

MAXQDA for Beginners - Teaching Guide

Here are a few tips from our professional MAXQDA trainers on how to conduct a MAXQDA workshop. Whether you are leading a large group with 20 participants, or simply introducing the software to your colleagues, this overview will start you off on the right foot.

Infrastructure

As the workshop-leader you will need two things: a projector and a computer that has MAXQDA installed on it. Each participant will also need a computer with MAXQDA installed on it. They can either bring their own computer or you can teach the workshop in a PC-lab that has computers equipped with MAXQDA. Anyone who doesn't have a MAXQDA license can download and use the free 14-day free trial version during the workshop www.maxqda.com/trial. If you are planning a research method course or you will be teaching students how to analyze qualitative data, we are happy to provide your attendees with a free course license. Find more information here: www.maxqda.com/maxqda-course-license

Example Files

MAXQDA Example Projects

MAXQDA comes pre-programmed with example projects in English, Spanish, Japanese, Chinese, Portuguese and German, which you can use for MAXQDA training sessions. You can access these projects by clicking the "Open Examples" option in the start dialog window that opens when you launch MAXQDA.

These example projects each contain various document types (e.g. interview transcripts, focus group transcripts, PDF files, video files, survey data, literature data and social media data), most of which have already been coded.

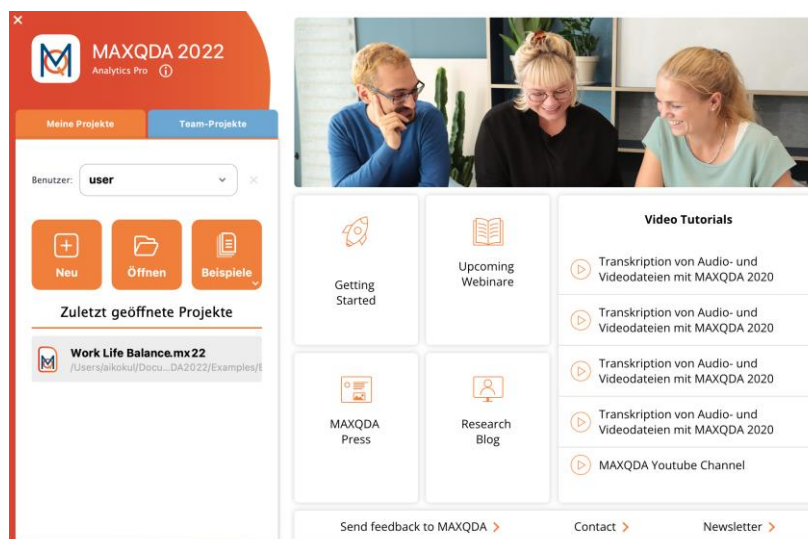


Figure 1: MAXQDA 2022 Start Dialog

For introductory workshops, we recommend that you have your participants start with an empty project file. That way you can best demonstrate how to import different data types. To do so you could export the documents of the example project, save them to your computer, and then distribute these files to each of your workshop participants (via email, USB, etc.) Click **Reports > Export > All Documents** to export all documents or activate specific documents you would like to use and then click **Reports > Export > All Activated Documents** to export only the selected documents.

In our experience it's a good idea to first introduce the MAXQDA user interface before demonstrating how to import documents like interview transcripts. Next, let everyone try importing documents on their own.

Reset Example Projects to their Original State

If you have previously used an example project to demonstrate MAXQDA in a workshop and already made changes to it, you can always download a new example project. To do so, close MAXQDA, navigate to the folder on your computer where the example projects are stored and delete the changed project. Start MAXQDA again and it will download the original, unchanged version of this project.

You can find this folder here:

Mac: /Users/username/Documents/MAXQDA/MAXQDA2022/Examples

Win: \Users\username\Documents\MAXQDA2022\Examples

Sources of Example Documents

You can also download a variety of example documents (survey, focus group transcripts, news articles) to use during your workshop here: maxqda.com/download/example-data-financial-downturn.zip

Special thanks to Christina Silver and Ann Lewins for granting the use of their example data set, which they created for the book: Using Software in Qualitative Research. 2nd edition 2014, Los Angeles/London/New Delhi/Singapore/Washington DC, SAGE Publications Ltd.

Networking Opportunities within the MAXQDA Community

1. MAXQDA Research Network: www.maxqda.com/research-network
2. MAXQDA User Forum: www.maxqda.com/support/forum/viewforum.php?f=7
3. MAXQDA International Conference: www.conference.maxqda.com/announcement
4. MAXDAYS Online Conference: www.maxqda.com/maxdays
5. MAXQDA Research Blog: www.maxqda.com/blog
6. MAXQDA User Group auf LinkedIn: www.linkedin.com/groups/9163087/

Troubleshooting

Have you or your students/clients experienced technical issues like software crashes, poor performance, disabled features, interface errors, or problems with the playback of audio files? It is always advisable to perform these basic troubleshooting steps and isolate the possible source of the problem before calling for external help.

- (a) Free up RAM by closing other open programs.
- (b) Restart the software.
- (c) Shut down and restart your computer.
- (d) Reset your interface settings in MAXQDA (automatic method)

Click on the gear icon in the top right corner of the MAXQDA window and check the option “Reset interface settings.”

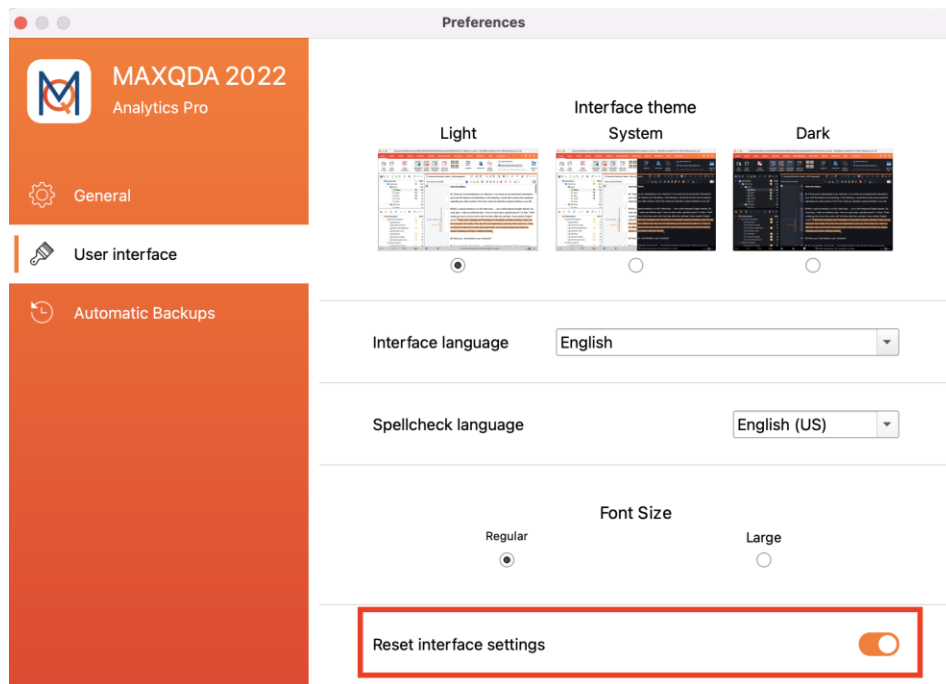


Figure 2: Reset interface settings automatically

- (e) Reset your user settings in MAXQDA (manually).

This solution can be used if MAXQDA does not start anymore and if you want to clear the list of last used projects.

Please be aware that due to the following procedure the list of recently opened projects will be emptied. The MAXQDA project files remain untouched at the location they were saved at and can be opened through **OPEN PROJECT** from the start dialog or from within MAXQDA.

Windows (local installation)

1. Close MAXQDA
2. Press WINDOWS-KEY + R
3. Type in the following and click OK: %appdata%/MAXQDA2022
4. Delete the files
 - "MAXQDA2022.prp"
 - "MAXQDA2022.ini"
 - "MAXQDA2022.ini.LOCK" (if existing)
5. Restart MAXQDA

Mac (local installation)

1. Close MAXQDA
2. Press CMD + ⌘ + G
3. Type in the following and click "OK": ~/Library/Preferences/MAXQDA2022
4. Delete the files
 - "MAXQDA2022.prp"
 - "MAXQDA2022.ini"
 - "MAXQDA2022.ini.LOCK" (if existing)
5. Restart MAXQDA

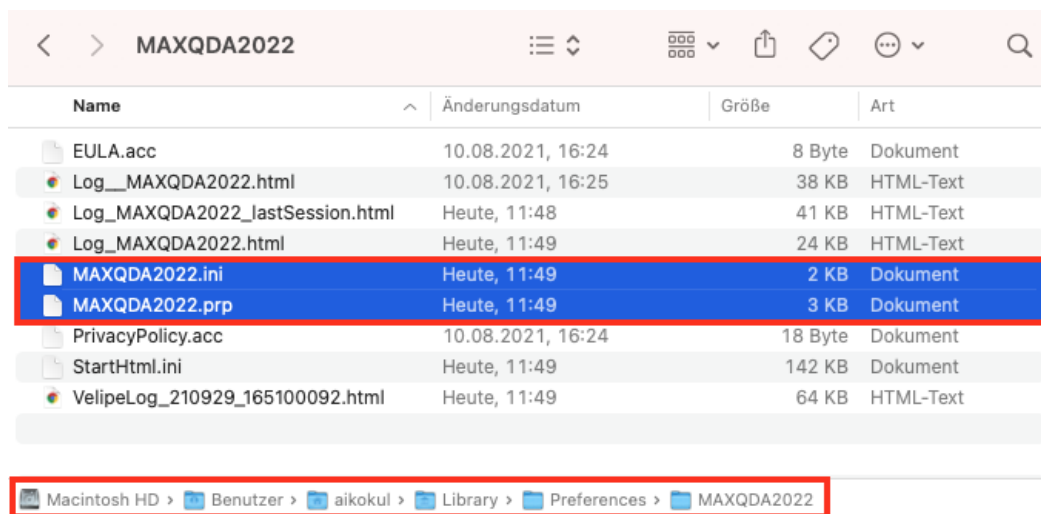


Figure 3: Reset user settings manually

(f) Set up a new database structure

To eliminate possible database errors and improve overall software performance, you can set up a new database structure with the following steps:

1. Create a new project file and save it on your local hard drive (e.g. your desktop).
2. Go to the HOME tab and select MERGE PROJECTS.
3. Select your existing project file and merge it into the opened empty project.

Further MAXQDA Trainer Resources

1. Free MAXQDA Training materials
 - a. Getting Started Guide: www.maxqda.com/books-literature
 - b. Free introductory webinars: www.maxqda.com/learn-maxqda/live-training
2. MAXQDA Professional Trainer and Workshops
 - a. MAXQDA Professional Trainer: www.maxqda.com/learn-maxqda/maxqda-professional-trainer
 - b. MAXQDA Workshops: www.maxqda.com/live-training
3. MAXQDA Trainer Portal for trainer-only guides, video resources, free templates, and training materials, and many more resources exclusively for our trainers:

www.maxqda.com/maxqda-professional-trainer/professional-maxqda-trainer-portal

(password: MQPT)

4. MAXQDA Press with high-quality literature about qualitative and mixed methods data analysis and feature-specific guides for free: www.maxqda-press.com/

MAXQDA for Beginners – Full Day Training Session Outline

This outline follows the basic steps of a typical research project. You should be able to cover the following topics and have enough time for the participants to work with MAXQDA on their own.

1. User interface
 - a. Four Windows – Four Workspaces
 - b. Ribbon menu and tooltips
2. Create a new project and import data
 - a. Create a new project
 - b. Import data
 - c. Organize data in document groups
 - d. Which data types MAXQDA can handle (text, PDF, transcripts, table, image, audio, video, surveys, Twitter data, YouTube, websites, literature)
3. View and edit data
 - a. View documents in the “Document Browser”
 - b. Edit data in Edit Mode
4. Code data and manage codes
 - a. Create codes
 - b. Coding options
 - i. Drag & drop segments onto an existing code
 - ii. Select segment and create a new code
 - iii. Select segment and in-vivo code
 - iv. Open coding, Color/Emoticode coding
 - c. Change code colors
 - d. Manage your Code System
 - i. Rearrange code system via drag & drop
 - ii. Move, copy and merge coded segments/codes
5. Retrieve coded segments
 - a. Activate documents and codes
 - b. “Retrieved Segments” window options
 - c. View your retrieved segments in table view (Overview of Retrieved Segments)
6. Working with memos
 - a. Create memos: document memos, code memos, text memos, and free memos
 - b. Display memos next to documents
 - c. Memo manager

7. Lexical Search
 - a. Search for key words
 - b. Automatically code search results

8. Export options
 - a. Export retrieved segments
 - b. Other Export options (Reports menu tab)

9. Where to find help
 - a. Help – free manuals and videos in MAXQDA 2022's start dialog
 - b. Free manuals and video tutorials on the MAXQDA website

If you have more time, you may want to include the following features and functions in your workshop: transcription in MAXQDA, visual tools, working with variables, and/or MAXQDA's teamwork functionality including the Teamwork Cloud.

Contact

Need help organizing a MAXQDA workshop? Contact us at trainers@maxqda.de