

Exporting and Reporting Data from a MAXQDA Project

Export Functions:

I see two main types of export from a MAXQDA project:

- Taking data elements out of the program to show them to someone who does not have access to MAXQDA (e.g. to discuss key coded data segments).
- Moving analysis elements from one project to another (e.g. sharing a coding scheme within a team).

For each of these procedures it is necessary to identify, and possibly isolate, the required elements before selecting an appropriate function to generate the export file. In each case it will be most important to maintain the integrity of the data being moved, while the formatting and presentation of the data will be of secondary significance.

Reporting Functions:

I think that reporting on a MAXQDA project is mainly concerned with communicating the results of the analysis. In this context the formatting and presentation will be the most important feature of the process as the data will have been transformed by the analysis. The reports will be made up of charts and tables generated with the program and raw data will only be included for illustrative purposes.

Please keep these ideas in mind as we look at several functions in MAXQDA.

It may be a good idea to trial these functions with a small amount of data from an example project before using them with your main data. This can save time if your computer generates a huge file which does not do what you hoped it would.

Aspects commonly found when exporting:

As always, we can look in 3 main ways for the ways to start these processes:

- Main menu ribbons
- Context menus
- Toolbars in the 4 main windows

For those with strong visual minds the icons to look for include the following:

	Export to a MS Office Word document (*.docx)
	Export to a MS Office Excel workbook (*.xlsx)
	Export to an HTML web page format (*.html)
	Main Export function with a later choice of format
	Print

The main menu ribbons which contain export functions are:

- **Codes > Export Code System**
- **Variables > Export Document Variables/Code Variables/Speaker Variables**
- **Reports > Export > Document System/Code system/more ...**

Most of the above are functions suitable for moving the selected elements into another MAXQDA project. For moving a code system, you should look for the formatting option or file type “MAXQDA Code System *.mtr”.

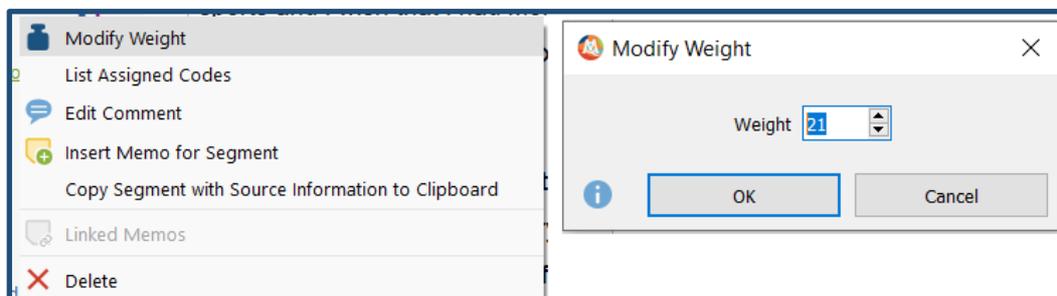
Some of these functions also offer the REFI-QDA system for moving work between compatible QDA software programs.

The **Home** menu includes a function to **Archive Data**. This is sometimes the final stage of a project and it creates a bundle of files which can be submitted to a data archive so that other researchers can re-use your data in the future.

Selecting the data for exporting:

For exporting coded segments, the main route is through activation of the relevant documents and codes and then using the export functions in the Retrieved Segments toolbar. However, this will often lead to too many segments being included and so it can be useful to think about how to refine the process.

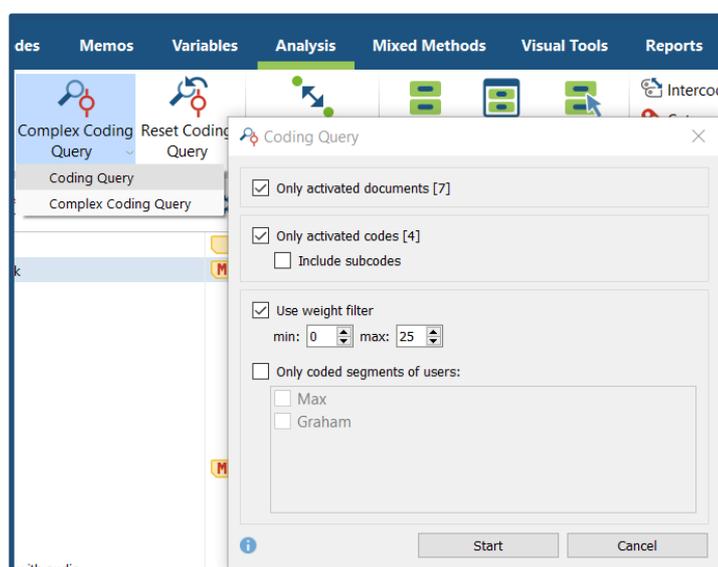
One refinement involves using the weight values that can be associated with each coded segment. These can be applied at any stage from the moment of first coding right through to just before doing the export by using the context menu on the code bracket for that segment.



Actual values of weight to be used are a matter of judgment. One suggestion is to use a range between 0 and 99, with low values (say <20) for weak connections between the code theme and the data, and high values (say >80) for segments which might be exemplars for that theme. If you set the default weight value at 50 (in the global preferences or with a click on the 4th item in the status bar at the bottom of the screen) then you will only need to set a specific weight value for the strong and weak segments.

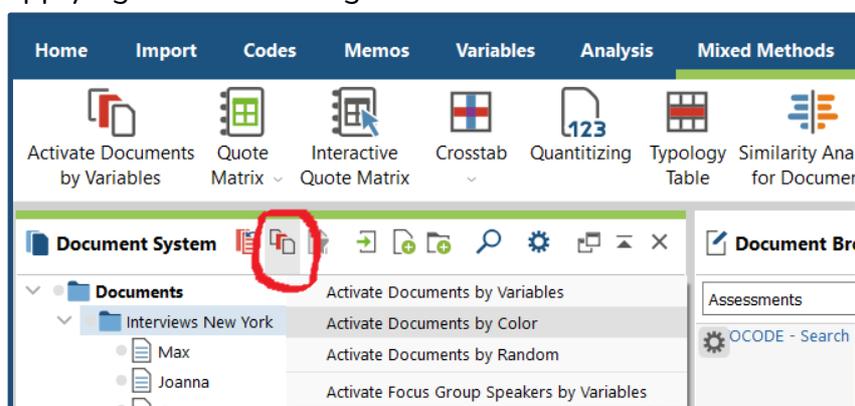
To use the weight values, you will need to use a simple (or complex) coding query and set an appropriate range in the “Use weight filter” fields.

Here only the weakly connected segments will be retrieved.

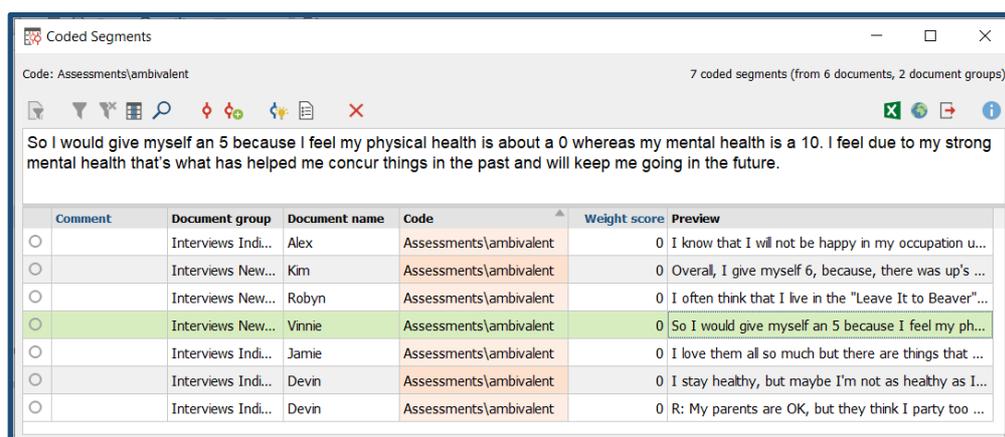


Note that in the illustration above you can see that another filter that can be applied in a coding query is by “users” so, in a team project, you could retrieve coded segments that have been applied by just one selected person.

With Complex Coding Queries you can impose a wide variety of restrictions on the segments to be retrieved before exporting those from the project. And by using the various “Activate Documents by ...” tools on the Document System toolbar you can vary the subset of documents from which the segments are retrieved before applying additional weight or user filters.



Another way of identifying data to be exported uses the context menu on a code in the Code System, and the option “Coded Segments” in the “Overviews” section. This opens a new window with a table display of all the segments attached to this code:



The export buttons can be seen at the right-hand end of the toolbar, and the 4th icon from the left allows you to show/hide the various columns of data about the segments. Although the preview column only displays the first part of each segment, the export will include the full texts. Highlighting one row displays its full text above but limits the export to just that one segment, so remove any highlighting before exporting.

Moving the Code System from one project to another:

This is a different type of export as it does not involve selecting data segments.

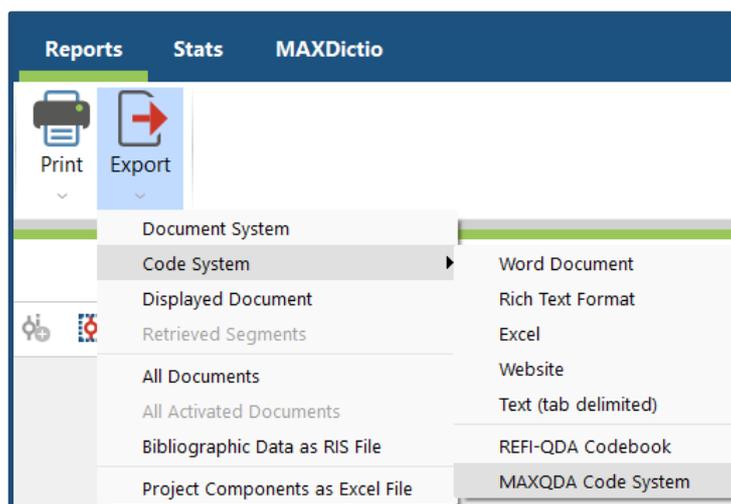
There are at least 3 alternative places to start this process:

- Main menu **Codes > Export Code System**
- Context menu on the highest level of the Code System
- Main Menu **Reports > Export > Code System**

Note that the 2 main menu routes allow you to select the export format with a further menu choice:

Here is the Reports Menu route. Note the range of choices for exporting other elements from the project.

Then there are 7 formats for the Code System. The last is the best for later importing into another project.



If you use the context menu in the Code System window, you will need to choose the format from the “Save as type” pull-down menu in the navigation dialog where you name the export file and choose a location to store it. For later import into another MAXQDA project you should use type “MAXQDA Code System (*.mtr)”.

In another MAXQDA project use the main menu option **Codes > Import Code System** to be taken through navigation dialogs to locate the file created above, in order to install that full Code System in the new project.

This process moves the full coding scheme including any hierarchical structure and all code memos. It does not move any other data, such as coded segments.

Aspects commonly found when reporting:

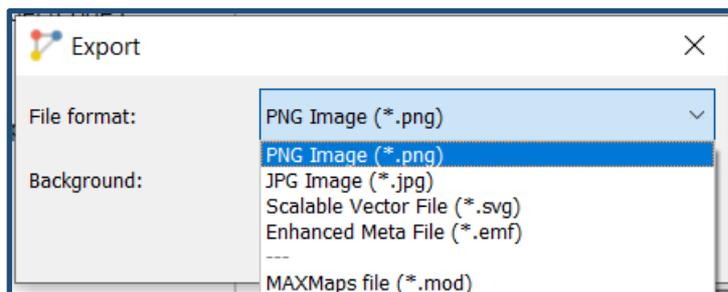
While there is a main menu ribbon with lots of reporting functions, I expect that a lot of reporting is done by exporting the tables and charts with the results of the analysis routines. In any window look out for the same export function buttons as before, plus one other:



Copy current display as an image to clipboard

This is useful for reporting charts and visual representations of the analysis so that you can retain the colourful formatting of your results in other documents and media.

In MAXMaps the Export function offers you a choice of image formats:



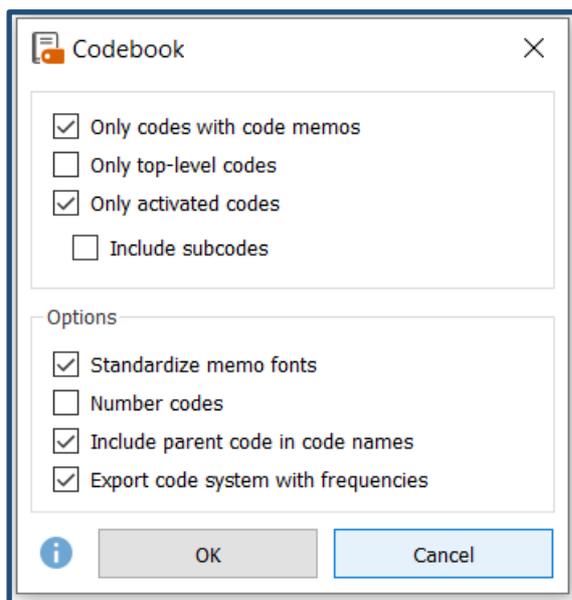
In other analysis functions, any choice of image format for exports may be offered in the “Save as type” pull-down menu in the navigation dialog. For a Code Map, the choices are just *.png or *.svg while, for a Word Cloud, they are *.png, *.jpg, *.jpeg, *.svg, or *.emf .

Any chart, table, map or cloud can be formatted in many different ways within MAXQDA, so it is worth finding which of these export types works best with the destination program you will be using for your final documents or presentations and then making notes so you can repeat the processes easily each time they are needed. You can then use the formatting functionality in MAXQDA with full confidence that what you see will indeed be what you get in the end product.

Other reporting functions:

Let us now look at some of the customized reporting functions in the Reports Menu.

Here is the dialog for setting up the **Reports > Codebook**. This is designed to create an appendix to your report that makes your analysis more transparent.



In the top part you can select codes; effectively you can exclude minor or trivial codes that did not contribute much to your analysis.

This cleans up your memos so that they have a uniform appearance. Code frequencies are optional.

Contrast the Codebook, above, with **Reports>Overview of Codes** which generates a table showing quantitative information about how the codes have been used.

A major reporting output is generated by **Reports>Smart Publisher**. This can easily become an enormous document, so some care is advisable when first exploring its parameters. It will export all coded segments for all the codes that you select, from all the documents that you select, in a structured MS Word type of document with chapters, an index and title pages. It may be a good idea to consider my comments about weight values for coded segments here, as this might be a useful way to keep its volume under control. This is not in itself an analysis of your data, rather it is a structured export of some of your data, using your coding as its framework.

A different approach may be applied by using the Summaries functions in the Analysis menu. If you construct summaries for each important code by document in the **Analysis>Summary Grid** tool, you can then display these in tables and export the tables to report your work in a purely qualitative way.

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