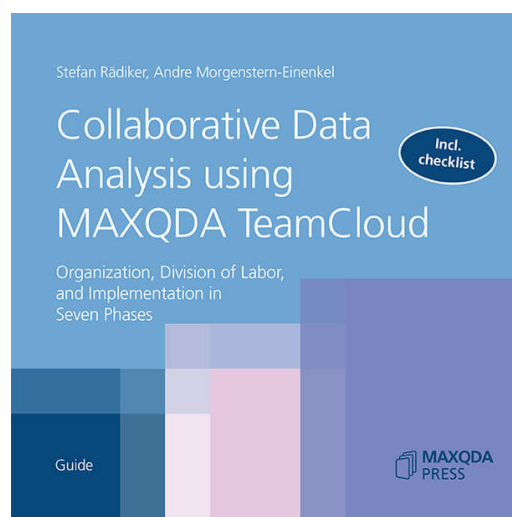




MAXQDA TeamCloud – Getting Started –

Extended excerpt from this MAXQDA Press guide:



www.maxqda-press.com

How does MAXQDA TeamCloud work?

MAXQDA is a single-user program that does not allow several people to access the same project file at the same time. With the help of TeamCloud, several people can work on local copies of a MAXQDA project file on their individual computers simultaneously. Using TeamCloud, they can easily exchange their analysis progress via the internet and merge their projects into a main MAXQDA project file. The principle of collaboration with TeamCloud is simple to explain:

1. The team lead opens or creates a normal MAXQDA project file, starts the first project cycle, invites team members, and makes the team project available to the members via TeamCloud.
2. The members download the project, work on it, for instance, write memos and code the data assigned to them, and upload the project back to TeamCloud.
3. The team lead imports the members' projects into its own project. This lead's project is the so-called main project, where all analyses, new documents, new codes, etc. are merged.
4. If necessary, the team lead can start the next teamwork cycle now, whereby the team lead makes the updated main project available to all members via the TeamCloud again.

Team lead and team members

We need to distinguish two roles when using TeamCloud: per TeamCloud project there is one *team lead* and by default up to four *team members*. All persons need a TeamCloud account, which you can create for free via teamcloud.maxqda.com. Only the project lead needs a paid TeamCloud license in addition to the MAXQDA license, the project members only need a MAXQDA license.

Not all MAXQDA licenses entitle the user to purchase and use a TeamCloud license. Detailed information can be found in the manual:

www.maxqda.com/help-mx22-teamcloud/start/the-teamcloud-license

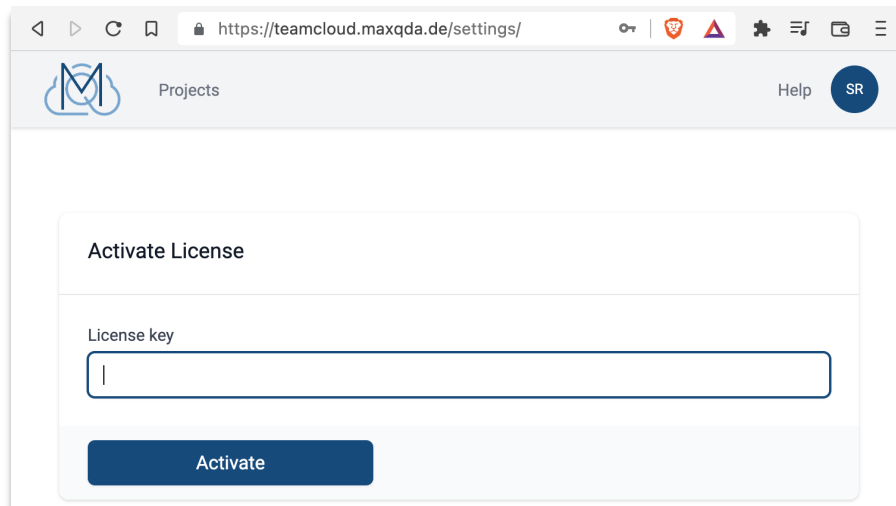
Collaboration is established on a project-by-project basis, which means you can be a team lead in one project and a team member in another at the same time. The number of projects per account is not limited, but the available storage space is. This is currently 25 gigabytes by default, which is a real limit only for larger projects containing a lot of video data.

The project cycle in detail

Teamwork in qualitative research projects often takes place in several cycles. For example, in the first cycle interviews are transcribed and documents are added, in the second cycle a code system is developed, and in further cycles the data is coded. Working with MAXQDA TeamCloud follows this principle and is organized in so-called project or teamwork cycles. The process is as follows:

One-time preparations

1. The *team lead* purchases a TeamCloud license:
www.maxqda.com/help-mx22-teamcloud/start/the-teamcloud-license
2. The *team lead* creates a free account on teamcloud.maxqda.com and enters the license in the account settings in the web interface. This will authorize the team lead to work in projects as a team lead, which means he or she can start team projects and share them with the members via TeamCloud.



Activate TeamCloud license on the TeamCloud website

3. The *team members* create a free account on teamcloud.maxqda.com.
4. The *team lead* prepares a normal MAXQDA project to be used for teamwork. This project can be empty, but usually you will already import documents and already create some codes and memos.

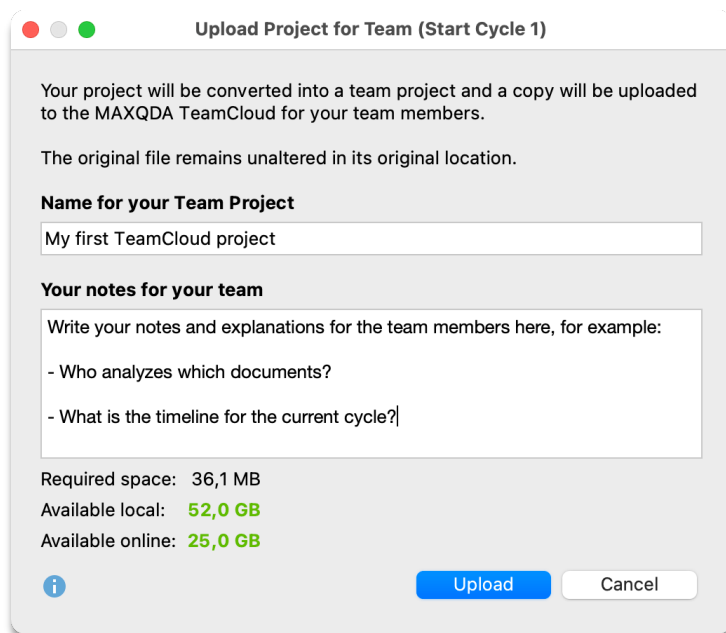
Starting the first cycle

5. The *team lead* switches to the **TeamCloud** menu tab in the open MAXQDA project and logs in to TeamCloud by clicking on the **MAXQDA TeamCloud Sign In** icon.
6. The *team lead* starts the first project cycle by clicking **Upload Project for Team (Start Cycle 1)** on the **TeamCloud** menu tab.



Start first project cycle by uploading the project to TeamCloud

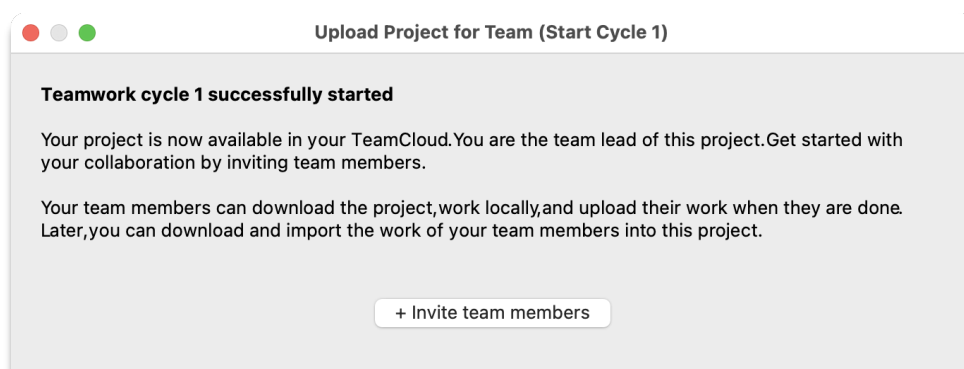
- In the dialog that appears, the *team lead* enters a project name and writes explanations and notes for the first project cycle in the so-called team lead comment.



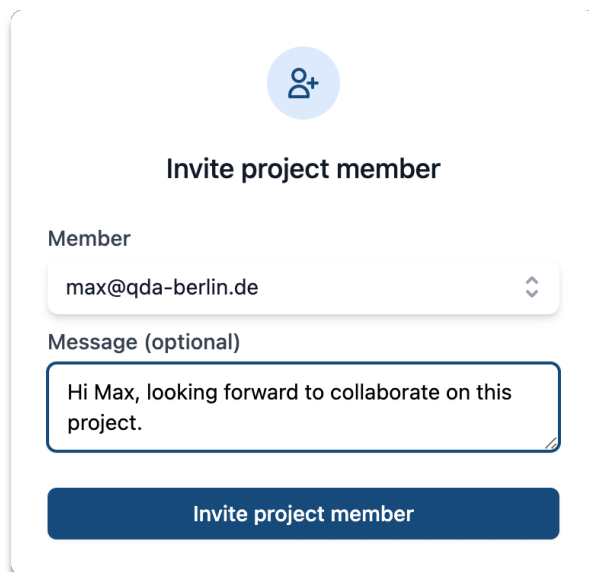
Team lead enters a name for the team project and starts first cycle

By clicking on **Upload**, the project is first converted into a TeamCloud project and saved locally on the team lead's computer in a folder managed by MAXQDA, the so-called TeamCloud workspace. Immediately afterwards, a copy is uploaded to TeamCloud.

- The *team lead* clicks **Invite team members**. The TeamCloud website will open where the lead can invite up to four members to the team project using their email addresses.

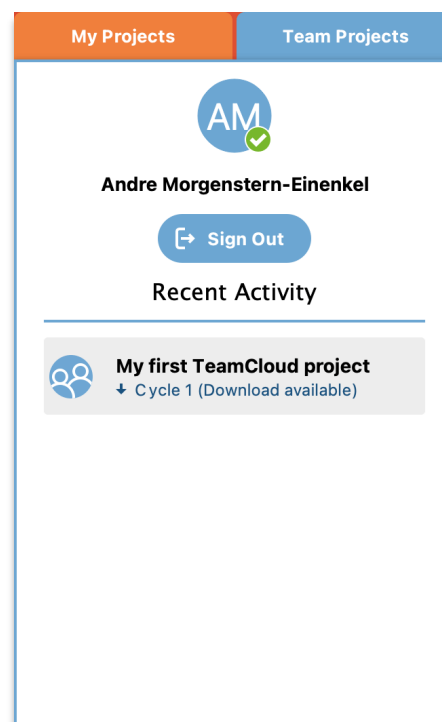
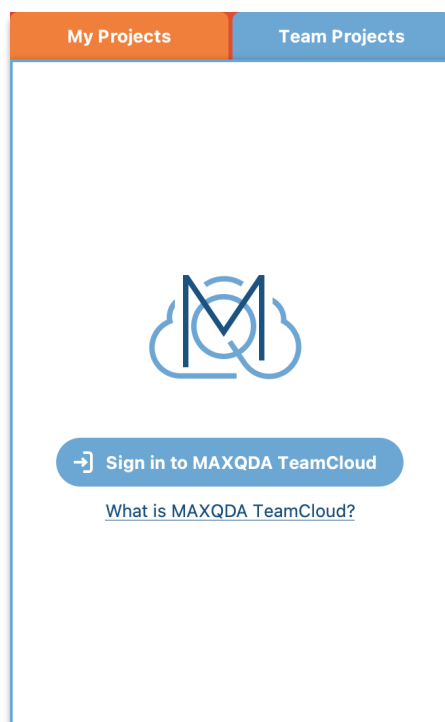


Clicking the "+ Invite team members" button opens the TeamCloud website



On the TeamCloud website, invite members to the project based on their email address

9. The *team members* receive an email containing an invitation to the team project. The invitation must be confirmed by clicking on a link or button.
10. The *team members* open MAXQDA and log in to TeamCloud on the start dialog by switching to the **Team Projects** tab. After logging in, the team project appears on the start dialog and can be opened by double-click.



Logging into TeamCloud on the MAXQDA start dialog (left) and available TeamCloud projects (right)

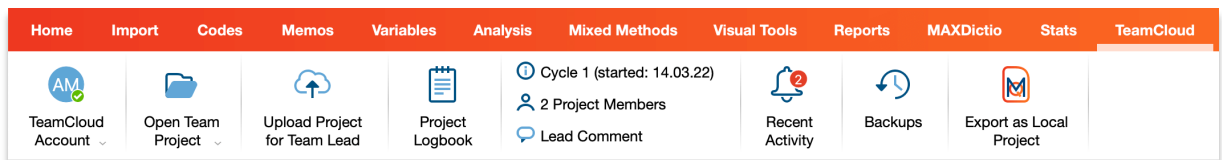
On-going cycle

11. The *team members* work on their local copies of the project, e.g., they code texts, write memos, transcribe audio recordings, import documents. They can close MAXQDA at any time and continue working on the project later.
12. The *team lead* can also continue working on their team project and can close and reopen it at any time. It is only important to make sure that they do not open the original, “non-TeamCloud” MAXQDA project, but the converted team project that is displayed in the **Team Projects** tab of the MAXQDA start dialog.

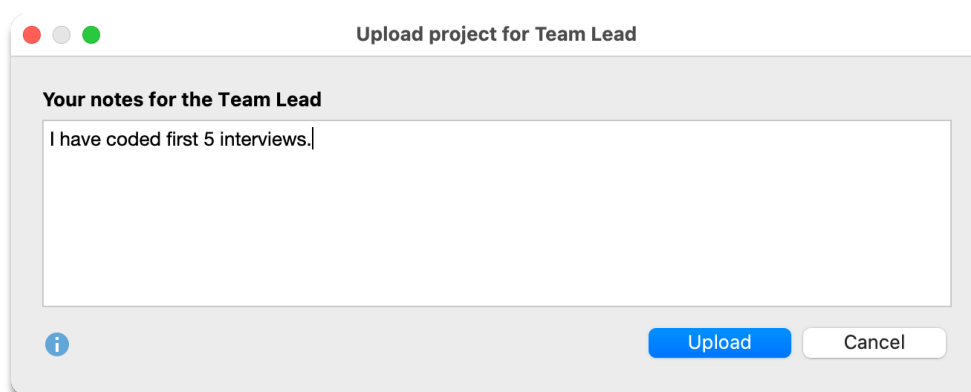
Since the team projects are available locally, everyone can work on their projects at any time, even if there is no or only a poor internet connection available, for example while being on the road. They only need to be online to upload and download the project with MAXQDA.

Closing the cycle: Merging the member's work into the main project of the team lead

13. After completing their work, the *team members* upload their team projects to TeamCloud by selecting **TeamCloud > Upload Project for Team Lead** in MAXQDA. In the dialog that appears, they can add notes for the team lead, e.g., which documents they have worked on.



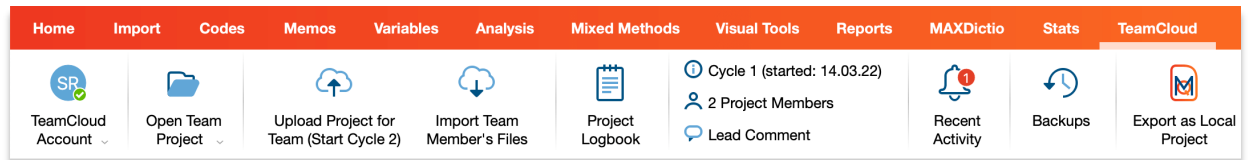
TeamCloud menu tab of team members



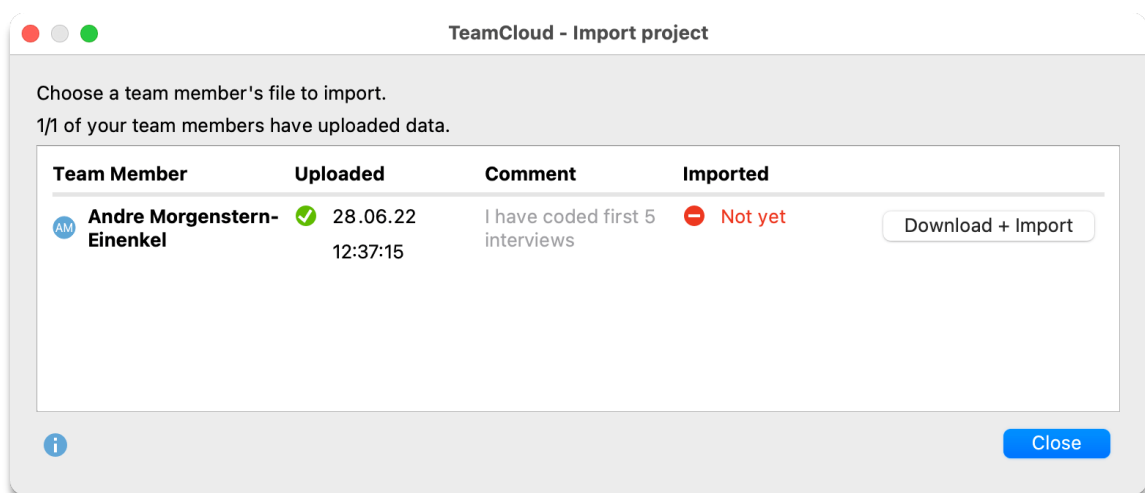
Team member uploads project to TeamCloud

14. The *team lead* is notified by e-mail when team members' projects are ready to be imported into the main project. Furthermore, a new activity is visualized on the MAXQDA **TeamCloud** menu tab via the **Recent Activity** icon.

- The *team lead* selects **TeamCloud > Import Team Members' Files** and clicks **Download + Import** in the list of available projects that appears. The lead can select in detail which analysis elements should be imported for which documents. MAXQDA uses a simple logic when importing: the new and updated elements are imported and overwrite older elements if necessary. Thus, the main project is always up to date. Elements deleted by members are not deleted from the main project.



TeamCloud menu tab of team lead

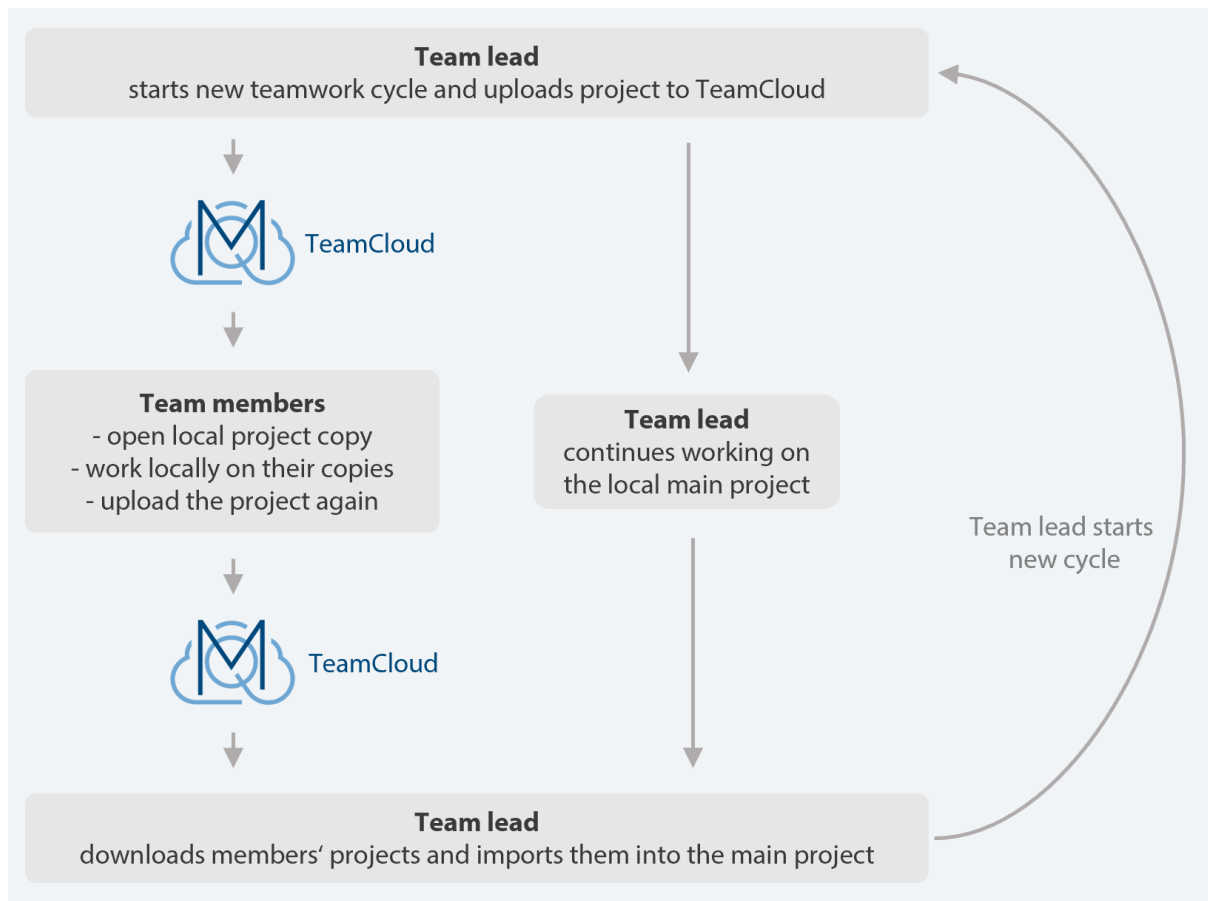


Import files of team member

The *team members* can upload their status of the project file several times in one cycle. Each time the project is uploaded to TeamCloud, the previous upload is overwritten. The *team lead* can import all project versions of a team member into the main project in one cycle.

Starting additional cycles

- If necessary, the *team lead* can start another cycle using the **Upload Project for Team (Start Cycle x)** function again. The next cycle should only be started if all team members' work from the current cycle has already been imported.
- The *team members* are notified by e-mail about the start of the new cycle. As soon as they select the project to open in MAXQDA, the current version of the project will be downloaded and opened. Any changes that a member has made *after* uploading his or her own work (e.g., additional codes added and additional text passages coded) will, of course, be overwritten.

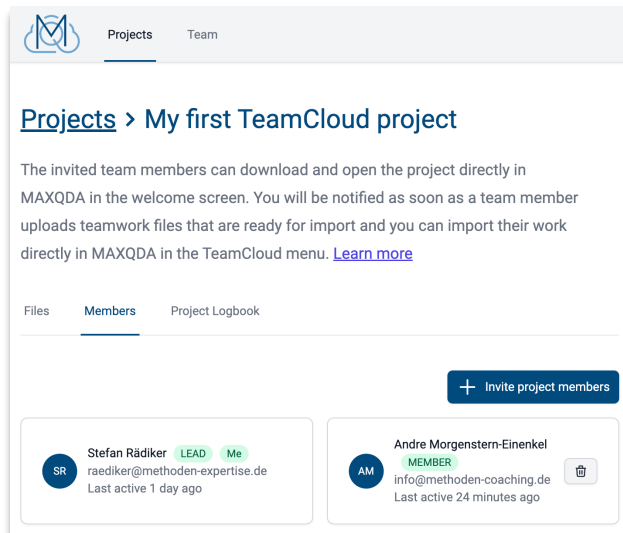


Overview of the teamwork cycle

Tip: To get started, it is recommended to create a TeamCloud project on a test basis and familiarize yourself with the workflow and the various functions before starting a real project.

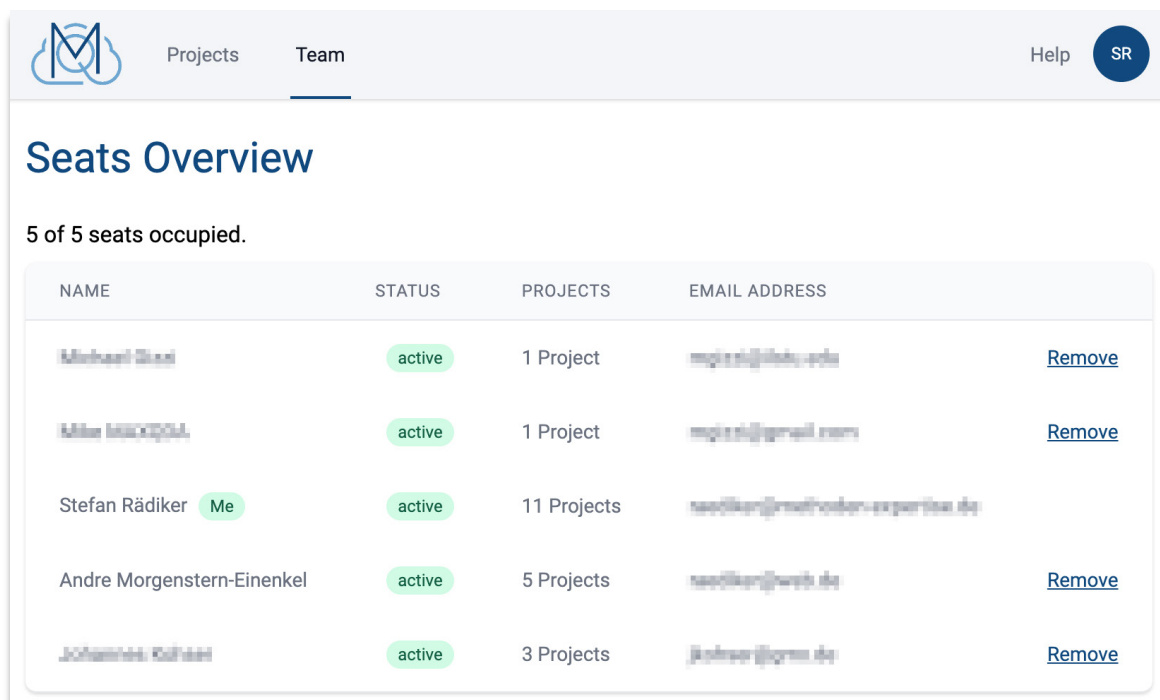
The TeamCloud website: Manage project members

Clicking on the **Project Members** function on the **TeamCloud** menu tab in MAXQDA opens the TeamCloud website (teamcloud.maxqda.com). There you can invite additional members to a project or remove them from a project at any time.



On TeamCloud website: Adding members to a project or removing them

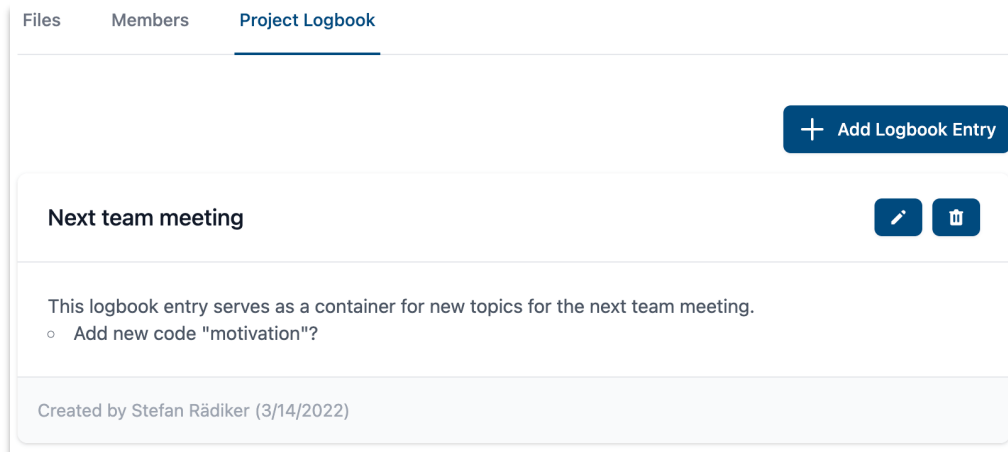
All people who have joined one of your projects are listed under the "Team" menu item on the TeamCloud website. Individuals can be assigned to multiple projects, but the total number of team member seats is limited; by default, five team member seats are available. The number depends on the license used and can be increased upon request to the MAXQDA team: <https://www.maxqda.de/kontakt/verbi-software>



On TeamCloud website: Overview of occupied seats

The TeamCloud website: Access the logbook

On the TeamCloud website, there is also a logbook available that can be viewed by all persons involved in a project and can be accessed directly from MAXQDA. This logbook can be used to record important decisions regarding the analysis process and organizational matters.



On TeamCloud website: Global logbook

Important notes on file management

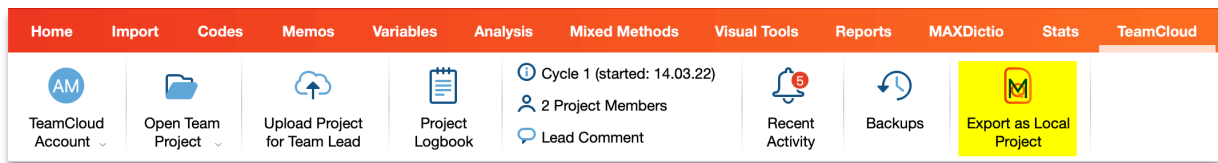
Set local storage location for team projects

By default, all team projects are stored in a folder managed by MAXQDA on the local hard disk. The storage location can be changed, if necessary, via the menu item **TeamCloud > TeamCloud Account > Preferences**.

Create and manage backup files

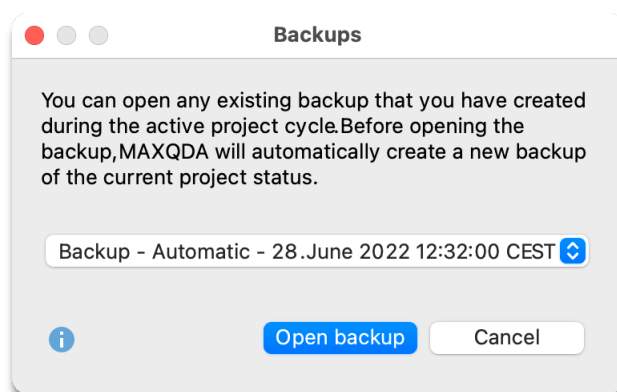
Whether working on a project in a team or alone, copies of the MAXQDA project files should be created regularly and archived. On the one hand, the copies serve the purpose of transparency since the copies represent snapshots at different points in time by which the progress of the project can be traced. On the other hand, the copies serve as backups. They can be accessed, for example, if an unintentional change can no longer be automatically undone, because MAXQDA has been closed in the meantime. We therefore recommend creating a copy immediately before major changes—e.g., a far-reaching revision of the code system (transparency) and possibly even additionally at the end of each working day (technical backup).

Manual project copies can be created at any time by selecting the **TeamCloud > Export as Local Project** function. This creates a “standard” MAXQDA 2022 project file with the file extension .mx22 that can be opened with all MAXQDA 2022 installations.



Start export as local project in the TeamCloud menu tab

If automatic backups are enabled in the global MAXQDA preferences, MAXQDA creates a backup in the local storage location for team projects when a TeamCloud project is opened the first time a day (the interval for backups can be changed in the global preferences). The backups are available for an opened TeamCloud project via the menu item **TeamCloud > Backups > Open Backup**, but only from the current project cycle.



Dialog to select a backup

Tip: You can request the creation of a backup at any time via **TeamCloud > Backups > Create Backup**.

The backups from older cycles are also located in the local storage for team projects. They can be accessed manually if needed. However, they cannot (and should not) replace a project from the current cycle. To use them, the team lead must first make any outstanding imports of team members' files. Then the main project is exported as a local MAXQDA 2022 project and opened as a "normal" MAXQDA project. Using the functions **Home > Teamwork > Export/Import Teamwork**, the missing data from a team member's project is transferred to the main project and the team lead starts a completely new team project.

Manage externally stored files

Audio and video files as well as large PDF and image files are not saved in a MAXQDA project file by default but are linked to it as external files. For team projects that are managed via TeamCloud, it is not necessary to worry about providing the external files for the team members, because the management of these files is automated by MAXQDA. All audio, video, image, and PDF files of a team project are automatically stored in a local folder and MAXQDA synchronizes the files via TeamCloud with all computers on which a team project is downloaded.

When a team member imports a new PDF document into their project during a teamwork cycle, the PDF file is copied to TeamCloud when the project is uploaded for the team lead, and it is copied to the lead's computer when imported into the main project. When a new teamwork cycle is started by the team lead, the PDF document is then available to all team members.

Switch computers

What should be considered if the team lead or team members want to switch computers?

- During a teamwork cycle, all persons should only work on one computer. It is not (reasonable) possible to work at home on the laptop and at work on another computer without risking data loss.
- The *team lead* can switch computers by following these steps:
 1. The *team lead* starts a new cycle on the old machine (after all team members' files were imported),
 2. opens MAXQDA on the new computer,
 3. logs in to TeamCloud and
 4. selects the desired project, which will then be automatically downloaded by MAXQDA.
- A *team member* can switch computers by following these steps:
 1. The member waits until a new cycle is started,
 2. opens MAXQDA on the new computer,
 3. logs in to TeamCloud and
 4. selects the desired project, which will then be automatically downloaded by MAXQDA.

Looking for more information?

YouTube Tutorial "Working with the MAXQDA TeamCloud"
www.youtube.com/watch?v=T6wwXWKZfpE

Frequently asked questions
www.maxqda.com/help-support/faq#fndtn-panel18014

TeamCloud Manual
www.maxqda.com/help-mx22-teamcloud/start/welcome