Quirkos Web Quick Guide

## November 2023

www.quirkos.com

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1.   Accessing Quirkos Web

Quirkos Web is a fully featured qualitative data analysis tool that runs in your web browser, and stores data on our secure network of servers across the world. Wherever you login, all your project data is available, and you can collaborate in real time with other Quirkos users.

Quirkos Web works on any browser on any device. It supports Windows, Linux, Mac, Chromebook, Android and iOS. Most major browsers will work with Quirkos Web, including Chrome, Firefox, Safari and Edge.

To access the service, visit https://www.quirkos.com/web in the web browser on your device.

You'll be presented with a login screen similar to the image on the right. Your login will be remembered between sessions and can be saved by the password manager in your browser.
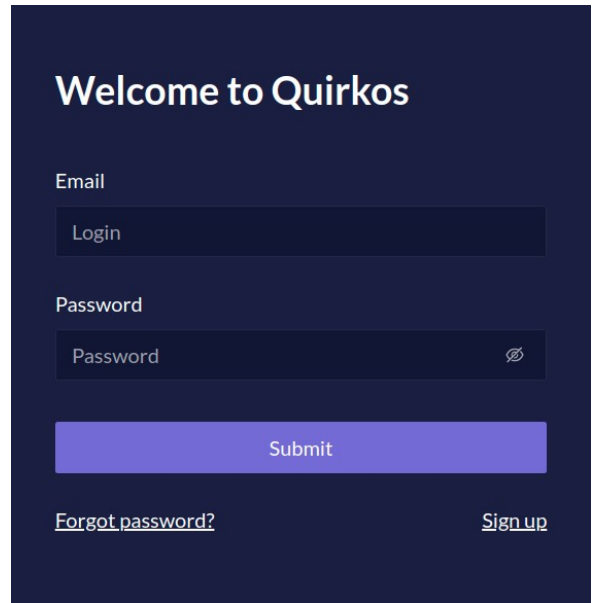
You will need to have a Quirkos Cloud account to login. If you don't have one already, use the 'Sign up' link to register for a 14 day free trial of the quarterly or annual subscription.
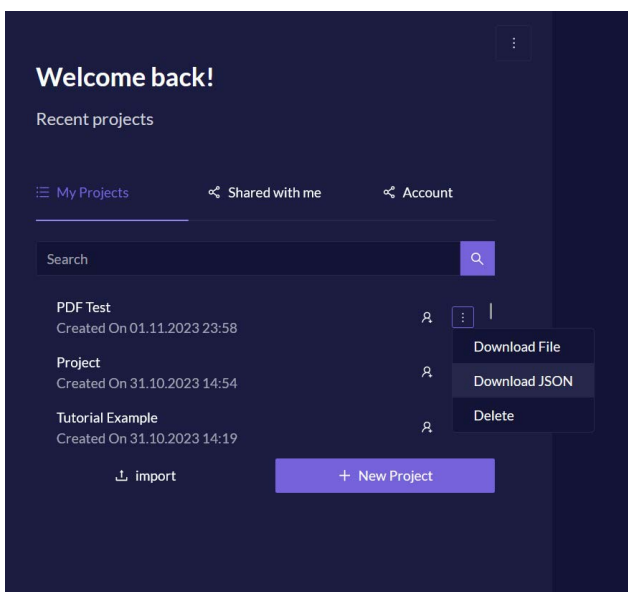
After signing in, you will see a list of recently used projects, a tab for projects that other Quirkos users have created and shared with you, and an account tab to manage your account settings. You can share projects using the share button to the right of any project, providing the email address of a registered Quirkos user.

Via the three dots next to each project, there are options to delete, download and export projects to your computer. There is also an **Import** button to allow you to bring in Quirkos projects from your own computer (for example created in the offline desktop version), or projects created in other software packages that support the REFI-QDA standard (pending).

2.   Quirkos Cloud Accounts

To access the Quirkos Web service, you must have an **active Quirkos Cloud account**. You can register for these at https://www.quirkos.com/buy and there are several different levels of discounts, and periods of subscription to choose from. All accounts (even during the trial period) allow you to create and collaborate on an unlimited number of projects.

You will be required to enter credit/debit card details at registration, but these will only be charged if you continue with the subscription after the 14 day trial period. If you are unable to provide credit/debit card details, or wish to discuss group or institutional licences, please contact sales@quirkos.com. Institutional users will be provided with their own dedicated link for individuals to register accounts without providing payment details.

You can manage your Quirkos Cloud account using the account tab of the Quirkos Web main menu.

Here you can suspend or resume a subscription, add Quirkos Transcribe to your current subscription, and change your billing information. Data is kept for one year after you end your subscription, so if you reinstate your subscription in that period you can keep working on previous projects.

For any queries about discounts, or issues creating accounts, please contact support@quirkos.com.

3.   Creating New Projects

After logging into your account, you need to **create a project** before you can import data. Click the [+] New Project button, and you will be prompted to give a name for the project (please note this cannot be changed later).

You can also add a password to encrypt the project - please note that this password cannot be recovered if you lose it, so keep it safe!

Click Create, and the project will be created in your account, and opened ready for you to work with.
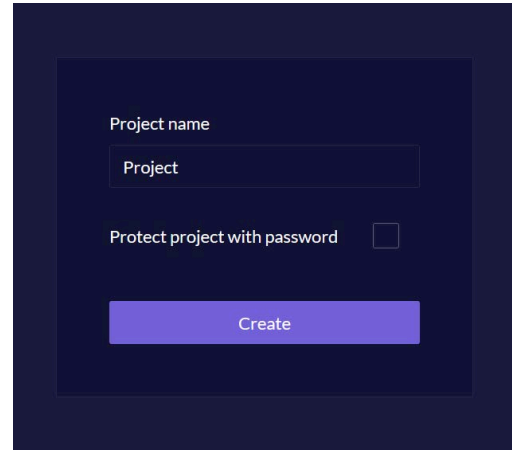
The main Quirkos view and functions are annotated below. The left side of the screen corresponds to the 'Canvas area' where codes are created and organised. The right side of the screen shows and manages data sources imported into the project. This shows the source itself, and functions for managing memos, source properties and editing the source itself.
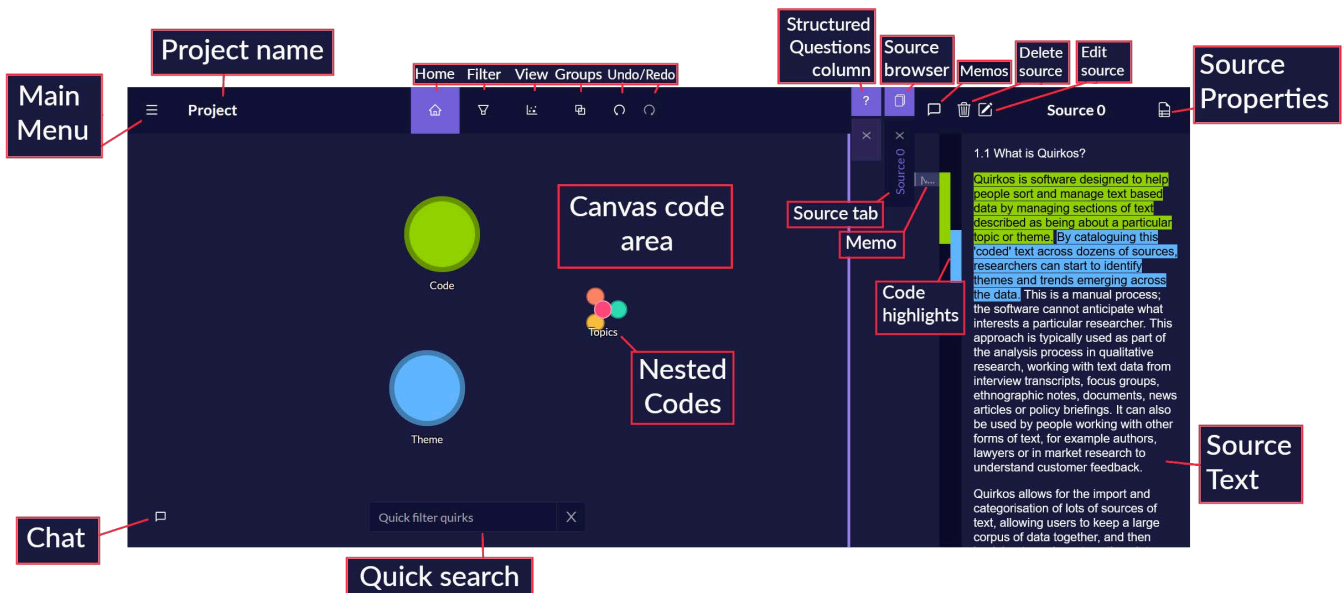
4. Importing and Editing Sources

Once you have opened a project, you can import sources at any time. This copies them into the project so that you may code, edit and annotate them.

To import, click on the Main Menu (top left hamburger menu) and choose Add Sources.
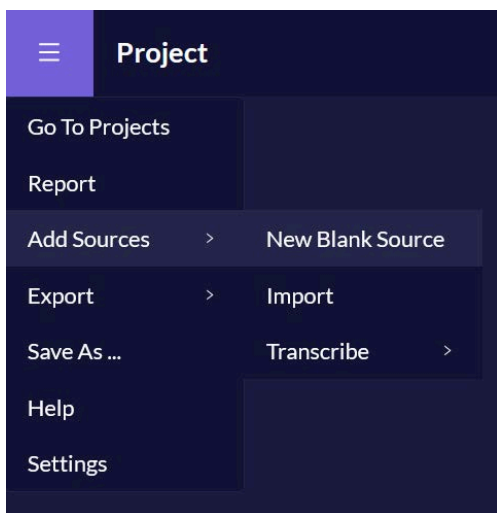
There are three options. The first, **'New Blank Source',** will create an empty source in your project so that you can write directly into it (for your own notes) or copy and paste from other programs and data sources.

If you have existing files containing data, use the **Import** function to bring them into the project. This will open a dialogue box to choose files from your computer or device. Navigate to the desired folder, and choose one or multiple files (holding down the Shift key). You can import many text files, including newer Word files (.docx) and PDF files. Pictures and tables can be imported as part of a Word (.docx) file, or copy and pasted from another source such as a webpage.

Finally, you can click '**Transcribe**' to use the Quirkos Transcribe function, which allows you to import audio and video files (such as .wav, .mp3, .mp4) and have them automatically transcribed into text. All Quirkos Cloud users get 100 minutes of transcription for free. If you need more transcription time than this, you will need to add Quirkos Transcribe to your subscription using the option in the Account tab. Find out more on our website.

The sources are shown by tabs which run vertically along the left of the source. The Source List button at the top left of the source pane lets you scroll through all the sources in the project, or filter them by name or property. If you have imported a spreadsheet with structured questions, you can click the questions in the question column to view responses to that question across every source.

Sources can be edited by clicking on the Edit button on the top left of a source. Here you can add and remove text, copy and paste, and change formatting to sources you have imported. Click the tick button to save changes, or the X to discard them. You may delete a source by clicking on the Delete button. This action cannot be undone once you have closed your project, so you are asked to confirm this change.
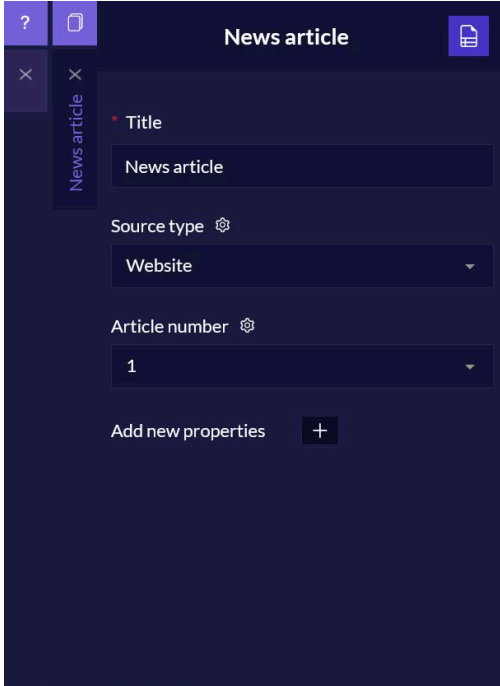
Note that sources which have been imported into the Web version of Quirkos cannot be edited in the Desktop version of the software, as it is only able to display but not modify most formatting.

5.   Editing Source Properties

In Quirkos, sources can be described or categorised by the source properties (this are sometimes called attributes in other software packages). These are often used to group sources by demographics, data type, or bibliographic data for articles and literature.

In the source you want to edit, **click the Source Properties button in the top right of the screen, to edit source properties**. The dialogue on the right is shown, and you can change the source name in the Title box at the top.

To create a new property, click the Add new Properties button, then create a Property and at least one Value (a possible type of property). Click Enter to save the value, and add more if needed. Click Save when finished with this property. You can then see any properties you have created, and select a value that applies to this source. For example a Property might be Age, and a Value for the source could be 42.
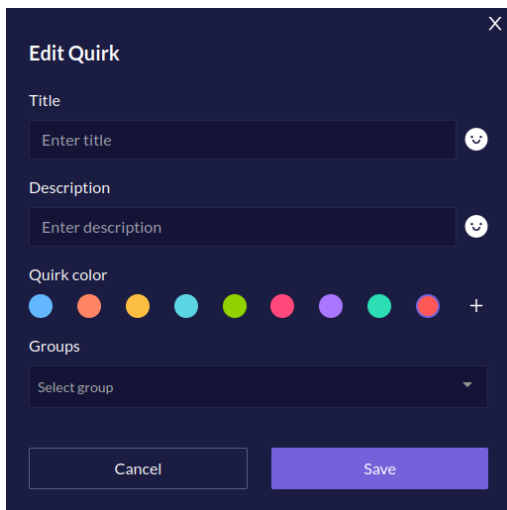

Click **Save** again, and these properties will be applied to that source. These can be used in the **Query view** to see results that match one or more sources.

6.   Creating codes and coding

A central part of most qualitative coding approaches is assigning selections of the data to a particular 'code' or 'theme' that is used to group together extracts about the same topic. In Quirkos these codes are represented by bubbles nicknamed 'Quirks'. You can **create these by right clicking anywhere in the canvas area on the left side of the screen and selecting New Quirk**.

It's also possible to create a new code by dragging and dropping text straight onto a blank area of the canvas. This will create a new Quirk already containing that extract of text – ideal for quickly creating new codes when doing grounded theory.

In the New Quirk dialogue box, you can select a title for the Quirk, and a longer description that will give more detail about the code and its use case. The emoji button on the right can be used to insert an emoji.

Quirks are created with a randomly chosen colour from the palette shown. You can change to one of the other colours in the 8 shown by clicking on the circle in the list. However you can also choose any custom colour by clicking on the + button and using the colour picker.

You can also assign a Quirk to one or more groups. Groups are non-hierarchical groups of codes that you can filter and show/hide using the Groups button on the main canvas. Click Save when you are done, and right click on a code again at any time to edit these options again.

Codes in the canvas can be dragged and dropped to move their position, and dragged and dropped on top of each other to create hierarchies of related codes.

To add text to a code/quirk, select some text from the source on the right, click within the selected section and drag and drop it onto the code. You will then see a highlight stripe with the Quirk colour in the left column next to the source text. Double click on the code to see all of the text assigned to that code. Right clicking on a code will provide additional options, including options to delete the code, or merge codes together.

You can also drag and drop text onto the Memo column (to the left of the highlight stripes) to create a short text annotation or note to a part of a source. The Memo button at the top left source pane opens and closes the column, and you can double click on memos to open and edit them.

7.   Code views

Double clicking on a code will show the code and all sub-codes in the hierarchy (also accessed by right clicking and selecting Overview). This shows all the extracts of data across all the sources in the project that have been coded to the code or subcategories. Clicking on one of the sub categories will show codes just from that sub category.

You can select all the quotes from the list using the tick box at the top right of the list, or select just one or more using the tick-box at the top right of each extract. **The copy button will then copy the selected quotes** into the system clipboard, and then you can paste them into Word or another application.
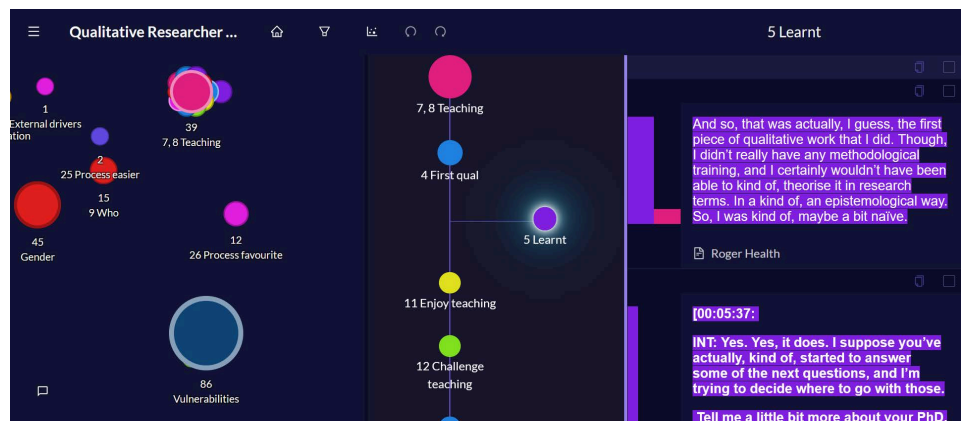
You can also select the Overlap view from right clicking on a Quirk which visualises the relationship between codes in the project. Each time a piece of text is assigned to more than one code, this is counted and visualised with the Overlap view. The more frequently overlapping codes are shown towards the top of the screen. You can click on more bubbles to show extracts of text which are coded to the main code, and the others. These can be 'chained' to show text coded to three or more codes.
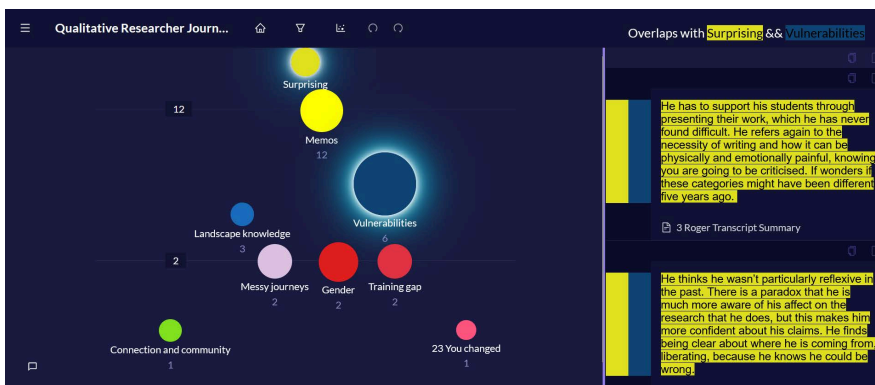
The view button in the main screen can also be used to change from the standard bubble canvas view to a list view which is more compact. The view options also allow you to sort codes in order of date, or alphabetically by Quirk name.

8.   Queries

In the Query view, you can see results for coded extracts that meet one of the criteria specified in the filter. **Click on the Filter (funnel icon) in the main view, then** either type in some text into the Text Search or click Add Criterion. In the first criterion box you can choose elements of the project to filter such as author, date of work, name of source, and source properties.
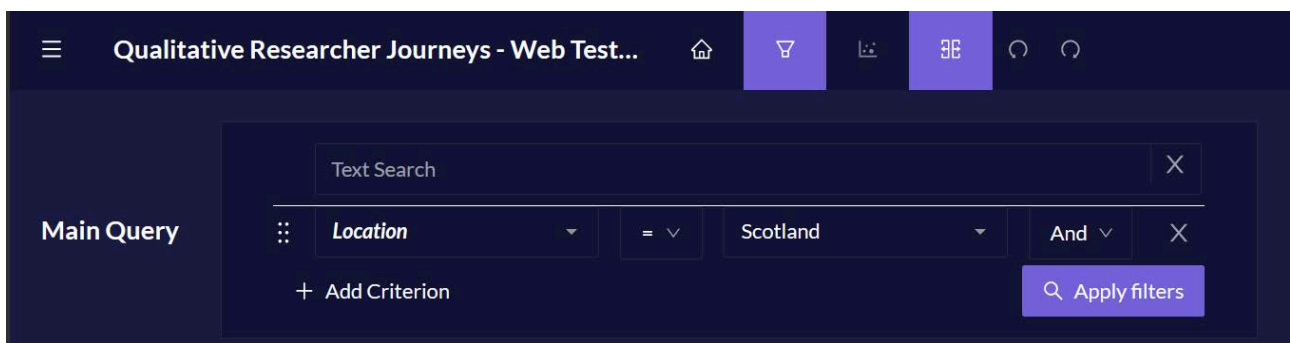
When you've chosen the filter criteria and value, you can click **Apply filters,** or add extra criteria, so results will only be shown if they match both (or more) of the filter options.

Results are shown in a list of descending frequency by code. You can view matching data extracts by code/quirk by clicking on that code in the list on the left of the screen; the extract will be shown on the right. These can be selected together, or individually using the tick box on the top right of each quote, and copied by clicking the **Copy** button. Click the **Home** button to go back to the main view; your query will remain until you exit the project or close your browser window.
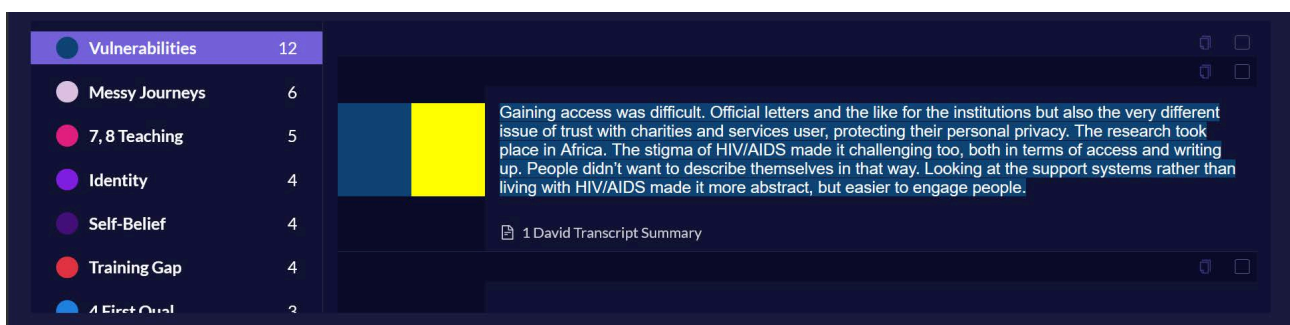
9.   Exports and outputs

You can **generate a report** containing summary tables, and full extracts of data by source or code using the Report option in the **Main Menu** (Top Left). When generated, this creates a preview of the report, with options in the right column that let you customise which sections are shown, and the layout of many elements.

Once you are happy with the layout, you can save it as a webpage (a zipped HTML archive), or to a Word document.

Via the Main Menu -> Export, you can also export all your project data as a spreadsheet (**Export XLSX**), or export full sources as Word documents, with your coding becoming highlights and comments in the document.

Within the Project list that you view upon first opening Quirkos Web, you can also download projects as JSON files or Quirkos project files (SQLite databases) that can be opened and shared with other Quirkos Cloud and offline users.

10. Mobile view

When used on a phone or tablet in portrait mode, Quirkos shows a special view optimised for small touch devices. After logging in, a source will be displayed, and when text is selected, a view on the bottom of the screen showing the 5 most used Quirks is displayed. Clicking on one of these bubbles adds the text to that code, or the ... button will show all the Quirks in the project in a list. The (+) button will create a new code containing the selected text.

The top left menu will allow you to select other sources in the project (All Sources), which allows you to edit properties with the cog button, and shows a colour coded grid of the most commonly used Quirks in that source. In the All Quirks view, you can order a list of all the codes in a project, and selecting a code will show all the extracts assigned to that code.

It's not possible to edit or create sources currently in the mobile view, but putting the device into a landscape orientation and reloading the page will bring the full desktop view. However, this works better on larger tablets than small phones.
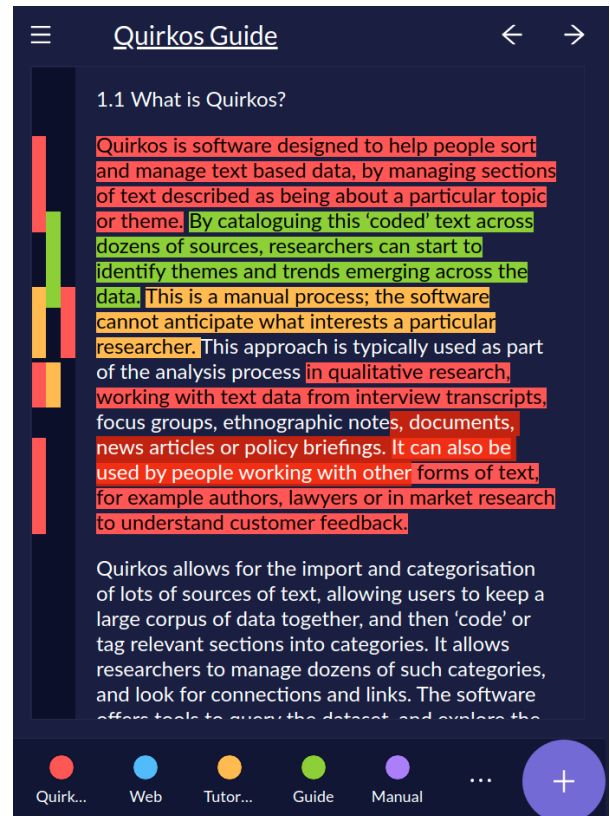
11. Settings and help

In the main menu (Top Left), you can choose the Settings option to open the options panel shown on the right. This allows you to change various aspects of the view in Quirkos, adjusting the size of elements like the main font size in the sources, the width of both the memo and highlight columns. There are options to turn on the generation of overlap and hierarchy views when creating reports (these are off by default as they can slow down report generation for large projects). The highlight counter toggle at the top adds a number to each Quirk, showing how many extracts of text have been coded to it.

The main menu also has a help option, which opens the main help and tutorial page on the Quirkos website. There are manuals (like this one), step-by-step guides and video tutorials demonstrating major functions and activities.

You can also email support@quirkos.com at anytime with any questions and feedback. Let us know how you'd like us to grow and improve Quirkos Web!