



# Quirkos

Getting started guide

Version 2.4 (November 2020)

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## Introduction

Quirkos is a simple and visual tool to help with the qualitative analysis of text data. It is identical on Windows, Mac and Linux, so this guide applies to all platforms. Here are a few things to bear in mind as you learn Quirkos for the first time:



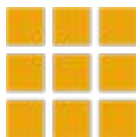
Quirkos can store your projects in our secure cloud server, or in one project file on your computer. Everything is in one file for easy backup and sharing.



Quirkos saves your work as you go, so there is no manual save button, but no risk of losing your work.



Add your data to the project from txt, rtf, csv, Word (docx) or PDF files, or copy and paste from any other source.



Describe your sources in any way with the source properties, such as age or gender, or type of source and comments.



Your themes or topics are shown as bubbles on the left side of the screen. As you drag and drop sections of text to them they will grow.



Drag and drop text onto the Memos column to add a note and record your thoughts and observations



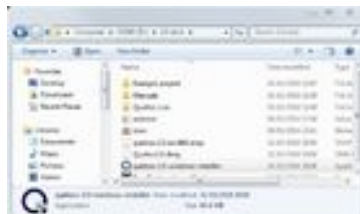
At any stage of your coding, you can create many different types of exports: detailed reports, coded transcripts for Word, or spreadsheets for statistical analysis.

## Installation

You can download the full version of Quirkos from our website, or from one of our USB sticks. You'll get a 3 week trial period to try the software (14 days for Quirkos cloud), and an extra week if you complete a short feedback questionnaire. Unlock Quirkos forever with a licence from our website that will let you keep working with your trial projects. Quirkos Cloud requires you to create an account, with username, password and payment details. Click Register/Manage account to set one up.



Download the latest version of Quirkos from our website ([www.quirkos.com](http://www.quirkos.com)). There's no difference between the trial and full versions.



Find the download location you saved to (usually Downloads) and double click to launch the installer (Windows & Mac).



On Mac, just double click to open the installer and drag the Quirkos App to the Applications folder. You're done, and can launch the app from Applications at any time.



On Windows, click 'Yes' on the security confirmation, and follow the instructions to install Quirkos to the location of your choice. Once it's done, you can launch from the icon on your desktop.



On Linux, install the snap package with the command: `snap install --devmode quirkos-2.3.amd64.snap`

## Your first project

The first thing you will see is the trial dialogue, letting you know how long you have remaining, and options for buying and activating the software. Just click Continue Trial on the left to start Quirkos.

### Quirkos Trial - 18 Day(s) Remaining

Thank you for using Quirkos. You still have 18 day(s) remaining to evaluate this version. After this period you will need to activate the application in order to continue using it.

Get an extra week on your trial by giving us feedback [here!](#)

For questions about extending your trial, contact [info@quirkos.com](mailto:info@quirkos.com).

Activation Key:

Continue Trial

Buy Licence

Extend Trial

Activate

### Welcome to Quirkos

Recent Projects:

Author:

Cancel Help

Open Other...

New Project

Next you'll choose to login to Quirkos Cloud, or work offline. The project dialogue, which shows a list of recent project files you've opened. Below this the 'Open Other' will open a different file. Click on the 'New Project' button to create a new file to contain your work.

In the new project screen, you have the option of password protecting the file, and creating a structured question project (only used for importing online surveys). Enter an author name or initials to identify your work on a project.

### New Project

Click on the New Project button again, and you'll be given a dialogue where you can choose the location of the project on your computer (if offline) and the file name.



The project file you create will contain all your sources and coding, kept on your own computer. You can move, share and back-up this small file easily, or move from computer to computer. Quirkos lets you create as many project files as you like, and you can merge them together at any time.

If it's the first time you've created a project, you will get a quick tutorial you can skip at any time [Close] and look at again in the Help menu. After that you will see the main screen:



- 1 The **left** side of the screen is the canvas area that shows the themes you are coding as bubbles or 'Quirks'
- 2 On the **right** the text of your sources is displayed, move between sources with the tab at the top
- 3 Add sources to the project with the button on the top right of the screen
- 4 All the main actions can be performed with the action bar at the top of the screen
- 5 The Add Quirk button creates a new theme on the canvas for you to code to
- 6 Switch between the text of your sources and the properties tab, where you can define your sources

## Button by button guide

The action bar on the left side of the screen controls the project and the canvas area where you store your Quirks.



This is the home button. It will always take you back to the main canvas from any other views.

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The Project button lets you open other projects, save your project as is, or merge projects together.

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Export options include ways to save your data as Word files, spreadsheets, or produce reports.

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Undo any action with the undo button

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Or redo that work with the redo button

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The view button changes how Quirks are arranged and displayed

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With the groups button you can choose which groups of Quirks are shown at any time

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The query view lets you see data that matches certain characteristics

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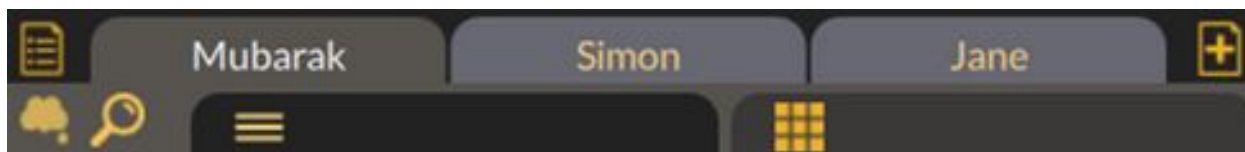
The help button will provide options if you get stuck or need more information

---



And the settings button lets you customise the layout of the screen, keyboard shortcuts for coding, and report generation.

The tab bar on the right column lets you control your sources and text:



Show all the sources  
in the project



Open and close the  
memo column



Search for keywords  
across sources



Show the text for the  
currently selected tab



Show the properties  
for the current source



Add a new source or  
sources to the project

## Step-by-step guide

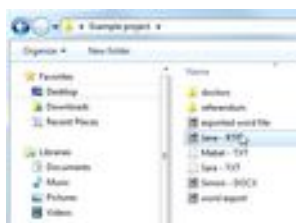
Now we've had a quick overview of the layout, let's get going and start bringing some data into our project.



First we are going to bring in some text sources. Click on the Add Source button on the top right of the screen...



This shows the import options. You can bring in one or many files at once, or bring in data from a spreadsheet (CSV). Let's choose 'Select File(s)'.



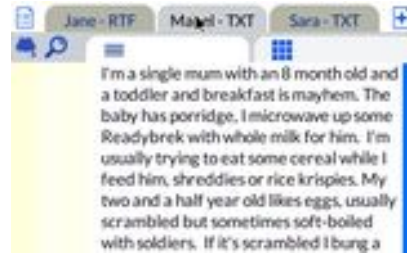
You can bring in any text, rich text, PDF or Word file in this way. In this example, we are bringing in sample files which you can download from [www.quirkos.com/workshops/breakfast/](http://www.quirkos.com/workshops/breakfast/)




Select one or more files that you want to import, and they will be copied into your project when you click the 'Open' button.





You'll get a message showing how many files were imported, and the three most recent sources will be shown as tabs on the top right of the screen. The text of the source will be shown in the column below.



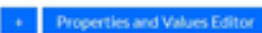
Using the source browser icon  on the top left of the source tab, you can see all of the sources in your project, search for them by name, sort and remove them.



Under the tabs for each source, there are two tabs to switch between the text of the source , and its properties . Click on the properties tab. Properties can be used to describe and categorise sources in any way.




Click on the small [+] button at the bottom of the tab to create a new property.




The quick property editor will open, and we add a new property for the Age of our respondents, and a value (32) for that source.



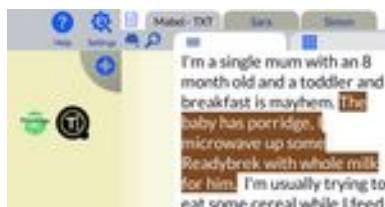
Add as many properties as you like in this way, and using the drop down arrow on the right of each property, either select an existing value, or create a new one for that source. Move between the properties for each source with the tabs at the top of the column if you wish to enter a value for each. Click on the text tab  to go back to the text of the source.



Now we'll start creating a coding framework to analyse our data. Clicking the large  button to add a new Quirk bubble to the canvas that represents a theme or code. It will be created in a random location, with a random colour, and the Quirk Property edit screen will open:



Here you can change the Title of Quirk, and put a longer description if you want. You can also click on the colour bar to change the colour, and assign the Quirk membership to any groups you have in the project. We'll call this one 'Porridge'.



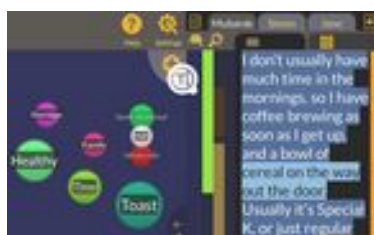
To add some text to the Quirk, select it from your source, and drag and drop it onto the bubble. Now it's been assigned to the code, and you'll see the text highlighted in the Quirk colour, and a coloured stripe next to the text in the highlight bar on the left of the text.



Create another Quirk, 'Family' in this case, and we can add some of the same text to it. You'll see overlapping highlight stripes, and hovering your mouse over one of those stripes shows a pop-up reminding you of the code name.



You can move quirks by dragging them around the canvas, and if you keep creating some more Quirks, you can group them together by dragging and dropping them on top of each other. Here we've made subcategories for different types of milk. Just hover your mouse over the 'parent' to open up and work with the 'child' Quirks.



Now it's up to you! Keep reading through your sources, coding, and creating new codes as you need them. You can even drag and drop text onto the Add Quirk button to create a new code with that text.



Double click on any of the Quirks to see all the sections of text you've assigned them to, and any sub categories. The Home button will take you back to the canvas view.




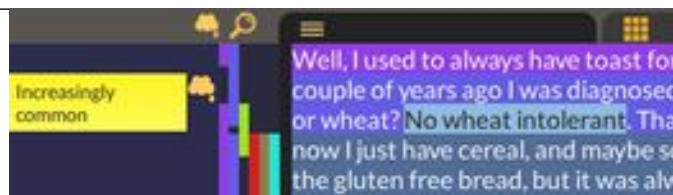
By right clicking (or long clicking) on any Quirk, you'll see the Quirk menu. Overview shows you the quotes and subcategories (just like double clicking). Overlap shows connections between Quirks, Edit lets you change the name, description, colour and groups. Merge lets you add two Quirks and their contents together, and duplicate creates a copy of that Quirk. Delete removes the Quirk from the project.




Choosing the overlap view for any Quirk shows a sort of Venn diagram of how often a piece of text was coded in more than one way. This example shows (with Dislike as the centre) that Fruit and Juice were the most disliked in the text. The further away a Quirk, the less overlap there was. Click on any Quirk to see the overlapping quotes.


Home takes you back to the main screen.

If you drag and drop text onto the column below the memo icon  you can add a note connected to that section of text. Clicking on the memo button will open and close the full memo column.



If you want to find all the times a particular word was used in the project, you can open the search column with the search button .

Use the All/1 button to change between searching the current source or the whole project, or use the Other Criteria to see results from just some sources.

After clicking Search (or pressing Enter) results are displayed on the right. You can code directly from the results, and show more of the source around the result with the (...) buttons. You can also include synonyms, or choose other search options. Close with the  button.



You should now be able to keep going through your sources, adding more if you need to, creating Quirks, and coding text. This is the stage of qualitative analysis that takes a while!

When you have done some coding, there are many tools in Quirkos to help you visualise and export your work. The first of these is the Query view.

Remember the source properties we used earlier? You can select them with the boxes at the top of the screen and use them to see results just from a subset of your sources.

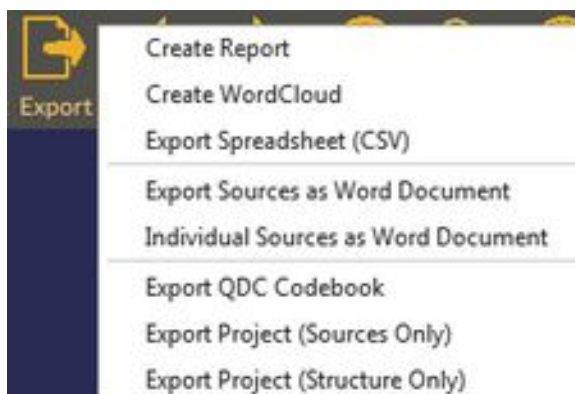
You can also see work done by a particular person, on a particular date or more by changing the PR (properties) selector to one of the other filters to see a side-by-side comparison of the results from two queries at once.



Remember, since there is no need to press save, you can exit Quirkos or open another project with the Project button at any time, without losing your work.



## Exports and Reports



The Export button gives you a range of options to create outputs and share your data with others.

You can create a detailed report (see below), a Wordcloud, or export your project to Excel or SPSS with the CSV spreadsheet export.

You can also create annotated Word documents from your transcripts, and save to the QDC standard for bringing your coding framework into other qualitative software.

Clicking on Create Report will give you a customisable report:

**Preview**

**Quirkos Report**

This report was generated by Daniel on Nov 13, 2018 2:27:56 PM for the following file: breakfast.qrk

**Sources Summary**

Title	Author	Date and Time	Length	Quotes #
Sara	Daniel	Aug 14, 2014 11:13:43 AM	1166	24
Jane	JSL	Aug 26, 2014 3:18:25 PM	2220	17
Mubarak	JSL	Aug 28, 2014 12:06:28 PM	611	6
Simon	JSL	Aug 28, 2014 12:13:45 PM	906	18

**Options**

Report Sections

- Report Info
- Sources Summary
- Quirks Summary
- Authors Summary
- Properties Summary
- Include Canvas Views
- Include Memos Tables

Canvas Views [YES]

Toggle Fullscreen Open in Web Browser Print Save Word Save HTML Save PDF

The left side of the screen shows how the report will look, and the right side gives options for formatting and what sections you want to include. Print, save as a PDF, Word file, or a HTML file to share as a customisable report.

## Tips and tricks

### Quirks

- Quirks can have sub-categories, and sub-sub categories. They can also be grouped using the 'Groups' settings in the Quirk Properties, and the Groups button which shows selected groups on the canvas.
- Speed up your coding with keyboard shortcuts, in the Settings menu. Select some text, press a key, and it will be assigned to that code.
- Text stays highlighted after you have dropped it on a Quirk, so you can add it to other themes. This 'concurrent coding' is a powerful way to map trends in your data with the overlap view and queries.

### Exports

- To bring your data other software such as Excel, use the CSV export. This will export the parts of your project as separate files: Quirks, Quotes, Sources and Memos.
- You can also export sources as a Word file, with each coded section highlighted as a comment. This is a great way to share and print your sources in a readable, annotated format. You can have everything in one file, or each source as a separate document.

### Miscellaneous

- Be creative! You can set any variable as a Source Property: you can rate the quality of the source, leave comments or notes, or use them for questionnaires with discrete or multiple choice solutions.
- Even the author name can be flexible – set your name to 'Not Sure' for a day, and you can easily see and remove the coding you did in that session
- Creates and edit a 'blank' text source to write notes or a coding journal to keep updating as you go along.
- Have a Quirk for 'Best Quotes' and collect times when someone says something you know is going to be in the report or paper!

## Next steps

This guide is a very brief overview of some of the main ways of working, but only scratches the surface! The main source of support and guidance is the Quirkos support website ([www.quirkos.com/support.html](http://www.quirkos.com/support.html)), where you can find a more comprehensive manual, Frequently Asked Questions, and a series of video guides to using Quirkos and general qualitative analysis techniques.

There are short and long introduction videos to the software, and a series of 'bit guides': one minute videos that each show a particular feature or task. You can watch these back to back, or skip straight to the bit you are stuck on.

There is also a discussion forum, where you can ask questions about using Quirkos (or any other aspect of qualitative research) to be answered by other users, or by members of the Quirkos team. We check the forum regularly, and it's worth searching to see if someone else already has a solution for your problem.

We run software training workshops, mostly at locations across the UK at the moment, but also schedule regular on-line interactive sessions. Check our website for details of the latest public events. We can also organise training sessions on demand for your team, department or organisation: e-mail or call us for more details.

If you can't find the answer to your question in any of the sources above, you can also e-mail us, [support@quirkos.com](mailto:support@quirkos.com) and we will reply to you as soon as we can. We always love to hear feedback, good and bad, as well as suggestions for what features or changes would make working with qualitative data easier for you.

[www.quirkos.com](http://www.quirkos.com)

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