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 8, which shows the process for creating code groups).
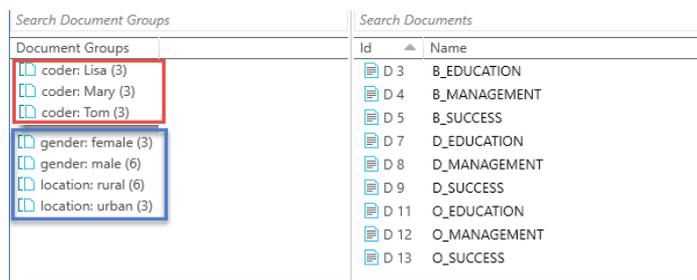


*Figure 4: Example for the use of document groups in team projects*

## 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 10).

### 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 5: 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.
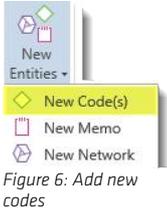


Figure 6: Add new codes

▌ 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 7: 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.
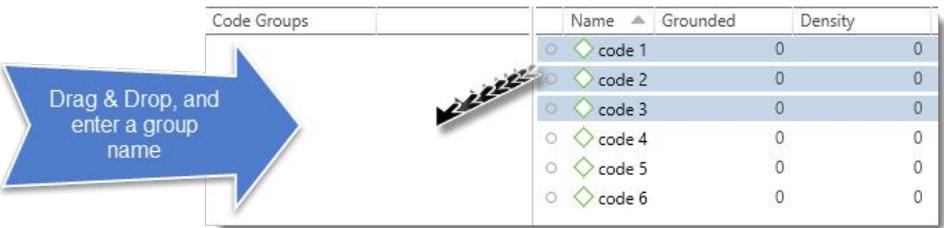
▌ Enter a name for the group.



Figure 8: Creating a group in a manager

## Saving The Project



Figure 9: 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".