

# Team Work: ATLAS.ti Mac



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# General Procedure

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

If your team uses ATLAS.ti 8 Windows, 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.

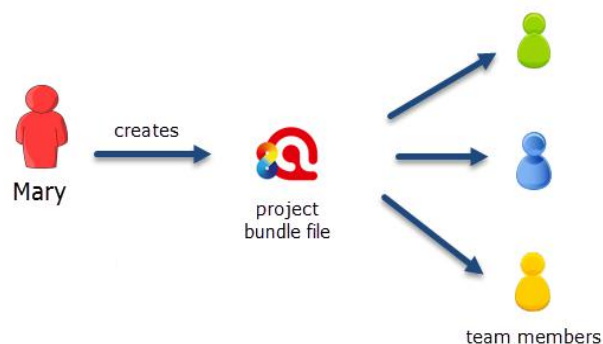


Figure 1: Steps 1 and 2: Creating and distributing the Master project



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 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 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

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, or might 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.

Document Group	#	Name
coder: Lisa	1	B_EDUCATION.doc
coder: Mary	2	B_MANAGEMENT.doc
coder: Tom	3	B_SUCCESS.doc
gender: male	4	D_EDUCATION.doc
gender: female	5	D_MANAGEMENT.doc
location: rural	6	D_SUCCESS.doc
location: urban	6	O_EDUCATION.doc
	8	O_MANAGEMENT.doc
	9	O_SUCCESS.doc
<b>Result: 9 of 9 Document(s)</b>		

Figure 3: 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).

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.

Select **PROJECT / SAVE. HOW TO**

### Adding Documents

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

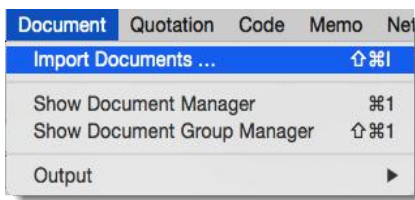


Figure 4: Adding documents to a project

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).

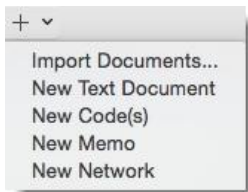


Figure 5: An alternative to the main menu option

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 Error: Reference source not found).

---

### 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.

---

Creation Date	Modifier	Modification Date	Origin
Feb 2017	Susanne	02 Feb 2017	
Feb 2017	Susanne	02 Feb 2017	
Feb 2017	Susanne	02 Feb 2017	
Feb 2017	Susanne F...	04 Feb 2017	/Users/Susanne/Dropbox/Kamera-Uploads/2016-01-...

Figure 6: Redirecting ATLAS.ti to the renamed or relocated linked file

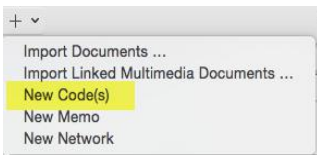
Linked files are currently automatically added to an exported project. With future updates you will have the option to exclude them and to transfer them separately.

### 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 Error: Reference source not found).

### 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.

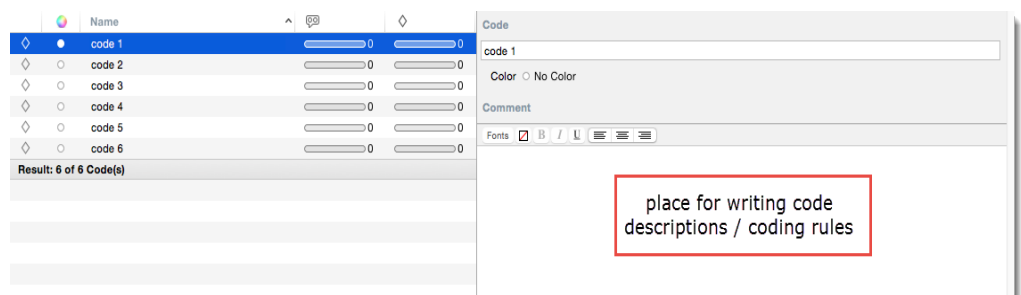


Figure 7: Adding code definitions / coding rules in ATLAS.ti Mac

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.

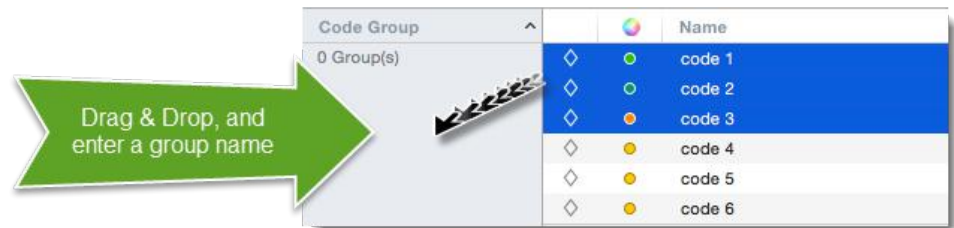


Figure 8: Creating a group in a manager

### SAVING THE PROJECT

Currently you cannot determine yourself where ATLAS.ti for 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

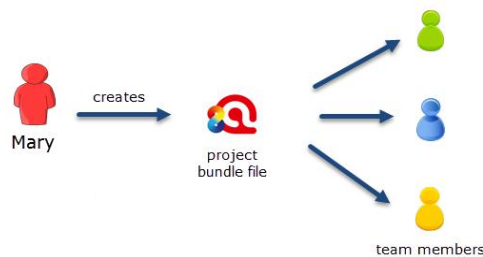


Figure 9: Creating and distributing the Master project

- 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 of your choice 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 recommend 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 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:

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



Figure 10: An ATLAS.ti Mac project bundle 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 **PROJECT / EXPORT**. See "Exporting The Project For Distribution" on page 9.

## 4. Project Administrator

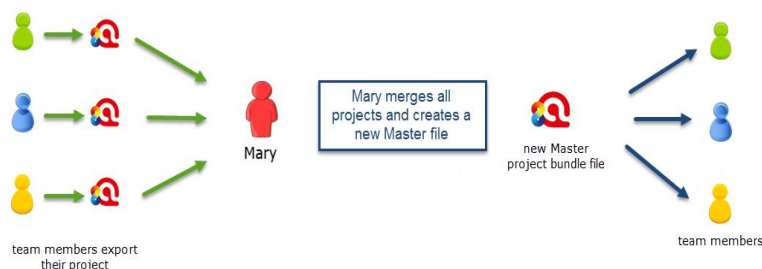


Figure 11: Steps 3 and 4: Combining the work of all team members and distributing it again

### 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 exists in the target 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.

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.

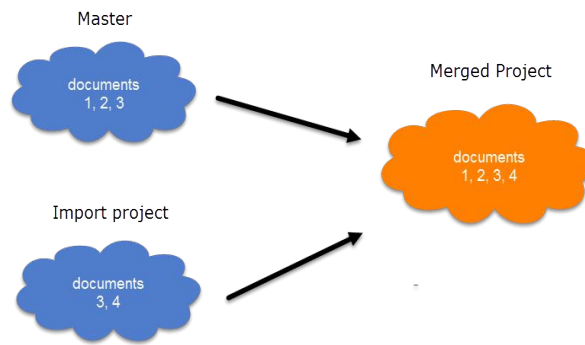


Figure 12: Merge example 1: Added elements to groups

**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.

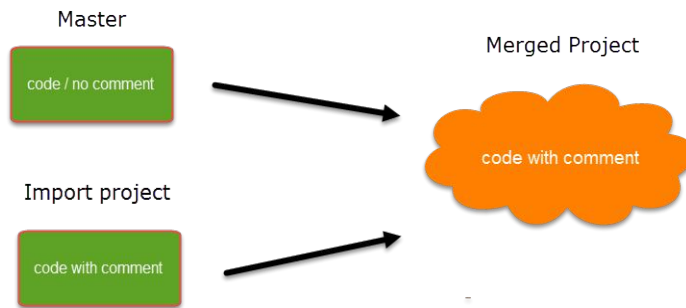


Figure 13: Merge example 2: Entities with comments, no conflict

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 local changes in conflict”**. If the comment of the Import project should be kept, you need to select the option **“Override local changes in conflict”** as shown in Figure 14.

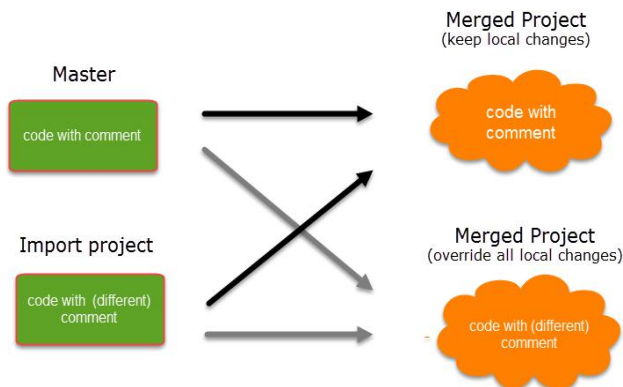


Figure 14: Merge example 3: Entities with conflicting comments

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 or some codings that still exist in second project to be merged, the merged project will contain those codes or codings again.

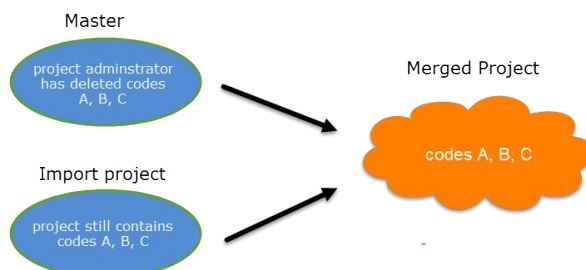


Figure 15: Example 4: Merging always adds entities, never subtracts

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 to check for 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

- 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 16 does not contain conflicts. The project administrator "Susanne" has set up the project, adding documents and codes and "Tom"

has been coding three data segments. If there are no conflicts, it does not matter which of the two options are selected.

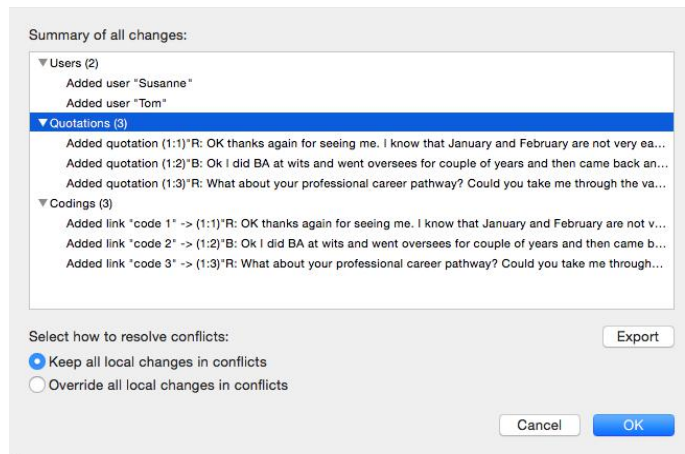


Figure 16: Merge summary report without conflicts

The summary report in Figure 17 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 as this stage, if you decide that it is best to double-check the import project.

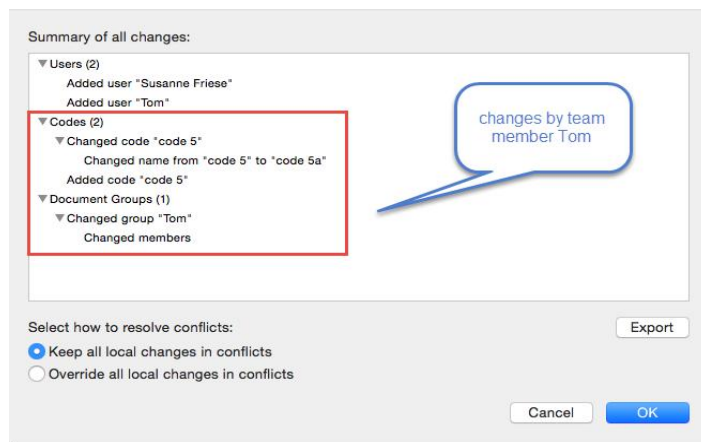


Figure 17: Merge summary report with conflicts

■ 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 TUTORIAL: [ATLAS.TI MAC - MERGING PROJECTS](#)

## 5. Project Administrator

### House Keeping

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

- The following video tutorials shows the merge process in ATLAS.ti Mac: [ATLAS.ti Mac - Merging Projects](#)
- 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](#)