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Conference Report:

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The First ATLAS.ti User Conference.
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Key words: ATLAS.ti; training in QDA software; QDA software; use of ATLAS.ti; artificial intelligence; hermeneutics; grounded theory methodology

Abstract: This report on the First ATLAS.ti User Conference shares our impressions and experiences as longstanding ATLAS.ti users and trainers about the First ATLAS.ti User Conference in Berlin 2013. The origins, conceptual principles and development of the program are outlined, the conference themes discussed and experiences shared. Finally, the future of the program is discussed.

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1. Introduction

The first ATLAS.ti User Conference took place in its hometown, the beautiful city of Berlin and the political capital of Germany. The event was conceptualised, organised and chaired by Susanne FRIESE of Quarc Consulting, an expert ATLAS.ti user and trainer (and author of "Qualitative Data Analysis with ATLAS.ti": FRIESE, 2012) with long-standing and close links to the software development team. It was hosted by the Center of Technology and Society at the Technical University Berlin, represented by Martina SCHÄFER. Some sixty participants attended from all over the globe, as was visible by the coloured paper ribbons we each received upon arrival and wore on our badges. These represented four continents: Africa, the Americas, Asia and Europe, and constituted a striking visual representation of the reach of ATLAS.ti. We share our impressions of the conference below[1]. [1]

1 Note that there were a total of around 50 paper presentations, posters, round tables and other events. This report only covers a small number of them. For a full overview see the conference proceedings by Susanne FRIESE and Thomas RINGMAYR (Forthcoming). You may check their website for availability: http://www.univerlag.tu-berlin.de.

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2. Origin, Principles and Development

The opening keynote was given by Heiner LEGEWIE and Thomas MUHR who together reflected on the development of ATLAS.ti over the past 25 years. LEGEWIE, a psychologist and medical doctor, and self-certified "grand-father of the baby" described the original conceptualisation of the need for qualitative data analysis (QDA) software. MUHR, chief developmental scientist and responsible for making the program into a commercially viable product, illustrated the principles of innovation and dedication to quality which has always underpinned their work. Alongside them have been a whole team of computer scientists, linguists and research assistants; as such interdisciplinarity has been a feature of the team since its formation. [2]

As LEGEWIE and MUHR informed us, development started in the psychology department at the Technical University of Berlin in 1989, in the context of a research project in the aftermath of the 1986 Chernobyl tragedy, comprising 60 in-depth interviews and a mass of field notes. Originally, they intended to develop both a software for analysing data and an archive containing verbal material on current culture, which could be used for secondary analysis. Several factors precipitated development, in the aim to demonstrate that QDA could be conducted using a computer, and Thomas MUHR, together with Renata TESCH (author of the seminal text "Qualitative Research: Analysis Types and Software Tools", published in 1990) conducted a survey in 1989 to find out what researchers' wanted in a QDA tool. [3]

Technically, the development team were interested in artificial intelligence (AI) in terms of knowledge representation and elicitation and Erhardt CONRAD, an AI specialist, worked with the team in the early years (MUHR having been one of his "star students"). CONRAD recalled the challenges of working with everyday language. "Readiness at hand" was a key factor, in that the development team wanted the software to enable users to work in a non-hierarchical environment in which it was possible to move freely in the workspace. [4]

Analytically, they were inspired by Anselm STRAUSS' version of grounded theory methodology (1987), and he became a mentor and personal friend. As they wanted the software to support hermeneutic text interpretation a main goal was to facilitate this, combined with semantic networking and annotation and complemented by text management. "Closeness to data" was therefore also a key guiding principle, reflected in the relational/semantic rather than hierarchical approach to the architecture. The basic model of objects (documents, quotations, codes, comments, families, memos and networks) thus has been in place since the beginning and all new developmental features feed off from and into that workflow logic. [5]

The name ATLAS.ti was inspired by the Greek hero, Atlas, famed for being shown with the whole world on his shoulders. The acronym ATLAS means *Archiv für Technik, Lebenswelt und Alltagssprache* [Archive for Technology, the Life

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World and Everyday Language]. The "ti" indicates the software and stands for: Text Interpretation. [6]

Thomas MUHR recounted that between 1989 and1992 a prototype of ATLAS.ti was developed at the Technical University of Berlin. The software was commercially released in 1993 under the auspices of the company "Scientific Software Development" (now ATLAS.ti GmbH). The ATLAS.ti mailing list, which enabled contact with users, began in 1991, while an article in *Qualitative Sociology* by MUHR (1991) and the book "Computer Programs for Qualitative Data Analysis: A Software Sourcebook" (WEITZMAN & MILES, 1995) had a lot of influence on the early commercial success of ATLAS.ti. To MUHR, the origin and the principles on which ATLAS.ti were based, i.e. artificial intelligence, grounded theory methodology, readiness at hand and closeness to the data, still hold today. Specific options which were added later on, like XML[2] (1998), editable documents (2004), RTF documents (2006), native PDF, Google Earth and associated documents (2009), the total reworking of multimedia functionality, multi-document vision and quantification of data in managers (2012) do not change the backbone of the program as it was originally envisioned. The iPad App, launched July 2013, enables a new way of collecting and analysing data while in the field; delivering full functionality on the level of PDs, codes and memos. Further developments for Android and Windows Tablets are underway, as is the development of a version compatible with the OS-X software from Apple computers. [7]

3. Using ATLAS.ti "Powerfully"

The keynote speech by Nicholas WOOLF, expert ATLAS.ti trainer and consultant who coaches researchers on their projects, focussed on "How To Use ATLAS.ti Powerfully", the title of his forthcoming book which will be published in 2014 (WOOLF, forthcoming). Using ATLAS.ti powerfully refers to his passion for encouraging researchers to use the program throughout each project from start to finish without sacrificing the emergent nature of qualitative research. He discussed the difference between an analytic strategy (what you plan on doing) and analytic tactics (how you plan on doing it); the first being by nature iterative and emergent, the second pre-determined, one-directional and predictable when using computer software as the "tactics". The underlying nature of tools like ATLAS.ti are thus contradictory to the nature of the analytic strategies being accomplished. During his many years as a consultant, WOOLF has identified four ways that people deal with this contradiction:

- Denial: they do not attempt to reconcile the contradictions, do not use software at all or just in the first stages of a project.
- Choice: they either choose not to use the software in order to preserve the emergent spirit of qualitative research, or choose the software and suppress the emergent nature of qualitative research.

2 See MUHR (2000) for its uses.

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- Trade-off: they compromise with a generic model of data analysis for all projects that is more structured than their methodology but not as cut and dried as the actual software operations.
- Transcend: the contrasts between tactics and strategy are well thought out and neither the emergent nature of qualitative research, nor the powerful use of the software, is sacrificed. [8]

To WOOLF, books on qualitative software do not help students accomplish transcendence. He found a working metaphor in military strategy from an authoritative military textbook (LUTTWAK, 2001). Analogous to the five levels of military strategy, WOOLF proposes five levels of qualitative data analysis (QDA): two levels of analytic strategy ("research question & methodology" and "analytic plan & tasks"), and two levels of analytic tactics ("software tools", and "combined and bespoke uses" of the software tools). LUTTWAK (2001) is famous in military studies for identifying a fifth level in the middle that mediates strategies and tactics, and which WOOLF refers to in QDA as the "translation" level for moving back and forth between the strategies and tactics. To WOOLF, understanding this middle level is the key to using ATLAS.ti powerfully, whereas learning how to operate the software is the most trivial aspect in the whole process. This keynote by Nicholas WOOLF was certainly thought-provoking, and his battle metaphor prompted lots of discussion amongst the audience. [9]

Much of the rest of the conference constituted parallel paper sessions in which researchers using ATLAS.ti originating from different parts of the world, reported on either their use of the software, the results of their research or aspects relating to the teaching of software. To us, the main value of the conference consisted of three opportunities available to participants: 1. users could meet each other and exchange experiences, 2. ATLAS.ti trainers and consultants could debate training issues and 3. users, consultants, trainers and developers could interact and shape the future of the software. We mention below aspects raised in selected conference presentations, to provide a flavour of the conference. [10]

4. A Meeting of Users

This conference in itself was the first specific ATLAS.ti focussed event and therefore offered users an important opportunity not previously available to share ideas. Several paper presentations focused on the reach of the software, and the alternative ways in which it is being employed. [11]

For example, David ATKINS and Trena PAULUS (University of Tennessee, USA) presented the results of their analysis of published articles on the use of ATLAS.ti. They reported the vast majority of articles mentioning the use of software derived from within health sciences disciplines, while data types analysed with the support of software were mainly qualitative interviews and focus groups. Their work illustrates clearly the extent to which the use of qualitative software has yet to penetrate across the range of academic disciplines undertaking qualitative research. [12]

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Kamalsingh RAMBAREE (University of Gävle, Sweden) reported on his use of ATLAS.ti in three separate projects, each employing different analytic approaches; ranging from grounded theory methodology a la GLASER (1978), thematic network analysis and a combination of a deductive approach and critical discourse analysis. He illustrated how ATLAS.ti could be used to support these very distinct approaches. [13]

Brett HANSEN (Capella University, USA) described his use of ATLAS.ti to support etic and emic qualities through an Ethnographic Content Analysis of internet job postings. He reported the capacity, foundation and modelling of ATLAS.ti to support the needs of his analytic approach, illustrating the identification and modelling of contextual elements and their relationships. [14]

5. Training ATLAS.ti

A common theme throughout the conference was that of training; reflected both in Nicholas WOOLF's keynote and also our own contributions (the interplay of methodological/analytic knowledge and CAQDAS and its effect on both teaching and learning the software (EVERS) and the issues involved in the adoption of software found in qualitative longitudinal research into use of software after initial training (SILVER). [15]

For example, Trena PAULUS (University of Tennessee, USA) and Gerben MOERMAN (University of Amsterdam, Netherlands) discussed combining software training with methods instruction, describing the features of their own modules for doing so. Brigitte SMIT (University of South Africa, South Africa) in contrast, discussed issues with teaching ATLAS.ti in the South African context, in which qualitative research is less well supported than quantitative research and thus students struggle with employing software effectively, often resorting to manual methods, where qualitative analysis is undertaken. [16]

Kate NNADEDE (University of York, UK) brought the many issues relating to training to her roundtable discussion on the topic, entitled "Training Matters: From a Novice to a Proficient User of ATLAS.ti". This included discussion of the factors involved in successfully transferring knowledge (prioritising length of training in workshop format) and the importance of having expert users available at institutional level. [17]

Finally, Ricardo CONTRERAS introduced the ATLAS.ti Training Centre and illustrated his workshop for novice users. [18]

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6. Shaping the Future of ATLAS.ti

Bringing together developers and users of qualitative software is useful not only in sharing methodological and practical experiences and their implication on teaching, but also in considering future developments. Indeed, the ATLAS.ti development team were present throughout, and expressed genuine interest in users' needs in contributing to future developmental direction. Amongst users' presentations concerning potential future developments were Agnes MÜHLMEYER-MENTZEL (Freie Universität Berlin, Germany), who, in a round table discussion, proposed a controlled vocabulary for the ATLAS.ti relation database. She presented her own ideas and sought input from others relating to this complex issue. Susanne FRIESE (QUARC Consulting, Germany) ran a workshop on the new ATLAS.ti iPad App, illustrating its uses for data collection and data reduction and enabling conference delegates to experiment with its use and interface with the desktop version of ATLAS.ti. [19]

The final conference session comprised several roundtables discussing issues relating to the future of the software. The topics discussed were:

- What did we learn in terms of methodological issues?
- What did we learn in terms of application (use of software features and fields of application)?
- The future of the software
- The next conference
- Teaching and training [20]

This gave participants another opportunity to discuss amongst themselves and to feedback to members of the development team, their wishes for future developments with the software. [21]

7. Summary: Well Worth the Wait

The first ATLAS.ti user conference was testament to both the wide-ranging success of the product and the value of users and developers getting together to discuss its application and future potential. This was illustrated in the breadth of geographic origin amongst those present and the range in the types of analysis being undertaken using it. The ATLAS.ti community has had to wait a long time for this inaugural user conference, but enthusiasm amongst those attending indicates it was very well received. [22]

The vast majority of participants were users and/or teachers of ATLAS.ti and therefore the level and intricacy of discussions was high. It really was a forum for users to explore issues with the like-minded. As long-standing users and teachers of ATLAS.ti we ourselves very much valued the opportunity to interact with those undertaking similar work in other regions of the world. Long-standing friends and colleagues were reunited, faces were put to "famous" names, new connections made and allegiances forged. Hearing how the software is used by researchers

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across disciplines, methodologies and world regions, as well as descriptions of differing approaches to teaching ATLAS.ti challenges ones own established models. The sort of reflection and dialogue this fosters can only serve to improve the way we think about, teach and use qualitative software. Susanne FRIESE should be congratulated for instigating the first ATLAS.ti user conference, and we hope the next one is not too far away. [23]

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