

Teamwork: ATLAS.ti 8 Windows

ATLAS.ti 8 Windows – Teamwork

Copyright ©2019 by ATLAS.ti Scientific Software Development GmbH, Berlin. All rights reserved.
Manual Version: 650.20190425. Updated for program version: 8.4

Author: Dr. Susanne Frieze (QuaRC)
Programming/Design/Layout: Dr. Thomas G. Ringmayr - hypertextt.com

Copying or duplicating this manual or any part thereof is a violation of applicable law. No part of this manual may be reproduced or transmitted in any form or by any means, electronic or mechanical, including, but not limited to, photocopying, without written permission from ATLAS.ti GmbH.

Trademarks: ATLAS.ti is a registered trademark of ATLAS.ti Scientific Software Development GmbH. Adobe Acrobat is a trademark of Adobe Systems Incorporated; Microsoft, Windows, Excel, and other Microsoft products referenced herein are either trademarks of Microsoft Corporation in the United States and/or in other countries. Google Earth is a trademark of Google, Inc. All other product names and any registered and unregistered trademarks mentioned in this document are used for identification purposes only and remain the exclusive property of their respective owners.

Contents

General Procedure.....	4
Overview Of Main Steps.....	4
Please Read.....	5
Default Location For ATLAS.ti Project Data	5
Setting Up A Team Project.....	8
1. Project Administrator.....	8
Creating Backups.....	11
2. All Team Members.....	12
3. Project Administrator.....	13
4. All Team Members.....	17
Appendix.....	17
User Accounts.....	17
Project Management	18
Useful Resources.....	20

General Procedure

This document describes how to best set up a team project when using ATLAS.ti 8.x Windows.

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.

ATLAS.ti 8 projects cannot be used in ATLAS.ti 7.

Overview Of Main Steps

PLEASE NOTE: When you work in a team with shared document and codes, you need to start with a MASTER project that contains all documents and codes that you want to share with the team. If all team members start independently, you end up with duplicate documents and codes after merging the projects.

1. The project administrator sets up the projects. Let's call the project administrator "Mary," and the master project "Project X".
2. Mary adds documents to the project and possibly a list of codes (see Figure 1).
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, rename the project 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 an updated master project.
7. Especially at the beginning of a project when the coding system is not stable yet, the team needs to get together and discuss coding decisions, code definitions and the like. Based on this the code system can be adapted. Maybe some more data has become available in the meantime, which Mary can now add to the project.
8. After this process, Mary exports the master project that now contains the work of all team members and any adjustments that needed to be made to the code system. She distributes the exported project bundle file to all team members (see Figure 2).
9. The team members import the updated project bundle file, rename the project file, and continue their work.

This cycle continues. If new documents have to be added to the project, this is best done by Mary. A good time for this is after merging and before sending the updated project bundle file. – Individual team members can also add documents to their sub-projects, but this must be coordinated well– having two or more people add the same documents to a project on different computers will cause complications and should be avoided!

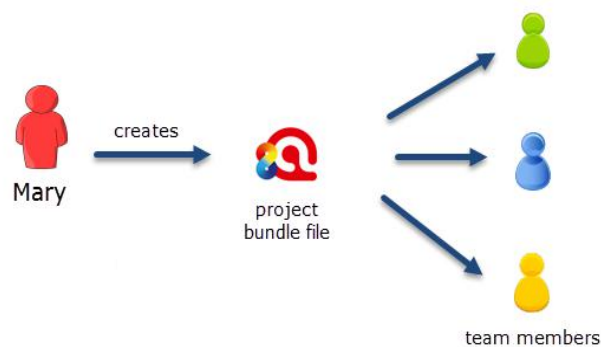
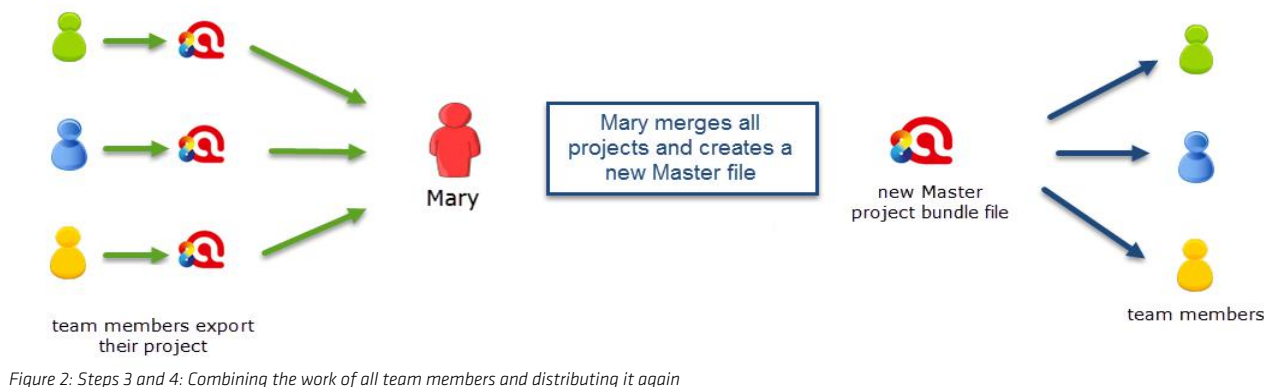


Figure 1: Steps 1 and 2: Creating and distributing the Master project



■ This video tutorial walks you through all steps: [Team Work in ATLAS.ti](#)

Please Read

- You need to start from a Master project that contains all documents and codes that you want to share. This means, one person in your team sets up the project and distributes a project bundle file to all team members.
- Each team member works within her/his own environment of ATLAS.ti.
- The location of where ATLAS.ti stores project related data can be determined by each user. See "Changing the Default Location for ATLAS.ti Project Data".
- Document libraries **CANNOT** be shared. Each person works with her/his own copy of the data set.

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.

If you are interested in running an intercoder agreement analysis, see the full manual or the ICA manual for a detailed description.

Each team member works within her or his own library folder. Each team member can set the library independently of any other team member. The library location is not set or determined by the project administrator.

Default Location For ATLAS.ti Project Data

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 %appdata% into the Windows 10 search field. Example: If 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 be changed. See below.

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

Changing the Default Location for ATLAS.ti Project Data

As explained above, the default location for ATLAS.ti project files is on the C drive. As it is not possible for all users to work on the C drive, either because there are institutional restrictions, for the C drive is already full and there is not sufficient space, there is the possibility to create a user-defined location where all of your ATLAS.ti data is stored.

For all users familiar with ATLAS.ti 7: This is NOT the same as in version 7 where you could create project-specific libraries that could be shared.

In ATLAS.ti 8, each user works within her or his own ATLAS.ti environment. What is new in version 8.1 is that you can define where this ATLAS.ti environment is located. This location can be within another folder on the C: drive, any other drive on your computer, a server, or an external drive.

It is not possible, however, to use a cloud sharing service like Dropbox because the specific way in which such systems work can jeopardize the integrity of your ATLAS.ti library.

It is possible to work with multiple libraries. Theoretically, you could create a new empty library every time you start a new project. This, however, requires careful data management on your part as you need to keep track on your own where all of these different libraries are located.

We strongly recommend that you create project backups on a regular basis by exporting your projects (see "Saving The Project").

HOW TO CHANGE THE DEFAULT LOCATION

When you start ATLAS.ti, select **OPTIONS** at the bottom left of your screen. If a project is already open, you need to close it first.

The last option under Application Preferences lets you change the library location or select a different library (**SWITCH LIBRARY**).

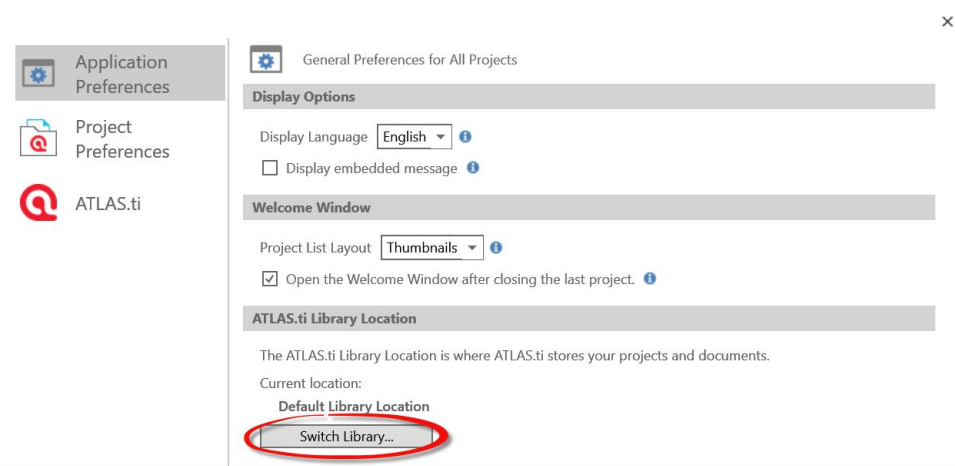


Figure 3: Start the Switch Library process

A wizard opens that guides you through the process. The next choice you need to make is whether you want to open an existing library, move the library to a different location, or create a new empty library.

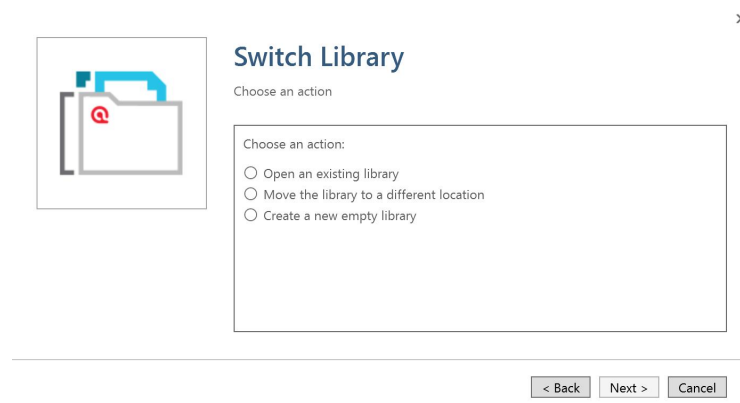


Figure 4: Different options for library switching

Open an existing library: Chose this option if you work with multiple libraries and you want to gain access to an already existing library at a different location.

Move the library to a different location: Chose this option if you want or need to move your current library to a different location, e.g. because you do no longer want to work on the C drive. It is possible to keep a copy of the library at the old location.

Note that the ATLAS.ti 8 library contains all of your documents plus your "project file." This is different from version 7, where only the project documents were stored in the library and the user saved the project file (HU) independently of it. In version 8, ATLAS.ti handles and manages ALL of your project-related data in the library.

Create a new empty library: This option allows you to create a new library at a location of your choice. If you already have projects, none of these will be moved over into the new library. To fill this library, you either create new projects from scratch, or you import project bundle files that you previously exported from other libraries.

After you made your choice, click **Next**.

If you selected to **open an existing library**, select the location for this library:

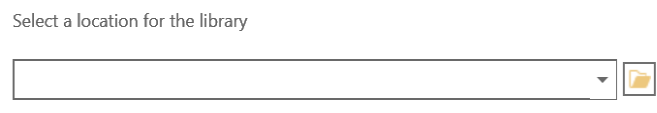


Figure 5: Select the location of the existing library

If you selected to **move the library**, select the location where you want this library to be. You can keep a copy of the actual state of the library at the current location. Just keep in mind that this copy is not updated if you continue your work using the library at the new location.

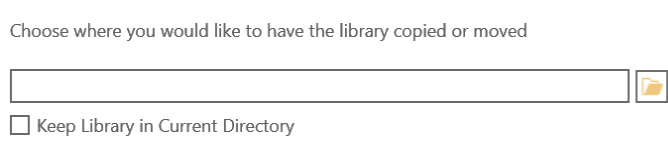


Figure 6: Select where you want this library to be stored

If you selected to **create a new empty library**, select where this new library shall be created. After confirming the new location, your opening screen will be empty and you can begin to fill it with new projects.




Figure 7: Select a location where you want your new library to be stored

A note from the HelpDesk: We know that your project data is very valuable to you and that you do not want to lose it. Therefore, please select a sensible location for the ATLAS.ti library. For instance: Do not store it on the desktop. You probably have a folder within your document system for the project you are currently working on where you store all project related data. If you cannot or do not want to use the ATLAS.ti default location, we recommend that you create a sub-folder for your ATLAS.ti-related work within your project folder, and within this sub-folder, a dedicated folder for your library. Make sure that your project folder is included in any automated back-up routine of your computer!

Setting Up A Team Project

The instructions are organized by the various tasks involved when working as a team. Below you find operating instructions for team members as well as for the project administrator.

1. 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 and click **CREATE**.

Adding Documents

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. You will be prompted to do so if this happens.

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, use the **ADD LINKED VIDEO/AUDIO** option.

Linked files are currently automatically added to the project bundle file when exporting a project. This could mean that your exported projects are quite sizable. With future updates you will have the option to exclude video files when creating a project bundle file.

Adding 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.

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 Ctrl or Shift key. Drag and drop the selected items into the side panel to the left (see Figure 13, which shows the process for creating code groups).

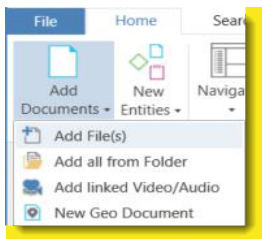


Figure 8: Add documents to a project

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

Figure 9: 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 codes and code groups individually to each sub-project, all codes and groups would be multiplied during the merge process because they would have different IDs (see "Merge Strategy" on page 13).

IMPORTING A LIST OF CODES

You can prepare a list of codes including code descriptions, code groups and colors in Excel and import the Excel file. This is how you need to prepare the Excel file:

You can enter headings like Code, Code Definition, Code Group 1, Code Group 2, but you do not have to. If you do not enter headings, the columns are interpreted in the following order:

- column 1: code name
- column 2: code description (comment)
- column 3: code group
- column 4: code group
- all subsequent columns: further code groups

Code	Code Definition	Code Group 1	Code Group 2
D_DEFINITION HAPPINESS	respondents ways of defining happiness for themselves	Definition happiness	
def happiness: a feeling	something that cannot be define precisely	Definition happiness	
def happiness: a state of mind	feelings of happiness are related to attitude	Definition happiness	
def happiness: fulfilment	defines also in contrast to being happy and happiness	Definition happiness	
def happiness: is subjective	something different for everybody	Definition happiness	
def happiness: long term view	being happy is short-term / happiness is long term	Definition happiness	
EFFECTS NEG	statements that deal with negative effects parenting has on one personally or on one's life	Effects parenting negative	Effects of parenting
effects neg: less fun/ satisfaction	fun aduct activities need to be reduced	Effects parenting negative	Effects of parenting
effects neg: loss of freedom	parenting experienced as burden as ones action radius is diminished	Effects parenting negative	Effects of parenting
effects neg: more worries/stress	more worries, more stress / less burdened before, more chaos	Effects parenting negative	Effects of parenting
effects neg: on career	negative effects on professional life due to being a parent	Effects parenting negative	Effects of parenting
effects neg: on financial issues	higher expenses, loss of income	Effects parenting negative	Effects of parenting
effects neg: on relationships	relationships suffer	Effects parenting negative	Effects of parenting

Figure 10: This is how you should prepare your code list in Excel



If you color the code names, this color is used in ATLAS.ti as code color.

- To import the Excel file, select the **IMPORT / EXPORT** tab and next the *Import Codes button* (he one with the down arrow).

ADDING CODES MANUALLY

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

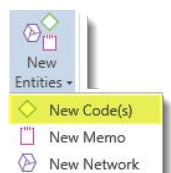


Figure 11: Add new codes

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 12: Adding code descriptions or coding rules

CREATING CODE GROUPS MANUALLY

- 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.

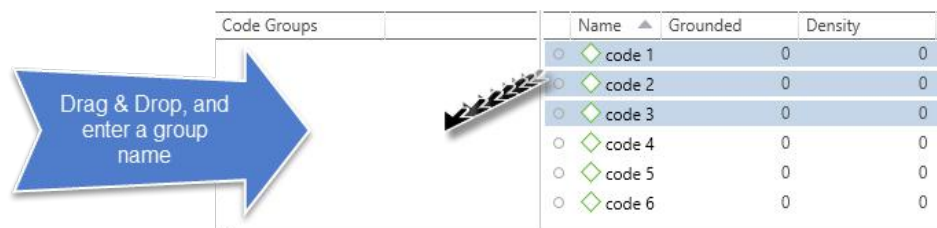


Figure 13: Creating a group in a manager

Saving The Project

Figure 14: 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 the application folder on your computer. See "Default Location For ATLAS.ti Project Data ."

It is possible to change the default location where ATLAS.ti stores project data. For more information see "Changing the Default Location for ATLAS.ti Project Data".

Exporting The Project For Distribution

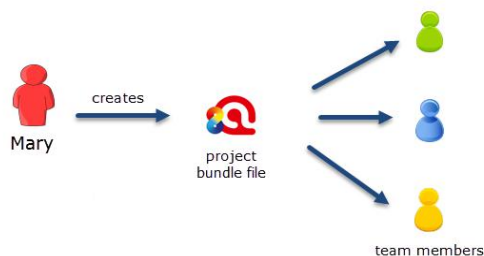


Figure 15: Creating and distributing the Master project

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

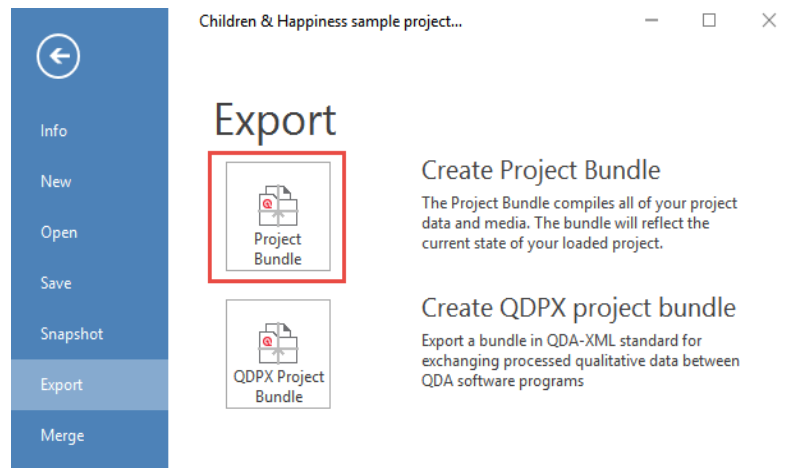


Figure 16: Creating a project bundle file

Click on the **PROJECT BUNDLE** button. This opens the Windows File Manager. Select a location for storing the project bundle. The default project bundle name consists of the project name plus the author and date in parentheses behind it, e.g., **"Project X (Mary 2017-09-27)."**

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.x Windows and Mac.

Project bundle files can be shared via a cloud services 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 + author and date. Renaming the bundle does not change the name of the project contained within the bundle. Think of the project bundle file as a box that contains your ATLAS.ti project plus all documents that you want to analyze. Putting a different label on the outside of the box will not change the name of the project file, which is contained inside the box.

Creating Backups

It is important to create project backups on a regular basis for both project administrator and team members. The project file that you see when you open ATLAS.ti is not a backup copy of the entire project. It is only your project file.

To create a backup for your project, select **FILE / EXPORT** and create a **Project Bundle** file (see Figure 16).

We recommend to create a project bundle file as backup after each work session.

2. 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 ATLAS.ti and select the **IMPORT PROJECT BUNDLE** button. If another project is currently open, select **File / New** and then the **Import Project Bundle** option.

During the process of importing the project, the name of the project can be changed:



Figure 17: Renaming a project file during the process of importing a project bundle

Rename the project by adding your name or initials to the project name. This is important for the project administrator later when he or she merges the projects of all team members (see Figure 17).

Click **IMPORT**.

RENAMING PROJECTS ON THE OPENING SCREEN

If you want to rename a project after it is imported, you can either do it on the opening screen when starting ATLAS.ti. If the project is already open, you need to close it to return to the opening screen.

On the opening screen, right click on the project that you want to rename and select **RENAME PROJECT**.

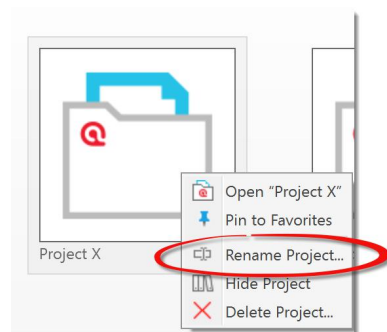


Figure 18: Renaming a project on the opening screen

Exporting Sub-Projects For The Project Administrator

After an agreed period of time, i. e., when 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 10. The name of the exported bundle file will include the name of the currently logged in user and the date, e.g. *Project X_coder 2 (Tom 2017-09-30)*.

3. Project Administrator

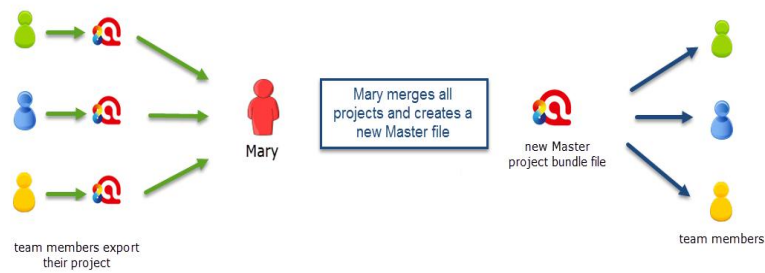


Figure 19: Steps 3 and 4: Combining the work of all team members and distributing it again

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 Duplicate Codes").

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.

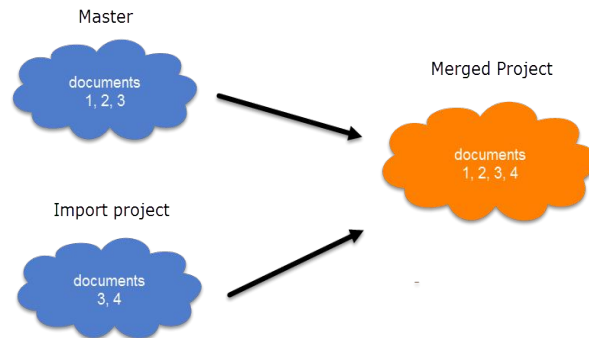


Figure 20: Merge example 1: Added elements to groups

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.

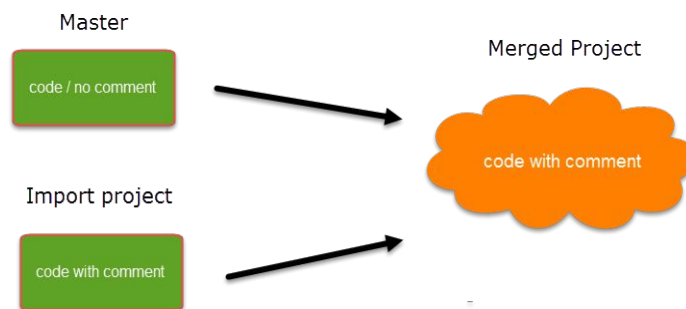


Figure 21: Merge example 2: Entities with comments, no conflict

In the case of an unsolvable conflict (e.g., 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 22.

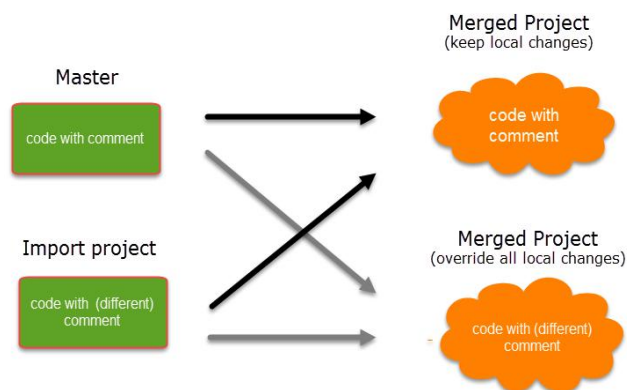


Figure 22: Merge example 3: Entities with conflicting comments

The decision which changes to keep can currently be taken only for all entities.

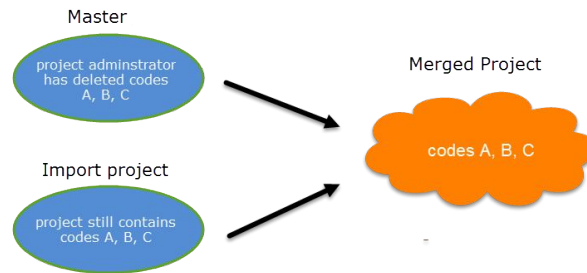


Figure 23: Example 4: Merging always adds entities, never subtracts

How deleted entities are handled: It is not possible to "subtract" entities. If one team member has deleted a code or some codings, and these entities still exist in another project, 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.

How to Merge

Before you merge, the recommendation is that you import all project bundle files first and take a look at the projects. If a conflict arises during the process of merging, you need to decide whether to keep all changes in the Master project or whether to override them. If you do not know what is contained in the projects to be imported, you cannot make an informed decision. Principally, it is possible to merge project bundle files without importing them prior to merging.

- To begin the merge process, open the Master project.
- Select **FILE / MERGE**.
- You have the option to select either a project or a project bundle file. If you have previously imported the bundle files of all team members, select **MERGE PROJECT**, otherwise **MERGE PROJECT BUNDLE**.
- Select a project from the list offered by ATLAS.ti, or load a project bundle file.

If you have a long list of projects, just enter the first few letters of the project name into the Search field.

In both cases, you have the option to create a snapshot of the current project before merging. There may be times, when you want or need to go back to an older version of your project. The default name for snapshot project is: *project name (Snapshot-date-time)*.

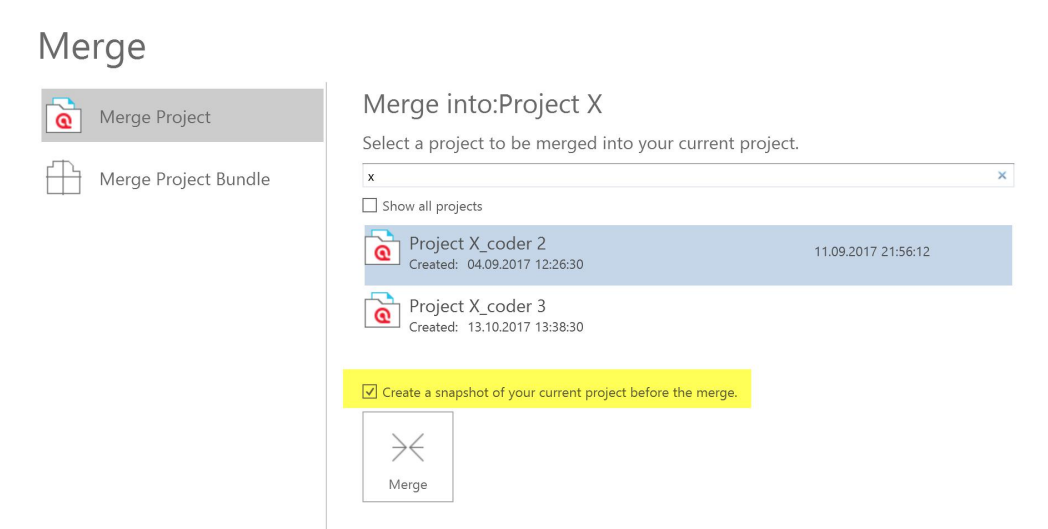


Figure 24: Select either a project file or a project bundle to merge

- After selecting a project or project bundle, 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 13 for further detail. After this process is completed, you see a Pre-Merge Summary:

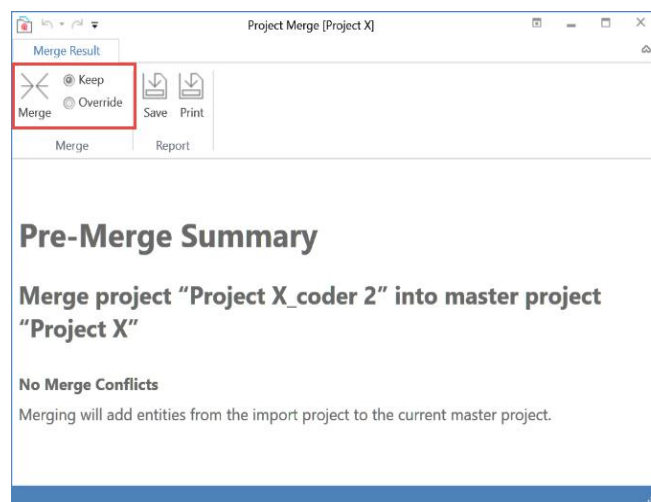


Figure 25: Check the pre-merge summary for conflicts

If there are no conflicts, you can proceed with merging the two projects by clicking **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 13).

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 or project bundle file.

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

Housekeeping

After merging all sub-projects, the project administrator may need to perform some housekeeping work, such 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.

MERGING DUPLICATE CODES

You need to do some housekeeping if you find duplicate codes in the merged project. This can happen, for instance, if team members independently have added codes that have the same name. As these codes have been created in different projects, they have different IDs and therefore they are added, not merged. The naming convention for duplicate codes is as follows:

- code A
- code A (2)

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.

Distributing The New Master File To Team Members

After all house keeping work is done, save the Master project and export it for distribution to team members (**FILE / EXPORT**). As before, the name of the project administrator and the current date is added to the bundle file. See "Exporting The Project For Distribution" on page 10.

4. All Team Members

Importing Updated Master Project

Team members import the updated Master project and as before rename the project file adding their name or initials.

As this is the second time round, the project name with the added coder name or initials already exists. ATLAS.ti will recognize this and will offer the following two choices:

- Keep current project as a snapshot
- Overwrite existing project



Figure 26: Importing project bundle and renaming project file when the name already exist

As you previously exported your project to send it to the project administrator, you already have a backup of your project. Therefore it will be OK in most cases to overwrite the existing project.

Make the appropriate choice and click **IMPORT**.

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

Appendix

User Accounts

ATLAS.ti automatically creates a user account based on the name that you use on your computer.

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

To create a new user account, select **USER MANAGER**. Next, click on the button **NEW USER** at the left-hand side in the ribbon.

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





Figure 27: User Management under the Tools & Support tab

A reason for creating a new user account is if two persons on a team have the same name. When merging projects that come from different computers and that use the same user name, the user name will be duplicated (e.g. Tom and Tom (2)). This means you can still distinguish the two users. However, it may be a bit cumbersome to always remember who is who.

Password Protection

- To set a password for your project, you need to load it first.
- Select **FILE / INFO**.
- Click on on the **SET PASSWORD** button and follow the instruction on the screen.

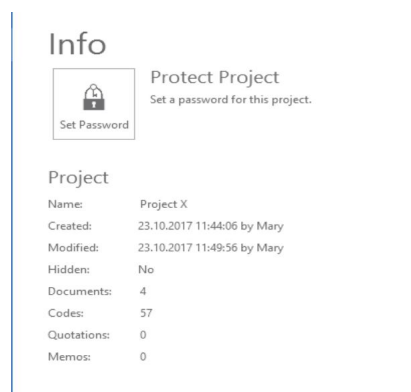


Figure 28: Setting a password

Please note that ATLAS.ti Scientific Software GmbH does not save your passwords. We cannot access, read or recover your password. If you cannot remember your password, you can no longer access your project!

Project Management

Creating Project Backups

- To create a backup of your project, select **FILE / EXPORT**.

This creates a project bundle file which contains all documents that you have added or linked to a project and the project file that contains all of your coding, the codes, all memos, comments, networks and links. Therefore, a project bundle file serves as external backup of your project independent of the ATLAS.ti installation on your computer.

In addition, project bundle files are used to transfer projects between computers. They can be read by both ATLAS.ti 8.x Mac and Windows.

Please export your projects on a regular basis and store the bundle files in a safe location. In case something happens to your computer, you still have a copy of your project to fall back on!



Figure 29: Creating project bundle files as backup

Click on the **PROJECT BUNDLE** button. This opens the Windows File Manager. Select a location for storing the project bundle file. The default name for the bundle will be the project name plus the name of the currently logged in user and the date: "project name (user name YYYY-MM-DD).

The name of the bundle does not effect the name of the project that is inside the bundle.

Creating A Snapshot

You may want to create a snapshot:

- to preserve certain stages of your project to review them later.
- as backup of your project file.
- as fall-back version before a merge, in case something turns out differently than you expected and you have already saved the merged project.
- as a copy of your project that you want to use as template for another project.

When creating a snapshot, ATLAS.ti automatically adds the following to the project name: (Snapshot YYYY-MM-DD hh:min:sec). You can, however, also enter any other name.

To create a snapshot, select **FILE/ SNAPSHOT**.

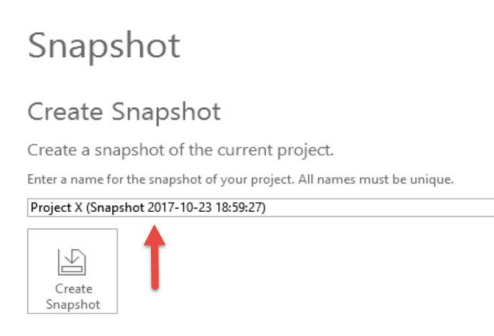


Figure 30: Default name for a project snapshot

Accept the default name or enter another unique name, and click **CREATE SNAPSHOT**.

Just like ATLAS.ti project files, snapshots are saved internally in the ATLAS.ti environment. A snapshot has the same ID as the project from which it is created.

Managing Projects

PIN TO FAVORITES

We recommend that you pin all projects on which you are currently working to the Favorites list:

- Right-click on a project in the opening screen and select **PIN TO FAVORITES** (see Figure 32).
- Or move with the mouse over a project name in the side panel on the left and click on the pin icon (see Figure 31).

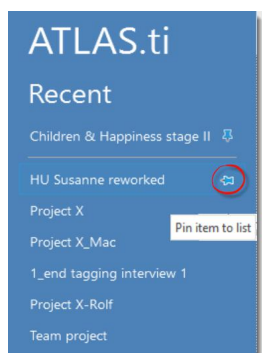


Figure 31: Pin project to favorite list

HIDE/ SHOW PROJECTS

If you accumulate many projects over time and if it becomes difficult to find the projects you are currently working on, you can hide all projects that you do not need at the moment.

Right-click on a project in the opening screen and select **HIDE PROJECT**.

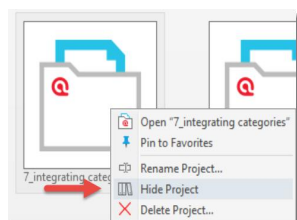


Figure 32: Hiding projects

All hidden projects show an icon on the top left of the project button (see Figure 34).

If at some point you want to see all projects again, activate the option **SHOW ALL PROJECTS** that you find above your list of projects:

In this view, you can change the project status "hidden" back to "show":

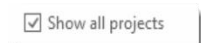


Figure 33: Show all projects option

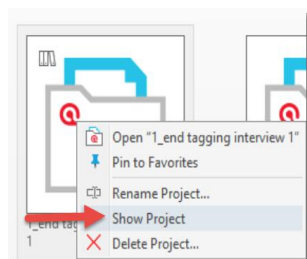


Figure 34: Make hidden projects visible again

DELETING A PROJECT

You can delete projects from the opening screen, either when you start ATLAS.ti or when closing all projects.

To delete a project, select it in the opening screen, right click and select the option **DELETE PROJECT**.

You will be asked to confirm the deletion as this is a permanent action that cannot be undone.

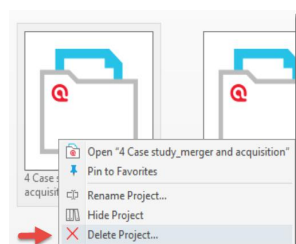


Figure 35: Deleting a project

Useful Resources

Under [Quick Tour ATLAS.ti 8 Windows – English](#) you'll find a playlist of 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.