



# Getting Started Guide

Free Guide

English

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[www.maxqda.com](http://www.maxqda.com)

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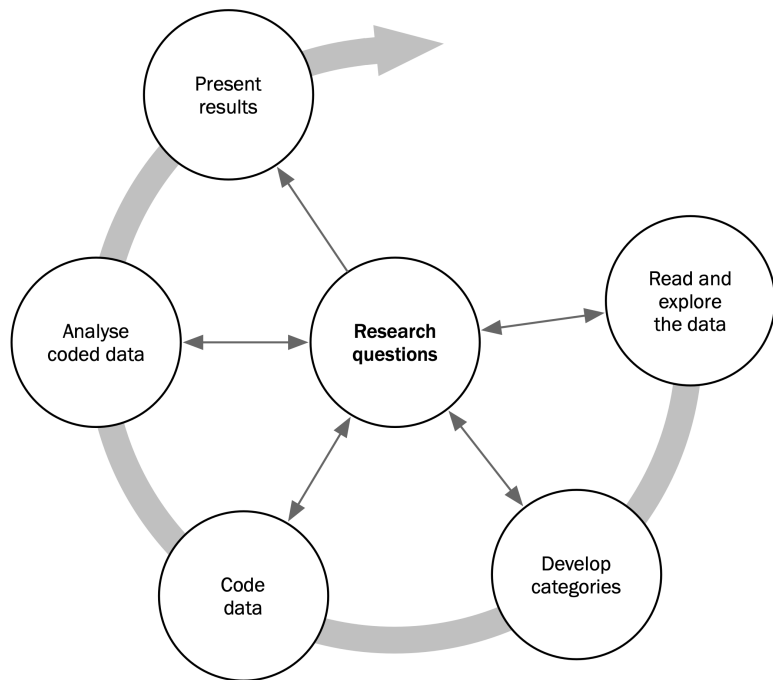
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## Introduction

Welcome to the **MAXQDA Getting Started Guide**! Since no one likes to read long introductions and manuals, we've tried to keep this one as short as possible to help you get started as quickly as possible. This guide will facilitate your analysis and enable you to gain your own hands-on experience with MAXQDA. We will focus on the actual usage of the program rather than the presentation of different data analyses and research methods. If you want to find out more about those, we've provided a list of useful publications in the chapter "References and further reading". As you may know, there is an endless array of different qualitative methods. However, MAXQDA can help you conduct most of them since they follow the same basic structure, pictured in the following illustration.

Most of qualitative analysis approaches work with categories. These can either be generated inductively, from the data, or, deductively, based on prior knowledge, such as existing theories or recent research results. Categories can also be referred to as codes or keywords. Despite their name, their function is to organize and systematize the data. They can also often work as codes for analysis. In this Guide, when we say *Codes* we refer to analytical codes, which are the result of an analytical process that goes beyond simply determining a topic.

Coding data can take a long time, but don't worry. There are various ways to make use of QDA (qualitative data analysis) software. With MAXQDA, it isn't always necessary to code your data in order to analyze it. You could also simply use it to only organize your data or to search for words and word combinations.

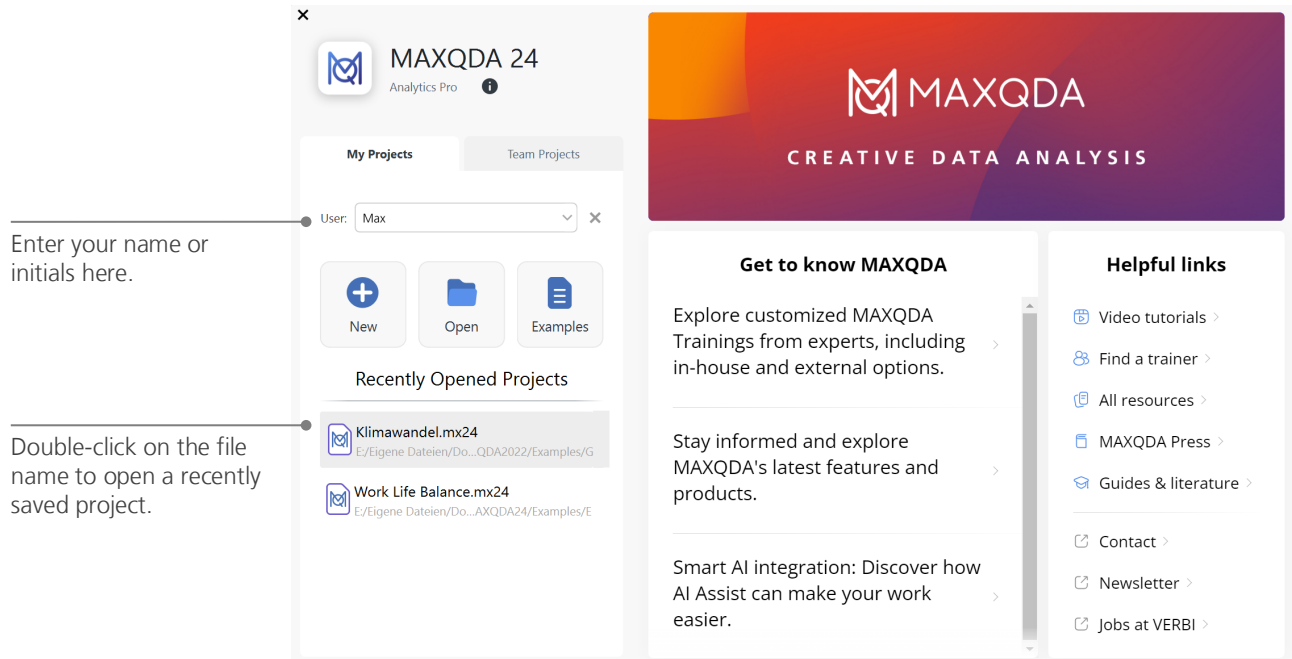


## The MAXQDA interface

### Starting MAXQDA

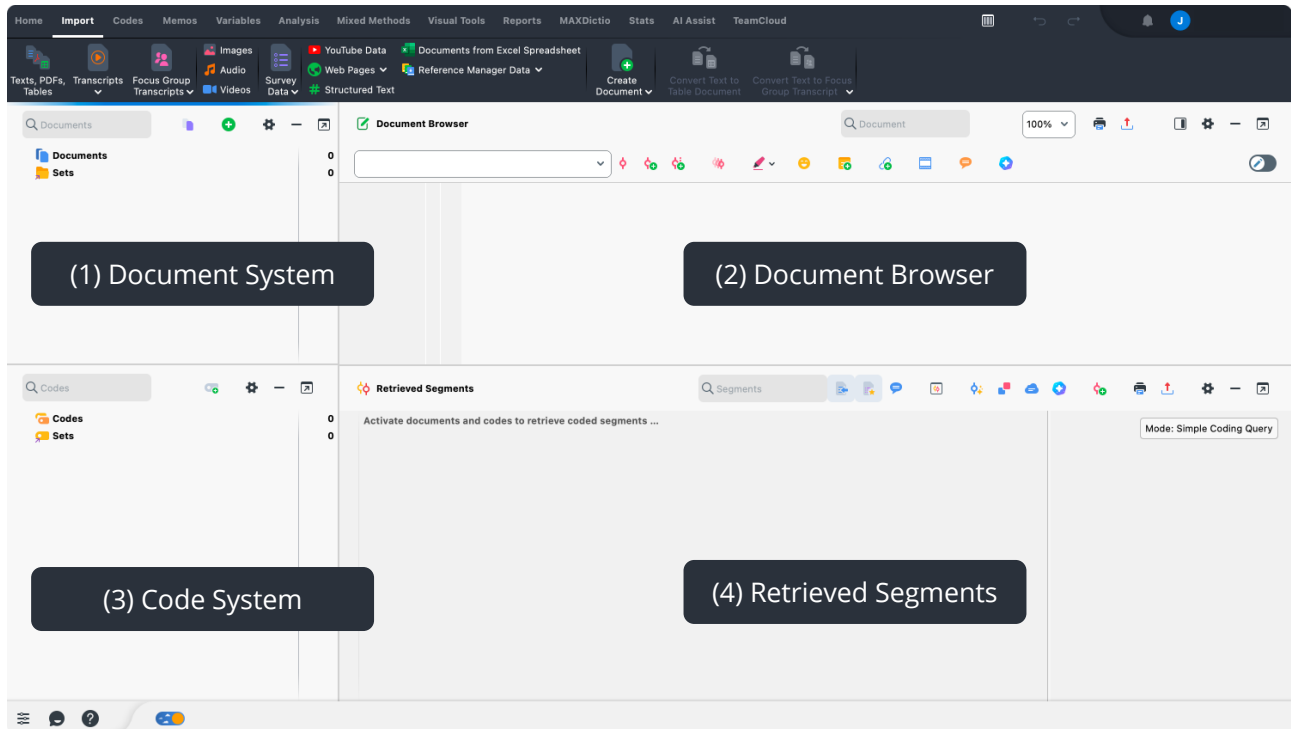
When launching MAXQDA, a text field appears on the top left, where you can type either your name or initials (the latter can be more practical for your later work).

To create your first MAXQDA project, click [New Project](#), name your project, and then save it to a location of your choice. The best location for a MAXQDA project is in a local folder on your computer rather than in a network drive or a USB flash drive. You should also avoid saving your project in folders that are synchronized by a cloud service like iCloud, Dropbox, or Google Drive. These services may compete for access to the project database while it is open in MAXQDA.



## The user interface

Once you successfully create and save your first MAXQDA project, MAXQDA's typical interface, characterized by the four main windows pictured below, will appear.

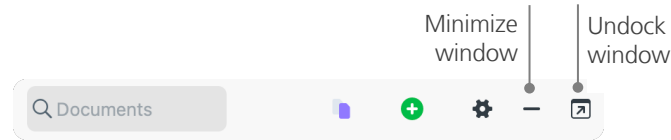



This four-way division makes working with MAXQDA effortless:

- (1) The **Document System** contains all the imported data with which you want to work.
- (2) In the **Document Browser** you can view and edit your imported data.
- (3) In the **Code System** you manage your codes and subcodes for data analysis.
- (4) **Retrieved Segments** is a results window, where you can later retrieve and view coded segments.

After the initial launch, the Retrieved Segments window remains minimized, since you usually do not need to retrieve any coded segments when you first start working on a project. You can display it again at any time by clicking

on the Retrieved Segments tab on MAXQDA's bottom bar. By the way, if you need more space for a specific task, you can minimize any of the four main windows by clicking on the black line on the right side of a window's menu tab. In case you're using multiple monitors, you can easily undock windows with the icon next to the black line.



**Tip:** Are you working with a very wide screen? Then you can switch to a three-column view in the upper right corner of the MAXQDA window: Just click on this icon: .

At the top of the MAXQDA window you will find the menu bar with various tabs. These menu tabs give you access to MAXQDA many functions. When you hover the mouse over a function, a short explanation appears.

## A few notes on data storage and saving

Everything you import, define, and comment on is managed by MAXQDA in a single project file. Essentially, MAXQDA's principle is: One Project = One File. You can identify these files by their .mx24 extension.

A project file, thus, always encompasses everything you'd want to work with. For instance, a research project, a bachelor or master's thesis and beyond. However, there's an exception to every rule: If you work with many videos or audio files, the MAXQDA project file would become very large after importing just a few videos. Therefore, image and PDF documents exceeding a certain size (by default 5 megabytes) as well as audio and video files are not saved within the project file. Instead, they are copied into the so-called *folder for external files*. Of course, in MAXQDA's global settings, you can freely define the folder and/or change the default megabyte limit.

A central MAXQDA feature, pertaining to saving your projects, is highlighted in the following box:

MAXQDA automatically saves everything that you import, edit or create. That's why there is no "save" button, which means that you can simply close MAXQDA after you're done working on projects. However, it is still important to create daily back-ups, for example, using the option *Save Project As*, which you can find on the *Home* tab and save them on a secondary storage device.

## Important key terms

Here are some of the most important key terms you should know when working with MAXQDA:

**Projects** are the files, or “work units” in MAXQDA. They contain all imported data, like texts, PDFs, pictures, tables as well as the codes, memos, and comments you created.

**Documents** are those units that you want to analyze. They can be interviews, focus group protocols, video or audio recordings, articles from scientific journals, and many more.

**Codes** are your most important analysis tool. They can be assigned to anything you consider worth marking, be it text segments, sections in a photo, or parts of a video.

The **Code system** or **Code tree** describes the entirety of all codes and subcodes which can be ordered hierarchically.

**Coding** is the act of assigning a code to a marked segment in your material.

**Coded segments** are those parts in your material that have been assigned a code.

**Memos** basically serve as your records. You can note your ideas, assumptions, and questions for your next analysis steps, or formulate first hypotheses regarding possible connections in the data.

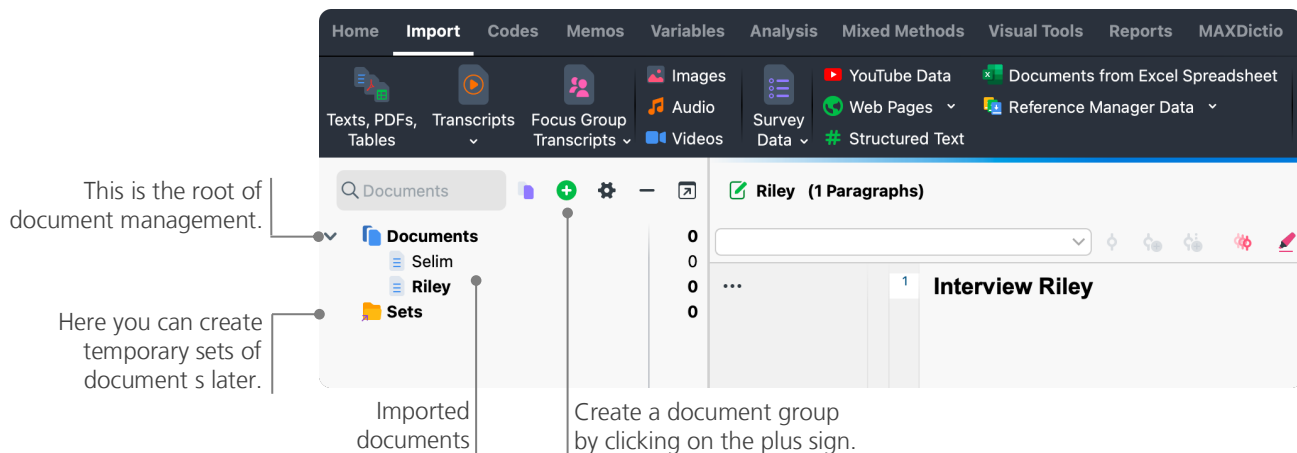
**Comments** are shorter than memos. You can use them to assign comments like “contradictory”, or “important part!” to coded segments. You can also use them to record a short summary of a coded segment.

**Overviews** are tabular presentations omnipresent in MAXQDA. There are overviews of coded segments, memos, variables, links, and so on. All MAXQDA overviews follow the same principle and allow easy access to individual elements so that you don’t lose track of your data.

## Import and explore your data

### Importing data

When you switch to the *Import* menu tab, you'll see the numerous types of data you can import into a MAXQDA project, such as transcripts, PDF documents, survey data, videos, and images. To import your data, you can click on the appropriate data type and select the desired files in the dialog that appears. There are many other ways to import your files into a MAXQDA project; for example, you can drag files from Windows Explorer or macOS Finder directly into the *Document System* window. No matter how you import: Your data will then appear in the *Document System* window:

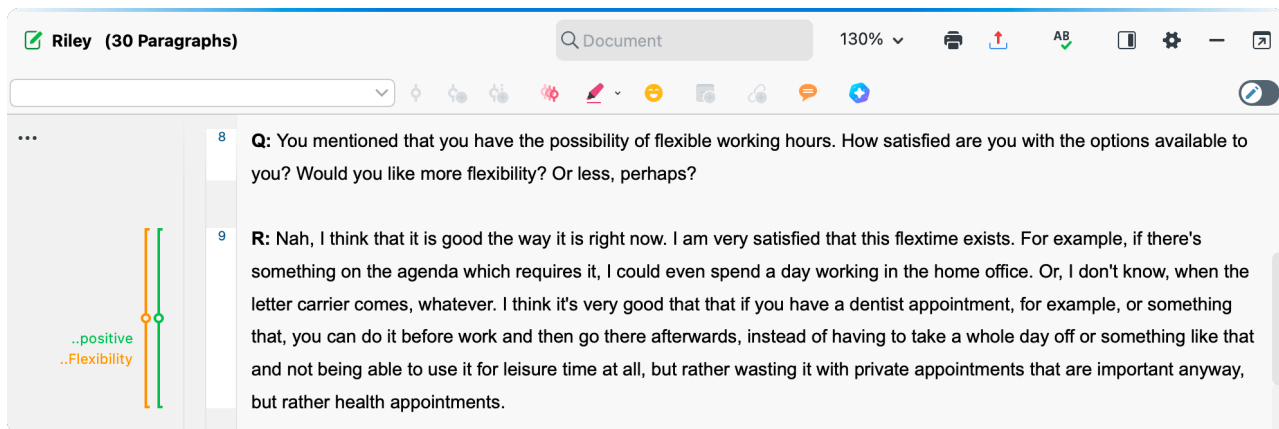


In the way that your computer lets you create folders to organize your files, MAXQDA's *New document group* function lets you create document groups to organize your documents. You can find this function by clicking on the green plus sign at the top of the documents window.

If you right-click on a document group and select the option *Import Documents*, your documents will be imported directly into that document group. After importing, you can move documents between the different document groups with the mouse, but this will rarely be necessary once a good structure has been created.

## Exploring data

Analyzing qualitative data does not really work without you knowing the data. So MAXQDA makes it easy for you to look through your files: simply double-click on a document in the *Document System* window, and it will be opened in the *Document Browser*, looking roughly like the interview transcript in this example:



Paragraph numbers make it easier to discuss certain segments in a team (“Have a look at the comment in paragraph 9!”) as well as coding entire paragraphs at once. You can also use the paragraph numbers to quote your data sources. If you need a more precise numbering for your data, you can change the display to line numbering at any time by right-clicking on the text and selecting *Convert to Line Numbered Text*.

In the example above you can see two vertical colored stripes, as well as a yellow sticky note symbol next to the text. The vertical stripes are the so-called “coding stripes,” symbolizing which code the text was assigned to (in this case the codes “Flexibility” and “positive”). To view long code names, simply enlarge the coding column by dragging the grey line next to the coding stripes to the right. The yellow sticky note shows that a memo has been attached to that paragraph.

**What is a memo?** Memos serve to create notes and records to attach them to documents, text segments, document groups, images, audio, or video clips, and of course codes – just like you would do with “real” sticky notes.

When you open a text in the *Document Browser* for the first time, this working area will still be empty since you have yet to code or created a memo. Just try to create one now: double-click somewhere in the memo sector and a memo dialog window will automatically open. Since we will talk about memos in more detail later, this is all you need to know for now, so you can close the memo.

## Search within your data

The exploration phase of your research may necessitate to search your text documents for certain words. To do so, you will find a search toolbar at the top of the “Document Browser”, allowing you to search in the currently shown text. A much more powerful tool than the local search is the [Text Search](#) (found under the [Analysis](#) tab labeled as [Text Search & Autocode](#)). The text search enables you to search several documents at a time; it is not restricted to opened documents.

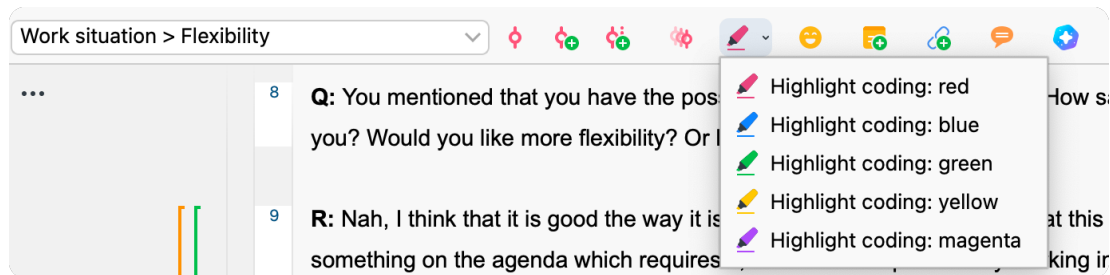
The screenshot shows the "Text search" window. It features a search list on the left with "family" selected. On the right, search options are configured: "In documents" is selected, "OR" logic is chosen, and the search is set to be "Within" the "Document". Additional options like "Find whole words", "Case-sensitive", "Interpret search items as regular expressions", "Find all word forms (lemma list)", "English" language, "Only in activated documents", and "Only in 'Retrieved segments' window" are present but unchecked. Action buttons at the bottom include "Open", "Save", "Run search", and "Cancel".

In this example, all available documents will be searched for the term “family”.

As soon as the window opens you can enter as many search items as you like at once. Use the return key to end your entry or add a new search string. Each search item is placed in a new line. The standard setting follows the “OR” logic, that is, any of the search items that is found will be listed as a hit. Clicking a hit in the results table will show you the corresponding passage in the *Document Browser* window.

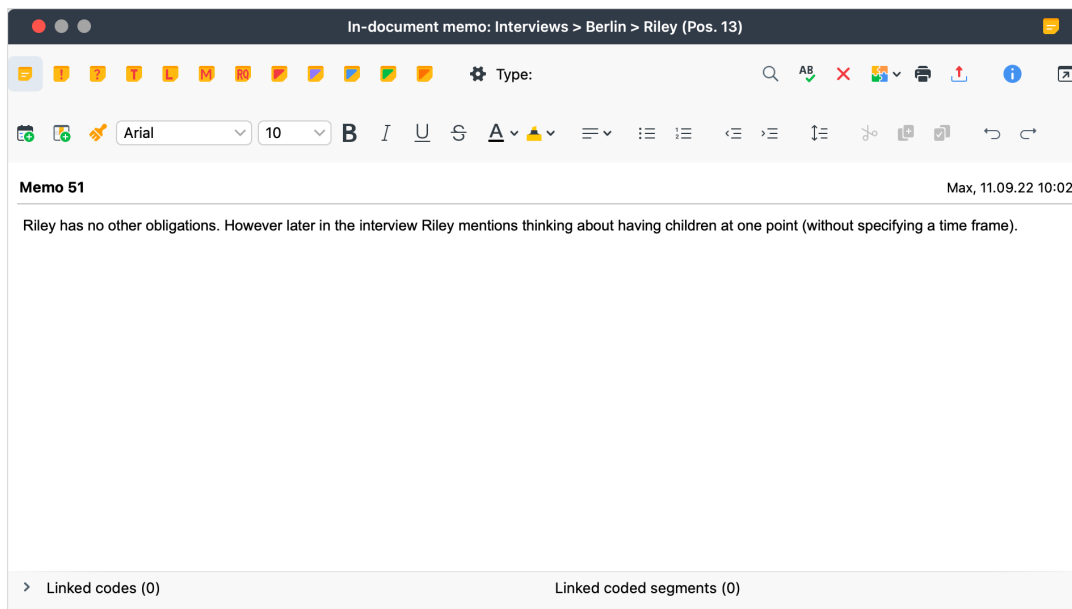
## Color-coding and memos

Sometimes you may want to mark something in a text or note comments, hypotheses, and further ideas, before you have even started thinking about categories and the general direction of your analysis. Just like you may highlight passages in a book or stick a note to a page, you may mark text using the *Highlight coding* function. There are five colored highlighters (red, blue, green, yellow, and purple). You can find the color-coding highlighter icons at the top of the *Document Browser* window.



You can select any part of the text with your mouse and then click on one of the symbols to highlight it with the color of your choice. The difference to highlighting in “real life” is that it is much easier to find those passages again in MAXQDA than to skim through a book. How to retrieve coded segments created with highlight coding, will be described further down in section *Analyze coded data*.

As we learned, highlight coding is a useful tool to mark important things even before the explicit coding process. Another useful tool is the *Memos* function. With the help of *In-document memos* you can attach memos to any place in any document. Select any part of a document, right-click on the highlighted selection and use the context menu to create a new memo for your thoughts and ideas:



You can title the memo, assign a matching symbol for the type of memo, and link it to certain codes and coded segments.

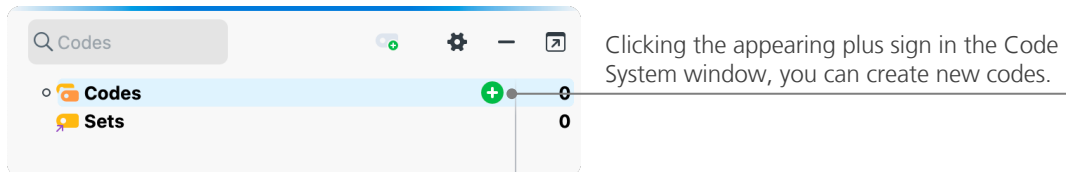
Similar to color-coding, you can easily retrieve memos. You can find all types of memos and a special memo search feature on the [Memos](#) menu tab. The search results are displayed in MAXQDA's *Memo Manager*, where you can easily manage, edit, and filter all your memos, for example, by only displaying memos you have written during a certain timeframe.

## Code your data

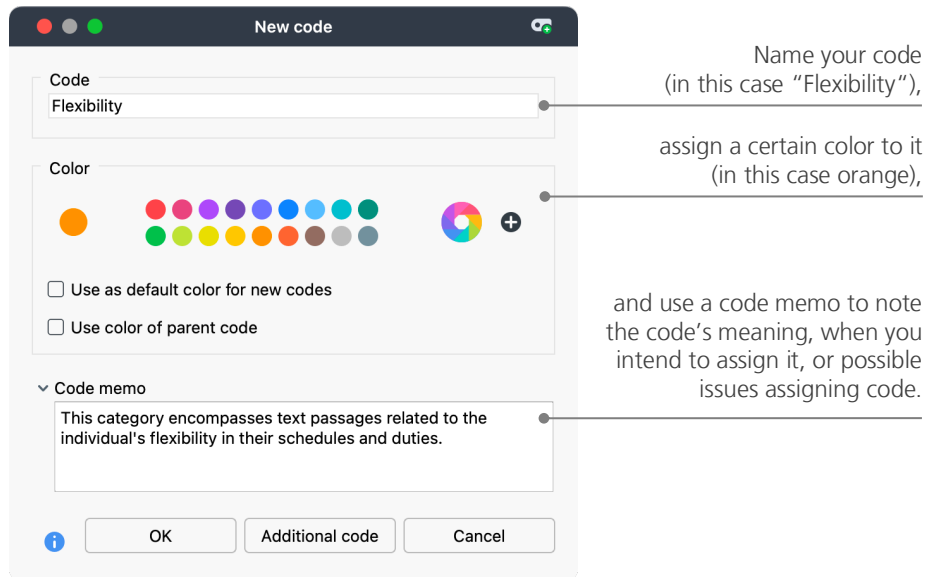
As we learned earlier, the central work technique among most analysis methods is *coding the data*. But what does this mean? Coding describes the process of selecting part of the data material, for example a paragraph or one part of an image with the mouse (just like in Word or other software) and assigning a code to it. This is principally the same as tagging content. However, coding in empirical social research includes much more than that.

So, what is a code then? Your first associations may be of secret services and their coding and decoding machines, or of codes as strictly regulated mappings as in Morse codes. Both associations are misleading! In the context of qualitative research, a code is more of a label used to name phenomena in a text or an image. In technical terms, a code is a character string that can consist of up to 127 characters in MAXQDA, be it several words or more cryptical strings like "CR128". In social research, codes can possess different meanings and take on different functions in the research process: there are *factual codes*, *thematic codes*, *theoretical codes* and many more (see Kuckartz & Rädiker, 2023; Richards, 2014). From simply looking at the code itself, its role in the research process is not always clear: it could be of minor importance or play a key role. Only its context or framing can shed light on that.

So, how are codes created? Simply click on the green plus symbol in the *Code System* window that appears when you hold your mouse over the first line. Using the plus symbol, you can add new codes to each level of your code system.

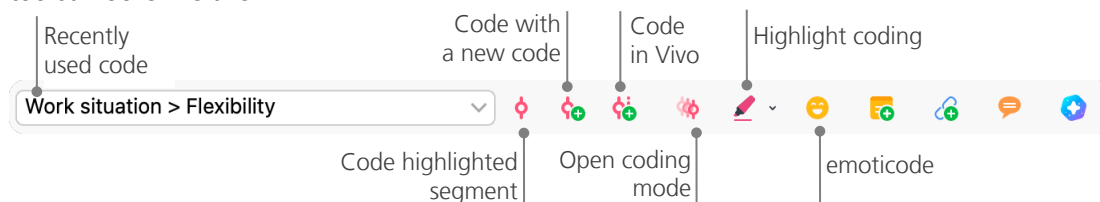


A dialog window to define your new code opens:



How can I assign a code to a certain document section? First, you select a section with your mouse (if you want to mark the whole paragraph, just click the paragraph number). Then you either drag and drop the marked section onto a code, or the other way around, that is, you drag the code onto the selected section. Once you have done that for the first time, you will see that the number next to that code in the *Code System*, showing how many times a code has been used, changed from "0" to "1". If you look at the *Document System*, you will see that the number of coded segments in a document is also displayed next to each document.

MAXQDA offers you other coding possibilities; you can access them via right-clicking a selected section in the document or via the icons in the coding toolbar, which is located at the top of the *Document Browser* window. The toolbar looks like this:



The code that you used last is always displayed on the very left. If you click on the red coding symbol to the right of the code name, MAXQDA will assign this code to the selected document segment.

# Analyze coded data

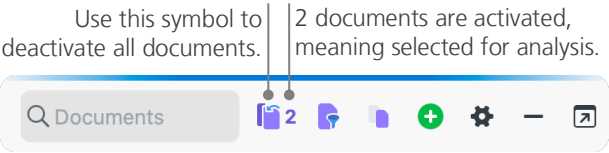
## Activating documents

Maybe you saw the option *Only in activated documents* earlier in the dialog window for the *Text Search* and asked yourself what might that mean. *Activation* is one of MAXQDA’s key concepts: it means that you can select documents (and/or codes) for your analysis and then work only with the selected items. How does the activation work? This is very simple: in every document’s and document group’s context menu you will see the option *Activate* right at the top. More experienced MAXQDA users will simply click the document or folder symbols to activate the document or a document group.



If a document is activated, you will see it right away. The document name and the symbol will be highlighted, and a circle will appear in front of them. MAXQDA displays the total number of documents currently activated at the top of the *Document System* window. If you want to limit your search to certain texts, activate them first and then choose the option *Only in activated documents* in the dialog *Text Search*.

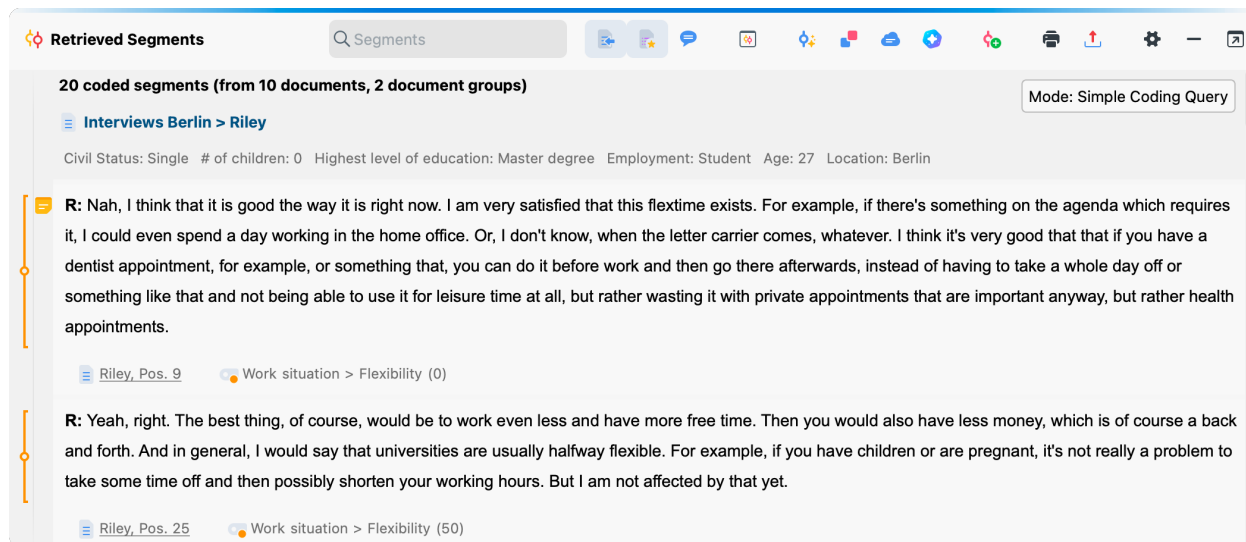
How can you reset the activation? Simply go to the *Document System* window and click on the icon *Reset activations* on the toolbar as shown in the figure below. Alternatively, you can click on the document or document group symbol again.



## Retrieving all segments coded with one code

Coding isn't everything and your analysis is certainly more than just coding. At one point you will want to stop coding and start looking at the results of that process. The easiest way is to retrieve all segments assigned to one specific code. If you, for example, conduct interview-based research, you may want to know what was said about a certain topic and who said what? The feature to get exactly those answers in MAXQDA is called *Coding Query*, and it works – like the *Text search* – via activations:

Activate all the documents that you want to include in the *Coding Query*, as well as those codes assigned to the segments you are interested in. The activation of codes works just like the activation of documents (right-click on the code and choose the option *Activate* or click on the symbol in front of the code name). All coded segments found will appear in MAXQDA's fourth main window, the *Retrieved Segments* window (if the window is minimized, simply click on its name on the bar at the bottom of MAXQDA's main window to open it). Below every segment you will see the segment's source information. In the example below, the first segment can be found in paragraph 9 of document "Riley".

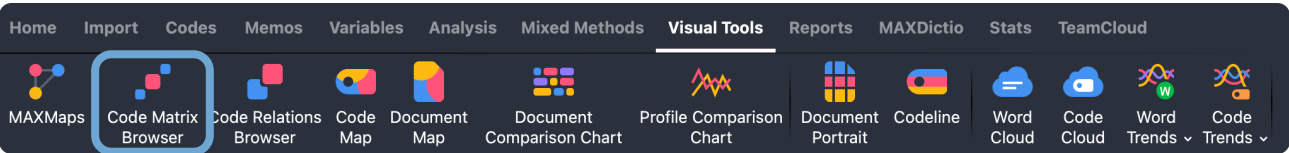


The source info does not only tell you which document a certain segment is from, it also lets you go directly to that document: simply click on the document name, and the document will be loaded in the *Document Browser* window with the coded segment right at hand, so that you can easily view it in context.

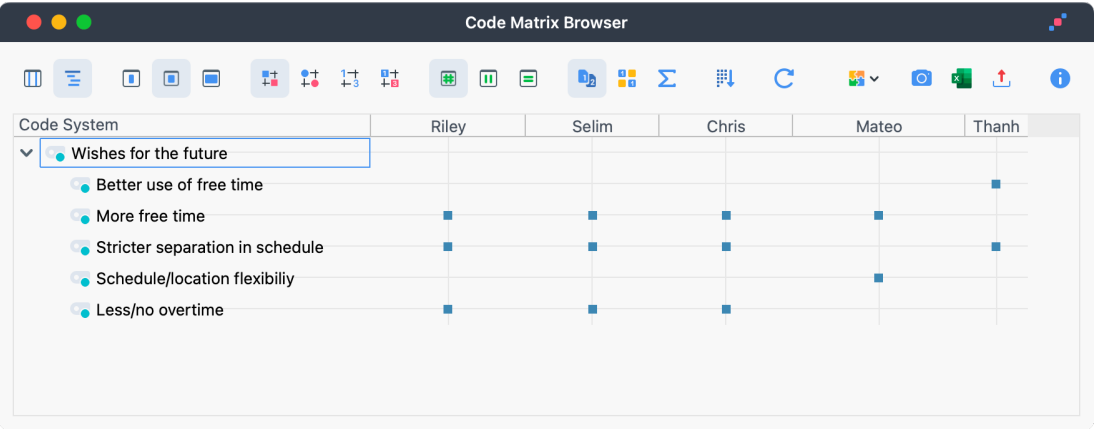
Using visualizations

Visualizing results is one of MAXQDA’s strengths which is why we want to include this chapter in our *Getting Started Guide*. There are several ways to visualize data in MAXQDA, starting with the possibility to assign individual colors to codes and documents. This does not only help you with the visual organization of your data, but colors can also be given certain meanings.

The visualization tools also allow you to show relations and patterns in the data in a comprehensively. The most used visual tool is the *Code Matrix Browser*, which you can open via the *Visual Tools* tab.



So, what does the Code Matrix Browser show?

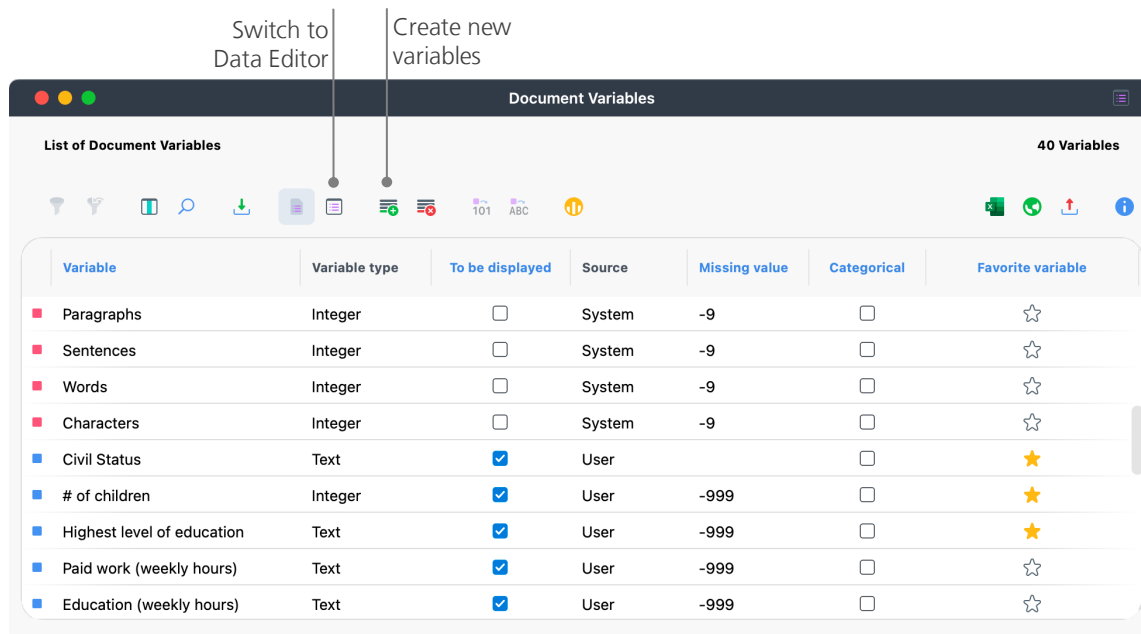


Columns list different documents; in this case each document is one respondent in an interview study on work-life balance. For example, the respondents were asked about their wishes for the future. In the visualization, you can see that Thanh talked about better use of free time, while the other four interviewees talked about more free time.

## Conduct mixed methods analyses

## Defining document variables

One of the most important MAXQDA features is its support of mixed methods approaches. For every document in the *Document System*, a whole set of attributes (that is, variables as used by statistics programs) can be managed. You can, for example, record personal data or background information for interviews as variables or variable values, and use them for your mixed methods analyses. The option *List of Document Variables* in the *Variables* tab will open the following window:



Upon opening, you will see that several variables have already been defined (the red labels). These are the so-called system variables whose values are automatically set by MAXQDA and cannot be changed. The option *New variable* lets you define further variables. **The most common variable types are Text (like “teacher” or “student” for the variable “occupation”) and Integer (like whole numbers for the variable “number of children”).** You can define new variables anytime.

## Entering variable values

To enter values for the document variables, use the toolbar in the *List of Document Variables* and switch to the *Data Editor*.

The toolbar lists the most used functions, for example, returning to the variable list.

Document group	Document name	Civil Status	# of children
Hamburg	Amadi	Single	-999
Hamburg	Arne	In partnership/married	-999
Hamburg	Chris	Single	0
Hamburg	David	In partnership/married	2
Hamburg	Kazumi	In partnership/married	1
Hamburg	Mateo	In partnership/married	0
Interviews Berlin	Riley	Single	0
Interviews Berlin	Selim	In partnership/married	3
Hamburg	Tatjana	Separated/divorced	1
Hamburg	Thanh	Separated/divorced	1

Simply click the column heading to sort the data according to that column's content.

Double-click to enter a value.

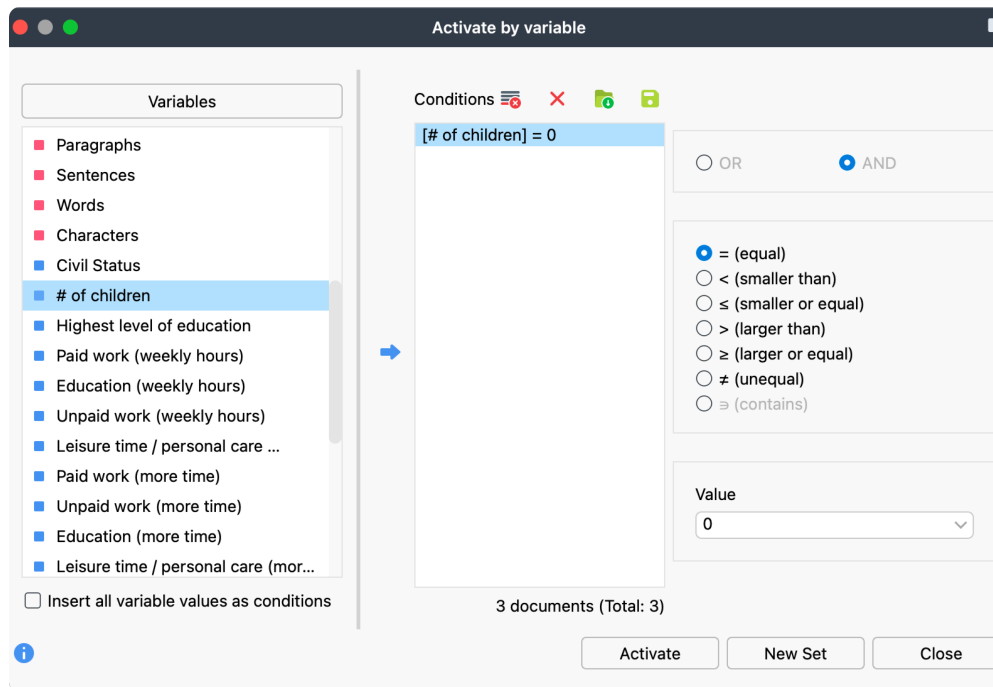
Using the feature *Document Variable Statistics*, you can create frequency tables and charts for the variables, for example to visualize the sampling structure of an interview study. You can also statistically analyze the document variables with MAXQDA Stats.



## Using document variables in your analysis

Quantitative and qualitative data can be connected in a variety of ways. The easiest way is to choose the document variables as the selection criterion when you run a *Coding Query*. This will enable you to compare sociodemographic characteristics like “What did single participants over 50 say about a specific topic?” or “How did the suggestions by participants in a partnership compare to those who are single?”. The relevant selection can be made with the function *Activate Documents by Variables* in the *Mixed Methods* tab.

First, choose a variable from the list on the left (in the example below: “# of children”), click the arrow and then choose the variable value on the right (in this case: 0). As soon as you click *Activate*, all documents with matching variable values will be activated in the *Document System*. In this example, we’re activating all interviews with respondents who are not in a partnership.



**Tip:** You can use the *New Set* button to store the found documents in a so-called document set.

## References and further reading

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## More information

We hope this guide helped you get started with MAXQDA. Of course, MAXQDA offers a whole range of further analysis functions and tools. To name a few, you can:

- create literature reviews
- transcribe audio and video files
- import and analyze data from various social media sites
- analyze focus groups
- visualize data or results
- conduct a quantitative text analysis with MAXDictio
- generate reports and statistical frequency tables
- automatically summarize data and get code suggestions using our **AI Assist** add-on

You can find a wide range of resources on our website [www.maxqda.com](http://www.maxqda.com)

- free introductory webinars
- online manual
- video tutorials
- list of upcoming workshops
- professional MAXQDA trainer database
- research blog, user forum, and more...

## MQIC – MAXQDA International Conference

The annual MAXQDA International Conference brings together MAXQDA users from all over the world in Berlin, Germany. The conference offers a rich program that covers everything related to MAXQDA and mixed methods research. It's a unique opportunity to network with other MAXQDA users and get to know the MAXQDA development team. Find out more at [www.maxqda.com/conference](http://www.maxqda.com/conference).

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