File 20120130.0850: Notes from meeting with Dr Fléchais, 0800 this morning (1500 his time):

Meeting conducted via Skype video. I was sending video, but Dr Fléchais did not. He shared his screen, on which was running ATLAS.ti with my evidence PDFs loaded as Primary Documents (PD) in the Hermaneutic Unit (HU). I sent Dr Fléchais six PDF files ahead of the meeting, denoted as:

- 20091102.1000: minutes of kick-off meeting; Mr Paul Ozura describes the ground rules for Alpha testing, and the expected schedule. A few other people asked questions in the meeting.
- 20100330.2145: brief notes on the status of Beta 1 testing; the developer complains about the NSA testers, and NSA testers complain about the developer.
- 20100413.1111: notes from a meeting about the ongoing certification testing, followed by two different summaries of the information.
- 20100419.1400 and 20100419.1500: notes from two different people describing the same status; one is an engineer, the other a project manager.
- 20100421_summary: my synthesis after listening to both.

When I called in, he had already loaded them into his copy of ATLAS.ti and shared the screen. I think Dr Fléchais was on a headset microphone, as his audio was very clear. I could see myself in a preview in the corner of his screen; I think my sending video was appropriate.

I have three case studies, he said. The 'Family Management' feature in ATLAS.ti is a useful thing; use it to differentiate between my summaries and the rest of the data. Don't try to understand all the features of ATLAS.ti in all its gory detail—just use it like a tool. Get coding immediately. Ignore the fancy features, like in a word processor. Just get text on the screen and ignore the other features for now.

Code each case study in a different HU. There are two phases:

1. Coding
2. Reflecting on your codes and producing network diagrams.

Free quoting vs open quoting and *in vivo* quoting. It is OK to identify quotations directly.

Do not code names directly. Instead, write a profile of each participant role, e.g., COTR, identifying who (and multiple people) played that role, a unique identifier for the role, and any other information about the role. Then code role names. Do not code proper names. Codes are about concepts, names of roles.

Don't mess with the data, but it's OK to make a copy of the data and search/replace on that to facilitate coding in the tool.

We talked about whether to import the entire `notes.tex` file as one PD, or whether it would be better to break it up into PDFs The tool will show you PDFs as necessary, and doesn't mix up the display, but I want to see if it can swallow the whole `notes.tex` file. The only problem with that is ATLAS.ti doesn't like it when the data files change underneath it. So it must be a copy or snapshot of the file as it exists now.

Work the profile into the coding scheme.

Use the Auto Coding Dialog tool. Try this tool.

Then we went into the actual coding; I watched as he narrated and ran the screen. 'Yelled' was a very interesting code to him. It represents conflict, and that was very interesting.

If you get further into the coding and want to change some earlier codes, refactor—don't restart.

Codes, quotes, memos—document your thoughts at the time of coding. Don't use the memo function in ATLAS.ti; just code 'my' memos using a different 'family' of documents from the meeting records.

What we are looking for here is, e.g., every time we see 'conflict' there is money involved, or schedule involved, or security controls, or a requirement, or something. We're looking for relationships.

Then, assuming all coding done, go to the network diagram phase.

When Dr Fléchais showed me the network diagram phase, I was reminded of a lecture I heard at Lockheed a few months ago on using network analysis to find the real root cause of a problem; in the network diagram, nodes that had all arrows going out of them and no arrows going in (I think it was) are likely candidates for the Root Cause. Now I can't find it.

First step, import the nodes. Then drag them around. You can create new nodes on this screen. Draw arrows. This is the step that Dr Fléchais can help with most. He needs to look at my data in his own copy of ATLAS.ti and criticise my network diagrams. Do they hold water? Can he see additional relationships that I did not identify?

At least one complete pass through the data before doing network diagrams. Dr Fléchais asked for a rough order of magnitude how many items I had to code. I said 100.

If I use one file, I can't use families for the data. But that might not be such a bad limitation.

I do the coding, then Dr Fléchais helps me make sense of it.

Don't second guess the data; just code what you see.

References