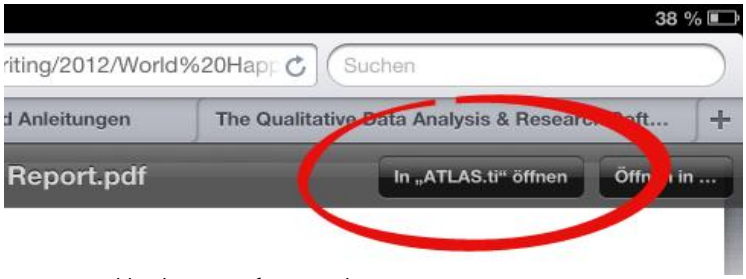

Figure 6: Add a document from another app via Open in "ATLAS.ti"

You may see the button 'Open in “ATLAS.ti' or 'Open in....', or both as shown in Figure 6 and 7 below.

Figure 7: Add a document from another app via 'Open it....'

The apps to chose from are of course dependent on what you have installed on your iPad. So it may look different on your iPad.

Select one of the two available options. You will then be taken back into ATLAS.ti Mobile, where you can choose a name for the new document. If the document already has a name, this name is already entered. You can accept it or enter a different name.

Press the **Add to Project** button.

Next, *select the project* to which you want to add the document. Click on the button New Project, if you want to add it to a new project.

Images and Videos: Photo, video, and drawing apps won't allow sending content directly to other apps. Almost all of them allow saving to the Photo Library, though. So save the images or videos to the Photo Library from the app. Switch to ATLAS.ti Mobile, and add your documents from the Photo Library.

Via An E-Mail To Yourself

Not all apps support sending documents to other apps. For those cases:

Send the document to yourself via e-mail.

Once you've received the mail you sent yourself, select the document in the Mail program, tap and hold it, and choose "Open In ATLAS.ti".

The Mail program won't allow this for audio, video, and image documents.

PDF - Some applications may not support sending PDFs to other apps, but may allow mailing the PDFs to yourself, as described above.

Renaming A Document Or Your Project

If you want to rename your project or a document, tab the " i " next to the project or document name.

Figure 8: Editing a project or document name

Removing Documents From A Project

Open the project so that you see all documents that you have added yo your project. Press the **Edit** button at the top right. All documents show a black circle with an X.

Figure 9: Removing documents

- Tap the little "x" in the upper-left corner of the document that you want to remove from the project.
- Press **Done** to continue to work on your project.

Saving The Project

The project does not have to be saved explicitly. All changes are saved immediately.

Working With Quotations

Creating Text Quotations

- Press and hold over a word within the text segment that you want to select as quotation. After around 2 seconds a magnifying glass appears and the word highlighted in blue.
- Drag the blue handles at the beginning and end the desired positions. A magnifying bar will appear to make it easier to find the exact beginning or end of the selection.
- Tap the **Create Quotation** button that appears above the selected text.

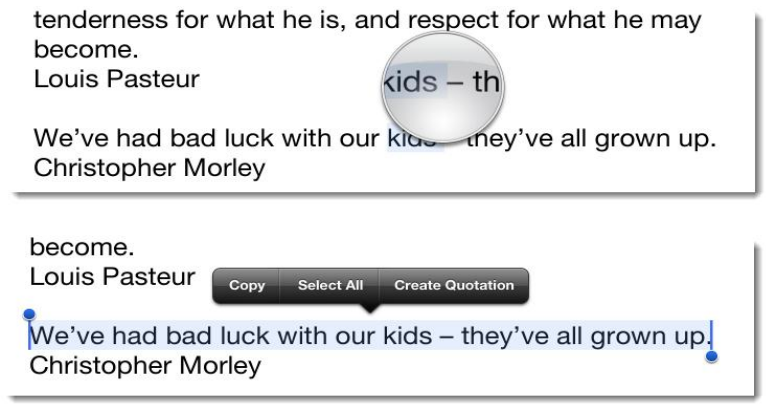

Figure 10: Select a text passage

A fly-out window comes in from the right. The quotation name is shown at the top. By default, the content of the quotation is used. Tap into the field if you want to rename it.

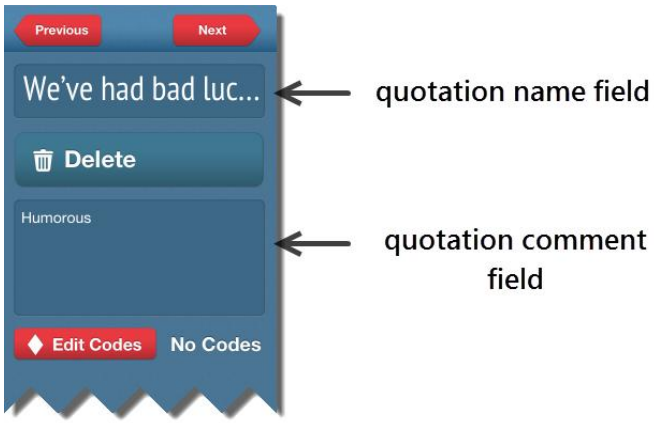

Figure 11: Fly-out window after having created a text quotation

In PDF documents you can only select text, no images. This is different from the desktop version where you can select both.

Writing Quotation Comments

Below the **Delete** button, you see a field where you can enter a comment. Tap if you want to write something about the quotation. This could be an intitial interpretation, an idea you how the quotation might be linked to other pieces of data, a more detailed explanation based on context knowledge you have, etc.

If you do not want to enter a code right away, tap on the text pane. The fly-out window disappears. You now see a white box in the margin area indicating the length of the quotation.

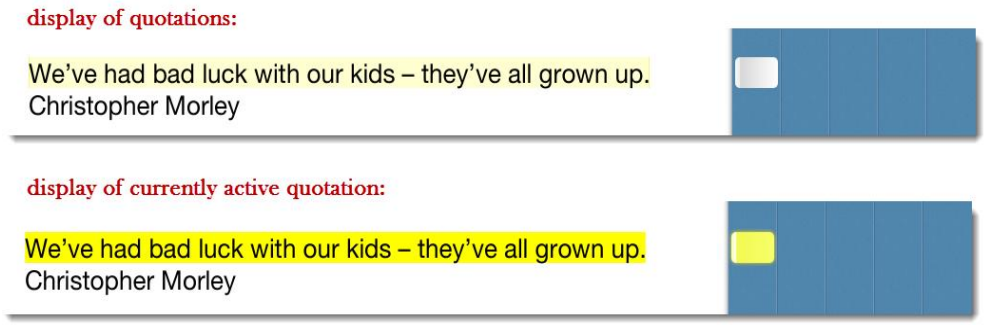

Figure 12: Display of quotations in the margain area

Tap to activate a quotation. It will be highlighted in a bright yellow color.

Double-click to make the fly-out window to come up again, e.g., if you want to code the quotation or want to edit attached codes later (see below “Working With Codes“ on page 25).

Creating Image Quotations

Hold your finger on the image and draw a frame. Pull at the blue handles to adjust the size. ATLAS.ti Mobile immediately creates a quotation from the selection.

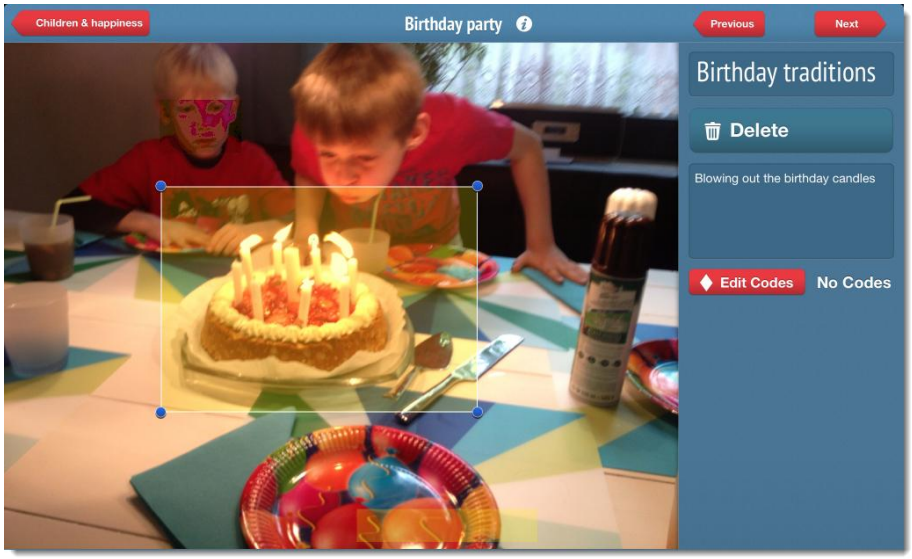

Figure 13: Creating an image quotation

In the field “Quotation Name,” you can enter a name for the quotation (recommended). If you do not enter a name, the coordinates of the quotation are shown in the quotation list. See “Retrieving Coded Quotations.“

Tap on the commend field to describe the newly created image quotation.

Creating Audio Or Video Quotations

Hold your finger on the audio wave form and pull it down. A quotation is immediately created when you release your finger.

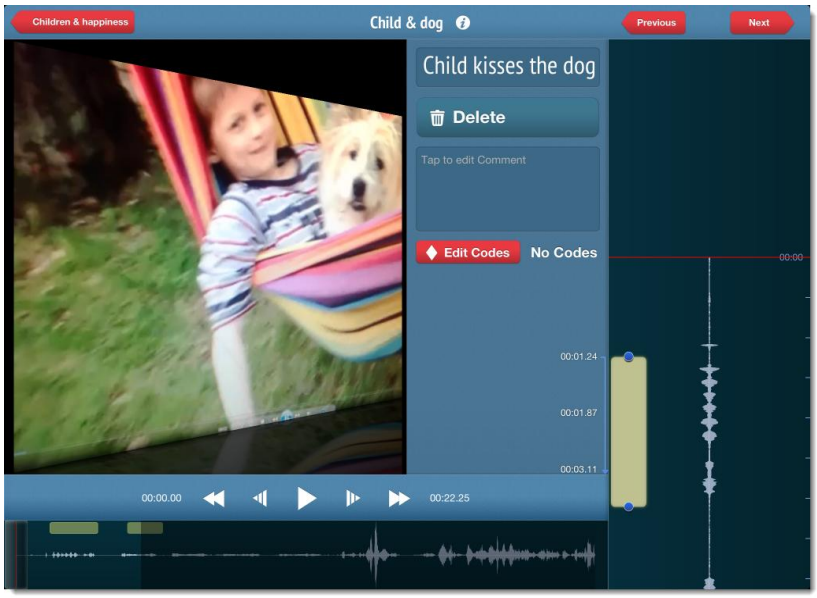

Figure 14: Display of a video quotation

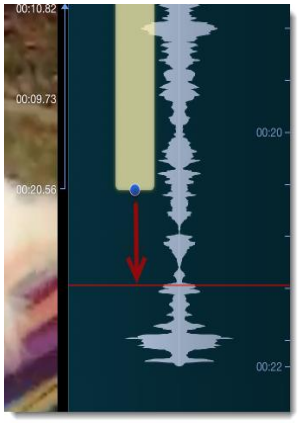

Figure 15: Adjusting the length

To review the segment size, tap on the quotation that is drawn over the wave form and select **Play**. As soon as you tap the quotation, the start and end position as well as the total length of the quotation are shown at the right-hand side of the video main screen.

To adjust start and end positions, use the regular video controls in the main video window: Stop the video at the desired position and pull the blue handles to the red line

As for image quotation, the "Quotation Name" field is empty and you can enter a name (recommended). If you do not enter a name, the start and end positions are shown in the quotation list. See "Retrieving Coded Quotations".

Tap on the commend field to describe the newly created video segment.

Adjusting The Size Of Quotations

Select a quotation so that the blue handles are shown:

For text and image quotation, tap on the quotation in the margin area so that it becomes active. Then double-tap. Audio or video quotations simply need to be tapped.

Move the handles to the desired position to modify start and end positions. Done.

Deleting Quotations

- Open a document and select a quotation in the margin area, then double-click so that the fly-out window pops up again. *OR*: Select a quotation in the quotation list and select the option **Show in Document.**
- Press the **Delete** button.

OR:

- Open the Quotation screen by pressing the *Quotations* tab at the bottom of the screen (see Figure 24).
- Tab the **Edit** button next to the search field. Select the quotation you want to delete and confirm by tabbing the **Delete** button.
- When you are finished, press **Done**.

Figure 16: Deleting quotations

Navigating Through Your Quotations

- Load a document.
- To jump from one quotation to the next, click on either the Previous or Next buttons that you see on top of the margin area.

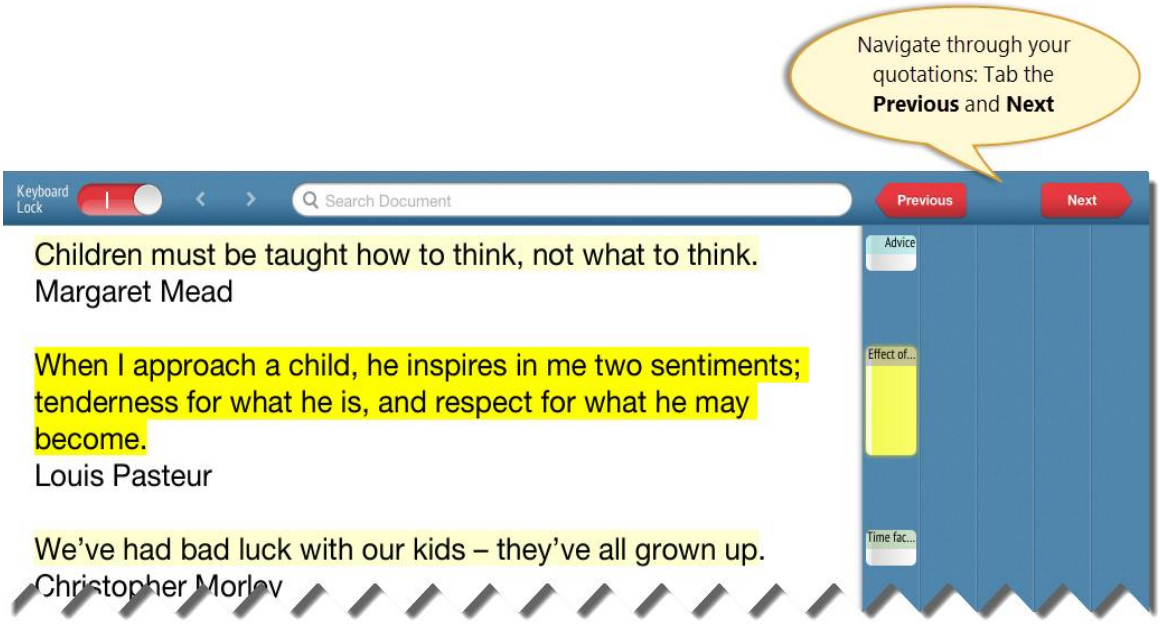

Figure 17: Navigate through your quotations

The Quotation Screen

To access the Quotation Screen, press the *Quotations* tab at the bottom of the screen.

The Quotation Screen provides an overview of all quotations you have created. On the left-hand side you see a list of all quotations sorted by document. If a quotation is coded, the code is displayed underneath the quotation name.

If you are looking for a particular quotation, or quotations that include a particular word, enter it into the search field. As the quotation names include the full text for text quotations, this is a way to quickly search through all tagged material - given that you have also entered meaningful names for image, audio and video quotations as recommended.

You can use the Quotation Screen to delete quotations (see page 22).

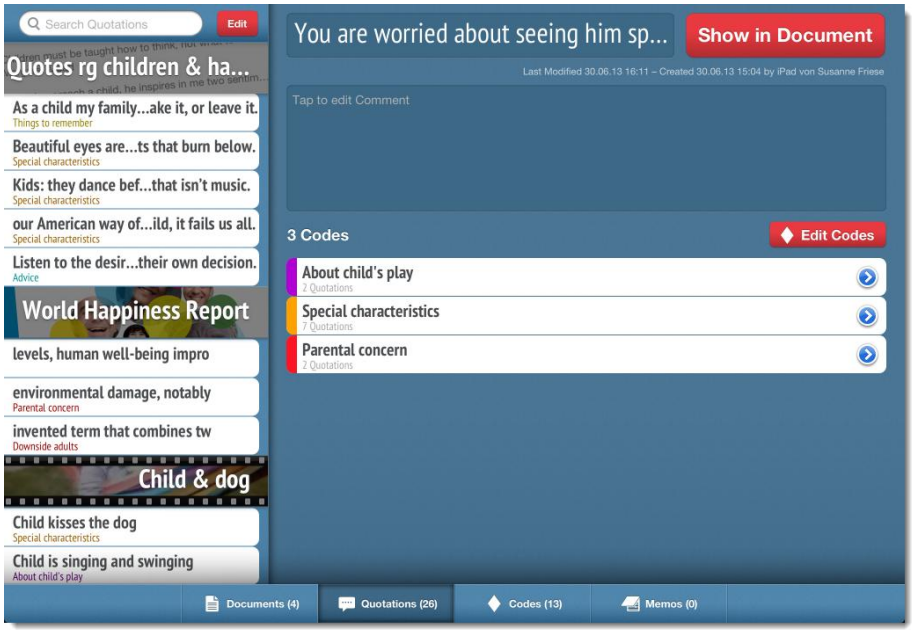

Figure 18: The Quotation Screen

On the right-hand side of the screen you see the name of the selected quotation, underneath the comment field, and below the comment field the list of codes that have been applied to the selected quotation

If you tap on the right-arrow in a code field, this brings you to the Code Screen (see page 32).

Working With Codes

Coding With A New Code

You can either add a code directly when creating a quotation, or any time later. If you enter or modify a code later, you need to activate the quotation again. In both cases, you see the fly-out window at the right-hand side of the screen with the quotation name on top:

Press the **Edit** Codes button in the fly-out window, to code a quotation.

To code a quotation with a new code, press the **Create Code** button and enter a name. Press **Done**. Repeat the process if you want to enter more than one code.

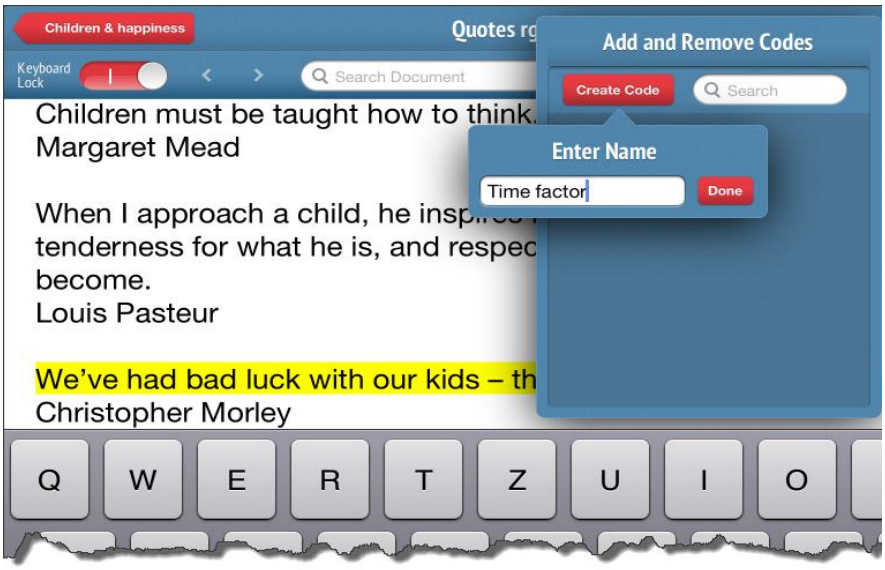

Figure 19: Creating a new code

The code(s) for a quotation are listed in the lower half of the fly-out window:

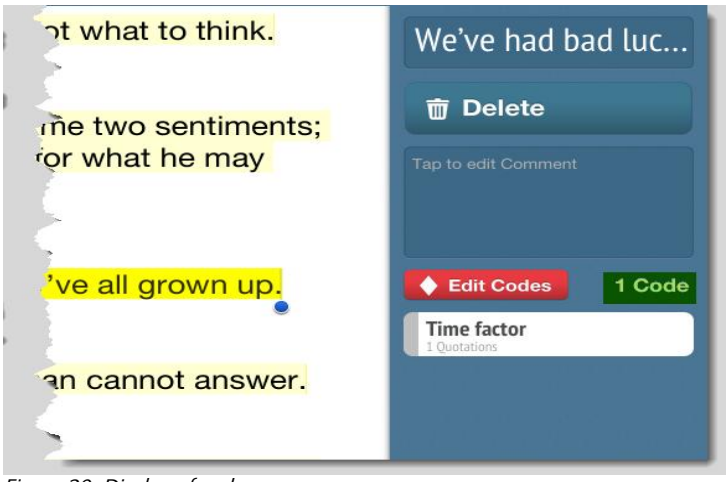

Figure 20: Display of codes

Click on the text pane to view the margin area with the coded segment.

If you do not return to the margin area, the selected code will be applied to the next selection you are making without having to create a quotation first.

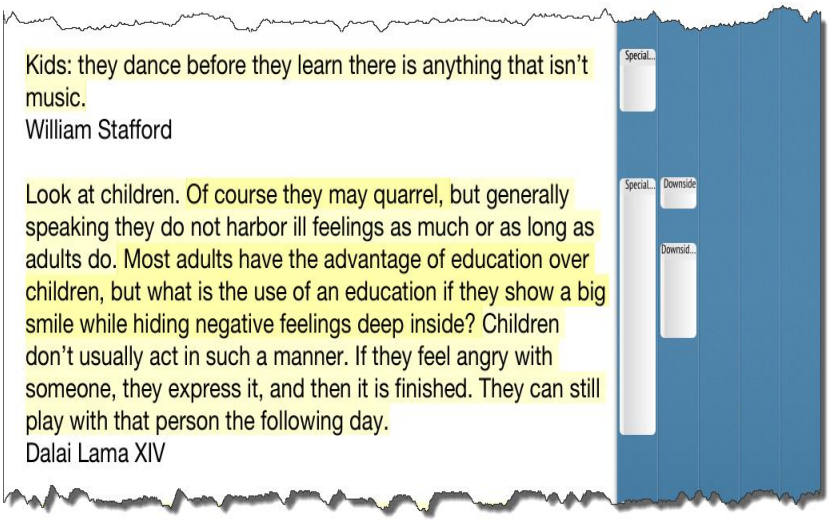

Figure 21: Display of codes in the margin area

All segments that have been set as quotation are highlighted. If segments are overlapping, this is indicated by a different shade of the highlight color (see Figure 21). The code names are displayed at the top of each quotation box in the margin area.

Coding With An Existing Code

You can select multiple codes from the code list by simply tapping on each code. The code field turns light blue. A second tab removes the selection. You also see the selected codes listed in the fly-out window (see Figure 22).

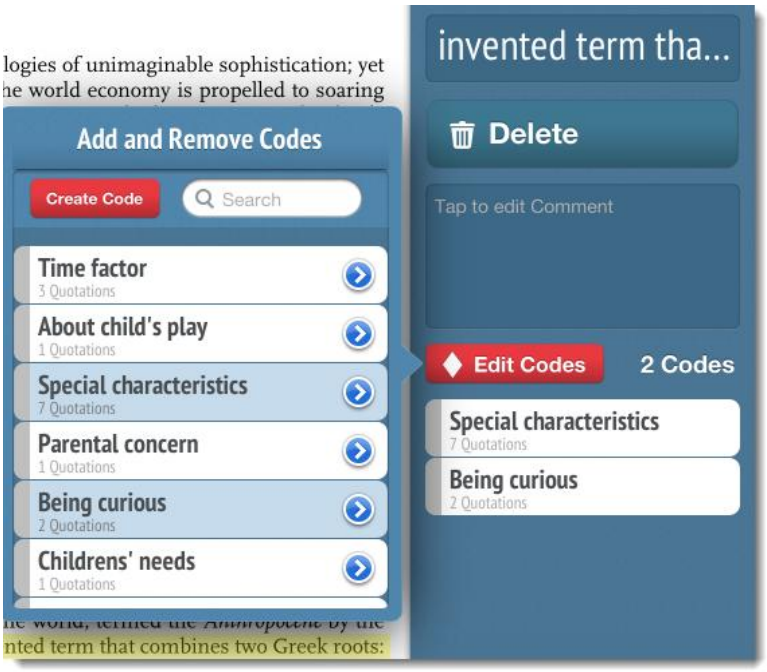

Figure 22: Coding with multiple codes

Add, Modify Or Remove Codes

If you do not code a quotation right away or later want to add more codes or remove some, you need to activate the quotation first:

- For text and image quotation, tap on the quotation in the margin area so that it becomes active. Then double-click. Audio or video quotations simply need to be tapped.
- For text and image quotation, click on the **Edit Codes** button; for audio and video quotations, tab **Edit Details**.
- Proceed as explained earlier in the section "Coding With An Existing Code."

Figure 23: Tab Edit Details if you want to add or modify codes for an audio or video quotation

To remove a code simply tap it in the list so that it is no longer highlighted. It will also disappear from the list in the fly-out window.

Creating New (Free) Codes

You can also create new codes without coding data segments at the same time. In order to do this,

Press the *Codes* tab at the bottom of the screen to open the Code screen.

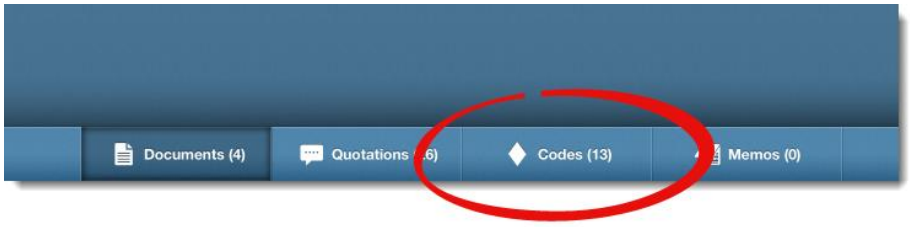

Figure 24: Accessing code properties

Tab the **Create Code** button at the top left-hand side of the screen to enter a new code name.

Figure 25: Create new code in code screen

Deleting Codes

Press the **Codes** tab at the bottom of the screen to open the Code screen.

Tap the **Edit** button next to the search field. All codes display the delete icon in front of the name. Tab the icon and confirm by pressing the **Delete** button.

Press **Done** when your are finished.

Figure 26: Deleting a code in the code screen

Setting Code Colors And Writing Code Definitions

There are two ways to access the pane where you can modify code properties:

In the *Add and Remove Codes* pane, select a code and click on the arrow pointing to the right:

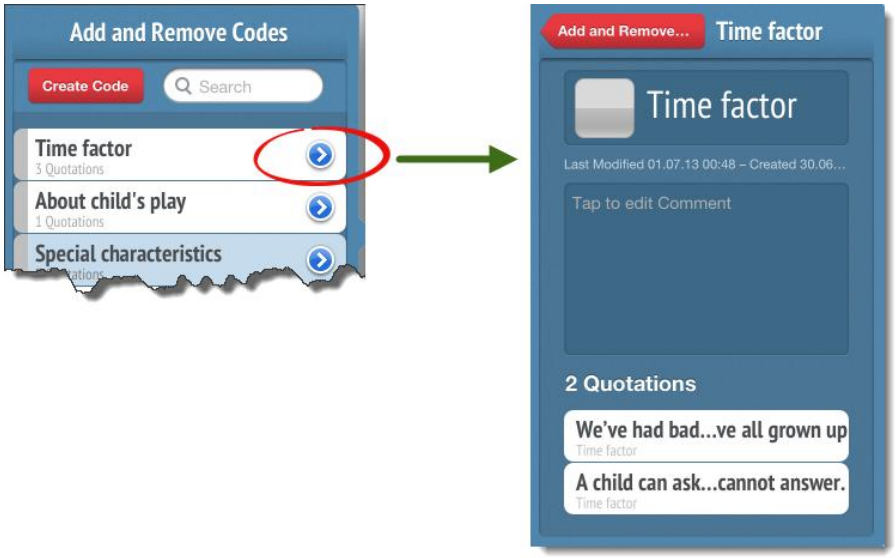

Figure 27: Changing code properties

Alternative: At the main project page, select the Codes tab at the bottom (see Figure 24).

To enter a definition or description for the code, tab on the commend field.

To change the color, tab on the grey rectangle and choose a color from the palette that opens:

Figure 28: Change code colors in code pane.

Display Of Code Colors

Code colors show up in various places: In the margin ares, the code labels in the quotation bars display the selected colors:

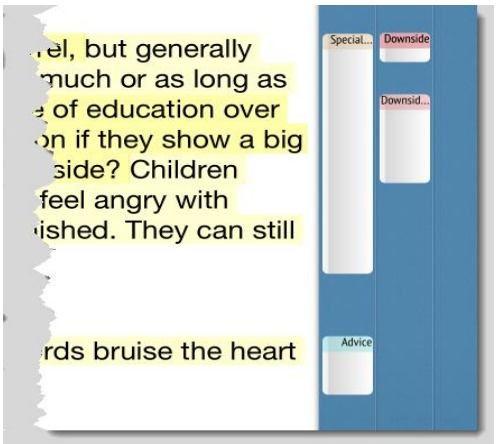

Figure 29: Display of code colors in the margin

In the Code screen (Figure 30), each code field hows a small color stripe at the right-hand side. The code name below a quotation is also displayed in the user-defined code color. You will also see this in the quotation screen as well as in the fly-out window when coding a data segment.

Display of code colors

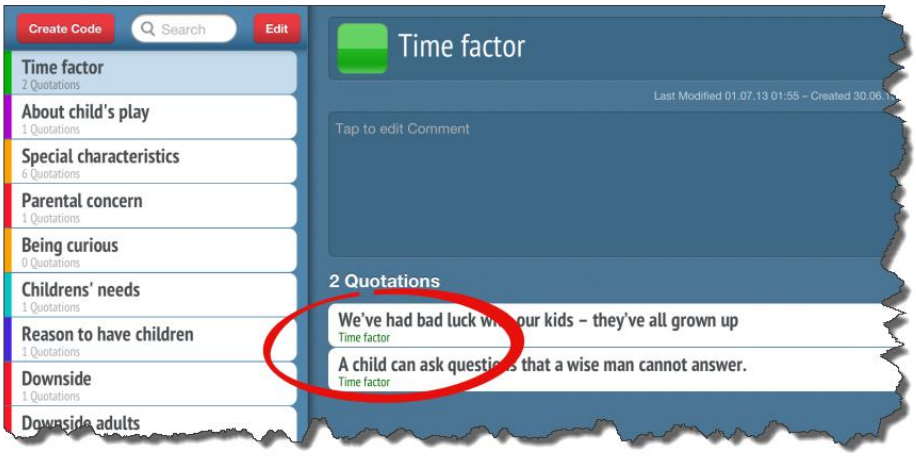

Figure 30: Display of code colors in the code area

Retrieving Coded Quotations

Press the **Codes** tab at the bottom of the screen (Figure 24).

Select a code. You will see the quotations that have been coded with this code on the right-hand side (see Figure 30 above).

To view the quotation in context, tap on the arrow pointing to the right:

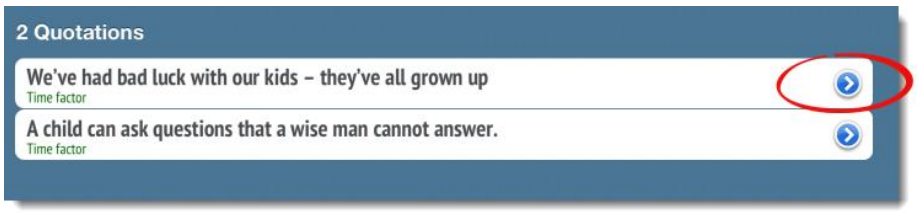

Figure 31: Viewing quotations in context

The screen switches to the Quotation screen. Click on the button **Show in Document**.

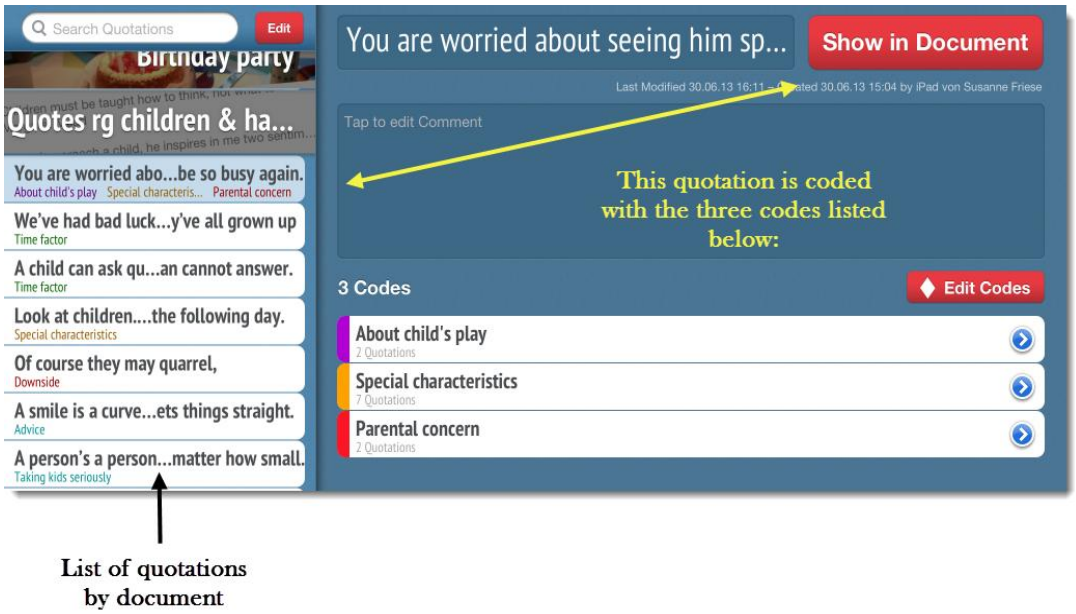

Figure 32: Retrieving quotations via the Quotation screen

To review other quotations also coded with this code, you need to go back to the previous screen. To do that, tap on the project name button at the top left-hand side of the screen and then on the *Codes tab (Figure 24)* at the bottom of the screen.

The Code Screen

To access the Code Screen, press the **Codes** tab at the bottom of the screen.

The Code Screen lists all codes on the left-hand side. On the right-hand side you see the details for the selected code: The name and code-color is displayed on top, directly below you see the code comment field, e.g. for writing a code definition. Below the comment field all quotations coded with this code are listed. If you tab on the right-arrow of a quotation field, this brings you too the Quotation Screen from where you can access the quotation in context (see "Retrieving Coded Quotations").

Further, you can work with the Code Screen to create new codes (see page 28), or to delete codes (see page 28).

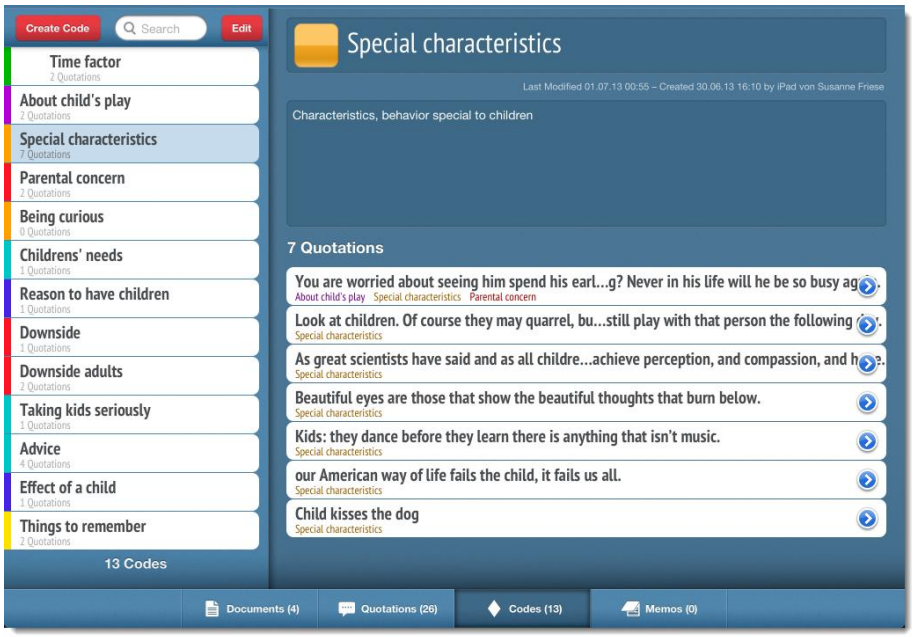

Figure 33: The Code Screen

Working With Memos

Suggested uses for memos:

(1) To take methodological notes
(2) Serve a "bulletin board" in team projects
(3) As a project planning device.
(4) A space to write up your analysis.

Writing memos is an important task in every phase of the qualitative analysis process. The **ideas** captured in memos are often the "pieces of a puzzle" that are later put together in the phase of report writing. **Theory-building**, often associated with building networks, also can involve the use of 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.

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 code word, consider making use of the **code comment** field to describe the code more extensively, or if you have some thoughts on the data segment you are coding, write your thoughts into the **quotation comment** field.

Like codes, memos have names. Just like code names, a memo's title should be short, concise, and descriptive. Don't confuse the name with its content!

How Memos And Comments Differ

Memos are similar to comments in that both are intended to hold lengthy texts, as opposed to codes that are simply naming a concept. Comments exclusively belong to one entity. They are not displayed separately from the object to which they belong.

Adding Memos

The memo screen currently allows you to add, edit and to delete memos.

Press the **Memo** tab to open the Memo screen.

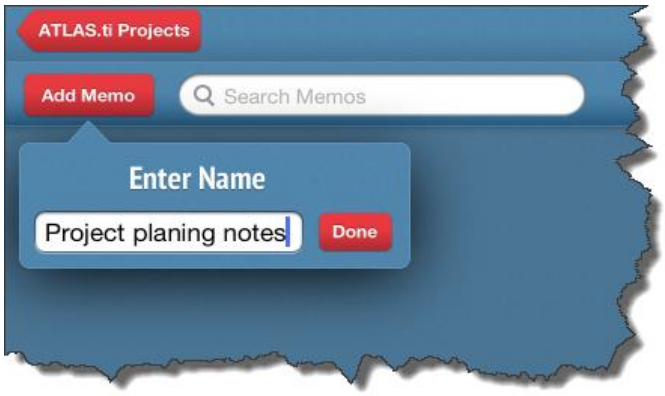

Figure 34: Adding a new memo

Tap the **Add Memo** button and enter a name for the new memo. Press **Done**.

An editor opens. Click on the **Font Size** button to select a larger or smaller font. Write your text and press **Close** when you are done.

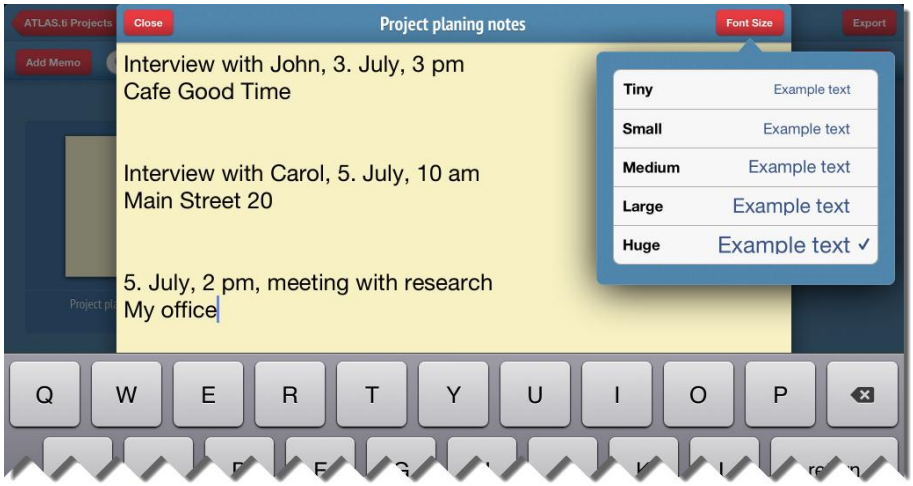

Figure 35: Writing or editing a memo

Deleting Memos

On the Memo screen, press the **Edit** button. Tap the little "x" in the upper-left corner of the memo you want to delete. Press **Done** if you are finished.

Project Export And Import

Exporting A Mobile Project

To continue your work in the desktop version, e.g., to run more sophisticated analysis, to link various objects, or to create network views, export your Mobile project.

Two options are available: You can export your project to the **document directory** of your IPad or to a **Dropbox** account.

If you export it to the document directory, you can download the project from iTunes to your Mac or PC.

If you upload your project to Dropbox for the first time, ATLAS.ti Mobile will ask you to enter your access data. You can log out from your Dropbox account any time (tap the **Settings** button). This is necessary, for instance, if you want to change the Dropbox account that is linked to your ATLAS.ti Mobile app.

Export A Project

- Select a project and then tab the **Export** button.
- Select the destination: **Documents Directory** or **Dropbox**. You will see a progress report. If you selected Dropbox as destination, the data are uploaded to your Dropbox account (thus you need an internet connection) and it takes a bit longer than saving the project to the iPad document folder.

Accessing Your Project In The Documents Directory

- To access your project via the Documents Directory, connect your iPad to your Mac or PC. Wait for iTunes to start.
- Select your IPad from the sidebar.
- Select the "**Apps**" tab.
- Scroll down to the **File Sharing** interface.
- Select ATLAS.ti from the list of File Sharing applications on the left.
- Select the folder with your project name and click on the **Save as** button at the bottom of the screen.

Figure 36: List of file sharing applications

Accessing Your Project In The Dropbox

Open your Dropbox folder and look for select the folder **Apps**.

Within the Apps folder you find an ATLAS.ti folder and therein a folder that has the same name as your project.

Importing A Mobile Project To ATLAS.ti Desktop

Double-click on the project folder that you either downloaded from iTunes, or the one in your ATLAS.ti Dropbox folder. Inside the folder you'll now find a folder that contains your documents plus your project file (compare the explanation provided in the section “Project“ on page 8).

Figure 37: Document folder and project file

Open ATLAS.ti on your computer and select **Project / Import / Import ATLAS.ti iPad project**.

Go to the folder where your iPad project is stored and select the project file. You may not see the file extension '*hprx*' if your Windows Explorer is not set to show file extensions.

A progress bar tells you how far the process has come along. Once finished ATLAS.ti opens a new HU. This HU has the name of your iPad project.

Alternatively:

Open ATLAS.ti on your PC and drag the project file onto the title bar of the ATLAS.ti window. You do not need to create a new Hermeneutic Unit first.

Just drag the file onto the title bar of the currently opened HU. ATLAS.ti will create a new HU from your iPad project.

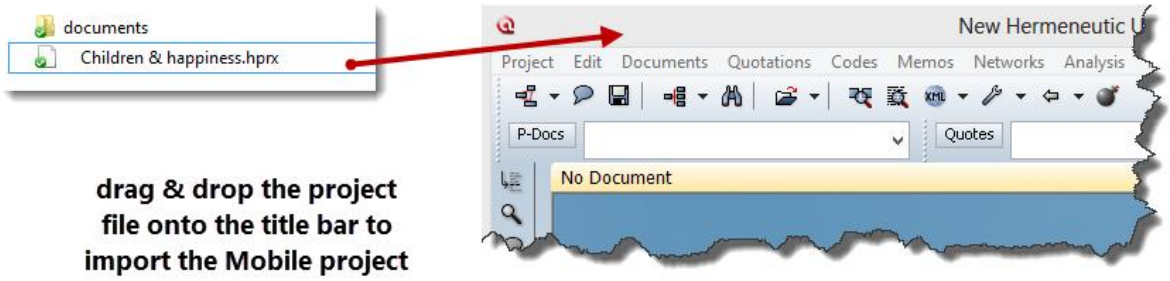

Figure 38: Importing the Mobile project to ATLAS.ti desktop

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