

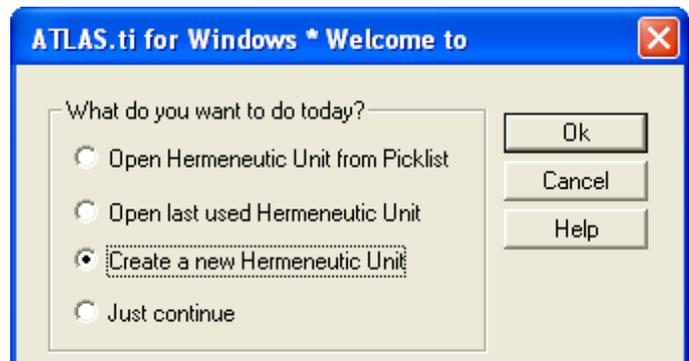
ATLAS.ti 5.5: A Qualitative Data Analysis Tool

Part V: Create and manage a basic HU

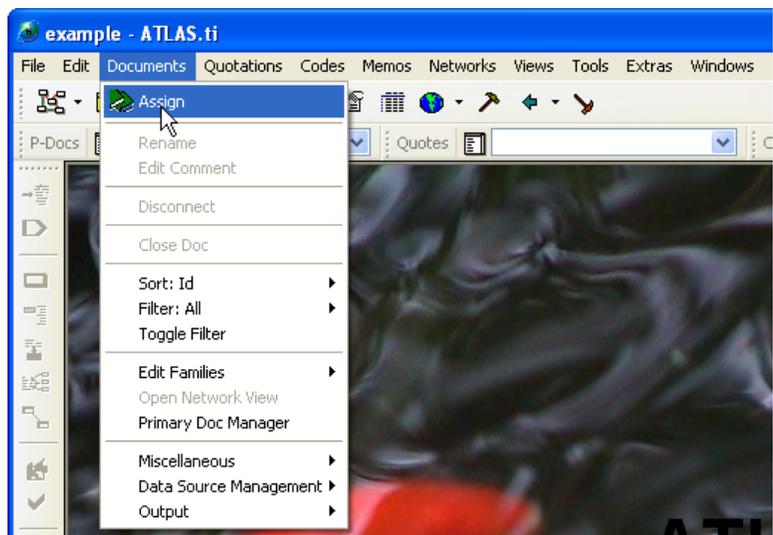
There is no right or wrong way to create and manage an HU, as stated earlier in this document. There are, however, some steps that you simply must execute to get started.

One of the most important steps is to think about organization before you start a new HU. It is in your best interest to save your HU and PDs in the same folder.

If you have different types of data, i.e. text, audio, video, it is recommended that you create different folders for each type of media.



1. Open ATLAS.ti. You will see a blank workspace and the following window.
2. If this is your first HU, your only option is to create a new HU.
3. Notice that the program did not prompt you to save; you must do this immediately.
4. Go to the main menu. Select **File – Save As**. Make certain to save your new HU in an appropriate source.
5. Once you have saved the HU, you will need to attach any PDs that are ready to analyze.
6. Go to the main menu. **Select Documents – Assign**.



7. Highlight all documents (PDs) you want to link to your HU. You can select more than one document by holding down the **SHIFT** key and using your mouse to select all documents you would like to assign to your HU. Click **Open**.

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Tip:

You can also use a drag & drop method to assign PDs to your HU. Simply open the file in which your PDs are stored; drag the file you want to assign to the HU into the ATLAS.ti workspace; and drop it. The file will open in the workspace and appear in your PD drop-down menu.

- Now all of those PDs are linked to your HU.
- You should now see all of these documents listed in the drop-down PD menu in your workspace.
- You can bring a PD into your workspace by selecting it from the drop-down menu.

Note:

You can assign a PD at any time or a single PD multiple times to your HU. ATLAS.ti assigns your PD a number as it is assigned (PD 1, PD 2, PD 3...). This is helpful if you plan to use a single document more than once in your project but want to code it in a different way.

- If you would like to remove a PD from the HU, go to the **Documents** menu or right-click the PD in the drop-down list. Select **Disconnect**.

Note:

Disconnecting a PD before it is analyzed is a simple action, but this action is far more complex after you've assigned quotations and codes to a PD. Unless you do not plan to use that PD or its associated quotations in your project, it is a good idea to disconnect it.

If you do decide to disconnect a PD with attached quotations, you will be asked whether you want to remove its quotations. You will not be deleting the PD's text; you will simply disconnect those links to the PD and the PD itself from the project.

