Spotlight Session – Memos

The Usefulness of Memos

Memos represent a simple yet extremely important tool in every data analysis project. For some research methodologies, memos are essential – the case of Grounded Theory, for instance. Memos represent a dynamic type of text that can be changed, supplemented, modified, and integrated at any time. In MAXQDA, Memos can be assigned to every single part of the project file to inform the data management and the research. Sometimes, MAXQDA uses Memos to supplement metadata to documents, especially when pre-processing features are used.

Types of Memos in MAXQDA

In the past, researchers would be spreading hand written post-its across the printed materials or on a blackboard. The principles for assigning Memos in MAXQDA remain the same, however producing information in digital format can be much more convenient. Later we will describe some of the advantages. For the moment, it is important to check the baseline features. Inside a MAXQDA project file, users can assign different types of memos, according to their position in the Project file. The options are compiled into the Memos tab:
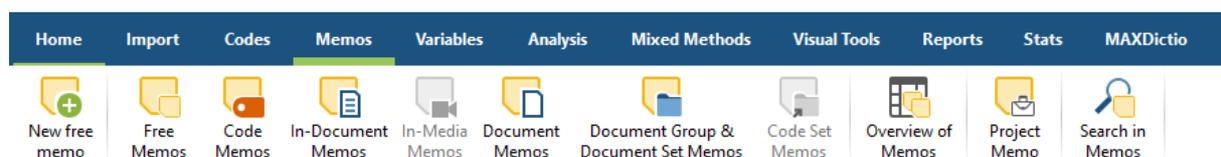
From this list, it is possible to foresee that Memos can be distributed in the different parts of the dataset. The options include the "Free Memo", not directly assigned to a position in the data material, nor to a document or code, and the "Project Memo", a memo that is displayed in the upper row of the Document System. To create a Memo, normally users are offered different strategies. Sometimes, it is enough to double-click a specific area inside the workspace of using the right-

click after selecting a document of a text segment. Memos can be copied or deleted by selecting the required entries directly. As in other parts of MAXQDA, there are options for exporting and printing memos transversely the different dialogue boxes. Once assigned inside the MAXQDA project file, the Memos are represented, by default, using dedicated yellow icons:
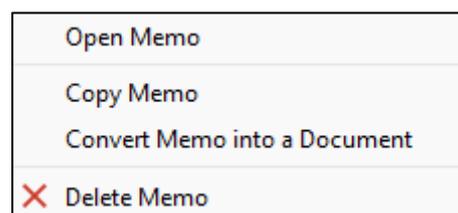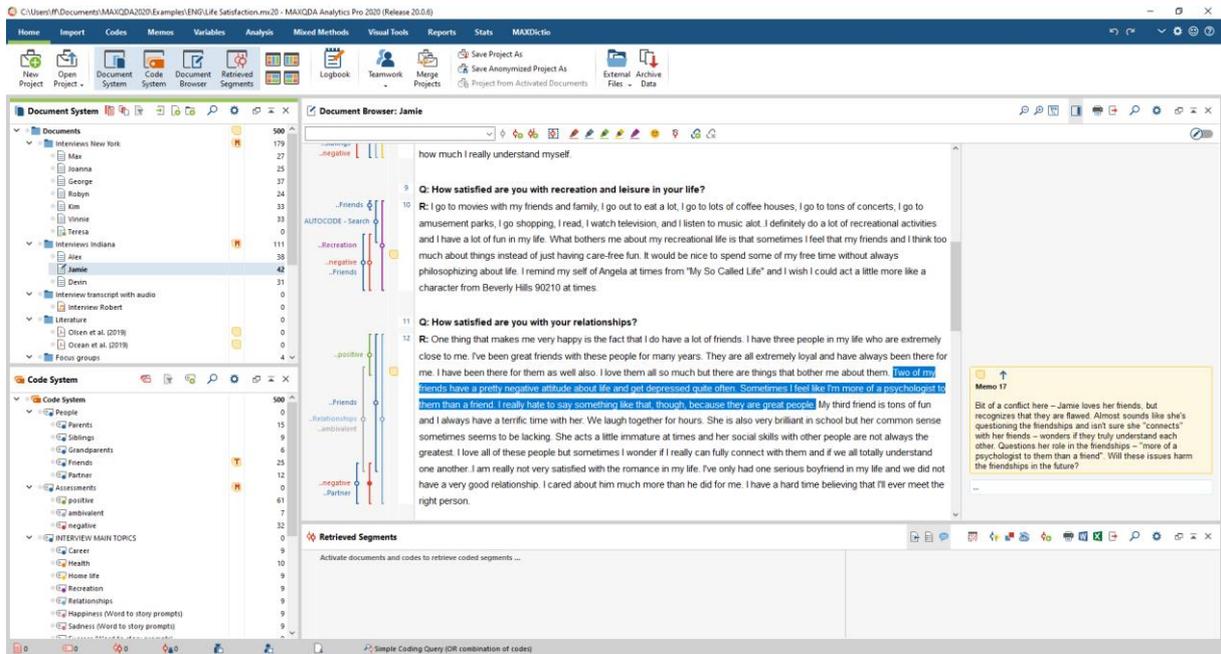
By moving the mouse over a yellow Memo symbol in MAXQDA, a small information window appears with the title of the Memo, the last modification date, if applicable the assigned label for the Memo type as well as the beginning of the Memo text. In the sidebar, it is possible to activate and read the contents of the in-document Memos. When editing a Memo, a dialogue-box comprising numerous options is available:
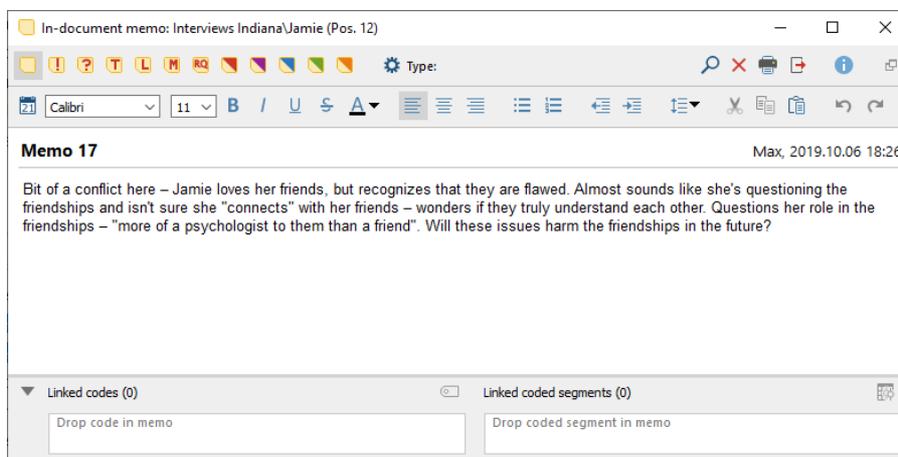
MAXQDA is saving all entered information and changes to a Memo when closing the window. In addition, the Memo window will be saved regularly and you can adjust the time interval in MAXQDA's settings. At the top, there is a toolbar for formatting the text, so you can create enumerations and numbers, for example. A table can be inserted by right-clicking in the text window and selecting the function with the same name. Additionally, in the upper area of the Memo, users can assign a meaningful Memo title – just click on the bold title with the mouse.

In the upper right corner MAXQDA shows when and by whom the Memo was last edited. Hold the mouse cursor over this information to see who originally created the Memo. Do not forget the options to assign different symbols to each memo. This makes it possible to indicate what kind of memo it is. At last, it is possible to link codes or coded segments to Memos. The boxes for the linked entries are displayed at the bottom. Another possibility, is to link text, images or Memo segments to each other using internal links. A click on the link at one position then jumps to the other position. The two linked segments can be in the same document/Memo or in two different documents/Memos:
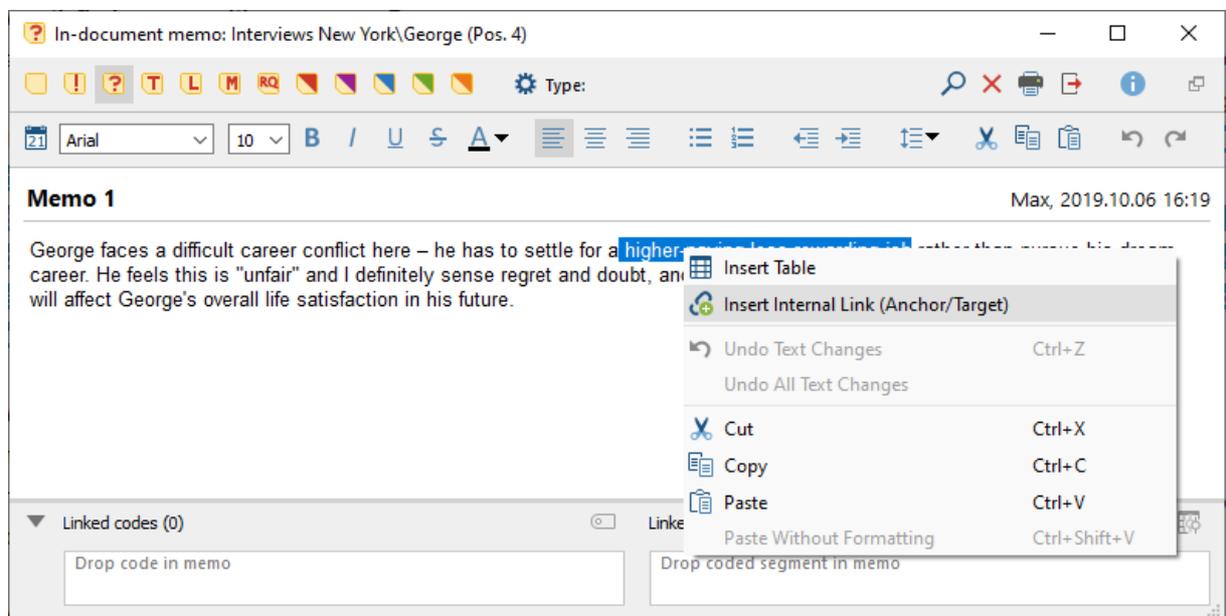
Memos can be converted to documents. The function is available in the Overview of Memos or in the context menu of any Memo symbol. Right-click on a memo icon in MAXQDA and choose Convert to a document to transform the memo into a document in the Document System.

Going Digital

One of the advantages of using a MAXQDA project file, is the ability to perform searches and complex queries to the dataset. Searching within the memos is very easy. A dedicated dialogue box is provided to complete the task using different criteria:
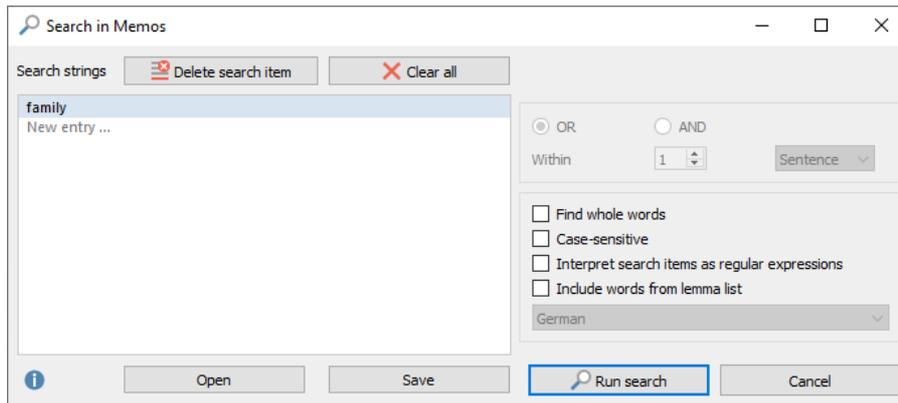
MAXQDA users do not have to worry about the exact location where Memos are assigned inside the project file since all the entries will be saved and compiled in tables. Therefore, it is possible to retrieve a group or all the entries at any given moment. Tabulated data is very easy to retrieve. The entries can be filtered according to their type using the Memo Manager:
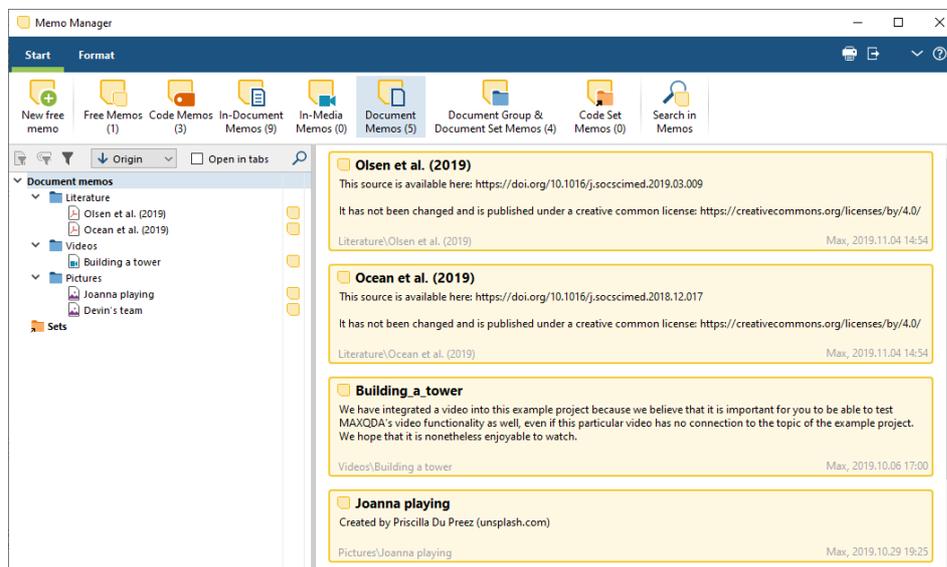
Eventually, users may want to reach all the existing entries for a thorough reading or simply to apply bulk actions (e.g. deleting several Memos). That comprehensive list is called Overview of Memos:

Overview of Memos — □ ×

All   24 Memos

All Memos ✕   X ⊙ ⤴ ⓘ

George faces a difficult career conflict here – he has to settle for a higher-paying less-rewarding job rather than pursue his dream career. He feels this is "unfair" and I definitely sense regret and doubt, and even some hopelessness. I wonder how this decision will affect George's overall life satisfaction in his future.

Title	Preview	Origin	Modified by	Modified	Created by	Created	Document	Co
MAXQDA Exampl...	This project give...	Project	Max	2019.11.04 14:45	Max	2019.10.29 18:46		
Friends	It is interesting t...	Code	Max	2019.10.29 18:50	Max	2019.10.29 18:50		Fri
Assessments	These codes will ...	Code	Max	2019.10.29 18:53	Max	2019.10.29 18:53		Ass
Memo 1	George faces a ...	In-document	Max	2019.10.06 16:19	Max	2019.10.06 16:19	George	
Memo 2	Despite George ...	In-document	Max	2019.10.06 16:20	Max	2019.10.06 16:20	George	
Memo 9	Again, this touch...	In-document	Max	2019.10.06 17:22	Max	2019.10.06 17:22	Vinnie	
Memo 10	I could picture Vi...	In-document	Max	2019.10.06 17:23	Max	2019.10.06 17:23	Vinnie	
Memo 15	Issues of doubt ...	In-document	Max	2019.10.06 18:25	Max	2019.10.06 18:25	Jamie	
Memo 16	Not sure what m...	In-document	Max	2019.10.06 18:15	Max	2019.10.06 18:15	Jamie	
Memo 17	Bit of a conflict h...	In-document	Max	2019.10.06 18:26	Max	2019.10.06 18:26	Jamie	
Olsen et al. (2019)	This source is av...	Document	Max	2019.11.04 14:54	Max	2019.10.28 17:55	Olsen et al. (2019)	
Ocean et al. (20...	This source is av...	Document	Max	2019.11.04 14:54	Max	2019.10.28 18:00	Ocean et al. (20...	
Joanna playing	Created by Prisci...	Document	Max	2019.10.29 19:25	Max	2019.10.29 19:25	Joanna playing	
Devin's team	Created by Josh...	Document	Max	2019.10.29 18:47	Max	2019.10.29 18:47	Devin's team	
Building_a_tower	We have integra...	Document	Max	2019.10.06 17:00	Max	2019.10.06 17:00	Building a tower	
Interviews from ...	It was much mor...	Document group	Max	2019.10.29 19:27	Max	2019.10.29 19:27		
Interviews from ...	There were very...	Document group	Max	2019.10.29 19:28	Max	2019.10.29 19:28		
YouTube: You D...	Title You Don't Fi...	Document group	Max	2019.11.01 16:48	Max	2019.11.01 16:48		
Twitter data (01...	All of these word...	Document group	Max	2019.11.01 16:54	Max	2019.11.01 16:54		
AUTOCODE - Se...	2019-11-04 21:1...	Code	Max	2019.11.04 21:12	Max	2019.11.04 21:11		AU

The table can be sorted using the different columns. In the column called **Origin**, it is possible to identify the type of memo. Again, users do not have to worry about the physical location of their printed data, the existing entries are easy to access regardless of their location. For those managing a large number of Memos, by using these tools it is less likely to leave important annotations behind. In the Overview of Memos, it is possible to perform a search in context using the dedicate icon. Once more, it is not necessary to browse manually endless lists of post-its.

Please refer to the **MAXQDA Training Center** for more information regarding MAXQDA tools: https://www.maxqda.com/training.