

Teaching Guide

How to teach MAXQDA 24



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MAXQDA

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MAXQDA for Beginners - Teaching Guide

Planning to run a MAXQDA workshop? Whether you are introducing a small group of colleagues to the basics or guiding a larger audience through its features, a well-structured session makes all the difference. To help you get started, we have put together some practical tips to ensure your workshop runs smoothly and effectively.

1 Infrastructure

Whether you are conducting an online webinar or an in-person workshop, one thing is essential: both you and your participants need access to MAXQDA. As the workshop leader, make sure you have MAXQDA installed and ready to use on your computer. Each participant should also have the software installed on their device, whether they are joining remotely or attending in a computer lab. Ensuring that everyone has access to MAXQDA from the start will help keep the focus on learning and hands-on practice.

- Anyone who doesn't have a MAXQDA license can download and use the free 14-day trial version during the workshop at www.maxqda.com/trial.
- If you are organizing a research methods course or teaching students how to analyse qualitative data, we are happy to provide free course licenses for your workshop if it meets the necessary requirements. You can find all the details here: https://www.maxqda.com/maxqda-course-license.
- To request licenses, simply email <u>(trainers@maxqda</u>.de) our training team and include the expected number of participants and the date of your workshop. We'll review your request and get back to you as soon as possible.
- As a MAXQDA trainer, you're also eligible for a 20% Trainer Discount that you can share with your participants. If you need the discount code, just reach out to us, and we'll issue a coupon valid for three months.

2 Example Files

Before diving into the planning phase of your workshop, it's important to mention that MAXQDA provides example projects that you can use to demonstrate various functions of the software.



2.1 MAXQDA Example Projects

MAXQDA comes pre-programmed with example projects in English, Spanish, Japanese, Chinese, Portuguese, German and Turkish 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 2024 Start Dialog

2.2 Preparing Example Data for Your MAXQDA Workshop

For introductory workshops, we recommend that participants start with an empty project file. This approach allows you to clearly demonstrate how to import different data types from scratch.

To provide example data, you can export documents from MAXQDA's example project, save them to your computer, and distribute them to your participants via email, USB, or a shared drive. To export all documents, go to **Reports > Export > All Documents**. If you only want to share specific documents, activate them first, then select **Reports > Export > All Activated Documents**.

2.3 Resetting the Example Project

If you have used the example project in previous workshops and made changes to it, you can always restore a fresh version. To do this, close MAXQDA, navigate to the example project folder on your



computer, and delete the modified project. When you restart MAXQDA, it will automatically generate a new, unchanged version.

You can find the example project folder here:

- Mac: /Users/username/Documents/MAXQDA/MAXQDA2024/Examples
- Windows: \Users\username\Documents\MAXQDA2024\Examples

2.4 Additional Example Documents

If you need more example data, such as survey responses, focus group transcripts, or news articles, you can download a selection here: maxqda.com/download/example-data-financial-downturn.zip

Special thanks to **Christina Silver** and **Ann Lewins** for granting the use of their example dataset, originally created for their book: *Using Software in Qualitative Research* (2nd edition, 2014, SAGE Publications Ltd.).

3 MAXQDA for Beginners – Full-Day Training Session Outline

In the following section of this Teaching Guide, we will outline possible topics for a MAXQDA Starter Webinar or Workshop. Please keep in mind that each webinar and workshop is unique, varying in format (online or in-person), duration, number of participants, and experience levels. With this in mind, consider this outline as a flexible suggestion rather than a strict guideline. Ultimately, you know your participants best and can tailor the content accordingly.

3.1 User interface

Begin by introducing the user interface so participants can familiarize themselves with the layout and tools.

1. The **ribbon menu** at the top provides quick access to essential functions, and tooltips appear when hovering over an icon, offering useful explanations of each feature.

2. Four Workspaces:

- **Document System**: Explain how to organize and manage imported data efficiently.
- **Document Browser**: Demonstrate how to view, edit, and navigate documents.
- **Code System**: Guide users in creating and structuring codes.



• **Retrieved Segments**: Show how coded segments appear and how to filter them for analysis.

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C Documents		- 3	Occument Browser		Ct Document	• •	00% ¥	• <u>*</u> « □	0 e -	0
Document S	system				Docume	nt Brow	ser			
Q. Codes G. Codes Sets	⊂s 0	- © °								
Code Sys	stem		Retrieve	ed Segment	s					
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Figure 2: MAXQDA 2024 Start Dialog

3.2 Create a new project and import data

- Create a new project by selecting *New Project* in the start dialog. Then, you can import data from various sources (text, PDF, transcripts, table, image, audio, video, surveys, YouTube, websites, literature).
- 2. After importing, show how you can **organize data** into **document groups**—for example, categorizing interviews by participant demographics, dividing reports by themes, or grouping survey responses by region.

	Home Import Co	des s Focu Tran	Memos 2 s Group scripts ~	Variable	s Analysis s III Survey s Data -	Mixed Met YouTube D Web Page # Structured	hods Visual Tools Reports MA Nata 📲 Documents from Excel Sprea s 🗸 🍓 Reference Manager Data 🗸 d Text	XDictio dsheet
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document s later.	Imported documents		Create by clic	te a docu icking on	ment grou the plus s	ıp ign.		

Figure 3: Document System



3.3 View and edit data

Guide participants through the **Document Browser**, emphasizing how to for example:

- Read and analyse text documents.
- Play and annotate audio or video files.
- Work with images and apply visual coding.

Demonstrate **Edit Mode**, explaining when and how to modify text or correct transcription errors.

3.4 Code data and manage codes

Introduce **coding strategies** and encourage hands-on practice with:

- **Drag-and-drop coding** (moving text segments onto an existing code).
- **Manual coding** (selecting a segment and creating a new code).
- In-vivo coding (creating codes directly from highlighted text).
- Open coding, color coding, and emoticode coding (visual categorization methods).

Discuss **code organization** by showing how to:

- Change code colors for visual clarity.
- Rearrange the **Code System** using drag-and-drop.
- Move, copy, and merge coded segments and codes.

Excercise Coding
• Create open codes based on the Interview with Riley. Look at the first two paragraph only.
Are there recurring themes?
• What are the relationship of these codes? Create parent and subcodes.
• Change the color of the codes in the code system for each categories.



3.5 Retrieve coded segments

Guide participants through the following steps:

1. Activating Documents and Codes

- Explain that retrieval is based on activation—only segments from **activated documents that have been coded with activated codes will be displayed.**
- Demonstrate different activation methods: clicking on the activation symbols, using the context menu, or selecting multiple documents or codes using keyboard shortcuts.

2. Using the Retrieved Segments Window

- Show how retrieved segments appear in the Retrieved Segments window.
- Highlight the source information displayed below each segment, including the document name, code, and location.
- Explain how to navigate between retrieved segments, open related documents, and use memos for additional insights.

🔅 Retrieved Segments	Q Segments	B	R	9		٥.	ø	0	¢0	e	t	4	-	
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. Interviews > Berlin > Thanh														-
Civil Status: Separated/divorced # of ch	hildren: 1 Highest level of education: Master de	igree Emp	loyme	nt: Emp	loyed Ag	ge: 32 L	Locati	ion: Ber	lin					
Very good. Now, I would say about	four.													
Q: Could you explain to me why?														
R: Because I would like to improve,	, like I mentioned earlier, my free time. Yeah	. In my fr	e tim	e, I wo	uld like to	o use th	e tim	e more	efficie	ntly. And	d I feel	that be	cause	of
that I'm not truly satisfied yet with m	ty balance after work. So that's why I left or	e point ou	ut.											
Thanh, Pos. 25-27 😋 Well-be	eing assessment (50)													

Figure 4: Retrieved Segments

3. Viewing Retrieved Segments in Table View

- Demonstrate how to switch to table view to get a structured overview of coded segments.
- Explain how to sort, filter, and interact with coded segments within this table.
- Encourage participants to explore how this view can be used for reporting and further analysis.



3.6 Working with memos

- Document memos: Used for summarizing document content.
- Code memos: Add reflections and definitions to codes.
- Text memos: Capture insights about specific segments.
- Free memos: General research notes.

Encourage using the Memo Manager to organize and review memos efficiently.



Figure 5: The Memo Manager

If time allows, consider including some exercises in your webinar or workshop. Here are some examples:





- Search for Keywords: Use the Text Search tool to find words or phrases across documents, coded segments, memos, or comments. Apply filters like whole word, case sensitivity, or wildcards for precise results.
- Autocode Search Results: Automatically code all found text segments with a **new or existing code**. Adjust coding range to include surrounding words, sentences, or paragraphs. Exclude irrelevant hits before applying codes to ensure accuracy.

3.7 AI Assist (optional)

When introducing AI Assist, focus on how it can make qualitative research more efficient without replacing human interpretation. The goal is to show participants how AI can support their analysis, not take over the process.

1. Summarizing Coded Segments

- Walk through how AI Assist can quickly summarize coded segments, making it easier to spot patterns and synthesize findings.
- Discuss when and why researchers might need to refine these summaries to ensure they're accurate and meaningful.

2. Al Chat Feature

• Show how researchers can use the AI Chat function to interact with their data—asking questions, clarifying concepts, and even getting suggestions for deeper analysis.

3. Suggesting New Codes

• Demonstrate how AI Assist can suggest new codes based on selected text, helping researchers uncover emerging themes they might not have noticed.

4. Autocode Function

• Highlight how AI-powered autocoding can analyze patterns in the data and apply relevant codes automatically, saving time while maintaining consistency.



Excercise Autocoding and Frequencies
 Go to Analysis > Text Search & Autocode. Create a lexical search for the term "family". Autocode results with a new code.
• Word Cloud: go to Visual Tools > Word Cloud and select the document group "Berlin" for the analysis. What do you learn about the interviews?
 Word Cloud: Pick a word in your word cloud that you find surprising and meaningful. Click on this word to read the segments. Are they interesting? You can autocode them either with an existing or with a new code.
 How often do interview partners talk about their Typical Workday? What do they say? View the segments by double clicking on the code-name and in the retrieved segments window.

Throughout the session, emphasize best practices for evaluating Al-generated insights. Whether it's summaries, chat responses, or autocoded data, researchers should always review, refine, and interpret Al's output critically. Al can speed things up, but the real insights come from the researcher's expertise and understanding of the data.

3.8 Visual Tools

MAXQDA's visual tools allow for an in-depth exploration of coded data relationships. Focus on these two tools during training:

1. Code Matrix Browser

- Demonstrate how to generate a matrix displaying the frequency of codes across documents.
- Show how the matrix can help compare coding patterns across different sources.
- Encourage participants to use filters and sorting options to refine their analysis.

Code-Matrix-Browser							-	O	×
		t 11 🔳			₽ C	- 22	0	t.	0
Codesystem	2001 Bush	2005 Bush	2009 Obama	2013 Obama	2017 Trump	2021 Biden			
Freedom-related			•						
Democracy-related	•			•					
Nation-related									
💿 People-related	•	+							







2. Code Relations Browser

- Explain how this tool visualizes relationships between different codes.
- Demonstrate how to identify co-occurring codes and thematic connections within the dataset.
- Discuss how these insights can be used to refine coding frameworks and build analytical narratives.

• • •	Code-Relatio	ns-Browser		•
a 🗉 🧧 🖬 🖬 📲 🕻		# 1	Σ 🖽 С 👪	- 🖸 📲 📩 🚯 🛛
Codesystem	Typical workday	Education	Friends & Family	Work/Life Separation
V G Work situation				
Flexibility				
Amount of hours				
🐚 Workplace & Career				
🍗 Salary & Budgeting		•		•

Figure 7: Code Matrix Browser





3.9 Export options

Demonstrate how to **export analyzed data**:

- Export retrieved segments for reporting.
- Use the **Reports menu** to generate structured analysis documents.

3.10 Where to find help

- Help free manuals and videos in MAXQDA 2024's start dialog
- Free manuals 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, working with variables, and/or MAXQDA's teamwork functionality including the TeamCloud or further AI Assist features.

4 Things to Keep in Mind

1. Online Sessions: Set Yourself Up for a Smooth Technical Experience

Your technical setup plays a big role in how effective your training session will be. A few things to consider:

- A stable internet connection helps prevent interruptions.
- A clear microphone ensures your voice is easy to understand.
- A good camera setup helps with engagement, but if you don't have one, a well-lit space and good framing can make a big difference.

Tip: Test your setup before your session, and if possible, have a backup plan in case of technical difficulties.



2. Create a Comfortable and Professional Training Environment

Your surroundings influence how participants perceive the session. A few things to keep in mind:

- A neutral or organized background helps minimize distractions. If that's not possible, a blurred background or virtual background can be a good alternative.
- Good lighting makes a big difference. Natural light works well, or a simple lamp positioned in front of you can improve visibility.
- A quiet space is ideal, but if background noise is unavoidable, using headphones with a built-in microphone can help.

Tip: Do a quick check before starting to make sure your background, lighting, and sound are as clear as possible.

3. Adapt to Different Experience Levels

Not all participants will have the same level of familiarity with MAXQDA. Some might be completely new, while others are experienced researchers looking to refine their skills.

- Start with clear objectives so everyone knows what to expect.
- Keep explanations simple at first, but be ready to go deeper if needed.

Tip: If possible, get a sense of your audience's experience level before the session so you can adjust your approach.

4. Focus on Hands-On Learning

MAXQDA is best learned through practice, so encourage participants to follow

along.

- Use realistic examples or datasets to make the training more relatable.
 - Give participants time to try things out on their own and guide them as needed.

5. Stay Up to Date with MAXQDA

MAXQDA is regularly updated with new features and improvements. As a trainer, staying informed is essential to delivering the most up-to-date and effective guidance.



- Check for updates before your training sessions to ensure you are presenting the most current version.
- Explore new features yourself so you can explain them clearly.
- If you're not sure about something, it's okay to look it up or direct participants to official resources.
- Check the Trainer Portal for all the necessary resources, which might help you answer the questions you may have.

6. Encourage Continued Learning Beyond the Training

Learning doesn't stop at the end of a session. Encourage participants to keep building their skills by: Providing additional resources, such as:

• MAXQDA free webinars:

https://www.maxqda.com/webinars

- MAXQDA Manual: https://www.maxqda.com/manual
- MAXQDA Getting Started Guide:

https://www.maxqda.com/getting-started-guide

- Proficient MAXQDA User Course: https://www.maxqda.com/academy/proficient-maxqda-user-course
- MAXQDA Academy resources: https://www.maxqda.com/academy

5 Further MAXQDA Trainer Resources

Enhance your MAXQDA training with these free materials, exclusive trainer resources, and networking opportunities.

Free MAXQDA Training Materials

- Getting Started Guide Step-by-step introduction to MAXQDA: https://www.maxqda.com/getting-started-guide
- Free Webinars Live online sessions covering essential features: https://www.maxqda.com/webinars

MAXQDA Professional Trainer & Workshops

• Become a MAXQDA Professional Trainer – Join our certified trainer program: https://www.maxqda.com/professional-trainer





MAXQDA Workshops - Find live training opportunities:

https://www.maxqda.com/workshops

Trainer Portal

• **Trainer Portal** – Access trainer-only guides, video resources, templates, and exclusive training materials (Password: MQPT): https://www.maxqda.com/trainer-portal

MAXQDA Press

 MAXQDA Press – Explore high-quality literature on qualitative and mixed methods research, including feature-specific guides available for free: https://www.maxqda.com/maxqda-press

Networking Opportunities in the MAXQDA Community

- MAXQDA Research Network Connect with researchers worldwide: https://www.maxqda.com/research-network
- MAXQDA User Forum Join discussions and get peer support: https://www.maxqda.com/forum
- MAXQDA International Conference Attend our annual global event: https://www.maxqda.com/international-conference
- MAXDAYS Online Conference Participate in virtual workshops and discussions: https://www.maxqda.com/maxdays
- MAXQDA Research Blog Read expert insights, tutorials, and case studies: https://www.maxqda.com/blog
- MAXQDA LinkedIn User Group Connect with trainers and users on LinkedIn: https://www.linkedin.com/groups/883209

Contact Us

Need help organizing a MAXQDA workshop? Contact us at **trainers@maxqda.de** – we're happy to assist you!



6 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.

- Free up RAM by closing other open programs.
- Restart the software.
- Shut down and restart your computer.
- 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."

M Preferences			×
MAXQDA 24 Analytics Pro	Light	Interface theme System	Dark
General			
Subser Interface	0	0	0
A Fonts Word Separation	Interface language	English	•]
Automatic Import	Spellcheck language	Deutsch (German)	
Automatic Backups	Regular	Text Size	Large
	Reset interface settings	•	0
		Save	Cancel

Figure 2: Reset interface settings automatically

• 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 lastused 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 where they were saved 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%/MAXQDA2024
- 4. Delete the files "MAXQDA2024.prp" "MAXQDA2024.ini" "MAXQDA2024.ini.LOCK" (if existing)
- 5. Restart MAXQDA

Mac (local installation)

- 1. Close MAXQDA
- 2. Press cmd + 습 + G
- 3. Type in the following and click "OK": ~/Library/Preferences/MAXQDA2024
- 4. Delete the files"MAXQDA2024.prp""MAXQDA2024.ini""MAXQDA2024.ini.LOCK" (if existing)
- 5. Restart MAXQDA

< > MAXQDA24	≔≎	*	٥	0	⊙ ×	Q
Back/Forward	View	Group	Share	Edit Tags	Action	Searc
Name	Date Modifier	4	Y	Size	Kind	
EULA.acc	06.10.2023,	13:20		8 Byte	Dokument	
Log_MAXQDA24.html	06.10.2023,	13:26		41 KB	HTML	
Log_MAXQDA24_crash.html	18.10.2023, 1	18.10.2023, 14:20 84 KF				
Log_MAXQDA24_lastSession.html	Heute, 14:50		65 KB	HTML		
Log_MAXQDA24.html	Heute, 14:53			43 KB	HTML	
MAXMaps.mlb	18.10.2023, 1	2:32		510 Byte	Dokument	
MAXQDA24.clog	24.10.2023,	14:28		14 KB	Dokument	
MAXQDA24.ini	Heute, 14:53			50 KB	Dokument	
MAXQDA24.prp	Heute, 14:50			4 KB	Dokument	
PrivacyPolicy.acc	06.10.2023,	13:20		18 Byte	Dokument	
StartHtml.ini	Heute, 14:53			84 Byte	Dokument	
TeamCloudVersionInfo.ini Users	Gestern, 14:3	32		131 Byte	Dokument	
VelipeLog_231020_152051475.html	Heute, 14:53			448 KB	HTML	

Figure 3: Reset user settings manually





• 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.

