

# Team Work: ATLAS.ti 8 Windows + ATLAS.ti Mac



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Document Version: March 2017.

Updated for program version: ATLAS.ti Windows 8.0.33 / ATLAS.ti Mac 1.5 or later

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# Contents

- General Procedure.....4
  - Overview Of Main Steps.....4
- Setting Up A Team Project.....5
  - 1. All Team Members.....5
    - Creating User Accounts (Windows).....5
    - Creating User Accounts (Mac).....6
  - 2. Project Administration.....6
    - Creating A Project (Windows).....6
    - Creating A Project (Mac).....6
    - Adding Documents & Creating Document Groups.....6
    - Adding Codes And Code Groups.....7
    - How To (Windows).....7
    - How To (Mac).....10
  - 3. All Team Members.....13
    - Importing The Master Project And Renaming It (Windows).....13
    - Exporting Sub Projects For The Project Administrator (Windows).....14
    - Importing The Master Project And Renaming It (Mac).....14
    - Exporting Sub Projects For The Project Administrator (Mac).....15
  - 4. Project Administrator.....15
    - Merging Sub Projects.....15
    - Master And Imported Projects .....15
    - Merge Strategy.....15
    - How to Merge (Windows).....17
    - How to Merge (Mac).....19
  - 5. Project Administrator.....21
    - Housekeeping.....21
    - Distributing The New Master File To Team Members.....21
  - 6. Team Membership.....21
    - Importing The New Master File & Renaming.....21
- Useful Resources.....21
- Appendix.....22
  - Where are ATLAS.ti 8 Windows Project Data Stored?.....22
  - Where are ATLAS.ti Mac Project Data Stored?.....22

## General Procedure

In this document we describe how you set up a team project when working in a mixed ATLAS.ti 8 Windows and ATLAS.ti Mac team. Due to the differences in operating systems, the instructions for Windows and Mac differ. You find different boxes with instructions for Mac and Windows users.

If all team members use the Mac version, or the Windows version, please check our [website](#) for the instructions that fit your situation.

Each team member needs to work on his or her copy of the project locally in the designated ATLAS.ti folder. In the future, it will also be possible to select a user-defined location for ATLAS.ti project data.

The kind of team work supported is shared coding and analyzing. This means if you have a lot of data you can spread the coding work across different team members. Each team member codes parts of the data and the work of all coders is put together via merging the various sub projects.

Checking for inter-coder agreement is currently not possible but will be implemented in the near future.

### Overview Of Main Steps

1. The project administrator sets up the projects. Let's call the project administrator "Mary," and the project "Master Project".
2. Mary adds documents to the project and possibly a list of codes.
3. She saves the project and exports it. This means creating a project bundle file (see Figure 1).
4. All team members import the project bundle file and begin their work.
5. To combine the work of all team members, each team member creates a project bundle file and sends it to Mary.
6. Mary merges all sub projects and creates a new Master file.
7. Mary exports the new Master file and distributes it to all team members (see Figure 2).
8. The team members continue their work.

This cycle continues. If new documents need to be added to the project, this needs to be done by Mary. A good time for this is after merging and before creating the new Master file.

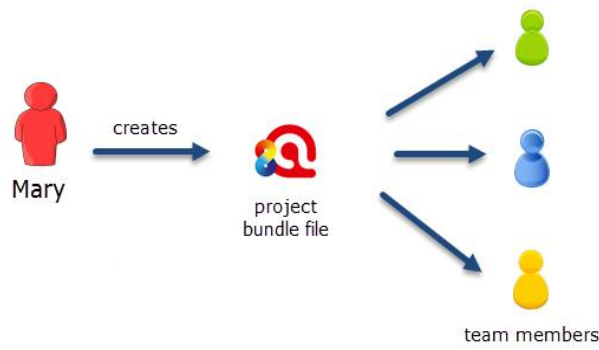


Figure 1: Steps 1 and 2: Creating and distributing the Master project

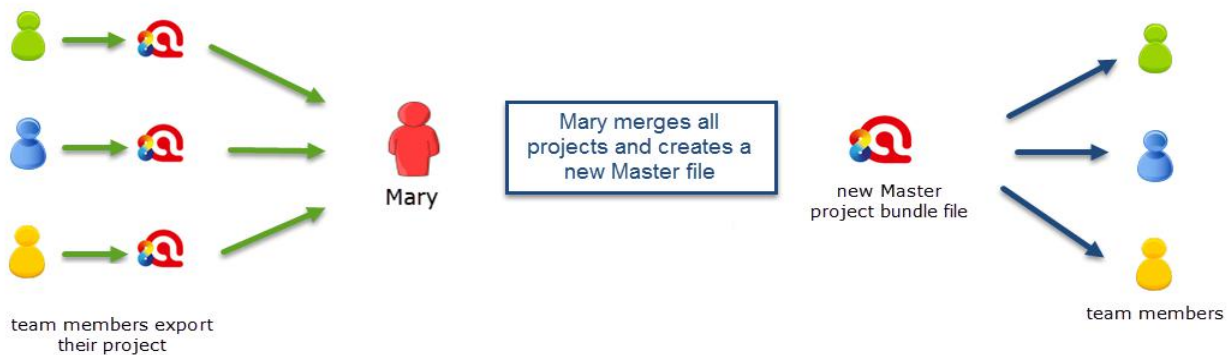


Figure 2: Steps 3 and 4: Combining the work of all team members and distributing it again

## Setting Up A Team Project

The instructions are organized by the various tasks involved when working as a team. There are operating instructions for team members and for the project administrator, divided by Mac and Windows users.

### 1. All Team Members

#### Creating User Accounts (Windows)

When you first opened ATLAS.ti, you were asked to add a user name. This name will be used to stamp all project entries.

If you want to check under which name you are working, select the **SUPPORT** tab and then **USER MANAGER** or **SWITCH USER**.



To create a new user account, select User Manager. After creating a new account, select **SWITCH USER** to log in using a different user name.

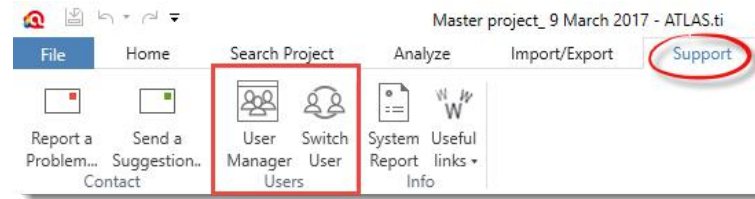


Figure 3: User Management tab in ATLAS.ti 8 Windows



### Creating User Accounts (Mac)

When you first opened ATLAS.ti, you were asked to add a user name. This name will be used to stamp all project entries.

- If you want to check under which name you are working, select the main menu option **TOOLS / USER MANAGEMENT / CHANGE USER**.
- If you want to create a new user account, select **SHOW USER MANAGEMENT**



It is also possible that the project administrator sets up all user accounts in the Master project. Then each team member only need to log in using their respective account using the **CHANGE USER** option.

We suggest that you discuss with your team how you would like to handle it and on which basis to create user names. What you want to avoid is two people logging in in as "Tom." You might come to the agreement that all team members use their first name if there is no duplication, or alternatively their initials or full names. Or you might prefer names like coder 1, coder 2, and so on.

## 2. Project Administration



### Creating A Project (Windows)

If you open ATLAS.ti, select **CREATE NEW PROJECT** from the start window. If a project is already open, select **FILE** and then **PROJECT / NEW**. Next, click on the option: **CREATE NEW PROJECT**. Enter a project name like "Master\_(project name)\_date" and click **CREATE**.



### Creating A Project (Mac)

To create a new project, select **PROJECT / NEW** from the main menu. Click on the option: **CREATE NEW PROJECT**. Enter a project name like "Master\_(project name)\_date" and click **CREATE**.



### Adding Documents & Creating Document Groups

The standard procedure is that documents are imported. This means a copy of the document is created, converted into an ATLAS.ti compatible format and stored in an internal library

For audio and video files you have the option to link them to your project. This avoids file duplication and saves hard disk space, as especially video files can be quite sizable. When you link a file to a project, it is not copied and imported into the project. It remains at its source location and ATLAS.ti opens it from there when needed.

This means that the file should remain at this location. You should not rename or move it to a different folder. If this happens, the file can no longer be displayed in the project and you need to redirect ATLAS.ti to its new location.

### Document Groups

You may also want to consider to group documents at this stage. The groups might reflect sample characteristics like demographic variables, locations, or time of data collection. They can also be used to support team work. In the latter case, you may want to create a document group for each team member and assign the documents they are supposed to code.

Search Document Groups		Search Documents	
Document Groups		Id	Name
coder: Lisa (3)		D 3	B_EDUCATION
coder: Mary (3)		D 4	B_MANAGEMENT
coder: Tom (3)		D 5	B_SUCCESS
gender: female (3)		D 7	D_EDUCATION
gender: male (6)		D 8	D_MANAGEMENT
location: rural (6)		D 9	D_SUCCESS
location: urban (3)		D 11	O_EDUCATION
		D 12	O_MANAGEMENT
		D 13	O_SUCCESS

Figure 4: Example for the use of document groups in team projects

### Adding Codes And Code Groups

if a common set of codes and code groups is to be used, they also must be added to the project at this stage. If each team member were to add the codes / code groups individually to each sub project, all codes and groups would be multiplied during the merge process (see “Merge Strategy“ on page 15).



### How To (Windows)

#### Adding Documents

To add documents, click on the **Add DOCUMENTS** button in the **HOME** tab, or click on the dialog box launcher (drop-down arrow).

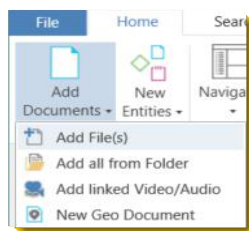


Figure 5: Add documents to a project

If you click on “Add Documents” you can select individual files. If you want to add entire folders, click on the dialog box launcher. All documents that you add to a project are copied and become internal ATLAS.ti files.

If you want to analyze larger-size audio or video files, us the **ADD LINKED VIDEO/AUDIO** option. If a linked file can no longer be loaded because the link is broken, a message will pop up asking you to redirect ATLAS.ti to the new location of the file.

Linked files are currently automatically added to an exported project. This could meant that your exported projects are quite sizable. With future updates you will have the option to exclude them and to transfer them separately. An option then is to store them at a central location where all team members can access them.

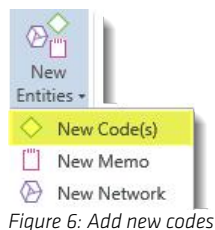


Figure 6: Add new codes

### Creating Document Groups

- To add document groups, open the Document Manager with a click on the **DOCUMENTS** button, or via the main document menu.
- Select the items you want to group by holding down the Shift or Cmd-key. Drag and drop the selected items into the side panel to the left (see Figure 8).

### Adding Codes

- To add codes, click on the **NEW ENTITIES** button in the **HOME** tab and select **NEW CODES** from the drop-down menu.

### Adding Code Definitions

- To add code definitions or coding rules, open the Code Manager with a click on the Codes button in the Home tab.
- Select a code and write a description or coding rule in the comment field below.

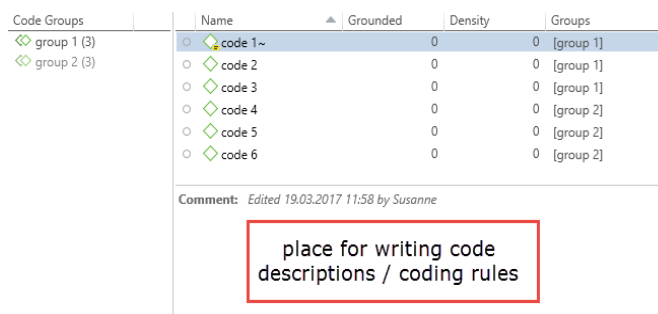


Figure 7: Adding code descriptions or coding rules

An "Import code list" option will be added in the near future, which will allow you to import a list of codes including comments and groups via an Excel spreadsheet.

### Creating Code Groups

- To add groups, open the Code Manager with a click on the **CODES** button in the **HOME** tab.



- Select the items you want to group by holding down the Shift or Ctrl-key. Drag and drop the selected items into the side panel to the left.
- Enter a name for the group.

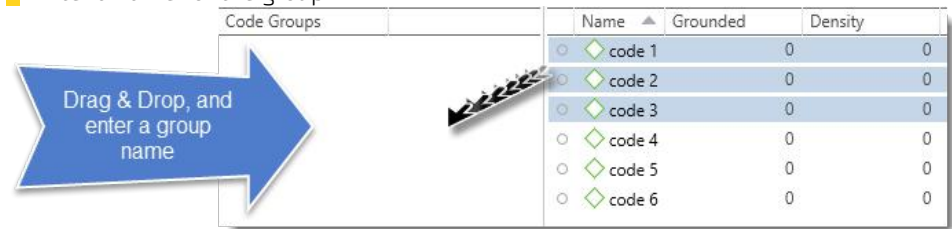


Figure 8: Creating a group in a manager

### Saving The Project



Figure 9: Quick access tool bar

To save a project, click on the Save icon in the Quick Access tool bar (see left), or select **FILE / SAVE**. The project is saved as internal ATLAS.ti file in application folder on your computer.

This default location can currently not be changed, but this will be possible in the future. Currently all team members need to work with a copy of the project and import it into ATLAS.ti on their computers.

### Exporting The Project For Distribution

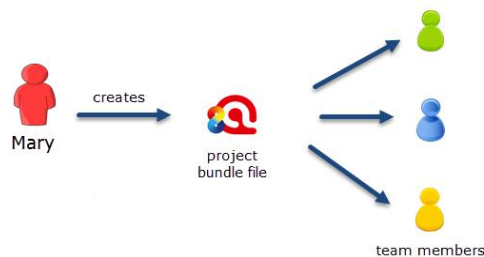


Figure 10: Creating and distributing the Master project

- To export the project for distribution to all team member, select **FILE / EXPORT**.

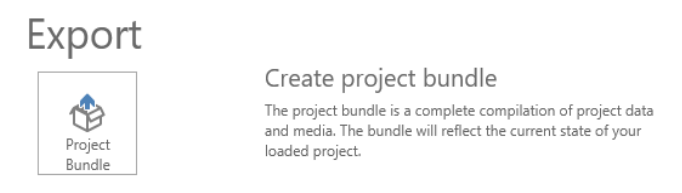


Figure 11: Project export

- Click on the **PROJECT BUNDLE** button. This opens the Windows File Manager. Select a location for storing the project bundle.

Distribute the project bundle file to all team members, e.g. via email, a folder on a server that everyone can access, or also via a cloud link or cloud folder.

The project bundle file has the file extension ".atproj" and can be read by both ATLAS.ti 8 Windows and ATLAS.ti Mac, version 1.5 and higher.

Project bundle files can be shared via a cloud like Dropbox, OneDrive, GoogleDrive, etc. Another option is to upload the project bundle file to a server of your choice and send a link to all team members so that they can download the file.

The default name of the bundle is the project name. You can rename the bundle file at this stage. However, please note – renaming the bundle does not automatically change the name of the project contained within the bundle. Think of the project bundle file like a box that includes your ATLAS.ti project plus all documents that you want to analyze. Putting a different label on the outside of the box does not change anything that is inside.



## How To (Mac)

### Adding Documents

To import text, PDF or image documents to your project, select **DOCUMENT / IMPORT DOCUMENTS...**

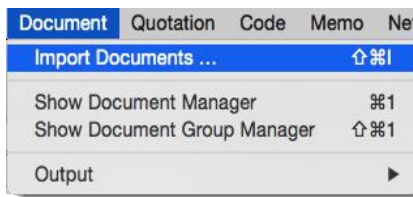


Figure 12: Adding documents to a project

An alternative to using the main menu option to add documents is to click the + button on the top left hand side of your screen (see below).

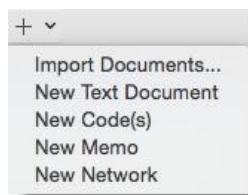


Figure 13: An alternative to the main menu option

You can also drag & drop documents or folders from the Finder into the Document Manager or the navigator for documents.

To link audio or video documents to your project, select **DOCUMENT / IMPORT LINKED MULTIMEDIA DOCUMENTS**. When you open the Document Manager, you will see the location of the file in the column "Origin" (see Figure 13).

### Redirecting a linked file that can no longer be loaded

If a linked file was renamed or moved, you need to let ATLAS.ti know about the new file name or location: Open the Document Manager and right-click on the document. Select the option Use **DIFFERENT FILE** and select the renamed file, or point ATLAS.ti to the new location.

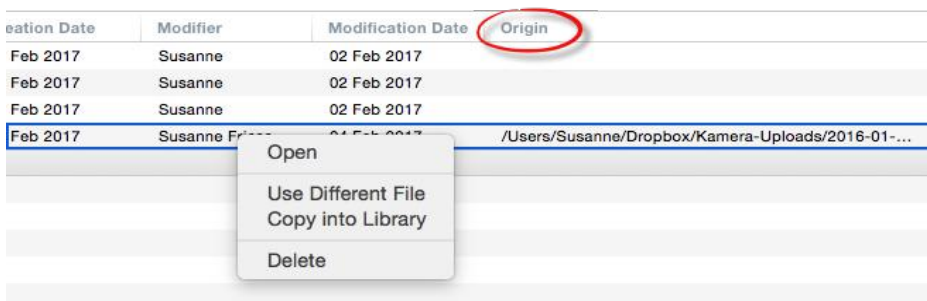


Figure 14: Redirecting ATLAS.ti to the renamed or relocated linked file

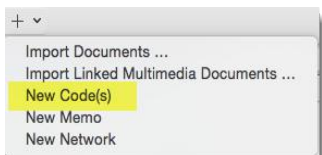
Linked files are currently automatically added to an exported project. With future updates you will have the option to exclude them and to transfer them separately.

### Creating Document Groups

- To add document groups, open the Document Manager with a click on the **DOCUMENTS** button, or via the main document menu.
- Select the items you want to group by holding down the Shift or Cmd-key. Drag and drop the selected items into the side panel to the left (see Figure 16).

### Adding Codes

- To add codes, click on the **+** button at the top left of your screen and select **NEW CODE(S)** from the drop-down menu.



### Adding Code Definitions

- To add code definitions or coding rules, open the Code Manager with a click on the Codes button, or select **CODE / SHOW CODE MANAGER** from the main menu (short-cut: cmd+3).
- Select a code and write a description or coding rule in the comment field to the right.

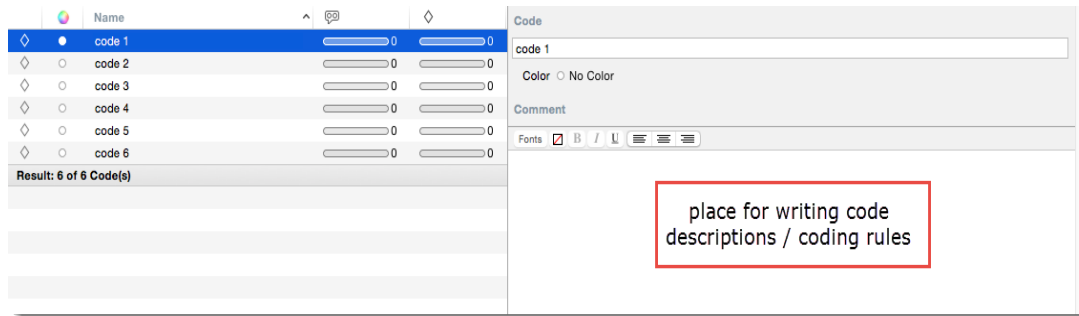


Figure 15: Adding code definitions / coding rules in ATLAS.ti Mac

An "Import code list" option will be added in the near future in both the Windows and the Mac version, which will allow you to import a list of codes including comments and groups via an Excel spreadsheet.

### Creating Code Groups

- To add code groups, open the Code Manager with a click on the **CODES** button, or via the main Code menu.
- Select the items you want to group by holding down the Shift or Cmd-key. Drag and drop the selected items into the side panel to the left.
- Enter a name for the group.

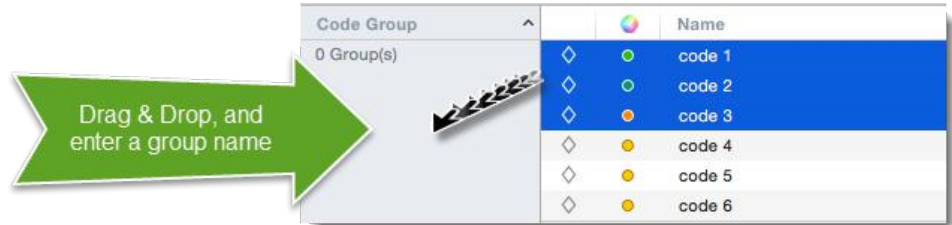


Figure 16: Creating a group in a manager

### Saving The Project

Currently you cannot determine yourself where ATLAS.ti Mac stores your project files. By default, they are stored in the application folder for ATLAS.ti. If you want to add this location to your routine backup, e. g. using Time Machine, this is the location:

~/Library/Application Support/ATLAS.ti.

This default location can currently not be changed, but this will be possible in the future. Currently all team members need to work with a copy of the project and import it into ATLAS.ti on their computers.

### Exporting The Project For Distribution

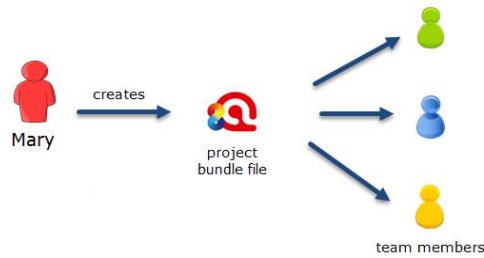


Figure 17: Creating and distributing the Master project

- Select **PROJECT / EXPORT PROJECT**. Select a location for storing the project bundle.
- Distribute the project bundle file to all team members, e.g. via email, a folder on a server that everyone can access, or also via a cloud link or cloud folder.

Project bundle files can be shared via a cloud like Dropbox, OneDrive, GoogleDrive, etc. Another option is to upload the project bundle file to a server and send a link to all team members so that they can download the file.

The Mac project bundle file has the file extension ".atproj" and can also be read by ATLAS.ti 8 Windows.

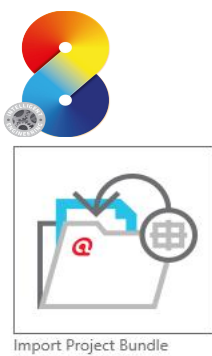
The default name of the bundle is the project name. You can rename the bundle file at this stage. However, please note – renaming the bundle does not automatically change the name of your project. Think of the project bundle file like a box that contains your project. Putting a different label on the outside of the box does not change anything that is inside.

### 3. All Team Members

It is recommended that all team members save a copy of the project bundle file on their computer, or their personal space on a server.

#### Importing The Master Project And Renaming It (Windows)

- Open ATLAS.ti and select the **IMPORT PROJECT BUNDLE** button and import the project. Next all team members need to rename the project, so that each of them work on sub projects, which unique names.
- In order to rename a project, you need to close the project that you want to rename.
- On the start screen, scroll until you see the button for the Master project. Right click and select **RENAME PROJECT...**



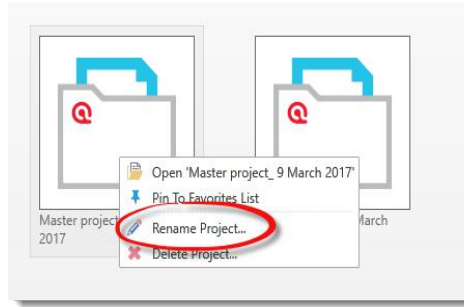


Figure 18: Rename project

- Add your name or initials to the Master project name. For an example see Figure 19).
- Double-click the renamed project to open it.



Figure 19: Example for naming a team member project file



### Exporting Sub Projects For The Project Administrator (Windows)

After an agreed period of time where everyone has done some work on the project, team members create their own project bundle file and send it to the project administrator.

- To export the project, select **FILE / EXPORT**. See "Exporting The Project For Distribution" on page 9.



### Importing The Master Project And Renaming It (Mac)

- Open the project bundle file by double-clicking, or open ATLAS.ti Mac first and select **PROJECT / IMPORT PROJECT** from the main menu.

To rename the imported project:



Figure 20: An ATLAS.ti Mac project bundle file

Select **PROJECT / RENAME**. Add for example your name or initials to the Master project file name. Example: "Master (project name)\_date\_SF"



### Exporting Sub Projects For The Project Administrator (Mac)

After an agreed period of time where everyone has done some work on the project, team members create their own project bundle file and send it to the project administrator.

To export the project, select **PROJECT / EXPORT**. See "" on page 9.



## 4. Project Administrator

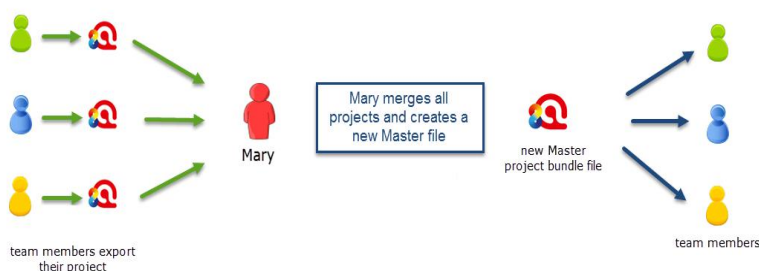


Figure 21: Steps 3 and 4: Combining the work of all team members and distributing it again

### Merging Sub Projects

The Merge Tool reunites projects that were originally divided for analytical or economical reasons. It brings together the contributions of different members of a research team. In the following a few general principles about merging are explained:

### Master And Imported Projects

The Master project is the project into which another project, called the "Import project" is merged. The Master project has to be loaded first before invoking the **Merge Project** option.

### Merge Strategy

The default option is to unify all objects that are **identical** and to add all objects that do not yet exist in the Master project.

### Identical Entities Explained

When an entity is created in ATLAS.ti— regardless if it is a document, a code, a quotation, a memo, a network, a group or a comment—this entity receives a unique ID, comparable to a fingerprint. When merging projects, ATLAS.ti compares the IDs of the various entities. If they have the same ID (fingerprint), they are unified. If the fingerprint is different, they are added. Thus, the name of an entity is not the decisive factor. If Tom has created a code with the name "sunshine" and Anne also has created a code with this name in her project, these two codes are not identical as they have different IDs. If you merge Tom's and Anne's project, the merged project will contain two codes: *sunshine* and *sunshine(2)*. If the meaning of both codes is the same and you want to keep one sunshine code only, you can merge the two codes manually (see "Merging Codes To Clean-Up" below).

Identical entities are unified, all others are added.

**Examples**

**Groups are additive:** Group B with documents {1, 2, 3} in the Master project merged with Group B' with documents {3, 4} in the Import project will result in Group B= {1, 2, 3, 4} in the merged project.

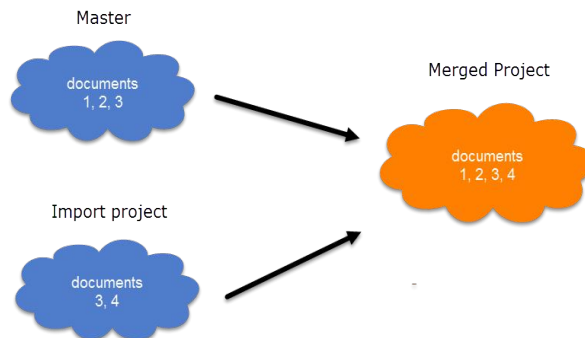


Figure 22: Merge example 1: Added elements to groups

**Entities with and without comments:** If there is a code C in the Master project that has no comment, and a code C in the Import project that has a comment, the merged procedure will add this comment to the merged project.

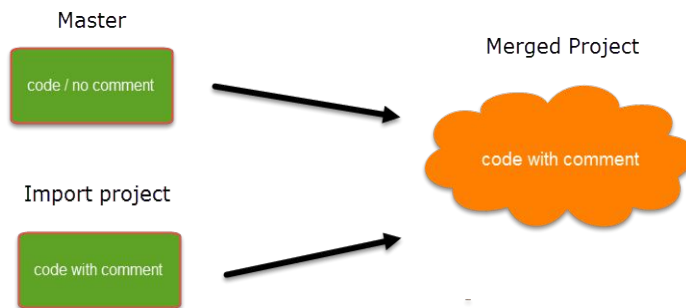


Figure 23: Merge example 2: Entities with comments, no conflict

In the case of an unsolvable conflict - code C in the Master project has a comment, and code C in the Import project also has a comment - the user can define which of the two conflicting entities will win. If the comment of the Master project should be kept, you need to select the option **“Keep”**. If the comment of the Import project should be kept, you need to select the option **“Override”** as shown in Figure 24.



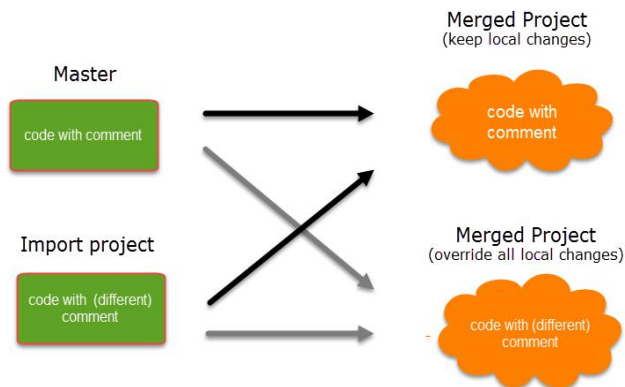


Figure 24: Merge example 3: Entities with conflicting comments

The decision which changes to keep can currently be taken only for all entities. In the future, you will be able to decide for each entity how the conflict should be resolved.

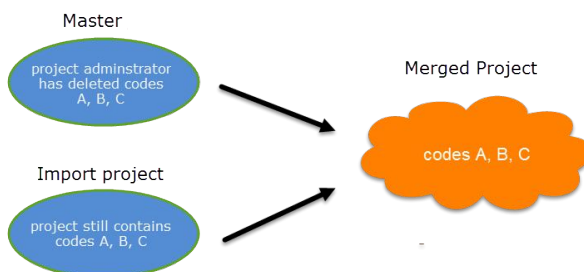


Figure 25: Example 4: Merging always adds entities, never subtracts

**How deleted entities are handled:** It is not possible to "subtract" entities. If one team member has deleted a code and some of these codings still exist in another project to be merged, the merged project will contain those codes or codings again.

If you want to clean up a project, this is best done in a "fresh" Master project after merging and before distributing the new Master file to all team members.

Currently it is not possible to merge projects coded for the purpose of checking inter-coder agreement. If you had two coders coding the same document, you can only see where the two coders disagree. If they do agree, the codings will be merged and the quotation only shows the name of one coder, namely the one of the target project.



### How To Merge (Windows)

To begin the merge process, open the previous Master project and save it under a new name. The previous version can be kept as backup. There may be times, when you want or need to go back to an older version of your project.

A suggestion is to include the Master project name, date of merging and merge iteration in the file name. Example: **Master\_Neighborhood study\_2017\_03\_18 (first merge)**.

- Select **FILE / Save As**. This automatically duplicates the project.

- Close the old Master project file and continue your work in the new duplicated version.
- Select **FILE / MERGE**.

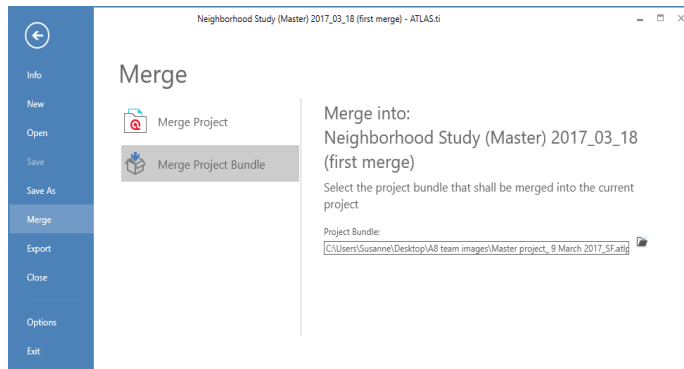


Figure 26: Merge dialogue

As team members have sent project bundle files, select the second option and one of the bundles that were sent to you. You merge two projects at a time. This means if there are



Figure 27: Validation report

three people working on the project, you will have to repeat the merge process two times.

- After selecting a project, click on the **MERGE** button.

ATLAS.ti checks the two projects for identical and different items. All identical items will be merged, all different items will be added. See "Merge Strategy" on page 15 for further detail. After this process is completed, a Validation Report opens:

If there are no conflicts, you can proceed with merging the two projects by clicking on **MERGE**.

If there are conflicts between the Master project and the project that you import, you can solve the conflict in two ways (see "Examples" on page 16).

**KEEP** means, the Master project "wins" and the changes made in the project that you import will be ignored.

**OVERRIDE** means, that all changes made in the project to be imported "win" and the entries in the Master project are overridden.

- After merging, check the final merge report and the merged project for plausibility. If you are satisfied with the results, save the project. If not, you can always select **UNDO**.

- If applicable, continue with merging the next sub project.

### Merging Codes To Clean-Up

If you find duplicate codes in the merged project, e.g. team members have added a code with the same name, you need to do some house keeping. Duplicate codes can be merged as follows:

- Open the code Manager. Highlight the codes that you want to merge, right click and select the **MERGE CODES** option from the context menu, or click on the "Merge Codes" button in the ribbon.

If all team members have been coding different documents, merge conflicts are unlikely to occur. A conflict could for instance arise if someone has modified a document or code group. As project administrator, you have to decide whether to accept this change or not.

Video tutorial:

[ATLAS.ti 8 Win – Mac compatibility /Merging projects across platforms](#)



### How To Merge (Mac)

- Open ATLAS.ti without opening the Master project. We first want to duplicate the Master project and this can only be done when it is closed. The previous version can be kept as backup. There may be times, when you want or need to go back to an older version of your project.
- To duplicate the Master project, select **PROJECT / OPEN**, right click the Master project file and select the option **DUPLICATE ...**
- You will be asked to enter a new name. We recommend the following structure: Master project name, date of merging and iteration of merging. For example: **Master\_Neighborhood study\_2017\_03\_18 (first merge)**.
- From the main menu select **PROJECT / MERGE WITH PROJECT**.
- Select the project to be imported, i.e. a project bundle file from one of the team members.

A summary report opens. If there are conflicts, you can decide which project should "win.:

Select the option: "**keep local changes**" if you do not want to change the entries in the Master project that conflict with entries in the project that you import.

Select the option "**Override all local changes**," if you indeed want the Master project to be changed and want to import all modifications made in the project that you import.

The summary report shown in Figure 28 does not contain conflicts. The project administrator "Susanne" has set up the project, adding documents and codes, and "Tom" has coded three data segments. If there are no conflicts, it does not matter which of the two options are selected.

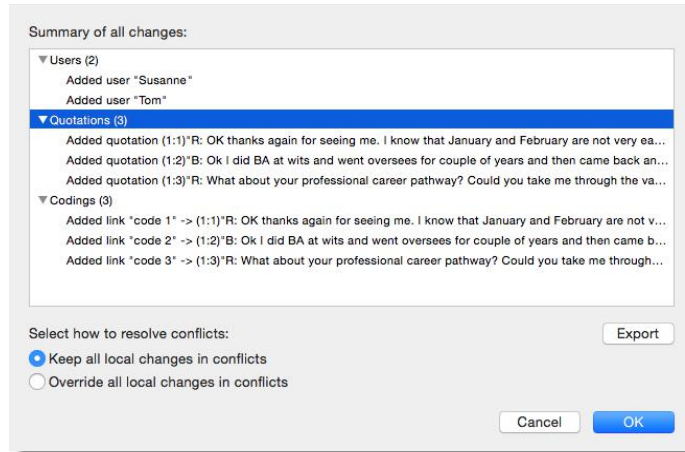


Figure 28: Merge summary report without conflicts

The summary report in Figure 29 indicates that a code was renamed, a new code was added, and a document group was modified. In order to make a decision whether to keep these changes overriding the Master file, or whether to discard them (by keeping all local changes), the project administrator is best advised to first check the project to be imported. The Merge process can be canceled at this stage, if you decide that it is best to

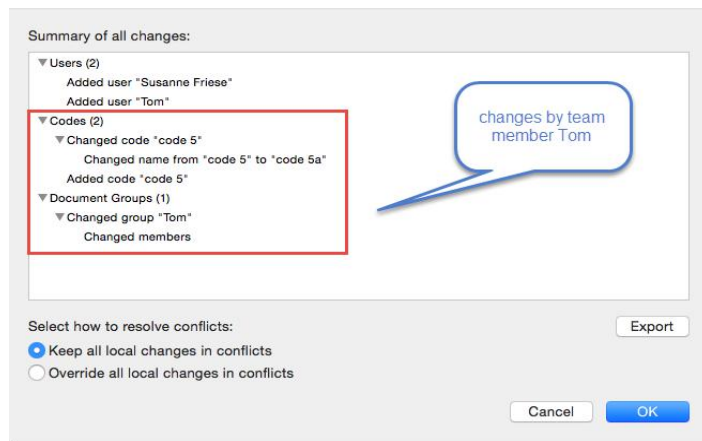


Figure 29: Merge summary report with conflicts

double-check the import project.

- Select **OK** to initiate the merge process.

After merging you have the option to open and save a merge report that lists all actual changes to the project. Double-check the resulting project. You can always select **UNDO**, if you do not want to keep the merged project.

- If merging was successful, save the new Master file (**PROJECT / SAVE**). If your team consists of several team members, continue with merging further sub projects.

### Merging Codes To Clean-Up

If you find duplicate codes in the merged project, e.g. team members have added a code with the same name, you need to do some house keeping. Duplicate codes can be merged as follows:

- Open the Code Manager. Drag the code you want to merge to a second code. Select **MERGE**,

If all team members have been coding different documents, merge conflicts are unlikely to occur. A conflict could, for instance, arise if someone has modified a document or code group. As project administrator, you have to decide whether to accept this change or not.

Video tutorials:

- [ATLAS.ti Mac - Merging Projects](#)
- [ATLAS.ti 8 Win - Mac compatibility /Merging projects across platforms](#)

## 5. Project Administrator



### Housekeeping

After merging all sub projects, the project administrator may need to do some house keeping work like cleaning up the code list, adding or modifying code groups, adding a memo with information for the team, or adding new documents and document groups.

### Distributing The New Master File To Team Members

After all house keeping work is done, save the new Master project and export it again for distribution to team members. See "Exporting The Project For Distribution" on page 9 and page 12,

## 6. Team Membership

### Importing The New Master File & Renaming

As before, team members import the new Master project and rename the Master file again adding their name or initials. See "Importing The Master Project And Renaming It (Windows)" on page 13, and Importing The Master Project And Renaming It (Mac) on page 14.

Continue the cycle of project exchange and merging between project administrator and team members as needed.

# Appendix

## Useful Resources

Under the following link you find a playlist that contain useful video tutorials :

- This video tutorial shows the merge process in ATLAS.ti Mac, but it is very similar to how it works in ATLAS.ti 8 Windows: [ATLAS.ti Mac - Merging Projects](#)
- This video shows how to transfer projects between ATLAS.ti 8 Windows and ATLAS.ti Mac and shows the merge procedure in ATLAS.ti 8 Windows: [ATLAS.ti 8 Win - Mac compatibility /Merging projects across platforms](#)
- Under the following link you find a playlist that contain video tutorials about how to work with ATLAS.ti 8 Windows including how to create a project, how to add documents, how to add codes, how to create groups, etc.: [Quick Tour ATLAS.ti 8 Windows - English](#)
- Under the following link you find a playlist that contain video tutorials about how to work with ATLAS.ti Mac: [Quick Tour ATLAS.ti Mac - English](#)

## Where Are ATLAS.ti 8 Windows Project Data Stored?

ATLAS.ti projects and all documents that you add to a project are stored in the application folder on your computer. The Windows application folder is called: `AppData` and can be found under your user account's home folder. Within the subfolder `Roaming`, you find folders from a number of different applications, including those for ATLAS.ti. The `AppData\Roaming` folder is a hidden folder and can either be accessed by entering the full path name or by typing into the Windows 10 search field `%appdata%`.

If your user name is "Mary," the full path would be:

```
C:\Users\Mary\AppData\Roaming\Scientific Software\ATLAS.ti.8
```

This default location for storing ATLAS.ti data can currently not be changed. Version 8.1 will have an option to add a user-defined location.

`AppData\Roaming` is a system folder and is not meant for user access. Files in this folder cannot be used outside ATLAS.ti.

## Where Are ATLAS.ti Mac Project Data Stored?

ATLAS.ti Mac stores your project files in the application folder for ATLAS.ti. If you want to add this location to your routine backup, e. g. using Time Machine, this is the location:

```
~/Library/Application Support/ATLAS.ti.
```

The `Application Support` folder is a system folder and is not meant for user access. Files in this folder cannot be used outside ATLAS.ti.