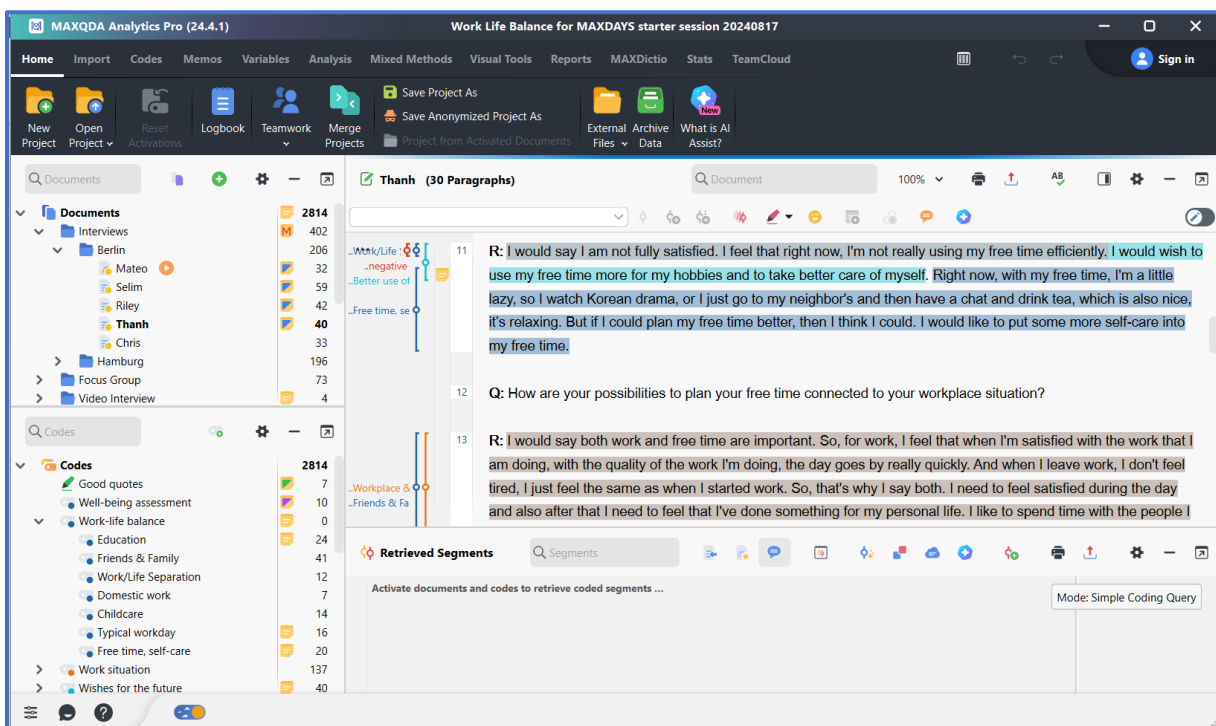
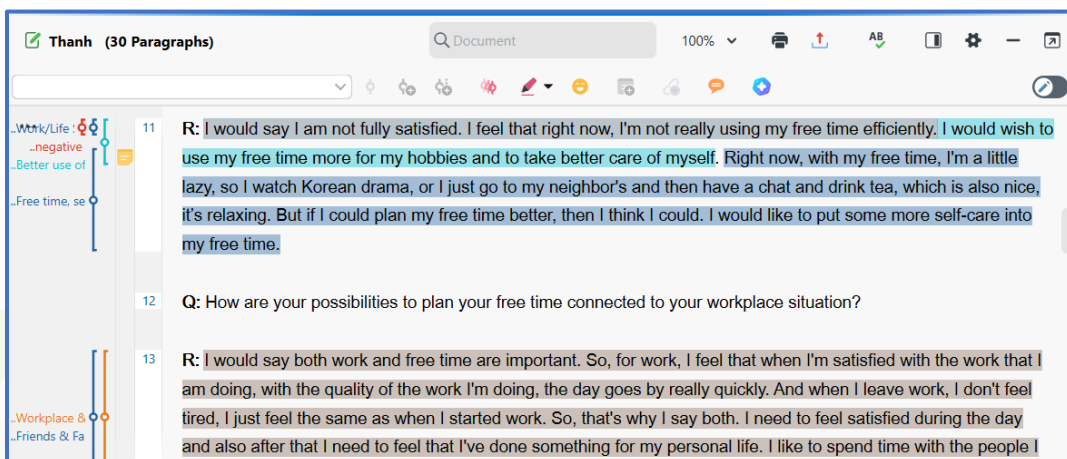


# Get Going! - Early Steps in MAXQDA Analysis

The first time you use a new program is often daunting but, fear not, MAXQDA is very intuitive and you will soon be using it with ease and confidence. Let's start by finding our way around the main screen:

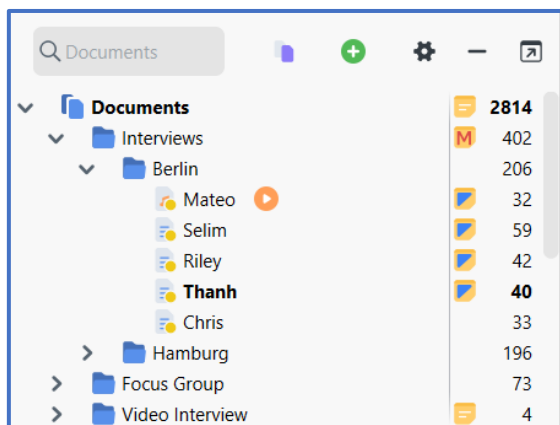


There are 5 main sections in this screen and we will look at each in turn. Start with the "Document Browser" which is the largest part of this image:



This is the main working area of the screen, where you examine your data and apply codes and other analysis tools. You can scroll up and down in the usual ways to move around the document. Codes that have already been applied to the data are shown in the margin to the left, and the text is highlighted with the colours of these codes. There are 2 toolbars at the top of this window, the upper one controls features that apply to the whole document while the lower one works with selected data segments. The name of the open document is displayed at the top left corner of the window (here it is "Thanh").

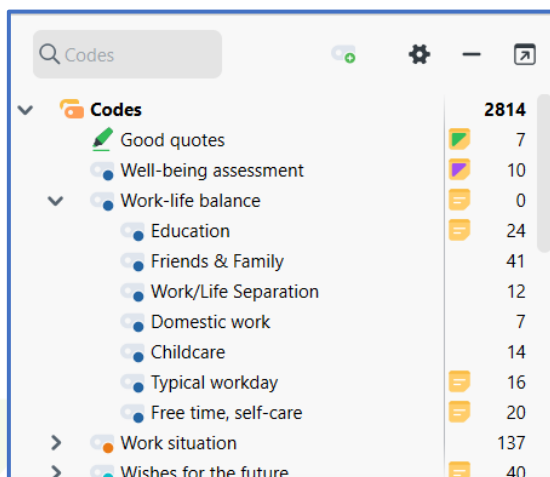
Now look to the left of that panel to find the "Documents" panel:



- Here is a toolbar for this window
- All the data documents are listed, they can be grouped at 2 levels.
- The numbers on the right show how many coded segments each document or group currently have.

Note that all data in the project is held in "documents", even if it is photos or other media. The toolbar is dynamic and changes according to what you are doing.

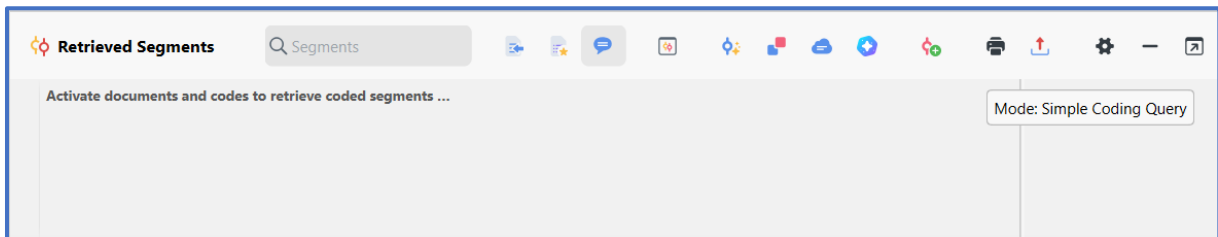
Beneath, you will find the "Codes" panel:



- Here is the toolbar for this window
- All the codes are listed, they can be grouped at many levels (but 2 or 3 are best when you start)
- The numbers on the right show how many data segments are currently attached to each code.

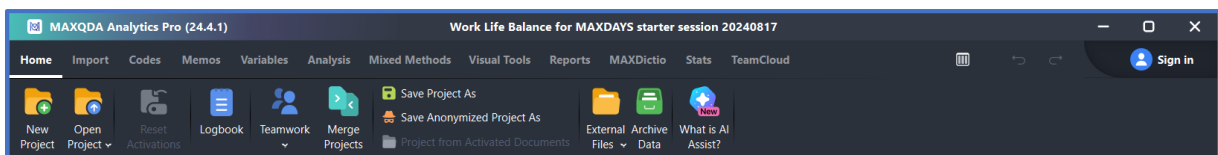
The Code System is very flexible, you can reorganize it many times as your understanding develops. You can select (and change) the colour of individual or groups of codes to alter how they appear in the Document Browser.

To the right you will find the "Retrieved Segments" window:

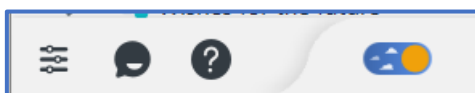


This is currently empty, but here we can display sets of data segments that are found in a combination of selected documents and selected codes (eg. all the segments in the Berlin group of documents that have been coded to "Childcare"). We will do this later in the session.

Finally, look at the top part of the screen where the menus are located:



The top bar displays the name of the project file you are currently using (important when you have multiple versions and back-ups). The 12 menus are identified by name just below that, in this illustration the "Home" menu is the one being used. Over to the right you will find 4 further elements - "Switch layout" toggles between this display and one with the Retrieved Segments to the right of the Document Browser (which can be more useful on wider screens) - then there are "Undo" and "Redo" buttons - and finally a "Sign in" section which is needed for AI and Team Cloud functions.

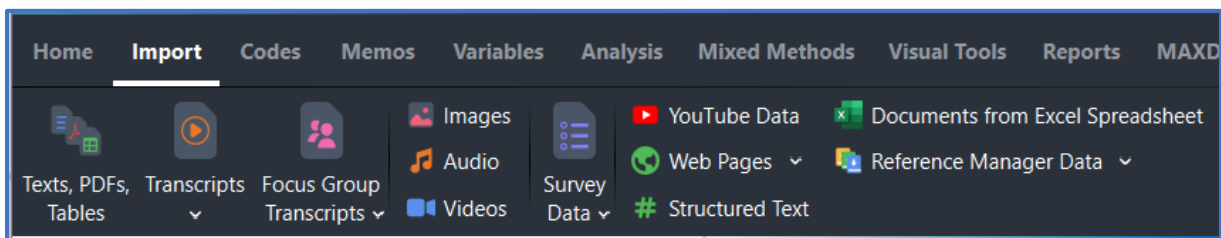


These buttons can be seen in the very bottom left of the screen.

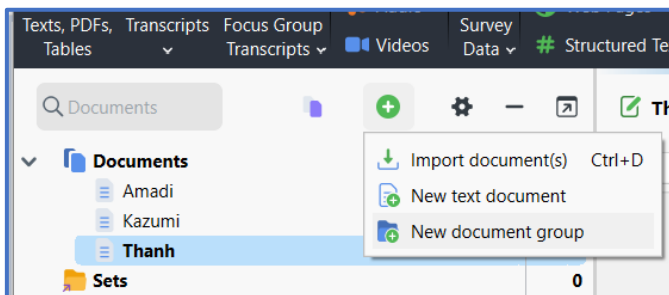
The "?" button gives you access to the full help manual, but context sensitive links are usually more useful (see the "Creating Codes" section below).

## Starting your own project:

When you start a new project (the first icon on the "Home" menu bar), all 4 panels will be empty and the first step is usually to import data into the project using the "Import" menu.



We will use the first icon "Texts, PDFs, Tables", the other functions are for more advanced projects with other types of data. You can import files one by one, or in larger groups, and they will be added to the list in the Documents panel.



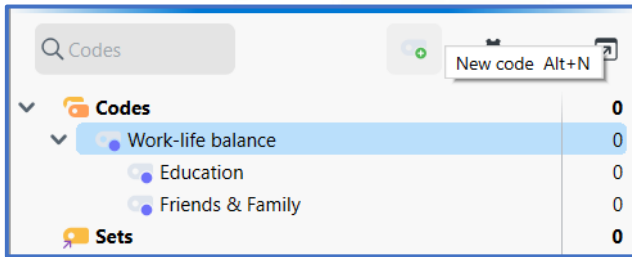
- Use the "+" icon to get this pull-down menu.

- Here is how you create groups.

You can reorganize your documents into different groups at any stage without disrupting any coding work you may have done, so early choices are not binding. Create groups that will help you to locate specific cases easily.

## Creating codes:

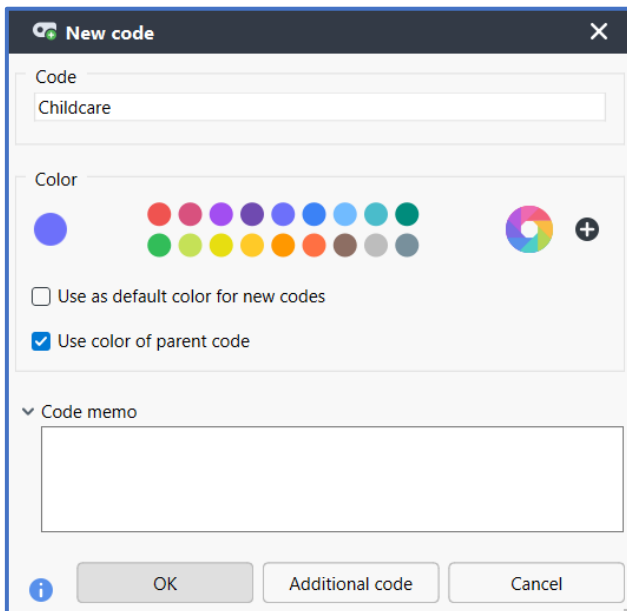
There are many ways to code data, this is just a quick lesson in the mechanics of doing this in MAXQDA and will not even cover all of these. Your chosen analysis methodology will inform many decisions at this point, today we are just looking at how to get the program to do what you want it to do.



- The "+" icon opens the New Code dialog.

- You can create an initial group structure by starting in selected places, or by dragging code names around the window afterwards.

Here is the New Code Dialog:



- Enter the name for your new code,

- choose its colour in this section,

- use this to make a group of codes share a colour.

- Code memos have many uses and you can enter a provisional definition here.

- "OK" to complete the dialog.

"Additional code" to complete one code and also start another.

Note the "i" symbol in the bottom left corner of this screenshot, clicking on this will open the help manual at the page about this function where you can learn a lot more. You should find one of these in every dialog box in MAXQDA.

Create a few codes for yourself and then explore the effects you can get when you drag them around in the Codes window. You can make one code a sub-code of another (indented in the list) or at the same level as another (not indented). This is a useful skill to have when you start working on live analysis.

## Applying codes:

There are too many techniques for attaching a particular code to segments of text to be set out in this brief introduction. Use the Reference Manual to learn more, and then decide on a few to use in your own work because they make sense to you.

The basic process is:

- select a segment of text,
- decide which code (or codes) should be applied to it,
- either drag the code from the Codes window and drop it on the selected text,
- or, drag the selected text and drop it on the desired code in the Codes window.

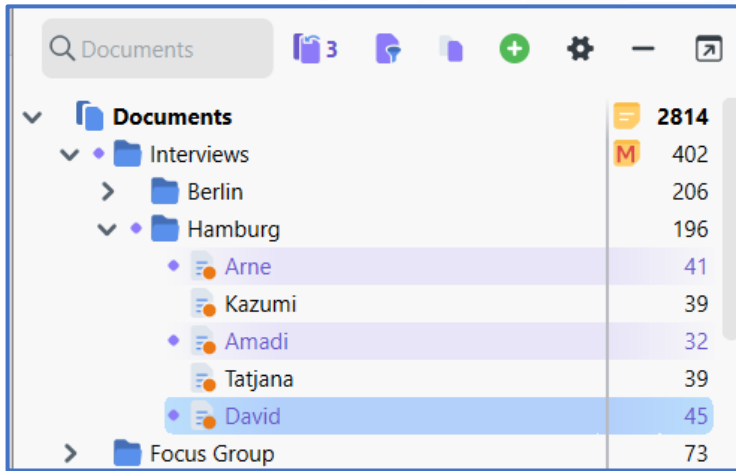
When you successfully attach a code to a text segment you will see a bracket in the code margin, in the colour of the code and with at least a part of the code name. By adjusting the "Preferences" of the code margin (click on the "... " near the top of the margin) you can also highlight the coded segment in the code's colour for extra visibility (as seen in the first section of this handout).

## Retrieving coded segments:

To leap forward many hours of coding work, open the example project "Work Life Balance". We can now explore the next steps in using the coded segments.

We now need to learn the concept in MAXQDA of "activation". This is how we tell the program which particular data elements we wish to work with at any given time.

In the Documents section, minimize the Berlin group and expand the Hamburg group (as shown in the illustration below), Then point to the document icon to the left of the name "Arne" and do a left-click - you should see a light shading appear for that row and a purple diamond appear to the left of that icon, these are the visual signs that this document has been activated. You can get the same effect by clicking in the place where the purple diamond will appear, say for the "Amadi" document. But if you click on the name area you just get a darker highlight and that document does not get activated.



- Note the "3" which tells us that there are 3 activated documents.

- Arne has been activated

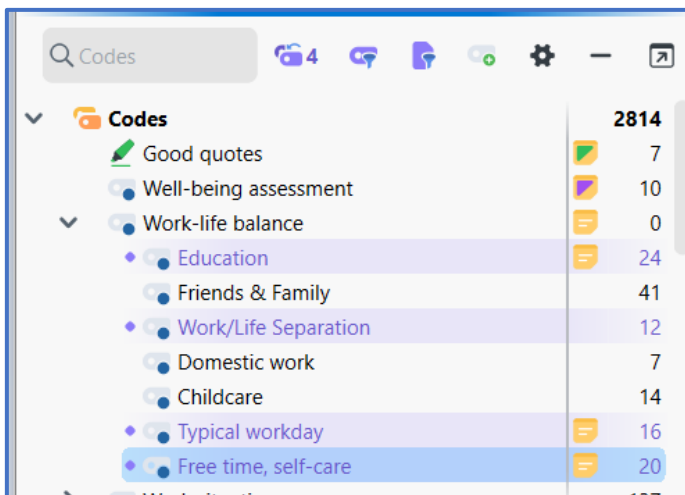
- Kazumi has not been activated

- David has just been activated (and so is highlighted)

You can activate a whole group with a single click on the group's folder icon.

You can cancel all activations in the Documents window by clicking on the first icon in the toolbar (the one beside the "3" in this illustration) - "Reset activations".

The Codes window works in a similar way:



- There are 4 activated codes.

- Friends & Family is not activated

- Typical workday is activated.

Reset code activations by clicking on the icon beside the "4" above.

Now do a small exercise. Reset all current activations in both the Codes and Documents windows (check that no number is showing beside the reset buttons in each toolbar). Then activate the whole Berlin group of documents and the "Childcare" code in the Codes window. Now in the Retrieved Segments window you should see 7 data segments which fit those parameters, ie discussion of childcare

amongst the Berlin cases only. This is just the start of the way you get a return benefit from all that coding work.

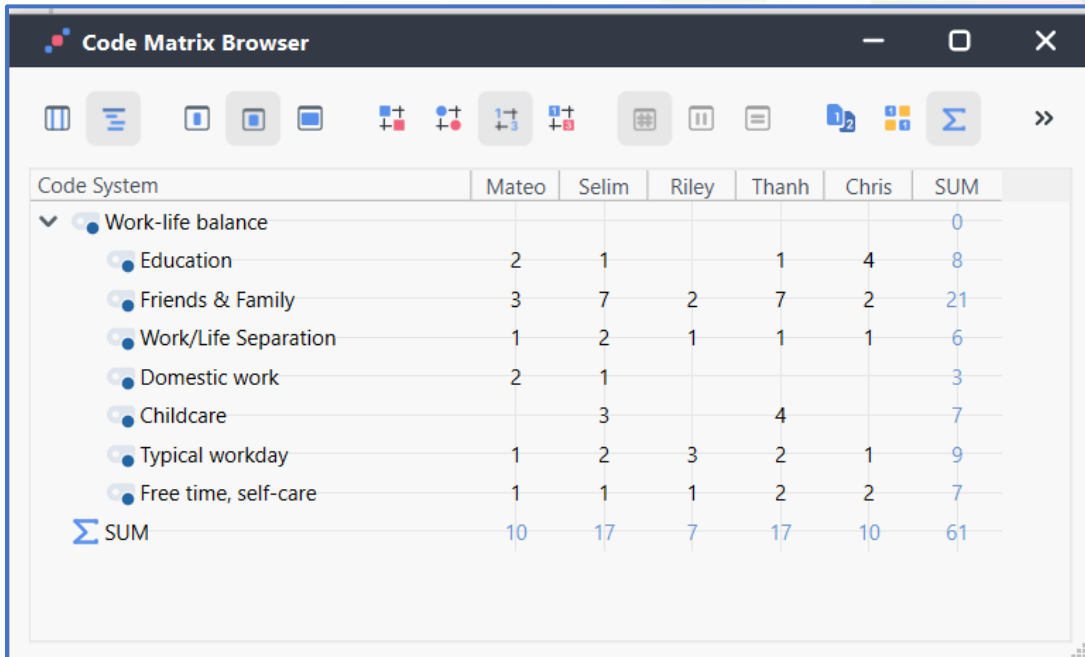
You can also change document and/or code activations by using "Context menus". These are found by doing a right-click (in Windows) on any object in the MAXQDA workspace to open a menu of all the possible functions which could be applied to that object. For documents and codes these include activation settings at the top of the menu list. Note that if you right-click in an empty part of the code margin of the Document Browser you will see a context menu for that margin which includes a check box for "Display coded segments in code colour" - this is the setting that causes the data segments to be highlighted as shown in these illustrations. These context menus are well worth exploring from time to time because they may suggest new ideas of things you might do with your data!

## Looking for patterns in the coded segments:

Using the same example project as before, we can now try something more advanced. We will create a table with a column for each document and a row for each code, with a count of the number of data segments that applies to each cell of the table.

Start by resetting the activations for both documents and codes (this should become a habit whenever you start a new bit of analysis and there is a one-click function for it on the Home menu ribbon). Now activate all the Berlin group of documents and all the codes in the "Work-life balance" group. The Retrieved Segments should now have 61 coded segments displayed - too many for simply reading them in turn. From the top menus select **Visual Tools > Code Matrix Browser**. In the dialog box accept the default selections (and note the Help function "i" in the bottom left corner) and click "OK" so that the table opens up in a new window, as illustrated below.





Code System	Mateo	Selim	Riley	Thanh	Chris	SUM
Work-life balance						0
Education	2	1		1	4	8
Friends & Family	3	7	2	7	2	21
Work/Life Separation	1	2	1	1	1	6
Domestic work	2	1				3
Childcare		3		4		7
Typical workday	1	2	3	2	1	9
Free time, self-care	1	1	1	2	2	7
<b>SUM</b>	<b>10</b>	<b>17</b>	<b>7</b>	<b>17</b>	<b>10</b>	<b>61</b>

In this table you might recognize the 7 childcare segments from the previous exercise (3 from Selim and 4 from Thanh), but now you have much more information at a summary level. Explore the effects of using the toolbar functions above the document names first. These might help you to see patterns even when the raw numbers are difficult to comprehend.

Finally, click on the first icon at the left end of the toolbar. This opens up the "Segment Matrix", which displays all of the source texts sorted into the same structure as the above table - you need to click on one code row at a time to see all of the segments attached to that code. This is an immensely powerful tool for exploring the meaning of any possible patterns you observe in the frequency table. To go back to that table, simply minimize or close the Segment Matrix window.

This has been a much simplified tour of the basic functions of MAXQDA. There are many more possibilities available to you, but now you have taken your first steps it will be much easier to explore them. Look out for the "Help" links as these will guide you through this powerful program. Good Luck!