

ACCELA PA Tech Workshops

Using HyperResearch for Qualitative Data Analysis

Prepared by Juan Pablo Jiménez

Getting Familiar with Menus

Sources Menu

The Sources Menu allows you to work with your source material files. Commands accessed through the Sources Menu are:

Open Source

Displays a pop-out menu allowing you to specify whether you wish to open a text file, an Image (JPEG, GIF, PNG, or PICT file), or a Movie (MOV, MPEG, AVI, Flash, and animated GIF) or Audio (MOV, MP3, AIFF, WAVE) file. Choose the submenu item appropriate for the type of file you want to display, and a standard Get File dialog will let you select the file and open it.

Note for Mac OS users: File types on Mac OS are determined by hidden info in the file referred to as the File Type Code, while on Windows file types are determined by the three-letter extension to the file name (e.g., “.mov”). Sometimes trading files between operating systems or downloading them from the Internet will result in a perfectly good file but if the Type Code is not set in the file it will not be selectable in the Get File dialog. **If you have a file of a supported type that does not appear in the Get File dialog, just cancel the dialog and then hold down the Option key while selecting the appropriate Open Source submenu again.** Selecting any of the Open Source submenu items while the Option key is down will cause the Get File dialog to show all files regardless of type code.

Close Source

Closes the current source window.

Remove Source

Removes all references to the selected source file, including its entry in the Master Source List and all codes assigned to the source material in the file.

Codes Menu

The Codes Menu allows you to work with the code references on your Case Cards, and provides access to other code-related features.

Encode...

If you have a portion of material selected in one of the source windows, selecting **Encode...** will open the Code List Editor so you can apply a code to create a new code

reference to that material.

If the Code List Editor is already open, choosing **Encode...** will trigger the Code List Editor's **Apply** button, create the new code reference in one step.

Choosing **Encode...** works the same as striking the Enter or Return key after making your source selection (or simply completing your selection depending on the settings in the Options window). See the section on the **Code List Editor** above for tips on efficient coding.

Autocode

The Autocode feature will search text source files for specified words or phrases and assign a specified code or codes to the found text.

When you choose **Autocode** from the **Codes** menu HyperRESEARCH brings up the Autocode window. There are three tabbed areas of this window that allow you to specify which text **sources** to search, which **phrases** to look for and what **code** or codes to assign to the found text.

Sources

The Sources tab displays the currently selected cases in your study, and allows you to assign text source files to each case. If the case selection is not exactly what you want, cancel out of the Autocode dialog box, choose Select Cases to revise your case selection, then return to Autocode. Once the proper cases are showing in the Sources tab of the Autocode window, double-click on a case to assign a source file to that case. You may assign more than one source file to a case. You may also assign the same source file to more than one case.

Phrases

The Phrases tab allows you to specify the words or phrases (the **search string**) you wish HyperRESEARCH to search for and select. To enter a search string, choose **Word or Phrase...** from the **Selection Criteria** menu. Enter any phrase you wish HyperRESEARCH to search for. (Please note that HyperRESEARCH will find only exact matches.) You may enter multiple search strings; each passage of source material that matches any of the search strings will be selected for Autocoding. You may also instruct HyperRESEARCH to include a specified number of characters, words, or lines before and after the found phrase in the source material selection. If you make a mistake with your phrases, choose **Clear Criteria** from the **Selection Criteria** menu, and enter them again.

Codes

The Codes tab allows you to specify the code or codes you wish assigned to the passages specified in the **Phrases** window. Click on the **Select Codes** button to access your Master Code List. You may select multiple codes; each selected code will be assigned to every selection of source material as specified in the Phrases window. Click **Clear** to clear the

selected codes if you make a mistake.

When you've specified the desired cases and corresponding source files, the target words or phrases, and the codes to assign, click **Autocode**. HyperRESEARCH will open each specified source material in turn, search for the given phrases, select the appropriate chunk of source material (including any characters, words, or lines previous to or following the found phrase, as specified in the **Phrases** window), and assign the specified codes to that chunk. The code references for the source material will be added to the index cards of the cases as specified in the **Sources** window. The Autocode feature may take some time, especially when dealing with multiple and/or extensive source files.

At the bottom of the Autocode window are **Save...** and **Load...** buttons. The Save button lets you save the current Autocode settings to a separate file so you can restore them later or share them with others who may be working on your HyperRESEARCH study. The Load button lets you load Autocode settings from one of these saved files.

Annotate...

Use the **Annotate...** command to add an annotation to the highlighted code reference. Annotations may contain any amount of text you wish. An annotated code reference will display a † symbol in the leftmost column on the Study Window. Annotations may be displayed in reports if you mark the **Annotations** checkbox in the Report Window. They will also be copied and pasted with code references provided you mark the **Annotations** checkbox in the Options dialog box, opened by choosing **Options...** (Windows) or **Preferences...** (Mac) from the Edit menu.

See also the **Annotation Window**.

Duplicate...

Duplicates code references, adding the specified references to the selected case(s) under the code name(s) specified.

If you have one or more code references highlighted on the current case, the Duplicate... command will duplicate only those references.

If you have no code references highlighted, the Duplicate...command will duplicate all selected (visible) code references, adding the new code references to the same case(s) the original code references are on. This is useful if you wish to make sure that all source material assigned one code (e.g. **loves chocolate**) will also be assigned another code (e.g. **loves sweets**) throughout your study. First make sure you select only those codes you wish duplicated (using the Select Codes pull-down menu, either from the bottom of the Study Window or from the main Codes menu). Then make sure you select only those cases you wish the duplication to affect (using the Select Cases pull-down menu, either from the top of the Study Window or from the main Cases menu).

Once you have the proper codes and cases selected or highlighted, choose **Duplicate...** from the Codes Menu. HyperRESEARCH brings up a dialog box prompting you to select

one or more code names for the duplicate code references it will add to your study. Once you've selected the proper code names, click **Select**. HyperRESEARCH will prompt you to confirm your decision, informing you whether you'll be duplicating the highlighted codes to the current case only, or all selected codes to the selected cases as appropriate. Click **OK** to proceed, **Cancel** to cancel.

To duplicate code references while retaining the same code name, either select the original name in the Code Selection Dialog Box, or use the **Copy Code(s)** command from the **Edit Menu** .

Rename...

Opens a dialog window in which you can change the name of a code reference highlighted in the Study Window.

If you have no code references highlighted, the Rename... command will rename all selected (visible) code references to the specified code name. First make sure you select only those codes you wish renamed (using the Select Codes pull-down menu, either from the bottom of the Study Window or from the main Codes menu). Then make sure you select only those cases you wish the renaming to affect (using the Select Cases pull-down menu, either from the top of the Study Window or from the main Cases menu).

To rename a code in your Master Code List, use the **Rename...** menu item in the **Edit Codes** pull-down menu in the Code List Editor window.

Re-code...

Lets you reassign code references highlighted in the Study window to another Master Code Name.

Selecting this item will open a dialog box containing a list of all codes currently in the Master Code List. You can optionally create a new Master Code in this dialog by clicking the New Code.. button. After selecting a code name from this list, click Select button to confirm your choice and close the dialog.

If you have one or more code references highlighted on the current case, the Rename... command will rename only those references.

If you have no code references highlighted, the Rename... command will rename all selected (visible) code references to the specified code name. First make sure you select only those codes you wish renamed (using the Select Codes pull-down menu, either from the bottom of the Study Window or from the main Codes menu). Then make sure you select only those cases you wish the renaming to affect (using the Select Cases pull-down menu, either from the top of the Study Window or from the main Cases menu).

To re-code a code in your Master Code List, use the **Re-code...** menu item in the **Edit Codes** pull-down menu in the Code List Editor window.

Delete...

Deletes the all highlighted codes on the current Case Card in the Study window. This completely removes the code from your case and cannot be undone. If you need to paste the code later, use **Edit->Copy** instead.

If you have one or more code references highlighted on the current case, the Delete... command will delete only those references.

If you have no code references highlighted, the Delete... command will delete all selected (visible) code references on all selected cases. First make sure you select only those codes you wish deleted (using the Select Codes pull-down menu, either from the bottom of the Study Window or from the main Codes menu). Then make sure you select only those cases you wish the deletion to affect (using the Select Cases pull-down menu, either from the top of the Study Window or from the main Cases menu).

To delete a code in your Master Code List, use the **Delete** menu item in the **Edit Codes** pull-down menu in the Code List Editor window.

Sort...

Opens the Sort Codes dialog box, where you can specify criteria by which to sort the codes.

HyperRESEARCH will sort first by the first criterion specified, then within any duplicates of the initial criterion will sort by the second specified, etc. Criteria include Code Name, Code Type (TEXT, IMAGE, MOVIE, THEME), Code Reference (the source material's position within its source file), or Code Source (the source file referenced). If you make a mistake or wish to alter the sorting criteria, click **Reset**. Click **Sort** to proceed, or **Cancel** to abort the sorting process.

Codes List Editor

Opens the **Code List Editor** window, where you can work directly with your Master Code list. Add, delete, or rename codes, enter code definitions, save your Master Code List to a separate file, or add a previously saved Master Code List.

Code Map...

Opens the **Code Map** window, where you can create a network diagram of your codes. You can use this to visually organize your master codes, graphically illustrating links between codes, groupings of codes, and the like. You may also apply the map's current code selections to your study, using the **Select Codes-> by Map...** command or by clicking on the **Apply** tool within the Code Map Window.

See the **Mapping Code Relations** and **Selecting Codes** topics for more information.

Select Codes

This command accesses a pop-out menu that allows you to select which codes you wish

to work with. References assigned unselected codes will be hidden- you must re-select them if you wish to work with them. Code selection options include:

All Codes

Select all codes in the current study's Master Code List. Note that HyperRESEARCH will actually select only those codes that have been applied to code references on the currently selected cases.

By Name

Select codes specified by name. Unselected codes are hidden.

By Criteria

Select codes by criteria. You may select code references based on the proximity (function) to other specified codes. Available functions include Equals, Excludes, Includes, Inside, Outside, Overlaps. Code references that don't match the criteria are hidden.

By Map

select only those codes that are designated as selected on the current Code Map Diagram. If there are no codes selected on the Code Map, this command will open the Code Map Window. See the Mapping Code Relations topic for more information.

By Type

Select only those code references that have been applied to the specified type of source file. Code reference types include Text, Image, Movie, and Theme. The Theme code type is a special type, not referring to any specific source material. Theme codes may be added to the study by the Hypothesis Tester. See the Testing Hypotheses topic for more information.

Unselect All

Hides all codes currently present in your study.

See the **Selecting Codes** topic for more information.