

MAXQDA for Beginners - Teaching Guide

Here are a few tips from our professional MAXQDA trainers on how to teach a MAXQDA workshop. Whether you are teaching a large workshop with 20 participants, or simply introducing the software to new colleagues, this overview will help you get started on the right foot.

Infrastructure

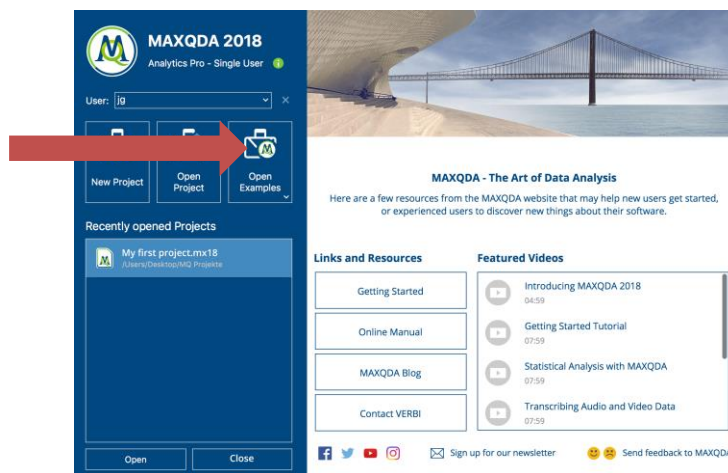
The teacher will need two things: a projector and a computer that has MAXQDA installed on it. Each participant will also need a computer with MAXQDA installed. They can either bring their own computer or you can teach the workshop in a PC-lab that has computers equipped with MAXQDA. Anyone who does not yet own a MAXQDA license can download and use the free 14-day free trial version during the workshop <http://www.maxqda.com/demo>.

Example Files

MAXQDA Example Projects

MAXQDA comes pre-programmed with example projects in English, Spanish, Portuguese, and German, which you can use for MAXQDA training seminars. You can access these projects by clicking the "Open Examples" option in the 'welcome' dialogue window that opens when MAXQDA launched.

The example project titles are "Life Satisfaction" (English), "Climate Change" (German), "Medical Health" (Spanish), and "Volunteering" (Portuguese). These example projects each contain various document types (e.g. interview transcripts, focus group transcripts, PDF files, video files) and most have already been coded.



We recommend that, for an introductory workshop, you have your participants start with an empty project file. This way you can better demonstrate how to import different data types. We recommend exporting the documents of the example project, saving them onto your computer, and then giving these files to each of the 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.

You can first introduce the user interface to the participants before demonstrating how to import documents like interview transcripts into MAXQDA. Next, have the participants try it importing documents on their own.

Further Sources for Example Documents

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

Special thanks to Christina Silver and Ann Lewins for allowing 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.

MAXQDA for Beginners – Training Session Outline

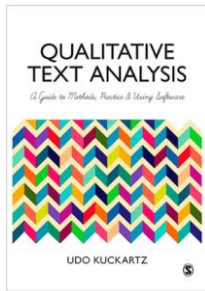
This outline follows the basic steps of a typical research project. You should be able to cover the following topics and have enough time for the participants to work with MAXQDA on their own.

- 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, table, image, audio, video, surveys, twitter data)
- 3. View and edit data**
 - a. View documents in 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. Color coding
 - v. Emoticon coding
 - c. Change code colors
 - d. Manage your Code System
 - i. Rearrange code system via drag & drop
 - ii. Move and copy coded segments from one code to another
- 5. Retrieve coded segments**
 - a. Activate documents and codes
 - b. Source information cards, jump back to original data
 - c. View your retrieved segments in table view (Overview of Retrieved Segments)
- 6. Working with memos**
 - a. Memo types: document memos, code memos, text memos, and free memos
 - b. Memo icons
 - c. Memo manager
- 7. Lexical Search**
 - a. Search for key words
 - b. Automatically code search results
- 8. Export options**
 - a. Export Retrieved Segments
 - b. Export elements through **Reports > Export**
- 9. Where to find help**
 - a. Help – free manuals and videos in the splashscreen of MAXQDA 2018
 - b. Free manuals and video tutorials on the MAXQDA website

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

Literature

MAXQDA can be used for many methodological approaches but the application of the software is not a research method in itself. We would suggest that you include basic information about qualitative research methods and analysis methodologies in your workshop. A good literature resource is the textbook *Qualitative Text Analysis*, written by the main developer of MAXQDA, Prof. Dr. Udo Kuckartz.



Qualitative Text Analysis

A Guide to Methods, Practise and Using Software

Udo Kuckartz

SAGE Publications, London, 2014

How can you analyse narratives, interviews, field notes, or focus group data?

Qualitative text analysis is ideal for these types of data and this textbook provides a hands-on introduction to the method and its theoretical underpinnings. It offers step-by-step instructions for implementing the three principal types of qualitative text analysis: thematic, evaluative, and type-building. Special attention is paid to how to present your results and use qualitative data analysis software packages, which are highly recommended for use in combination with qualitative text analysis since they allow for fast, reliable, and more accurate analysis. The book shows in detail how to use software, from transcribing the verbal data to presenting and visualizing the results.

The book is intended for Master's and Doctoral students across the social sciences and for all researchers concerned with the systematic analysis of texts of any kind.

Contact

Need help organizing a MAXQDA workshop? Contact us at research.network@maxqda.com.