

Teamwork in ATLAS.ti 8 Mac

ATLAS.ti 8Mac - Teamwork

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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.

If you are interested in running an intercoder agreement analysis, please read the description in the full manual.

Overview Of Main Steps

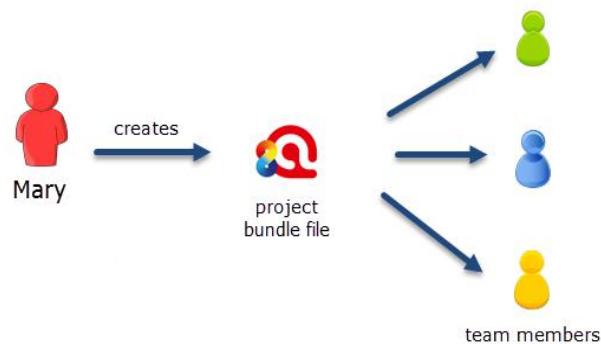


Figure 1: Steps 1 and 2: Creating and distributing the Master project

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.

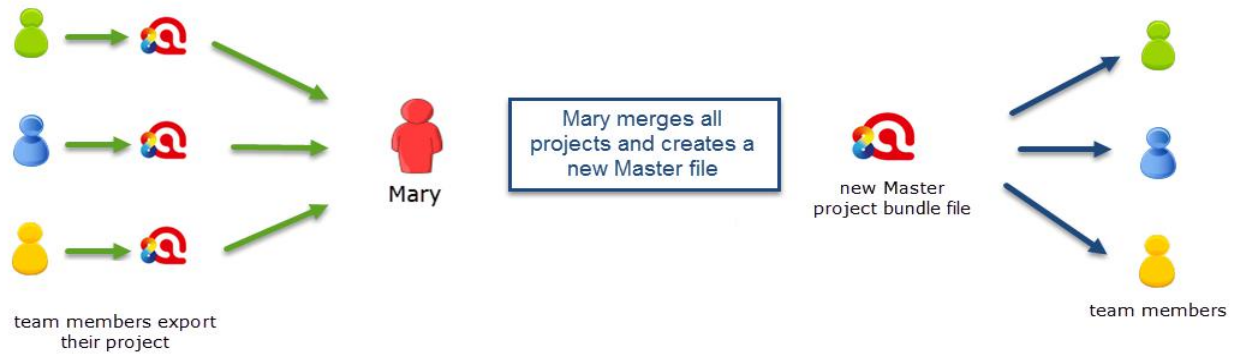


Figure 2: Steps 3 and 4: Combining the work of all team members and distributing it again

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.

Setting Up The Team Project – Tasks of The Project Administration (Mac)

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

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.

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

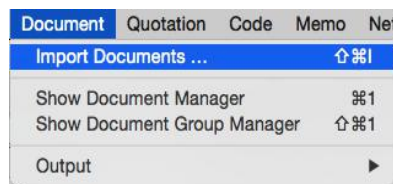


Figure 3: Adding documents to a project

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).

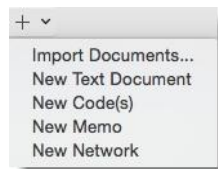


Figure 4: An alternative to the main menu option

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

To link audio or video documents to your project, select **DOCUMENT / IMPORT LINKED MULTIMEDIA DOCUMENTS**. When you open the Document Manager, you will see the location of the file in the column "Origin" (see Figure 4).

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...	02 Feb 2017	/Users/Susanne/Dropbox/Kamera-Uploads/2016-01-...

A context menu is overlaid on the last row of the table, with the following options: Open, Use Different File, Copy into Library, and Delete. The 'Use Different File' option is highlighted.

Figure 5: 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.

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 Shift or Cmd-key. Drag and drop the selected items into the side panel to the left (see Figure 10).

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 10).

Importing A List Of Codes, Code Definitions And Groups

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:

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 6: Preparing a code list for import

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:

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

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

To import the Excel file, select the **CODE / IMPORT CODE LIST**.

The finder offers the following three options at the bottom of the window:



Figure 7 Ignore header

If you have added header information like code, code definition, group, etc., activate the first option **Ignore header (first row) during import**.

Select **Update existing codes**, if the project already contains codes that have the same name as already existing codes.

Select **Keep existing codes**, if you want to add all codes from the Excel file to the already existing list of codes.

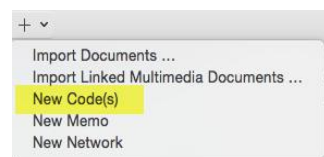


Figure 8: Creating new codes

Adding Codes & Code Definitions Manually

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

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.

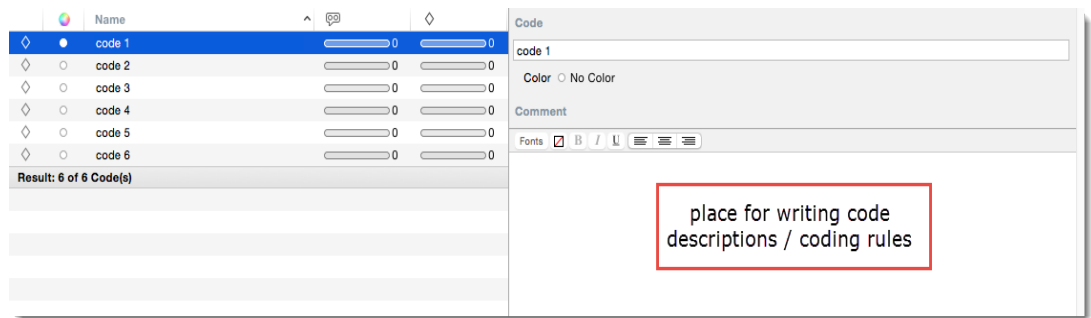


Figure 9: Adding code definitions / coding rules in ATLAS.ti Mac

Creating Code Groups Manually

- 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.

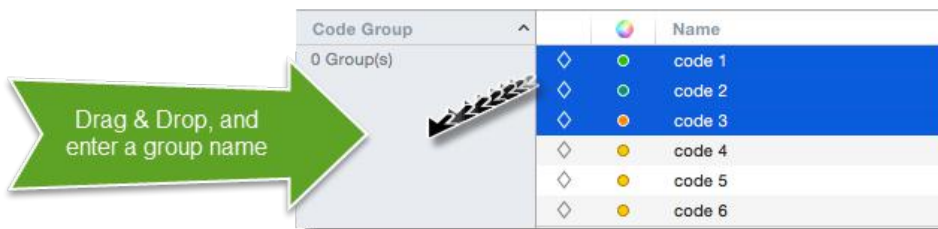


Figure 10: Creating a group in a manager

Saving The Project

By default, all project data 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 be changed. See "Changing the Default Location for ATLAS.ti Project Data ",

If you want to store project data at a different location, see "Changing the Default Location for ATLAS.ti Project Data ".
 If you want a physical file, you need to export the project. See "Exporting The Project For Distribution".

Exporting The Project For Distribution

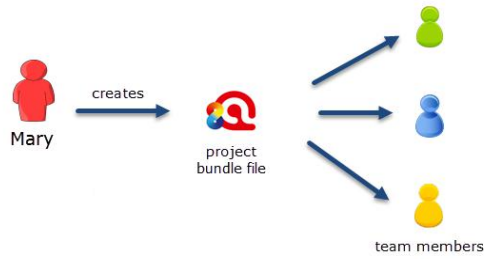


Figure 11: Creating and distributing the Master project

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

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

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

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

2. Working On The Project (Team Members)

The first task of the team members is to import the project and to rename it. Renaming is necessary for the later merging process. If all team members are done with the task assigned to them, they return the project to the project administrator for merging. If the project administrator were to receive two or more projects that all have the same name, it would be difficult to determine which projects to merge.

It is recommend that all team members save a copy of the project bundle file their receive 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 12: 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**.

3. Merging Projects – A task For The Project Administrator

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:

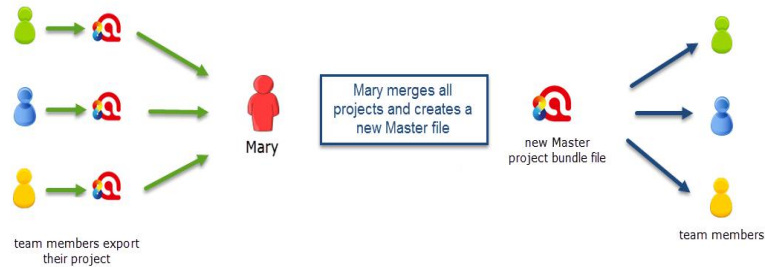


Figure 13: Steps 3 and 4: Combining the work of all team members and distributing it again

Terminology and Procedure

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 "Housekeeping").

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.

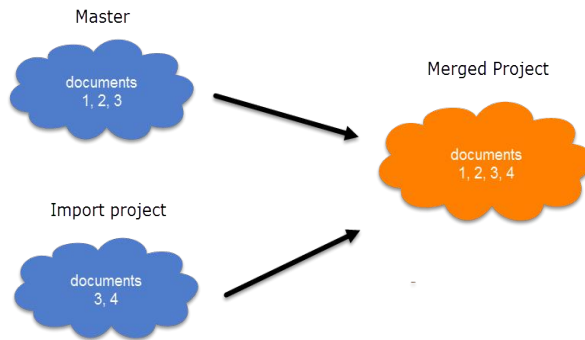


Figure 14: Merge example 1: Added elements to groups

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.

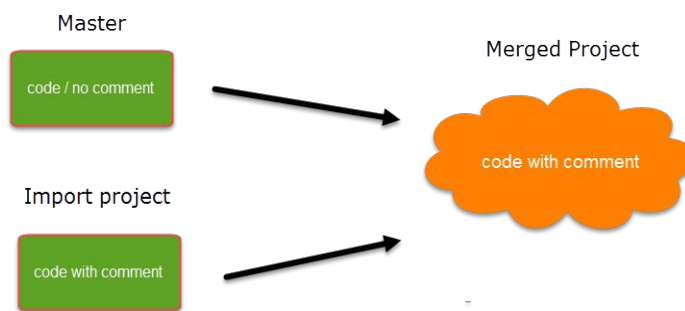


Figure 15: Merge example 2: Entities with comments, no conflict

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 16.

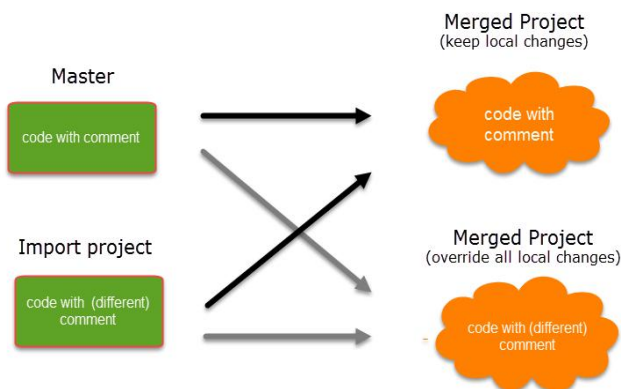


Figure 16: Merge example 3: Entities with conflicting comments

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

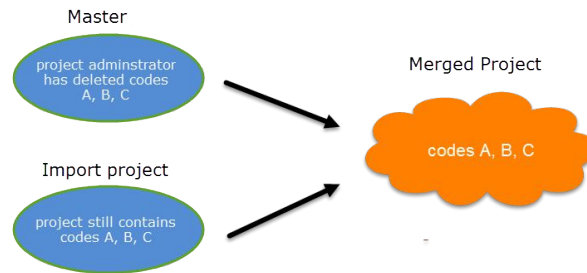


Figure 17: Example 4: Merging always adds entities, never subtracts

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

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

Currently it is not possible to merge projects coded for the purpose of checking inter-coder agreement. This option will become available in version 8.1.1. 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 18 does not contain conflicts. The project administrator "Susanne" has set up the project, adding documents and codes, and "Tom" has coded three data segments. If there are no conflicts, it does not matter which of the two options are selected.

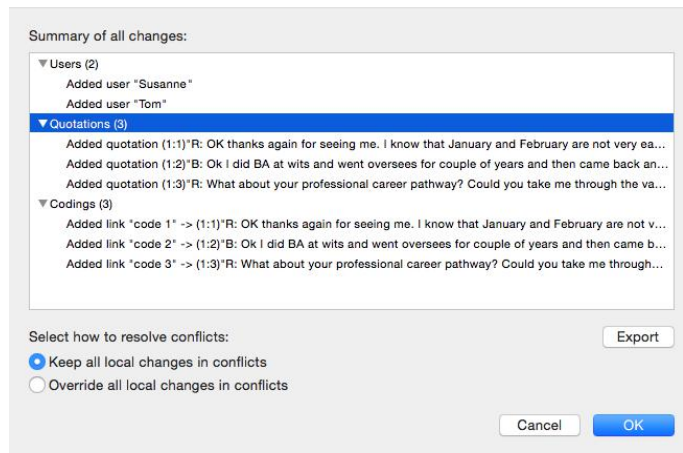


Figure 18: Merge summary report without conflicts

The summary report in Figure 19 indicates that a code was renamed, a new code was added, and a document group was modified. In order to make a decision whether to keep these changes overriding the Master file, or whether to discard them (by keeping all local changes), the project administrator is best advised to first check the project to be imported. The Merge process can be canceled at this stage, if you decide that it is best to double-check the import project.

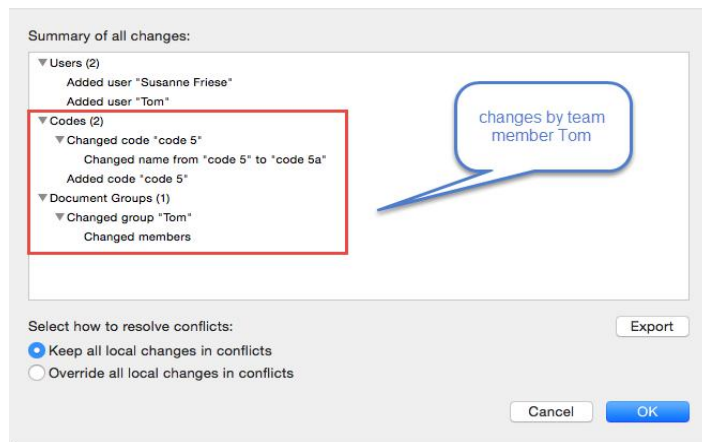


Figure 19: Merge summary report with conflicts

- 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.

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.

MERGING DUPLICATE CODES

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... INTO.....**

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](#)

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 (**PROJECT / EXPORT**).

As shown above, in the Windows version the name of the project administrator and the current date is added to the bundle file.

4. Continuing Workflow (Team Members)

Importing The New Master File & Renaming It

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 .

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

Appendix

Useful Resources

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

- This video tutorial shows the merge process in ATLAS.ti Mac: [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](#)

Where Are ATLAS.ti Mac Project Data Stored?

ATLAS.ti saves all project data within its own ATLAS.ti environment. You can find all ATLAS.ti data under:

~/Library/Application Support/ATLAS.ti.

If for some reason, you cannot store data at the default location, you can move the library to a different location or you can create one or more new libraries (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

ATLAS.ti does not support cloud-based storage of library data. Cloud-based storage locations synchronize data across devices and therefore make unauthorized changes to the content of the library. This can potentially damage your projects. When selecting a library location, ATLAS.ti will check whether this location is a cloud-based storage and will not allow you to create a library at this location or move your existing library to this location. However, we can not guarantee that a cloud-based storage is always recognized. If you use a user-defined location for your library, it is your own responsibility to ensure that it is not on a cloud-based storage. ATLAS.ti GmbH rejects all responsibility for data loss resulting from such as setup.

The default location for ATLAS.ti project files is on your Macintosh HD. As it is not possible for all users to store data at this location, either because there are institutional restrictions, for the drive is already full and there is not sufficient space, you can create a user-defined location where all of your ATLAS.ti data is stored.

Project libraries cannot be shared. Each user works within her or his own ATLAS.ti environment.

In ATLAS.ti 8, each user works within her or his own ATLAS.ti environment. You have the possibility to define where this ATLAS.ti environment is located. This location can be within another folder on the hard disk, any other drive on your computer, a server, or an external drive. It is not possible to use a cloud sharing service like Dropbox because this might jeopardize the integrity of your ATLAS.ti projects!

It is possible to work with multiple libraries. Potentially, 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 (**PROJECT / EXPORT**).

Select ATLAS.TI / SWITCH LIBRARY.

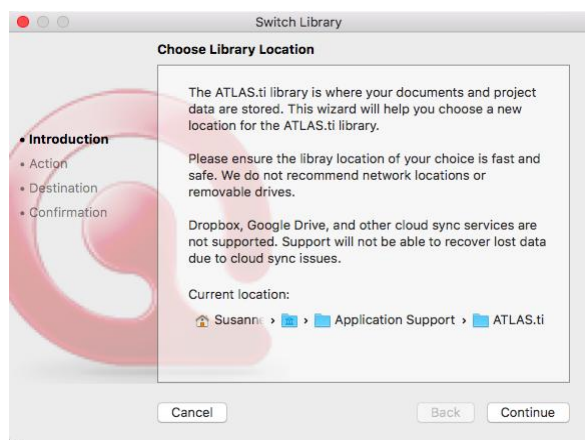


Figure 20: Starting the Switch Library procedure

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.

Open an existing library: Choose 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: Choose 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 files. 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. 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 have made your choice, click **CONTINUE**.

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.

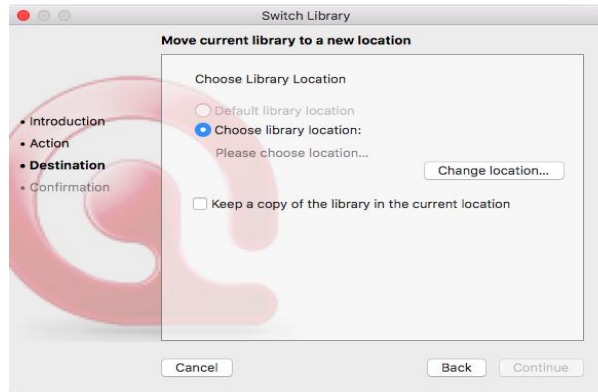


Figure 21: Move current library to a new location

The option **open an existing library** is useful if you previously have created a library at a different location and want to access the projects contained in this library, or if you want to change back to the default library. The option "Default library location" is only active, if you currently use a user-defined library.

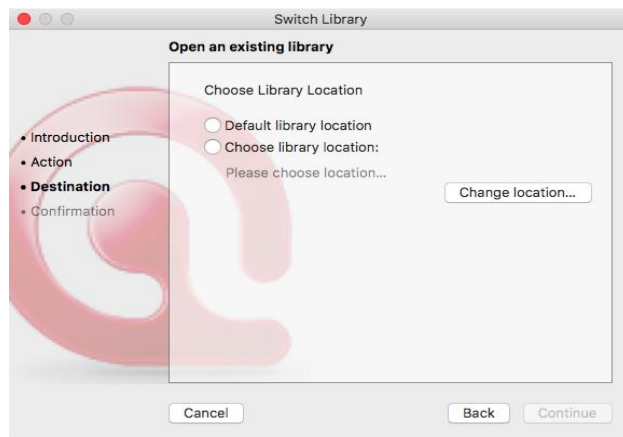


Figure 22: Open an existing library

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

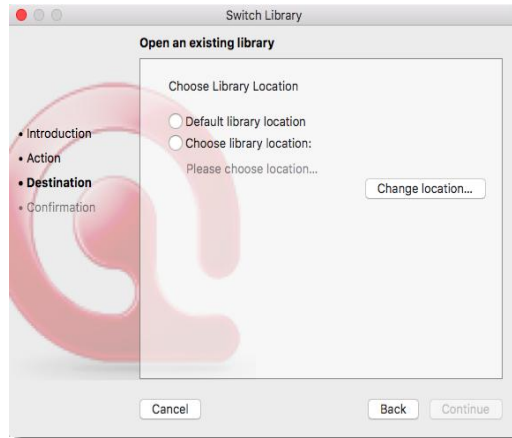


Figure 23: Open an existing library

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 folder for your library. Make sure that your project folder is included in the automated back up routine of your computer.

Creating User Accounts (Mac)

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

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

Password Protection (Mac)

Under the Project menu, you find an option to set a password for your project, or to delete it.

- To set a password, select **PROJECT / CHANGE PASSWORD**.

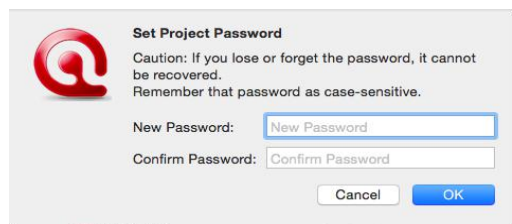


Figure 24: Set project password dialogue

As stated in the dialogue, a password cannot be recovered– also not by our technical team! Thus, you must make sure not to forget the password. Store it in a secure place.

- To remove a password from your project, select **PROJECT / DELETE PASSWORD**.