

Teamwork: ATLAS.ti 8 Windows



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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.....5
 - 2. Project Administrator.....6
 - Creating A Project.....6
 - Adding Documents & Creating Document Groups.....6
 - Adding Codes And Code Groups.....7
 - How To.....7
 - Saving The Project.....8
 - Exporting The Project For Distribution.....9
 - 3. All Team Members.....9
 - Importing The Master Project And Renaming It.....10
 - Exporting Sub Projects For The Project Administrator.....10
 - 4. Project Administrator.....11
 - Merging Sub Projects.....11
 - Master And Imported Projects11
 - Merge Strategy.....11
 - How to Merge.....13
 - Merging Codes To Clean-Up.....14
 - 5. Project Administrator.....15
 - Housekeeping.....15
 - Distributing The New Master File To Team Members.....15
 - 6. Team Membership.....15
 - Importing The New Master File & Renaming.....15
- Appendix.....16
 - Useful Resources.....16
 - Where are ATLAS.ti Project Data Stored?.....16

General Procedure

In this document we describe how you set up a team project when using ATLAS.ti 8 Windows exclusively.

If your team uses the Mac version, or you work in a mixed Windows-Mac team, 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.

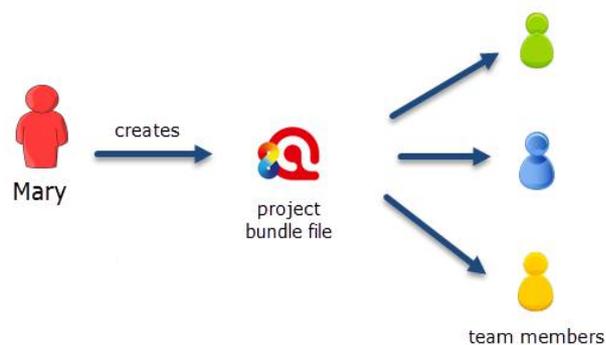


Figure 1: Steps 1 and 2: Creating and distributing the Master project



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.

1. All Team Members

Creating User Accounts

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.

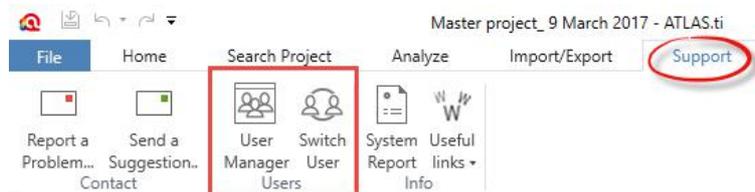


Figure 3: User Management tab in ATLAS.ti 8 Windows

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 **SWITCH 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 Administrator

Creating A Project

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**.

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.

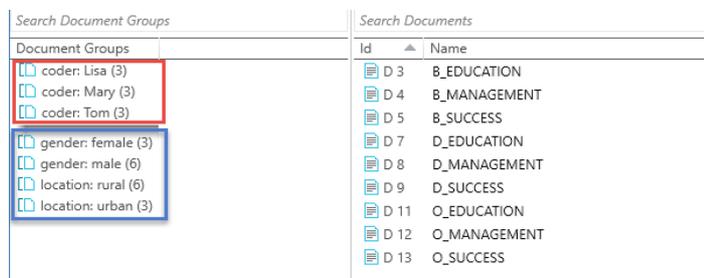


Figure 4: Example for the use of document groups in team projects

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 11).

How To

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).

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.

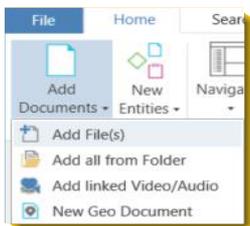


Figure 5: Add documents to a project

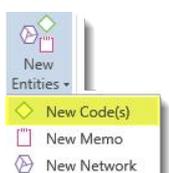


Figure 6: Add new codes

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.

Code Groups	Name	Grounded	Density	Groups
◇ group 1 (3)	◇ code 1~	0	0	[group 1]
◇ group 2 (3)	◇ code 2	0	0	[group 1]
	◇ code 3	0	0	[group 1]
	◇ code 4	0	0	[group 2]
	◇ code 5	0	0	[group 2]
	◇ code 6	0	0	[group 2]

Comment: Edited 19.03.2017 11:58 by Susanne

place for writing code descriptions / coding rules

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.

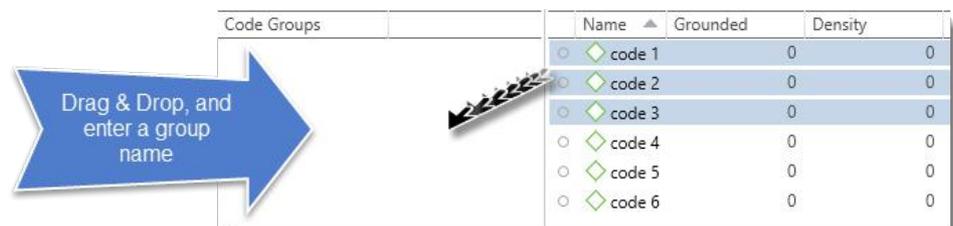


Figure 8: Creating a group in a manager

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

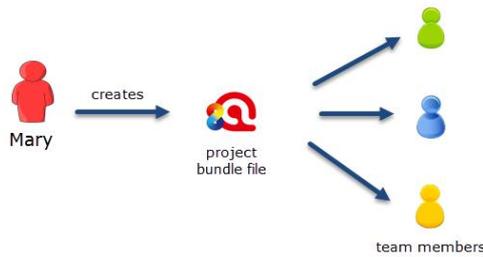


Figure 10: Creating and distributing the Master project

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

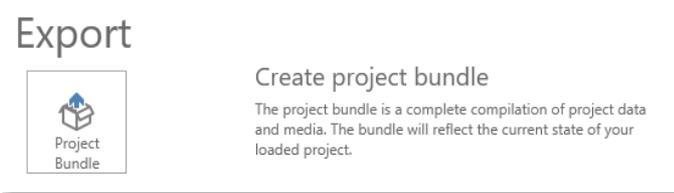


Figure 11: Project export

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.

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

- 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...**

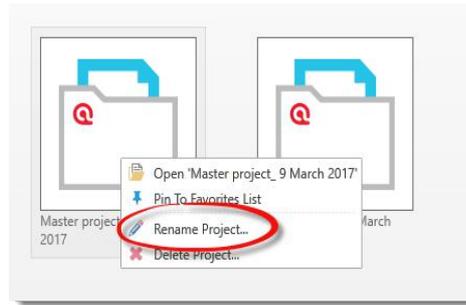


Figure 12: Rename project

- Add your name or initials to the Master project name. For an example see Figure 13).
- Double-click the renamed project to open it.



Figure 13: Example for naming a team member project file

Exporting Sub Projects For The Project Administrator

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.

4. Project Administrator

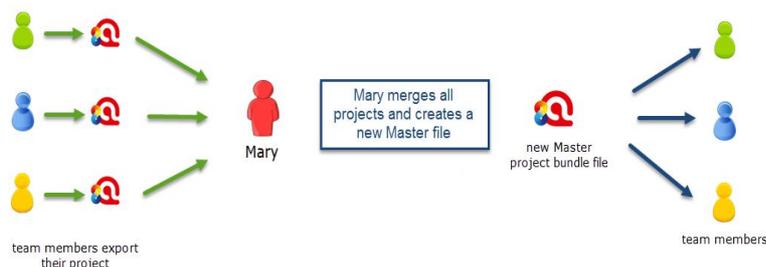


Figure 14: Steps 3 and 4: Combining the work of all team members and distributing it again

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.

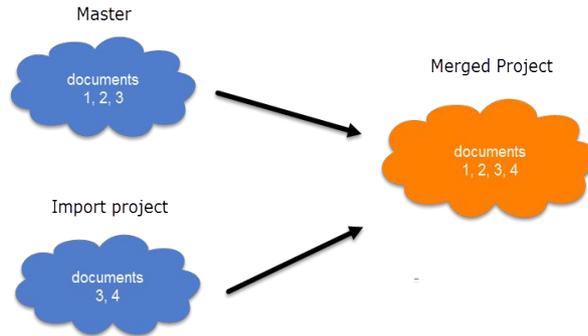


Figure 15: Merge example 1: Added elements to groups

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.

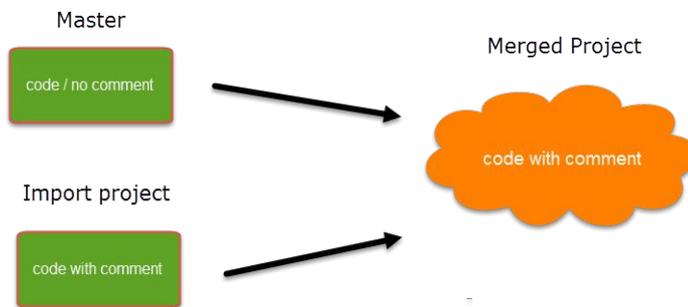


Figure 16: Merge example 2: Entities with comments, no conflict

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 17.

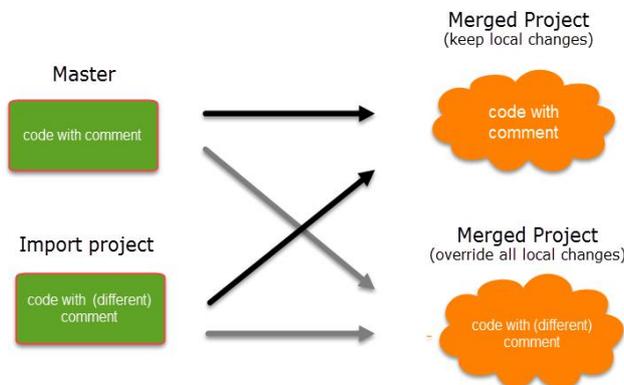


Figure 17: Merge example 3: Entities with conflicting comments

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.

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.

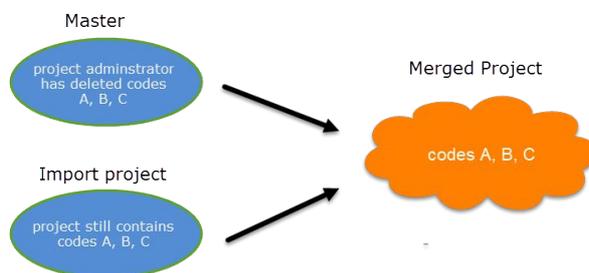


Figure 18: Example 4: Merging always adds entities, never subtracts

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

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**.

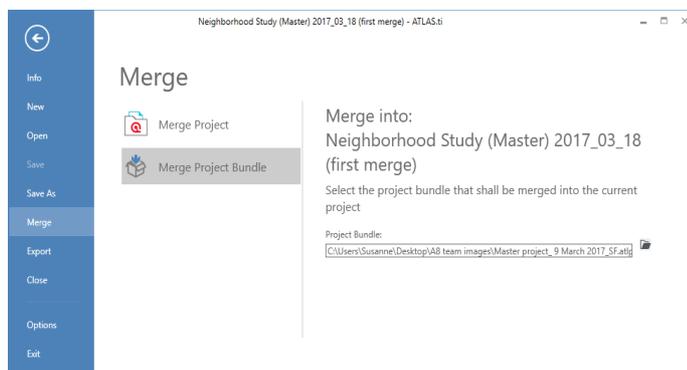


Figure 19: Merge dialogue

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 three people working on the project, you 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 11 for further detail. After this process is completed, a Validation Report opens:



Figure 20: Validation report

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 11).

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.

5. Project Administrator

Housekeeping

After merging all sub project, 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.

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" on page 10.

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 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](#)

Where Are ATLAS.ti 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 sub folder Roaming, you find folders from a number of different applications, also 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%.

f the 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 not meant for user access. Files in this folder cannot be used outside ATLAS.ti.