ATLAS.TI: Working with Teams & Merging Documents

FIRST STEP
TEAM MANAGER

CREATE THE PROJECT to be Shared and Worked on By All.
*Note: Your team cannot merge HU's. Have to start out all working on the same HU that is shared with each other.

ADD ALL THE DOCUMENTS THAT WILL BE USED IN THE PROJECT
*Note: Can go back and add more documents later, but best if you don’t have to

ADD CODE BOOK
*Note: Can go back and add more codes.

SECOND STEP
TEAM MANAGER

Save the Project: Save As

CREATE A COPY BUNDLE OF THE PROJECT
SEND THE COPY BUNDLE TO ALL RESEARCHER/CODERS

THIRD STEP
RESEARCHERS / CODERS

FIRST. OPEN THE COPY BUNDLE
SECOND. SAVE PROJECT WITH YOUR NAME AND DATE
PROJECT>>> SAVE AS >>> Project Name_Your Name_Date
THIRD.  LOGIN WITH YOUR USER ID.
TOOLS>>> USER MANAGEMENT>>> SWITCH USERS>>>WRITE YOU NAME INTO THIS BOX BELOW “ATLAS.TI User Account” (as if you are writing over the word in there – super, guest or admin) >>> Hit OK

*NOTE IF YOU SKIP THIS STEP: THEN IT WILL NOT BE POSSIBLE TO IDENTIFY YOUR WORK WHEN MERGED WITH THE ENTIRE TEAM PROJECT.

*NOTE EACH TIME: EACH TIME YOU RE-START YOUR PROJECT – YOU WILL NEED TO DOUBLE CHECK THAT YOU ARE LOGGED WITH YOUR USER ID. THE SYSTEM WILL NOT PROMPT YOU TO DO SO!!

FOURTH STEP
RESEARCHERS ARE READY TO START CODING.

*NOTE MAKING CHANGES TO CODE BANK WHEN CODING: IF YOU ENTER A CODE THAT IS NOT IN THE ESTABLISHED CODE BOOK, YOU MAY WANT TO PUT A COMMENT ON THIS QUOTATION OF THIS CODE EXPLAINING WHY YOU CHOOSE TO DO THIS.

*NOTE TO MAKING CHANGES TO DOCUMENTS IN PROJECT: PLS DO NOT ADD DOCUMENTS, EDIT DOCUMENTS, DELETE DOCUMENTS – DOING THIS WILL PREVENT YOUR WORK FROM BEING MERGED BACK INTO THE MAIN/MANAGER’S PROJECT.

FIFTH STEP
WHEN YOU ARE DONE CODING.
SAVE YOUR CHANGES TO YOUR PROJECT USING SAVE OR SAVE AS PROJECT>>> SAVE AS >>>  Project Name_ Your Name_ Date
*Note: You are NOT saving as a BUNDLE
*Note: The Name at the Top of the Document will not Change.
SEND THE SAVED PROJECT TO YOUR TEAM MANAGER.
It should look like this with extension .hpr 7

Team Merger_Sarah_08Feb2016.atlc.bpr7

*NOTE SAVE YOUR CHANGES: IT IS ALSO RECOMMENDED TO SAVE YOUR PROJECT AS A COPY BUNDEL JUST TO HAVE A BACK UP STORED ON YOUR GOOGLE DRIVE OR DROPBOX.
Merging Documents from Various Researchers by the Team Manager:

Open Up the Copy Bundle HU that you sent out to research/coding team
PROJECT>>> Merger HU>>> (click on the little yellow folder) SELECT THE
SAVED PROJECTS FROM EACH OF YOUR RESEARCH TEAM MEMBERS ONE AT A TIME

*NOTE THE MERGER MANAGER (Step 3):
MAKE SURE YOU CHECK OFF
SAME PDs AND DIFFERENT CODES
CLICK ADD TO QUOTES
(CONTINUE READING THROUGH)

Step 1

Step 2

Step 3

USER ID:
YOU WILL ALSO NEED TO SET YOUR USER ID AS SUPER:
TOOLS>>> USER MANAGEMENT>>> SWITCH USERS >>>(SELECT) SUPER.
(SEE ABOVE SCREEN SHOT)

NOTE REGARDING SEEING AUTHORSHIP OF CODES AND QUOTATIONS
• IF YOU ESTABLISHED A CODE BOOK WHEN YOU SENT THE HU YOU WILL SEE SUPER FOR
AUTHOR OF CODES, THEREFORE TO SEE HOW CODES MATCH UP GO TO QUOTATION
MANAGER...
  o MOVE THE COLUMN CODE AND USER ID NEXT TO EACH OTHER TO SEE WHO CODE
WHICH QUOTATION

• CODE MANAGER – AUTHOR = CREATED THE CODE
• QUOTATION MANAGER - AUTHOR = CREATED DESIGNATION OF A QUOTATION
  / PUT A CODE ON THAT SENTENCE MAKING IT A QUOTATION

• IF YOU DID NOT ESTABLISHED A CODE BOOK WHEN YOU SENT THE HU YOU WILL SEE
USER ID NAME FOR AUTHOR OF CODES
CONSENSUS BUILDING
YOU WORK THROUGH THE CODES AND QUOTATIONS REVISING AND BUILDING CONSENSUS.

MERGE CODES. HIGHLIGHT THE PRINCIPLE CODE AND RIGHT CLICK >>> MERGE CODE>> SELECT CODE THAT SHOULD MERGE INTO THAT PRINCIPLE CODE.
* NOW THOSE CODES’ NAMES WILL BE CHANGED TO THE PRINCIPLE CODE’S NAME
*NOTE: YOU CAN ALSO RENAME CODES

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Repeat Process if you would like to send out a additional documents- or- start coding next round of documents using a revised code back.

So – re-bundle the HU with the new code book and documents.

COPY BUNDLE (new date) SEND OUT to research /coding team

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Questions to Atlas.Ti or NYU Data Services
Offer for a Webinar to Explore the Merger Process Further

See this Atlas.Ti Document for further reference

Outstanding Questions:
Still some confusion using the User Manager Feature.