Step One: New User Registration

The first step is new user registration from the CAT home page.

1. Go to the website: http://cat.ucsur.pitt.edu/
2. Select "click here to register for a new account."

The following steps will take you through the **"New User Registration"** for the person who going to be the **primary account** holder. A primary account holder controls who has access to the data management, coding, analysis and reporting in the new user's account.

1. Create unique user name and password.
2. Provide required background information (first/last names and e-mail address).
3. Click on the confirmation link you will receive in via email.
4. Acknowledge the privacy and security statement.
5. Your account will be authorized (this may take a few minutes or a few days).
6. You will receive an email when your username and password are authorized.

> ***Note:*** *As a first time user you will need to create coder sub-accounts,* ***unless you are the sole coder****. You can create unlimited number of sub-accounts.*

Forgot Your Password?

If you forget your password and want to reset it, select:

1. "Click Here" on the home page to the right of the username and password field.
2. Enter your username and email address
3. A new password will be generated and sent to you.

If you cannot remember your username or your email address is wrong, contact Dr. Stuart Shulman (mailto:stu@polsci.umass.edu) for assistance.

To Login

Go to the CAT Home Page: http://cat.ucsur.pitt.edu/

1. In the Login fields type your Username and Password.
2. Then select Login.
3. You will be taken to the main page.
4. The username will appear in the left hand corner of the main page.

Step Two: Preparing a Raw Dataset for Coding

You can upload and code a dataset from a file with text formatted in one of three ways:

1. a plain text file (.txt)
2. a zip archive of plain text files (.zip)
3. an XML file (.xml).

Data Preparation When Using a Single Plain Text File

CAT relies on predefined spans of text to enable the auto-loading of discrete items or what we call **"codeable units"** during the coding process. Unless you use one of two special delimiters, the system assumes you want to apply your codes to the entire document.

If you upload a single plain-text file, the coding system will present the codeable units one at a time consisting of the text lying in between each pair of blank lines. The blank link is the delimiter in just this case (*only for the single text file dataset*).

When uploading a single .txt file as your raw data, prepare it as follow:

<**text to be coded**><hard return>
<hard return>
<**text to be coded**><hard return>
<hard return> …

Data Preparation When Using a .zip Archive of Plain Text Files

If you upload a collection of plain text files in a .zip archive, the system assumes that each document is a "codeable unit." You can, however, insert a special delimiter in your raw data:

==--endcodeableunit--==

This delimiter allows you to upload a .zip archive of two or more files and still code at the sub-document level, rather than whole document level. As with the single text file, the span of text to be coded is up to you (e.g., a sentence, a question/answer pair, a paragraph, etc.).

The delimiter has to be on a line all by itself - that is, you need to have:

<**text to be coded**><hard return>
==--endcodeableunit--==<hard return>
<**text to be coded**><hard return>
==--endcodeableunit--==

Note: Be sure to save your raw data files as "plain text" (.txt) files.

Data Preparation using an XML File

The system will verify that it conforms to the correct schema definition and process the file as such. This schema may be found at: http://cat.ucsur.pitt.edu/resources/codeupload.xsd

A sample XML document and tips on using the XML upload functionality can be found at: http://cat.ucsur.pitt.edu/resources/codeupload.xsd

Preparing the Code File (*optional, but recommended*)
If you do not upload a code file, you will have to opportunity to define the codes on the next screen as well as assign the keyboard keystrokes associated with each code.

There are three parts to the code file, which also must be a plain text (.txt) file:

1. the code name (e.g., yes, borderline, no)
2. the definition (e.g., yes, this is new information)
3. the key stroke (e.g., 1, 2, or 3)

The definition is preceded and followed by a "pipe" or vertical line |. The pipe is found on the key with the backslash, just above the Enter key. Press Shift and Backslash to make the pipe.

The content of a sample code (.txt) file might look as follows:

No|No, no specific new information provided|1
Borderline|Boundary case|2
Yes|Yes, specific new information provided|3

Uploading New Raw Data File and Code File
Once your dataset and code file (optional) are prepared you may upload them for viewing and coding. Navigate to the Upload New Raw Dataset page. You will have several options:

Raw Dataset Name: If you do not give it a name it will take the default file name
Raw Data File: Click Browse to select the file with your prepared raw data
Code File: Click Browse to select the file with your code list
Data Format Style: Choose Standard or Word-by-Word (most will use Standard)

Three other **extremely important** options are options available to be selected on this raw data upload page.

- **Disable verification for user-defined and multiple coding.** Check this box to remove a step where coders review their selections and verify the choices are final. Check this box to enable confident coders to work rapidly through a high-volume coding projects.
- **Allow user-defined codes.** Check this box to enable the creation of new codes during the coding process.
- **Allow coder to select multiple codes.** Check this box to allow coders to select more than one code per codeable unit.

To complete this step in the process, select **Upload**.

Add/Edit Raw Dataset Codes
At this point, you may edit the uploaded codes and add new codes. Once you are finished with the Add/Edit Raw Dataset codes section, select **Finish**. Confirm that you are finished and the dataset will be uploaded and listed in the Raw Dataset table. Click on the link file name in the dataset column on the **View Raw Dataset** page.

Assign Coders
Follow these steps to assign coders to your project:

1. Select V**iew Raw Datasets**. Choose from available coders. As a first time user, you will need to create sub-accounts for new coders, but the primary account holder is available as a coder by default. You can create an unlimited number of sub-accounts.
2. Click on the **Manage Sub-accounts** link on the account drop down menu.
3. On the following screen, click on **Add New Sub-Account**.
4. You will be prompted to enter the following:
    - **Username** (one that is not already in use by another account)
    - **Account Type**:
        - **Regular Account:** most users will have regular accounts
        - **Expert Account:** expert accounts are for Co-Principal Investigators, partners, and senior project managers who have higher level privileges with the datasets.
        - Primary Account holders are automatically set to "Expert Account" status
    - **Contact information** (e.g. name, email address, etc.)

This new coder will appear on the sub-account list as the first new coder. The person with the sub-account will receive an email and must go through a confirmation process before beginning to code.

5. Click on the data file name and you will see the list of sub-account holders
6. To assign a coder to a project (dataset), click coder's name and select **Add**
7. Click on **Set Chosen Coders** and this coder will be added to the table listing the coders assigned to that dataset. This table allows you to track by user name, real name, total time, number of items, and average time they spend coding.

Step Three: Code Datasets

Once a primary or secondary account holder is assigned to a dataset, that CAT user can select **Code Datasets** under the **Datasets** drop down menu. At the **Datasets to Code** page, you will see a table that includes Dataset Name, # Complete, and Total Paragraphs.

Manage Dataset Permissions
Log in as **Primary Account Holder** and select **View/Upload Raw Data** from the **Dataset** drop-down menu. Click the dataset you want to give access to. You will see the list of **Available Coders** and you can choose as many **Coders** you want to have access to the analytic tools for that project. After you have selected, be sure to press **Set Permissions** to activate the new permissions for that dataset.

Step Four: Analysis of Coded Data

Coding reliability analysis can be done by choosing either **Standard Comparisons** or **Code by Code Comparisons** from the **Analysis** drop down option. For both a Standard Comparison and a Code by Code Comparison:

1. Select the dataset
    - Note: you must have "locked" a raw dataset or else uploaded an ATLAS.ti coded dataset, to have datasets available on this drop down list.
2. Select from the **Available Coders** and "Add" them to the **Chosen Coders.**
3. Select from the **Available Codes** and "Add" then to the **Chosen Codes**

For Standard Comparison, you will be further asked to select a method of comparison, either **Fleiss' Kappa** or **Krippendorf's Alpha**. There is also a box to check if you want to suppress overlaps if none exist. There are no overlaps in CAT-coded data. ATLAS.ti users, however, can generate overlapping spans of text

For Code by Code Comparison, you will be further asked to pick from **Show Comparisons** drop down menu:

1. Exact matches,
2. Overlaps, or
3. Mismatches

You will also pick from the **Sort/Collate By** drop down menu Code, Coder, or Quotation. Once you have chosen the desired choices, select **Run Comparison** and view the table with your results. You have the option of downloading the result as a Rich Text File (.rtf) document.

Step Five: Adjudication – Validating Coded Data

Adjudication is the process of judging coder choices. It involves looking at codeable units one at a time and assessing the validity of the specific coding choices. To

1. Choose the **dataset** to validate.
2. Select **add** or **add all** to select codes.
3. Select **continue** to begin. If the dataset has already been partially validated, the validation will start where it was left off.

You can exit the validation at any time by clicking on the navigation links to the left. The next page will contain the following items:

- Change code filter option
- Code(s)
- Paragraph being adjudicated
- For each annotation, the next un-validated coder annotation will be displayed with the current code to be adjudicated in **bold red letters**. Click the **valid** button if the annotation is correct or the **not valid** button if it is not. Alternatively, you can press the keys "1" or "Y" if the annotation if valid, or the keys "3" or "N" if it is not.

- Number of paragraphs left to be validated
- Codes chosen by which coders
- File name and paragraph numbers will also be given

View and Edit Validated Dataset

1. Choose the dataset.
2. Choose the coders.
3. Choose the codes.
4. Click **edit validations.**
5. Review the validity of the column.
6. Determine if the number listed in the code column is appropriate. If it's not, select the drop down menu to change the code.
7. When complete, on the top navigation bar, select **validations** and then **check coder statistics**.
8. Select a coder from the drop down menu. For each coder, you can view their statistics.
9. Select **validations**, select **view dataset statistics**.
10. Select the dataset to view. For each coder, you can view his/her statistics.

Step Six: Reports and Memos

1) Log in as the **Primary Account Holder**.
2) Press **Reports** from the main navigation bar and select **Dataset Reports**.
3) Choose the **Dataset** and select the elements for your report, the coders, and the codes and click **Generate Report**.

Adjudication Reports

1) Log in as the **Primary Account Holder**.
2) Press **Reports** from the main navigation bar and select **Adjudication Reports**.
3) Choose the **Dataset** and select the codes, the coders, and the elements for your report and click **Generate Report**.

Viewing Memos

1) Log in as the **Primary or Sub-Account Holder.**
2) Press **Memo** from the main navigation bar and select **View Memos.**
3) Choose the desired filter from bookmark text or by the dataset.
4) The exporting function allows you to send the memos to a CSV/Excel file or RTF.

Step Seven: Manage Account Information

1. On the **Account** drop down menu, select **Change Password**. Type in your current password, the new password, and then confirm your new password. Select **Change Password**.

2. On the **Account** drop down menu, select **Update Account Information**. Enter new or updated information and select **Update Account**.

3. Under Manage Sub-Accounts, you may create another sub-account. Choose **Add New Subaccount** at the top of the page and fill in the required fields (*) and press the "**Create Account**" button when complete. An e-mail will be generated and sent to the new subaccount holder with a link to a page where they will need to validate their account. Once their account is validated, they will be able to choose their password and will be granted access to the website.

4. On the **Account** drop down menu, select **Manage Subaccounts**. To edit a subaccount, click on the "edit" icon at the far left and update the information as requested. You have the option of limited functions for the sub-account user