TRANSANA and Chapter 10 Managing interpretations through writing

Chapter 10 in *Using Software for Qualitative Research* is all about managing interpretations; managing where and how you make analytic notes, using software structures to ensure your thoughts do not get forgotten or your notes lost. Ways of expressing or visualizing connections and relationships are sometimes provided in software and help in the generation and management of the ideas that you have about the data. The literature that informs your work is very important and these software programs can be used in many different ways to manage cross referencing with substantive data or to manage the literature review itself. ***See all coloured illustrations (from the book) of software tasks and functions, numbered in chapter order.***

Sections included in the chapter:

Writing as continuous analysis – Critical Appraisals of literature – Analytic memos – Process memos – Definitions - Linking notes to data – Integrating notes with other work – Visualising memos

Analytic Memos and Research Journals in Transana
by David K. Woods, Ph.D., Transana's Lead Developer

Transana contains two systems for analytic writing. Notes are Transana's system for writing analytic memos and analytic notes associated with particular data items in your database. Notes tend to be focused narrowly on the data item to which they are attached. Research Journals are text documents you create within Transana for larger scale analytic writing. You might journal during your analysis, writing about what you do, in what order, and why. You might create a create a separate research journal for each of your analytic questions, adding to the journal each time you discover something in the data relevant to that question, as a way of keeping your thinking on each question collected in one place but separate from other issues. You can place links to specific data items (Quotes, Clips, Snapshots, and Notes) in a research journal in Transana.

10.1 Analytic Memos in Transana

The topic of analytic memos has come up several times already. We discuss Transana's model for analytic memos, called Notes, in chapter 5 exercises, (sections 2.8, 3.6), also in Chapter 7 exercises. You may wish to review these sections.

See also Table 10.4 in *Using Software for Qualitative Research* which models the processes of writing and note making to eight phases of research project management and analysis for the Coca Cola case study. Although framed around the specific analytic needs of the

Coca Cola dataset it can be adapted to for different research designs and is relevant to the writing tools available in Transana.

In Transana, you can create free-form Notes, which you can associate with Library, Document, Episode, Transcript, Collection, Quote, Clip, and Snapshot records. While notes allow you to work any way you want to, I, as a general rule, use different types of notes for different types of analytic memos.

I rarely use Library Notes when working alone. When I do, they tend to describe the schema I use for organizing my original, raw data files, and they describe what files belong to a particular Library. The larger the study, and the more people bringing raw data into the analysis, the more important Library Notes can be.

I use Document and Episode Notes to describe my observations about a specific raw data file or set of synchronized media files. I record things I notice on first reading or viewing here, particularly ideas of analytic strains I want to remember to follow up on. (If I will only be using multiple transcripts for a given media file, most of the observations I make during transcription also go into Transcript notes rather than the Episode Note.) Finally, I will often describe the circumstances and details of data collection in a Document or Episode note, particularly for Episodes that contains multiple simultaneous media files.

I primarily use Transcript Notes in situations where I am creating multiple transcripts for a given Episode. In that case, I start by describing the analytic function for the transcript, focusing on how it differs from the other transcripts I create. If I am using multiple simultaneous transcripts for an analysis, those observations about a media file I make during transcription might go into the Episode Note if are transcript-independent, but they will definitely go into a Transcript Note if they are in any way specific to the transcription methodology or analytic lens I'm using for each separate transcript.

I use Collection Notes to describe the analytic purpose of each Collection I create. If the collection has a non-analytic function, as when I create an "Uncategorized Data" collection for things I want to follow up on later but don't want to take the time to categorize in the moment, I'll make that clear in the Collection Note. When I am creating Quick Quotes and Clips, I add a Collection Note to my Quick Quotes and Clips collection that describes the focus of the analytic pass I'm implementing using Quick Quotes and Clips. (I double-check that note when I rename the Collection functionally.) If the function of a Collection changes, I time-stamp and write about the change and its causes without deleting the older information, even (and especially) when that information is contradicted or superseded.

I use Quote and Clip Notes a lot when I'm creating and editing Quotes and Clips to describe the thinking behind each Quote or Clip I create. I try to note information about why I start and end the data item where I do and why I include the coding I do when that information isn't painfully obvious (and sometimes even when it is, because things that are obvious today might not be

tomorrow. It's especially important to note these things when I'm working as part of a team, to ensure consistency!) While this process can feel like it is slowing down the process of Quote or Clip creation (and especially the process of Quick Quote or Clip creation), I am usually grateful that I did it after the fact.

I use Snapshot Notes to document the reasons behind creating each Snapshot and coding it the way I do. This is a good place to put into words the analytic intent behind the zooming, framing, and detail coding is drawn on a Snapshot, which might be obvious in the moment, but which might not be so obvious to a colleague or even to yourself when you revisit your data in 6 months or 6 years' time.

Being conscious of the different roles that different types of notes can play helps me think through the logic of where a particular idea or comment "belongs" in my larger structure of notes. This, in turn, makes it much easier to know where to look for that comment at a later time, when I may remember writing something but may not remember where I did so. When I have a question about why I coded a particular Quote, Clip, or Snapshot in a particular way, I can be pretty sure that the note attached to that Quote, Clip, or Snapshot will contain whatever clues to that puzzle I left for myself.

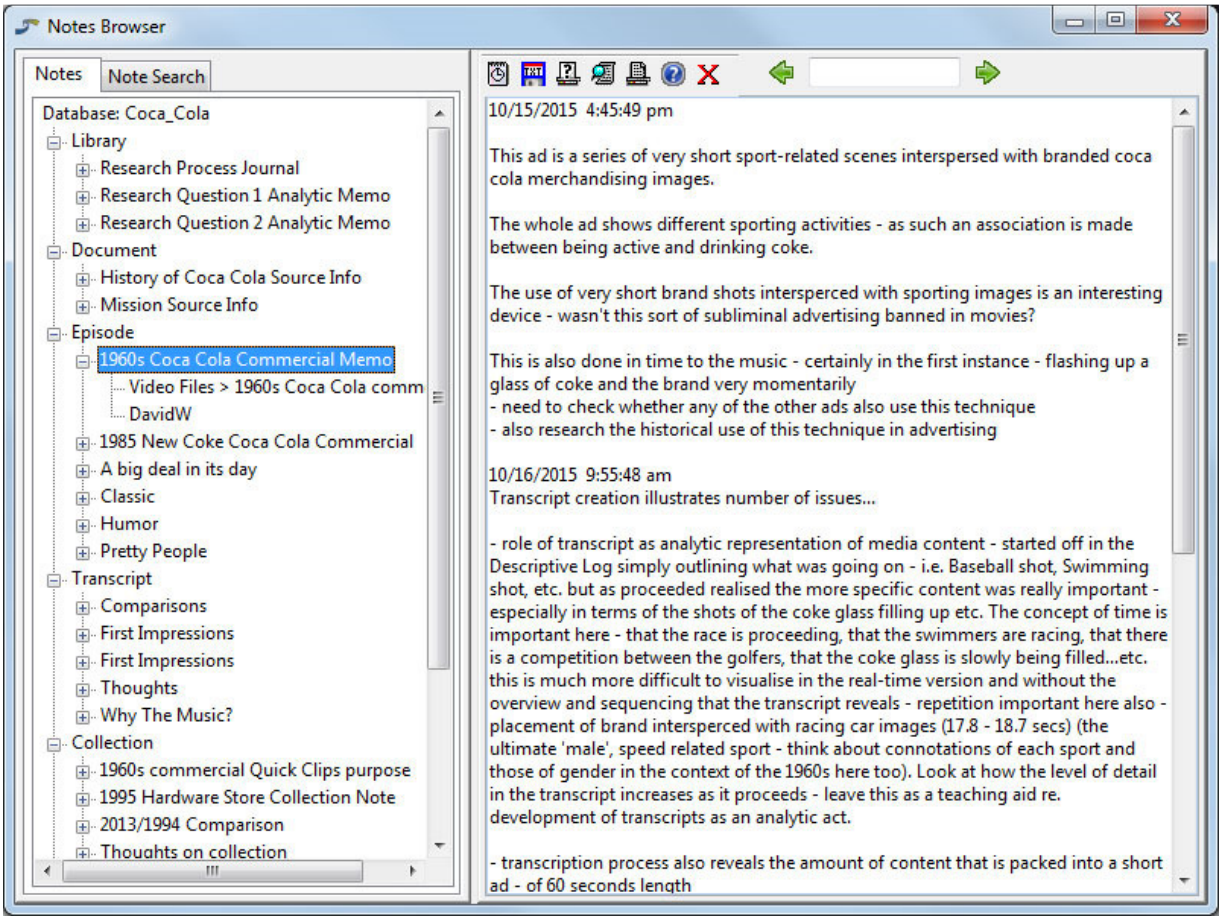
Silver and Lewins talk about structuring memos, using formatting within notes, such as color or character style, to denote analytic meaning (see Table 10.2, pages 234-244 and page 248)

Transana does not support any formatting of text within Notes. However, you can use text "flags" to denote the same information that formatting would impart. Flags have two advantages over formatting. First, their meaning is usually more apparent to colleagues and to yourself after the passage of time. Second, flags are available to the Note Search function, to be described in the next section, in a way that formatting is not.

10.2 The Notes Browser

One of the major consequences of the design behind Transana's Notes system is that analytic memo information tends to get scattered throughout a project database. The larger your project grows, the more scattered your notes become, and the more challenging it can become to locate a particular note you can recall making for yourself.

To address this issue, Transana provides the Notes Browser tool. To view the Notes Browser, go to either the Tools menu or the Window menu and choose the Notes Browser menu item.



The Notes Browser allows you to see all of your notes in one place, sorted by type of Note.

The Note Search tab allows you to search for particular words or phrases in your notes, making it easier to find a particular note you are looking for when you cannot locate it. Enter a word or phrase into the Search Text box in the left hand window and press the Search Button. Only notes containing the word or phrase will be displayed in the Notes tree. When you select a Note to view, your search term will be automatically placed in the Note's Search Text in the right hand window, ready for you to search for instances of that phrase in the current note.

Transana's Notes editing interface, whether inside or outside the Notes browser, provides toolbar buttons for inserting date/time stamps, for exporting individual notes to plain text documents, and for printing Notes. The Notes editor also supports cut, copy, paste, and undo functionality through the keyboard shortcuts common to all programs for your operating system.

10.3 Notes in Reports

Notes can be included in Transana's Collection Report (see Chapter 8 exercises - section 8.4), as well as the Document and Episode Reports (see section 8.5) by adding the desired Notes categories on the Reports Contents tab of the report's Filter Dialog. This allows you to create a

report that includes all of the notes related to a particular Collection or set of Nested Collections, optionally including all of the notes for Quotes, Clips, and Snapshots in those Collections, or for all Quotes, Clips, and Snapshots associated with a particular source data file.

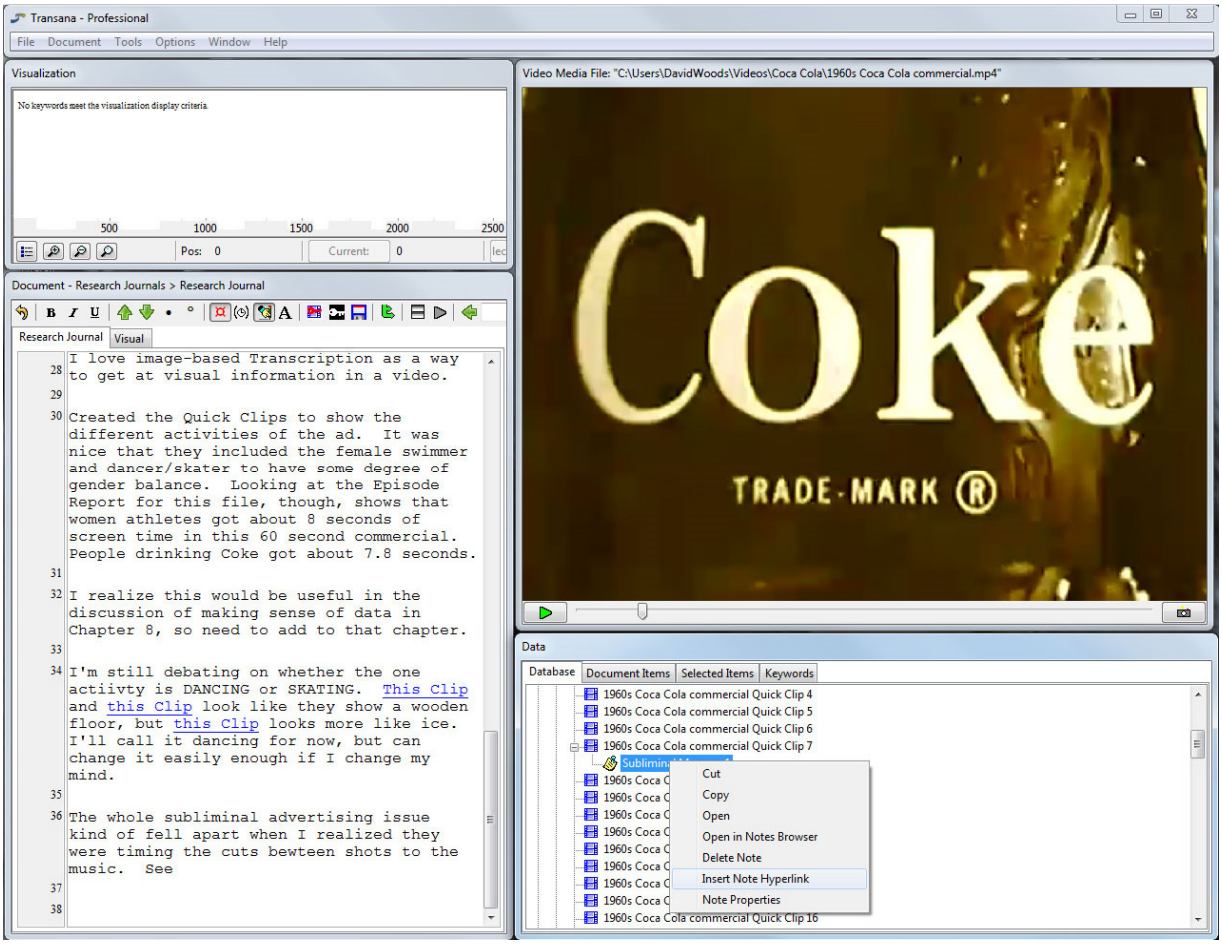
You can also create reports that just include notes from within the Notes Browser. In the Notes Browser's Database Tree, you can right-click the main Database node to request a report including all notes in your project. You can also click each of the main nodes to request the Library Notes Report, the Document Notes Report, the Episode Notes Report, the Transcript Notes Report, the Collection Notes report, the Quote Notes Report, the Clip Notes Report, and the Snapshot Notes Report, depending on the type of notes you would like to include in the report. The Notes Reports include a Filter Dialog, allowing you to choose to include or exclude individual Notes from the reports if you so desire.

10.4 Research Journals in Transana

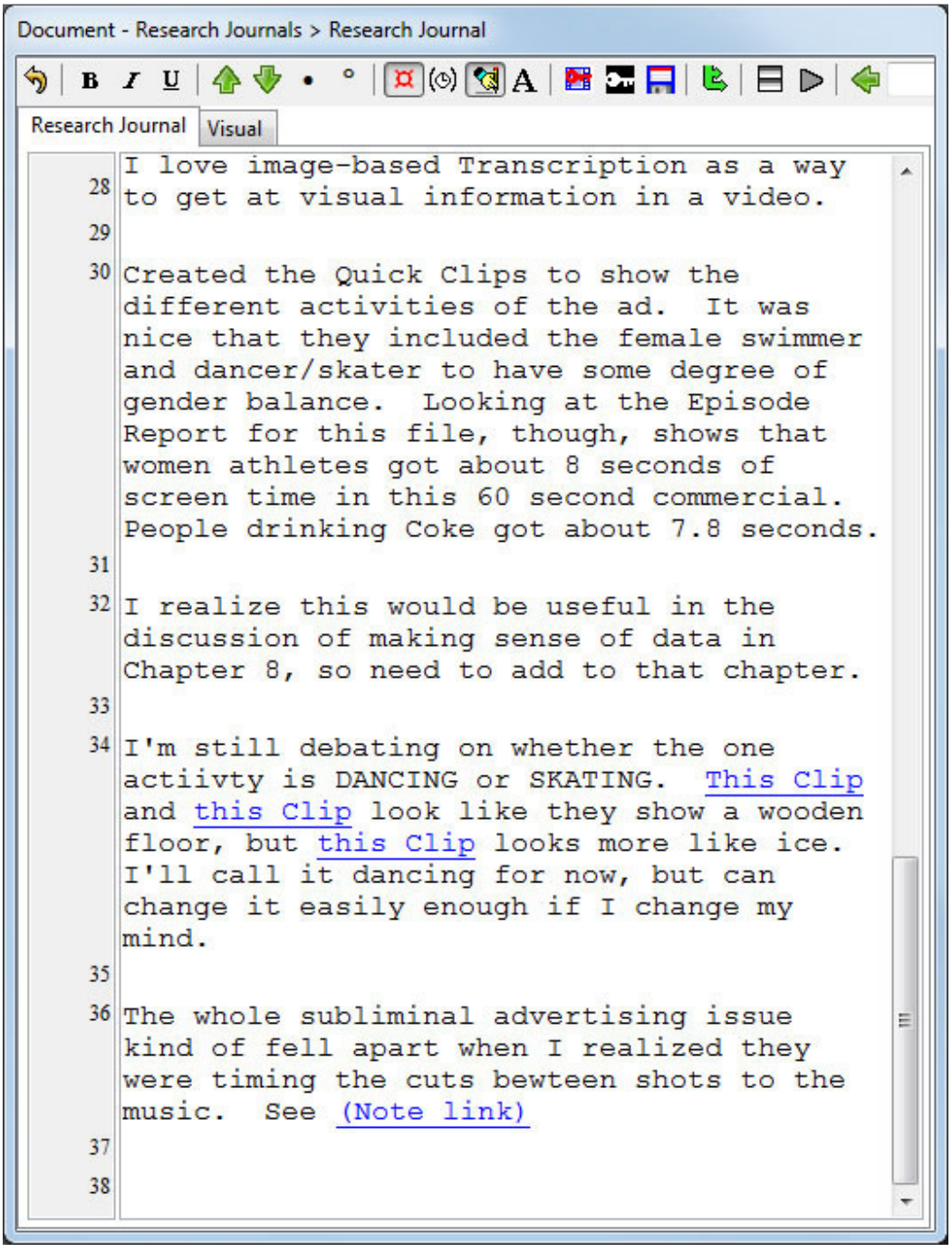
Research Journals are text documents that you create in Transana for the purpose of analytic writing that is broader than is appropriate for Notes. Unlike Notes, Research Journals are not attached to specific data items in Transana's database, and conceptually, they can be used for analytic thinking and writing that transcends individual data items.

To use Research Journals, start by creating a Library called "Research Journals." Next, right-click that Library and select "Add Document," giving your Research Journal a name that reflects its analytic function. Put the Research Journal into Edit mode and you can write whatever you would like in the Document.

Sometimes, as you write, it would be nice to link to specific data items which serve as examples of something you are writing about. In Transana, you can add hyperlinks to Quotes, Clips, Snapshot, and Notes in Research Journals. While you are editing a Research Journal, simply locate the Quote, Clip, Snapshot, or Note you want to link to, right click the item, and choose "Insert (item type) Hyperlink" from the popup menu.



This places a generically-labelled hyperlink in your Research Journal.



If you click the link, Transana will load the linked data item. If the item is a Quote, Transana will load it into a new tab in the Document window. If it is a Clip, Transana will load the Clip into the main interface, populating the Media and Visualization Windows and either adding a new tab in the Document Window or replacing the previous Episode or Clip transcript in the Document Window. (Transana can only have one media-based data element loaded at a time.) If the link is to a Snapshot or a Note, the linked item will open in a new window.

Since the link is a live hyperlink, that presents a minor challenge when you want to edit the hyperlink's text. Rather than clicking on the link to place your cursor, you need to click next to the link, and then use the cursor keys to move the cursor into the link for editing. Once the cursor is inside the link text, you can edit that text in any way you would like.

When working with Snapshots, you face a unique choice. You can create a link to your Snapshot, but you can also add the Snapshot to a Research Journal as an image instead of creating a link to it. The primary difference are that the embedded image, while easy to see, will not be updated should you modify the Snapshot. The hyperlink, while you have to click to see it, will always take you to the latest, most up-to-date version of the Snapshot.

The Transana web documentation associated with this publication has focused primarily on the analysis of media files and visual information. But Transana has tools for working with and analyzing text data that are very similar to those described for working with media data. With text-only data, you create Documents instead of Episode / Transcript pairs. You create codable Quotes instead of Clips. (There are both Standard Quotes and Quick Quotes.) Quotes appear in Reports, Maps, Graphs, and Searches in many of the same ways these web pages have described for Clips.

Research Journals are really just normal documents in Transana. This means that you can create Quotes from your Research Journals, and in the process, can code your Research Journals. You may also note that you can in fact add hyperlinks to all documents and transcripts in Transana. Research Journals are where they are most obviously useful, but you can use them for a variety of reasons throughout Transana.

Silver and Lewins Figure 5.7 (page 129) illustrate that codes are useful devices for all types of information and data.

You could go in any direction now. See previous exercises or go to Chapter 13 exercises which explore searching possibilities provided by Transana.