Project Merging
in ATLAS.ti Mac

Project Merging

Project Merging was implemented in version 1.0.50.

Below is a detailed description of this feature that is essential for collaborative work and for streamlining the workflow for individual users as well.

Currently, merging offers a set of basic options that, nonetheless, fully permit full-fledged team project work. Future releases will add more sophisticated options for special fine-tuning and even better control over your merged projects. – We strongly recommend that you follow the suggested set up for team projects as illustrated in Figure 1 below.
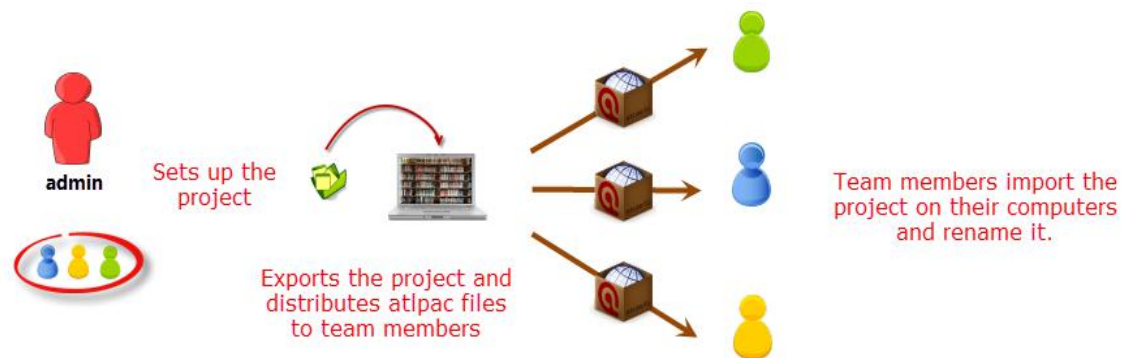

Figure 1: Recommended workflow for team projects

Video tutorial: ATLAS.ti Mac - Merging Projects

The Merge Tool lets you join projects that were originally divided for analytical or economical reasons. Its main purpose is the support of teams. It links together the contributions of different members of a research team. A common scenario is the analysis of different sets of documents by different team members, sharing a common code base. Another application is that different researchers code the same documents in the process of developing a code system, or for the purpose of checking inter-coder agreement. Of course, the single researcher can also benefit from this function using the merge facility to help organize large projects.

Main Concepts Of Merging

Target And Source Projects

The target project is the project into which another project, called the 'source project' is merged. The target project has to be loaded first before invoking the MERGE PROJECT option.

> To prevent accidental overwriting of an existing project you will want to create a new project first into which you merge all "sub"-projects, or duplicate the target project before you begin the merge process . See program manual for detailed instructions.

Merge Strategy

The default option is to **unify all entities that are identical** and to add all those that do not yet exists in the target project.

> Identical entities are unified, all others are added.

When creating an entity in ATLAS.ti, this can be a document, a code, a quotation, a memo, a network,a group or a comment, this entity received a unique ID, like 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 (e.g. by dragging sunshine (2) onto sunshine, then select MERGE)).

This has some consequences for the workflow in team projects. If a team wants to use a common code list, the project administrator needs to setup a Master project first adding all codes. This also applies to importing documents. If a common set of documents should be analyzed, all documents need to be added to a Master file first before distributing the project to team members.

> Team projects need to be set up by a project administrator before they can be distributed to team members.
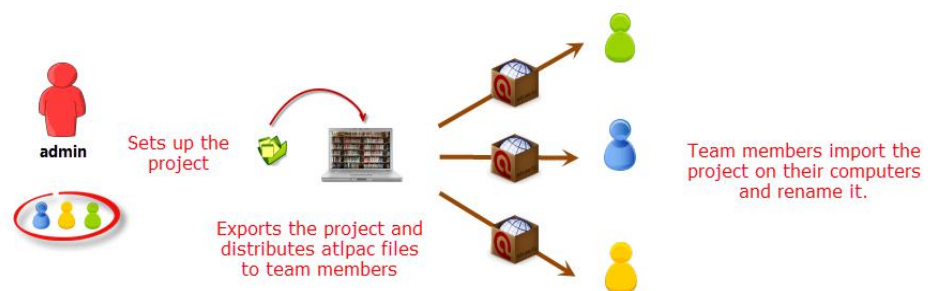

Figure 2: Workflow when setting up a team project

How To Merge Projects

▌ Open a project. This will be the target project.

▌ Select PROJECT / MERGE WITH PROJECT.

Select the source project. The source project needs to be an exported project (see the section on project management in the full manual).

If you want merge two projects that you have created on the same computer, the source project needs to be exported first.

A summary report opens. If there are conflicts, you can decide which project should "win". The option "keep local changes" means that entities are only added, nothing is changed in the target project. If you want the entities in the target project to be changed based on modifications in the source project, select: "Override all local changes".
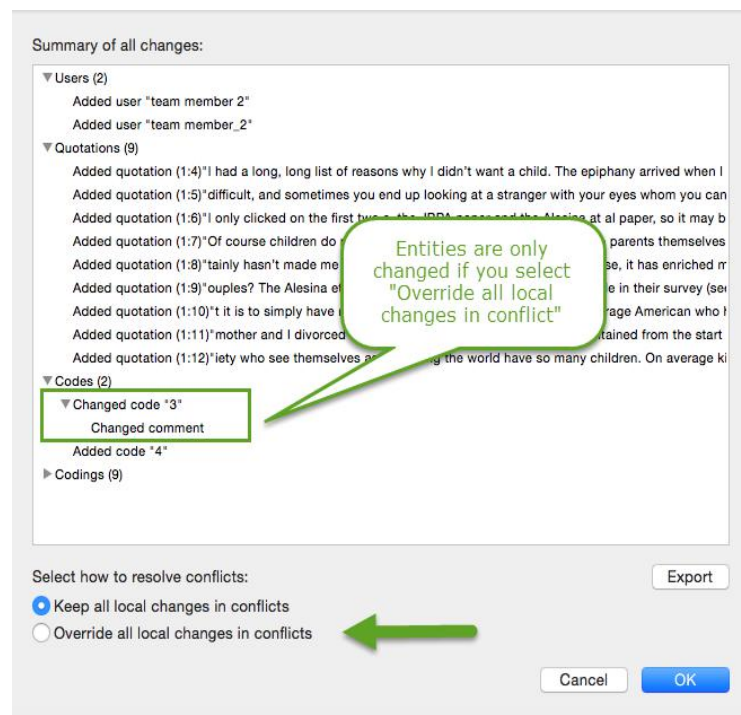

Figure 3: Review Summary of Changes before the merge process

When selecting **OK** the merge process begins. After merging you have the option to open and save a merge report that lists all actual changes to the project depending on the chosen conflict solution.

Double-check the resulting project. You can always select Undo, if you do not want to keep the merged project.

Two Examples Illustrating The Merge Strategy

Example 1 – Recommended Procedure

There are two people on the team: the administrator and the team member. The administrator sets up the project adding one document and codes 1, 2 and 3. Code 1 is orange and code 3 is light green.

Figure 4: Project setup by the administrator

The project administrator saves the project, exports it and sends it to the team member. The team member imports the project and renames it immediately (Project / Rename). See alsoFigure 2: Workflow when setting up a team project.

The team member adds a comment to code 3, continues to code the project and adds a code 4.

To prepare the project for merging, the team members saves the project, exports it and sends it back to the administrator.

The administrator starts the mere process by opening the Master project.

The next step is to select Project / Merge with Project... and to select the project sent by the team member.

The summary report looks as follows:

Figure 5: Merge report example 1

In order to merge the comment written by the team member into the Master file, the option "Override all local changes in conflicts" need to be selected:

Figure 6: Select Override all local changes if already existing items have been modified

After the merge, the following entities are added to the project:
• 9 quotations and codings and a new code 4.
• Code 3 was modified, i.e. the comment written by the team member was added.
• The document was unified as it the ID was identical in both projects.

	#	^	Name	Type	Quotations	Creator
📄	1		3_Belkin parenting blog discussion.docx	Text	▬▬▬ 12	Administrator
Result: 1 of 1 Document(s)						

	⬤	Name	^	💬	◇	⬨	Comment	Creator
◇	🟠	1		▬▬ 5	▭ 0	1		Administrator
◇	⚪	2		▬▭ 4	▭ 0	1		Administrator
🗄	🟢	3		▬▭ 3	▭ 0	1	a comment written by team member 2	Administrator
◇	🟡	4		▭ 0	▭ 0	0		team member_2
Result: 4 of 4 Code(s)								

Figure 7: Example 1: Document and Code Manager after merging

Example 2 – This is How NOT to do it

There are two people on the team: The administrator and the team member. The administrator sets up a project, adding one document and codes 1, 2 and 3. Code 1 is orange and code 3 is light green.

	#	^	Name	Type	Creator	Quotations
📄	1		3_Belkin parenting blog discussion.docx	Text	Administrator	▬▬ 3
Result: 1 of 1 Document(s)						

	⬤	Name	^	💬	◇	⬨	Modifier
◇	🟠	1		▬▬ 1	▭ 0	0	Administrator
◇	⚪	2		▬▬ 1	▭ 0	0	Administrator
◇	🟢	3		▬▬ 1	▭ 0	0	Administrator
Result: 3 of 3 Code(s)							

Figure 8: Project setup by administrator

A team member also sets up a project also adding document "3_Belkin parenting blog discussion" and a document called "5_NY magazine_Discussion…." The team member

	#	^	Name	Type	Modifier	Quotations
📄	1		5_NY magazine_Discussion of All Joy…	Text	team member	▬▬ 3
📄	2		3_Belkin parenting blog discussion.docx	Text	team member	▭ 0
Result: 2 of 2 Document(s)						

	⬤	Name	^	💬	◇	Modifier
◇	⚪	3		▭ 0	▭ 0	team member
◇	⚪	4		▭ 0	▭ 0	team member
◇	⚪	5		▭ 0	▭ 0	team member
Result: 3 of 3 Code(s)						

Figure 9: Project setup team member

adds the tree codes 3, 4 and 5:

When merging these two projects, there will be two issues. As the team member also added document "3_Belkin parenting blog discussion", the merged project will contain the document twice. The content of the two documents may be the same, but they are not identical as the document was added to two different projects, Therefore they are treated by ATLAS.ti as two different documents.

Please note: Currently, duplicate documents cannot be merged manually to fix this problem! Please follow the recommended work flow when working in teams on the same set of documents (see Figure 2).

The summary report shows that all entities of the second project will be added, also items that have the same name:
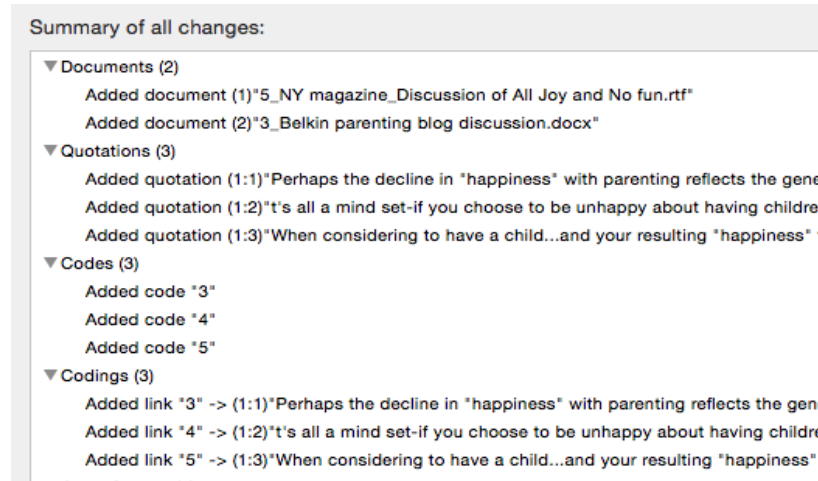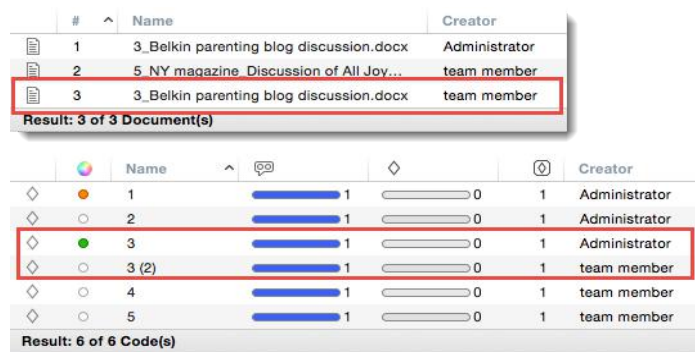

Figure 10: Merge report example 2

The merged project looks as follows:

Avoid duplicate documents by observing the recommended work flow for team projects!

Figure 11: Items in the project after merging

- Document "3_Belkin parenting blog discussion" is duplicated. There is currently no merge procedure as in the Windows version to unify these documents manually if the duplication was not intended.
- Code 3 is duplicated. This is not a problem. You can simple drag code 3(2) onto code 3 in the Code Manager and select MERGE.
- Codes 4 and 5 are added.