# MaxQDA Training Worksheets

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The following document provides screenshots and instructions to access the information reviewed in the training. This guide will be helpful as you begin to use the software on your own and need a reminder of where to find the different functions we review in the workshop.

Software Layout

There are four areas that you'll use in the software:

- The document system displays all of the documents you've uploaded to your database.
- The code system displays your codes and the coding hierarchy that you've defined.
- The document browser displays the document that you are currently working with.
- The retrieved segments section displays any segments you've asked MaxQDA to retrieve through code output or queries.
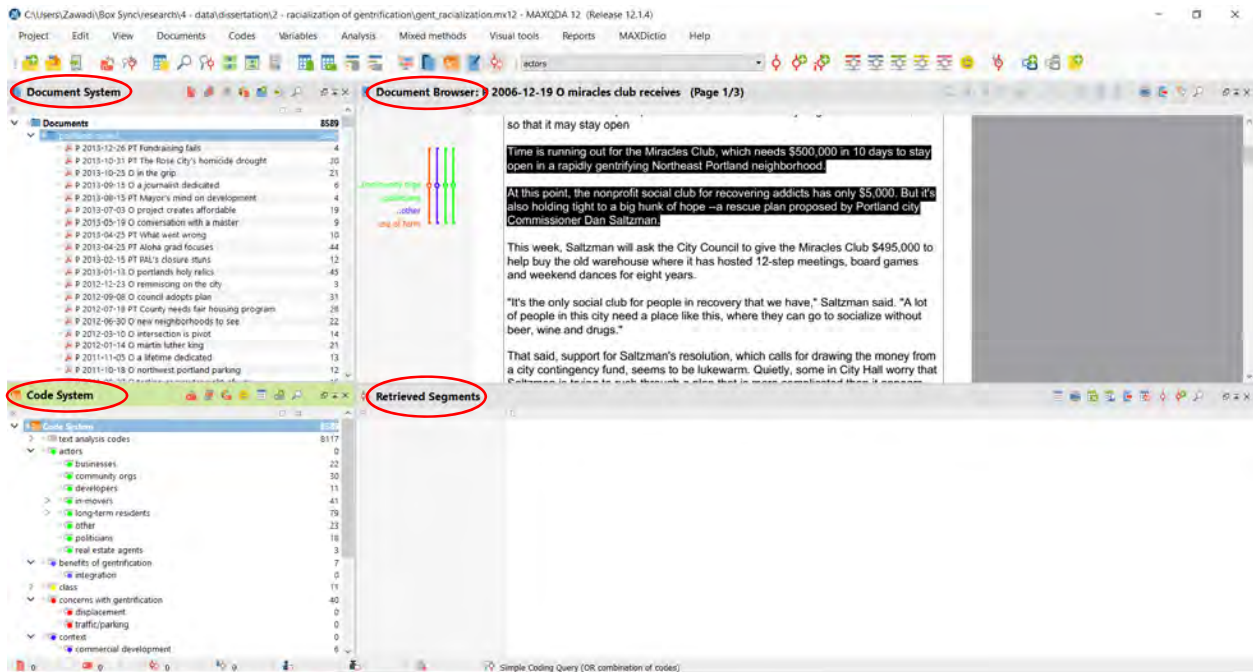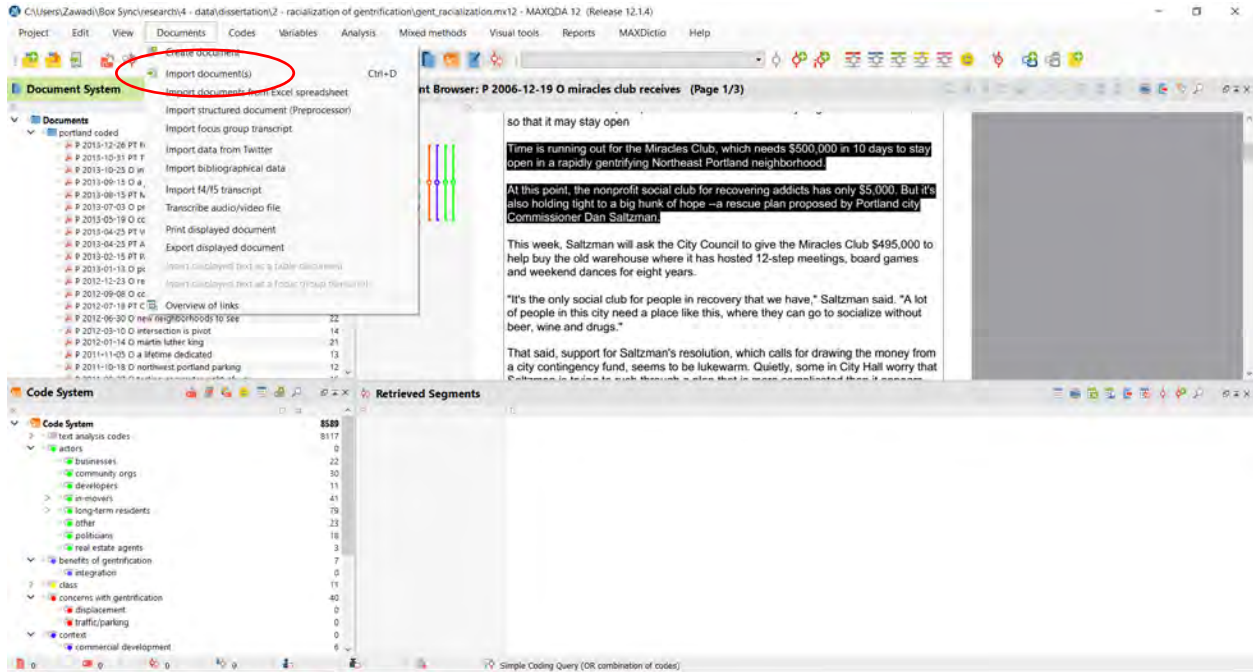
Starting a New Project
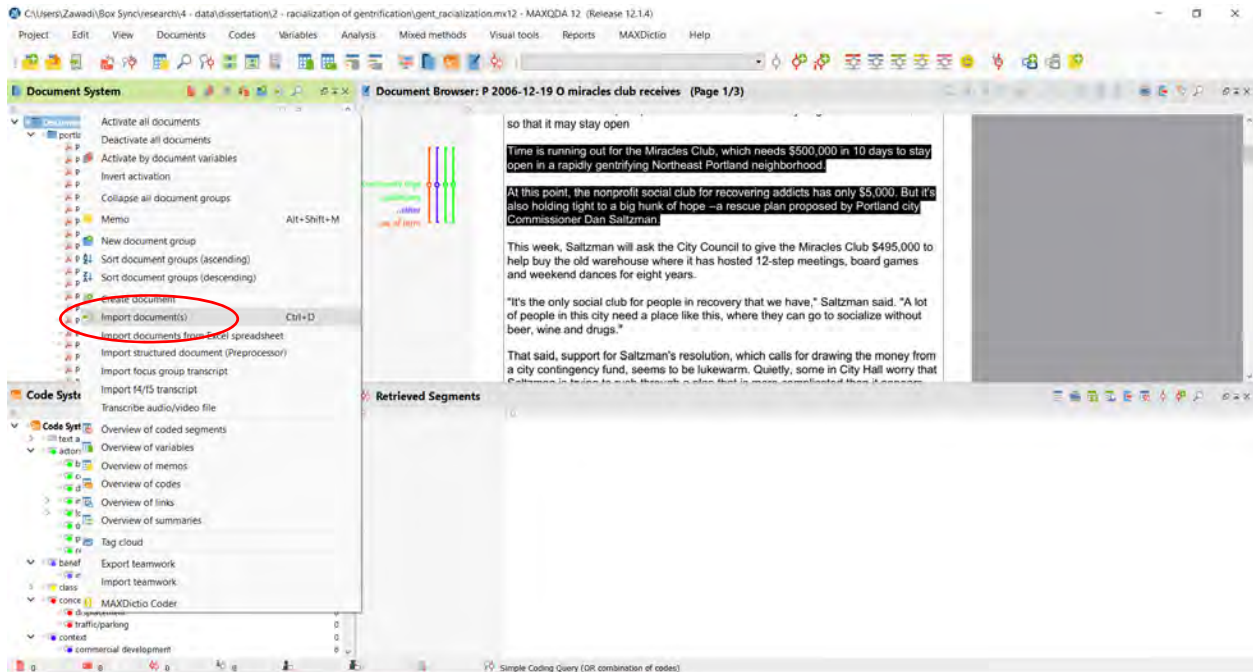When you first open MaxQDA, choose "Create and open new project."
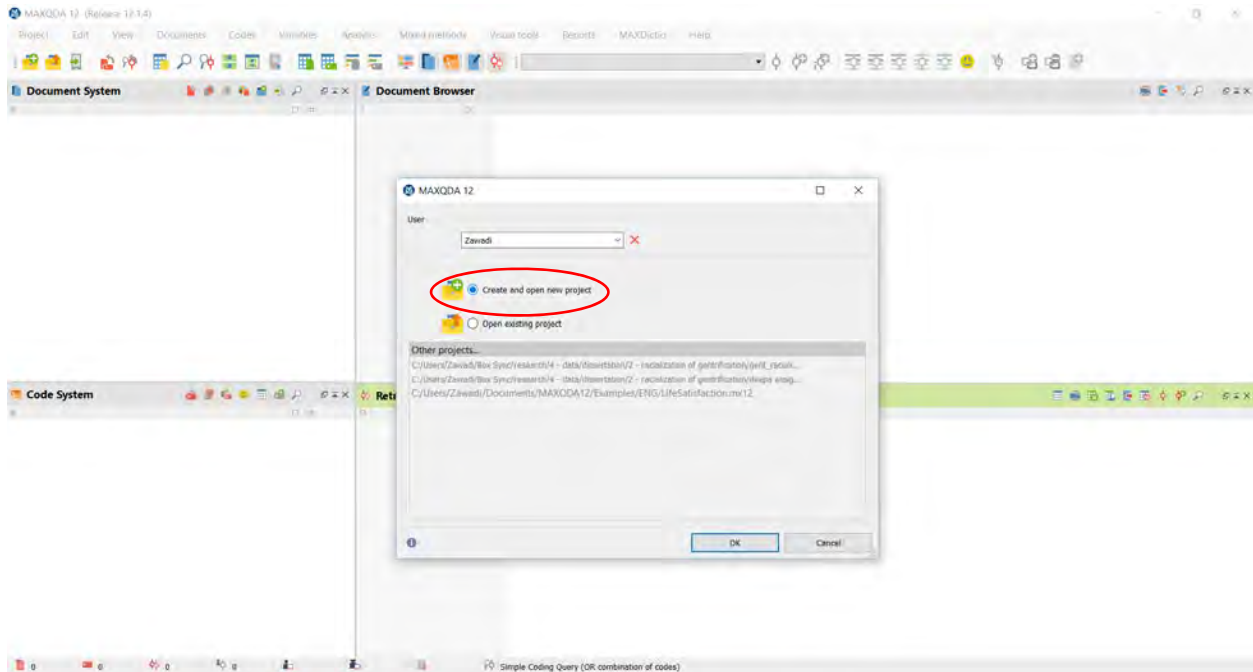
Or when you have a database open, select "New Project" from the "Project" menu.

Importing Documents

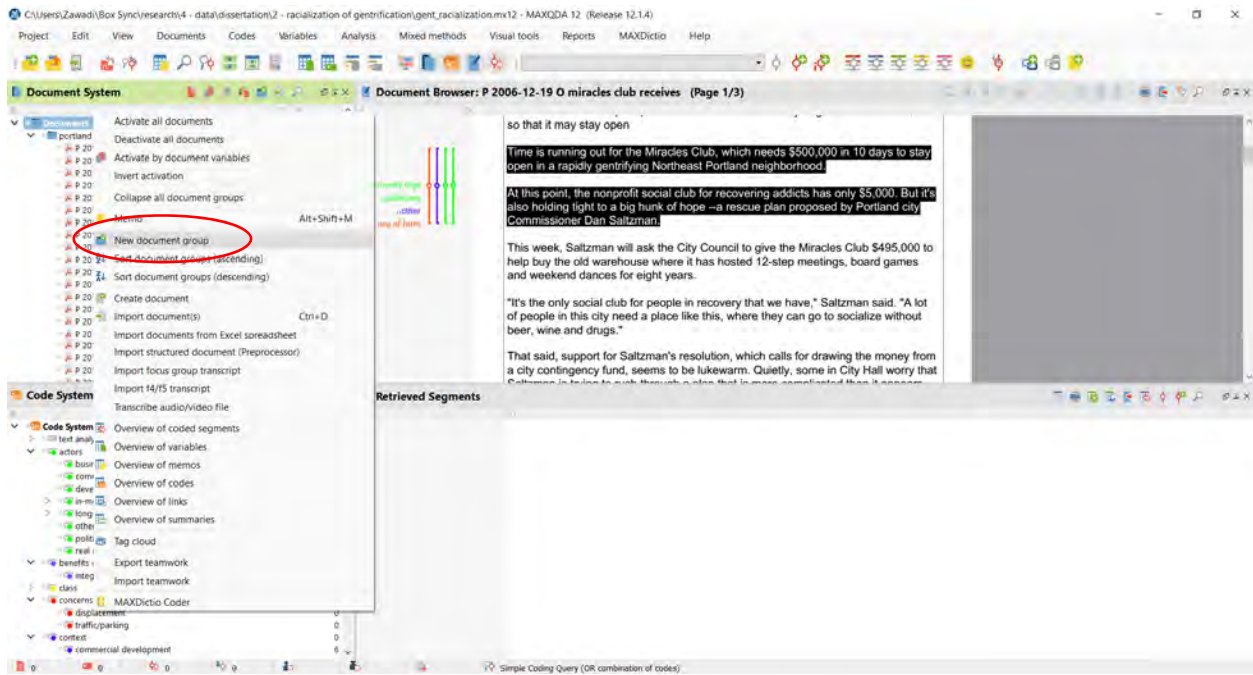To add documents to your database, select "Import document(s)" from the "Documents" menu.

Or right click on "Documents" in the Document System and select "Import document(s)."

Creating Document Groups

To add a folder structure, which MaxQDA calls "document groups," right click on "Documents" in the Document System and select "New document group." Then name your document group.
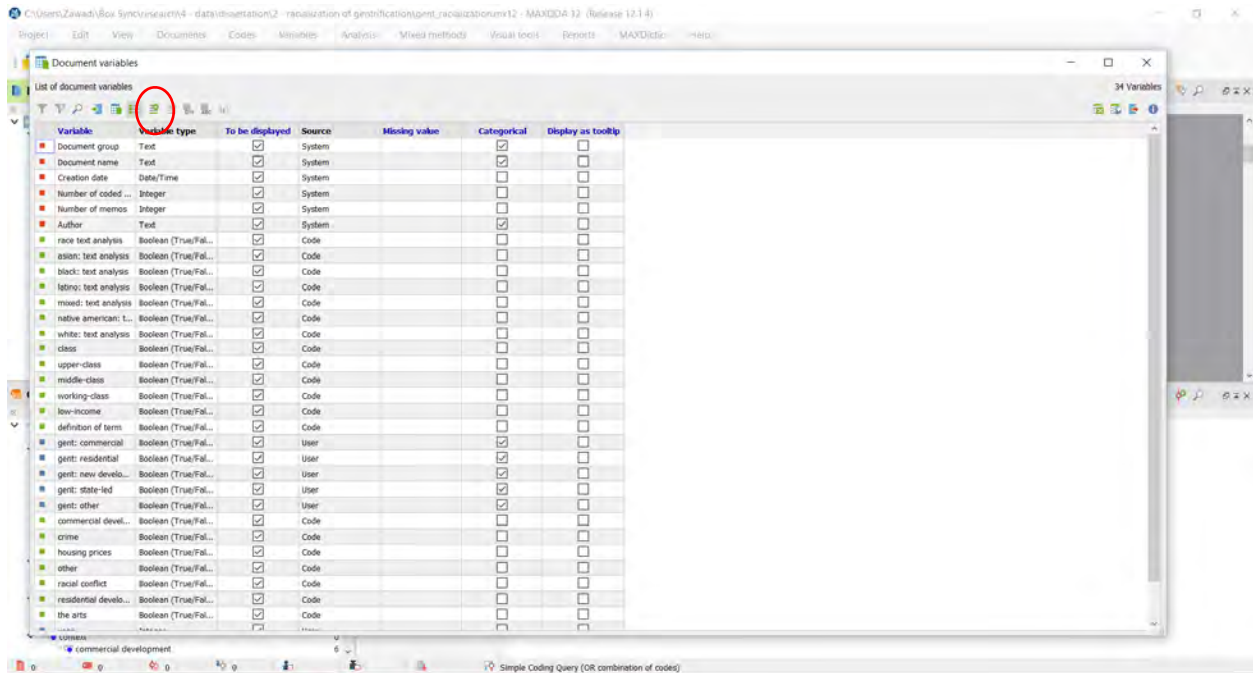
Adding Variables about your Documents
"Variables" or attributes about your documents can be added manually or automatically.

To manually add attributes, you must first create the variables you want to add. Click on the "Variables" menu and select "List of document variables."

In the list of document variables, click on the "New variable" icon.

Name the variable and select the variable "type." The variable types include:
- Text – an empty text box
- Integer – a metric or category with a numeric value
- Floating point – number
- Date/time – date or time formatted option
- Boolean (True/False) – a yes or no value

You can also define whether you want a missing value to be indicated by anything other than a blank.
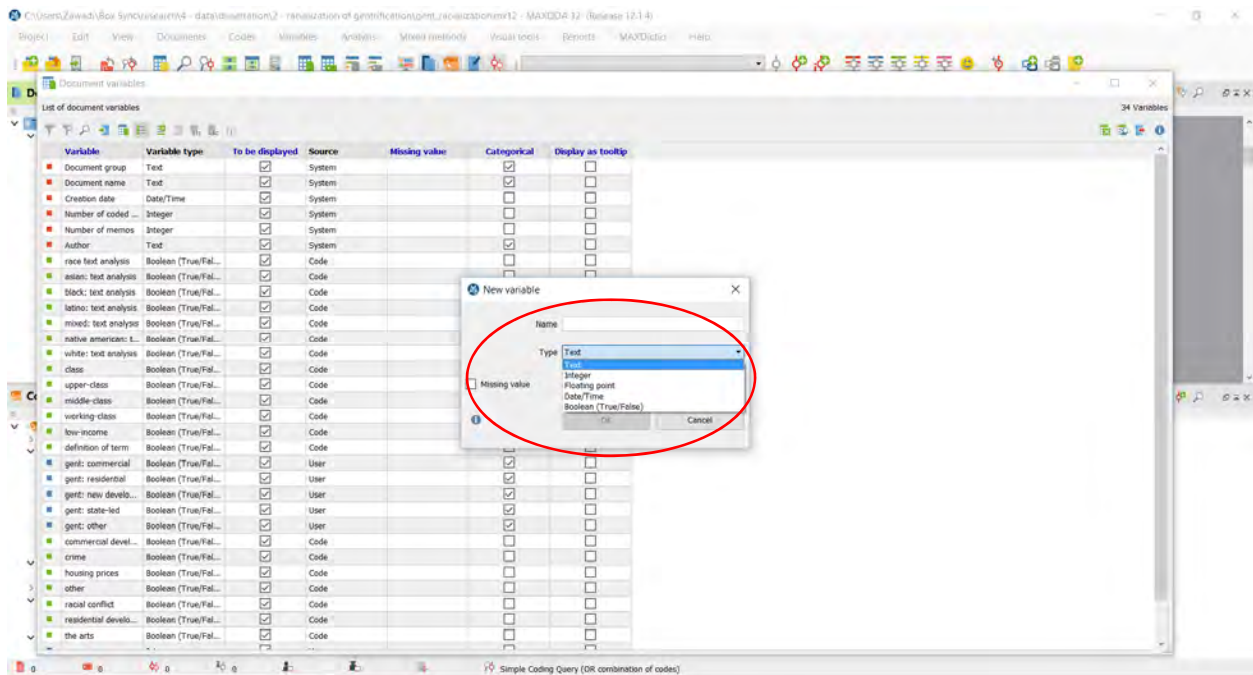
Once you have set up a variable, you can edit the values for each document manually by clicking on the "Data editor" icon, which will display a table with each of your document names in the rows and the variables in columns.
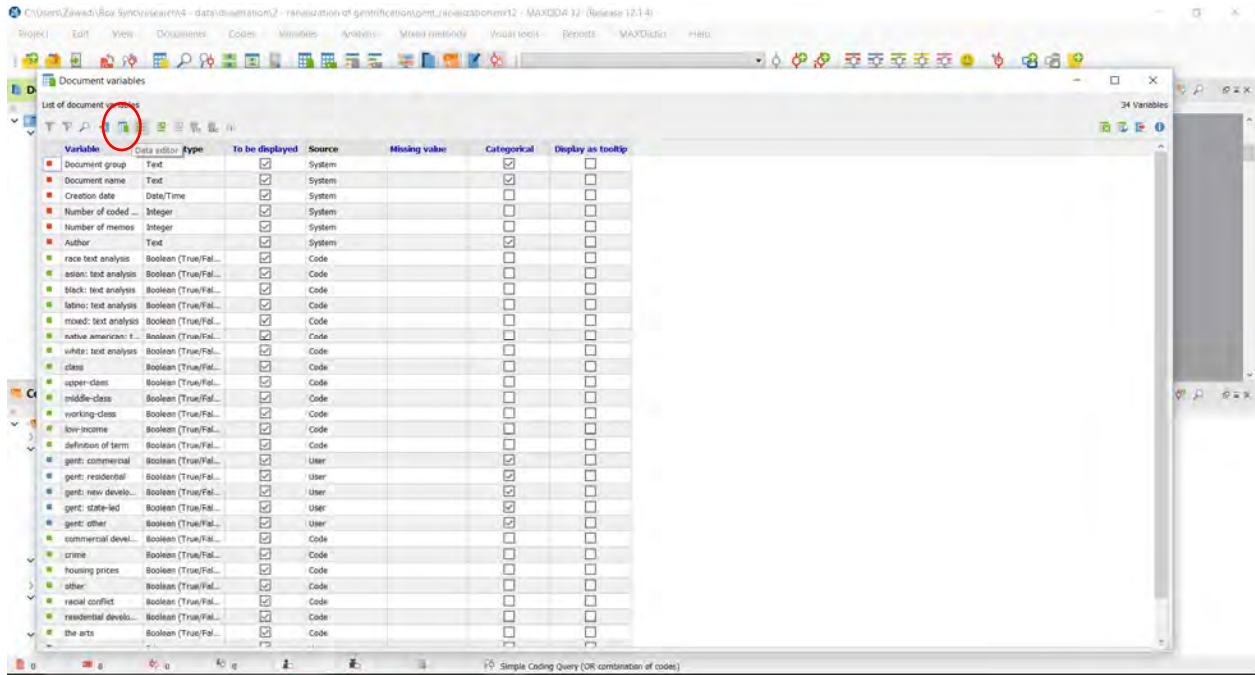
Alternatively, you can import an Excel spreadsheet with variables already predefined. To do this, click on the "Variables" menu and select "Import data."

Browse to where your Excel spreadsheet is saved and select the file. Select the variables you want to import from the list and then click "Import."
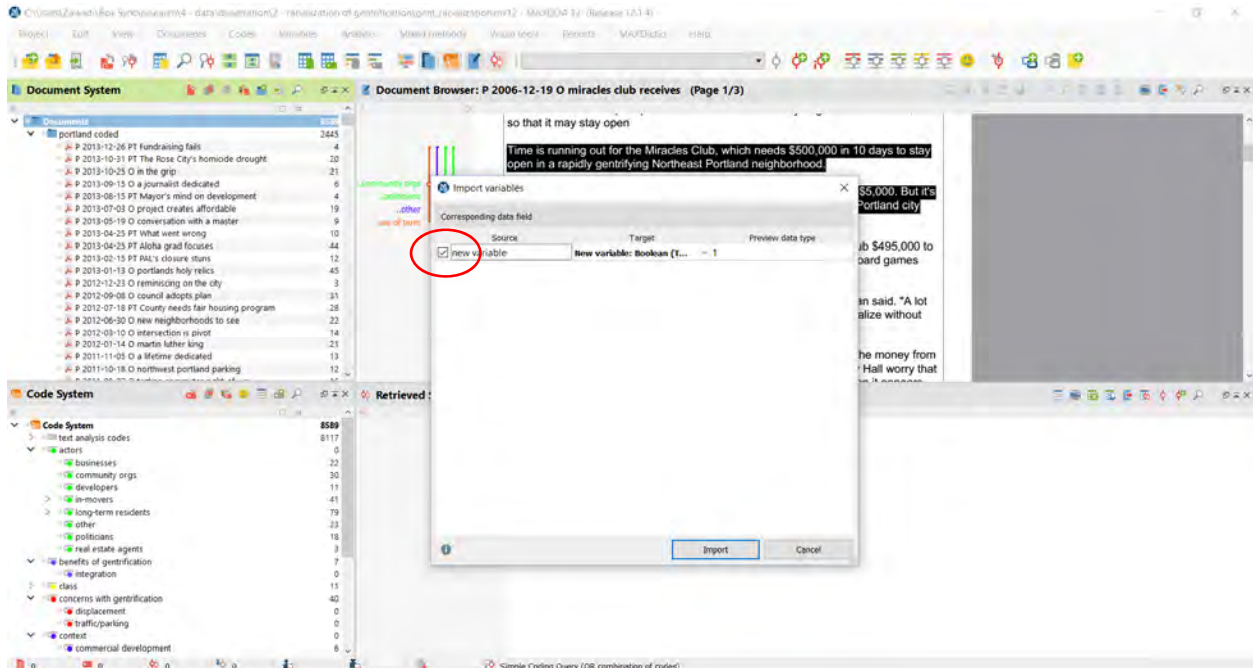
Adding Codes

To add codes to your database, click on the "Codes" menu and select "New code."
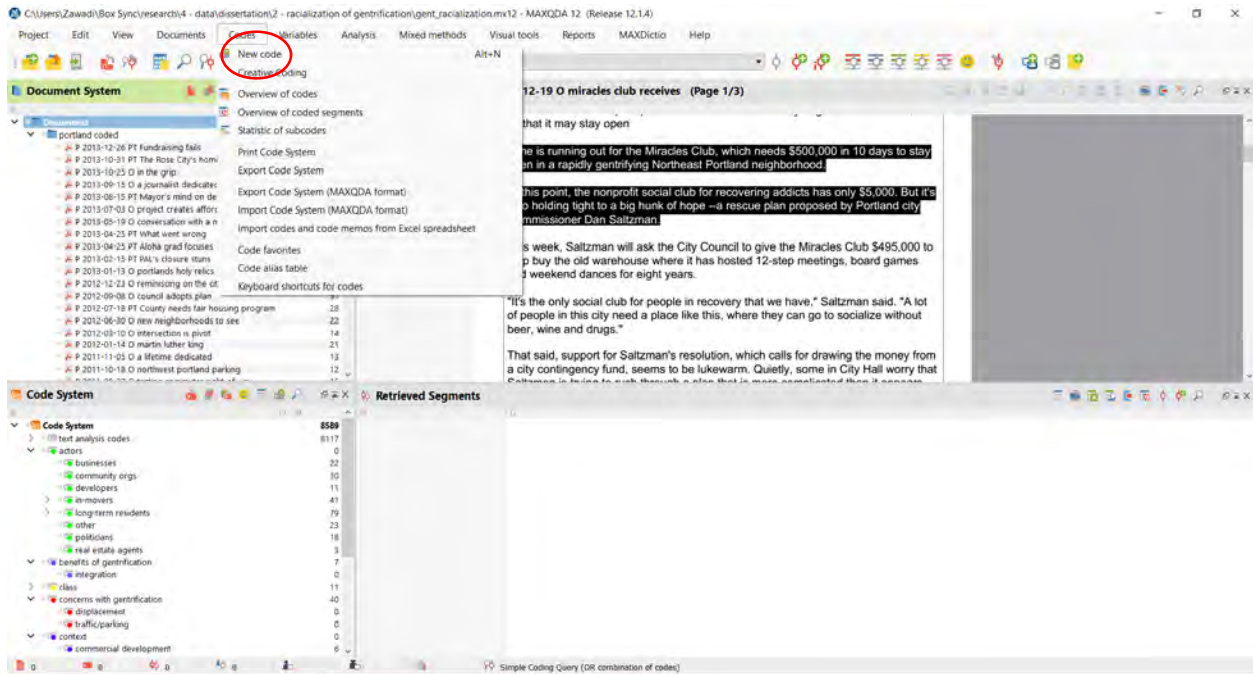
Or right click on "Code Systems" or the code for which you want to add a subcode and select "New code."
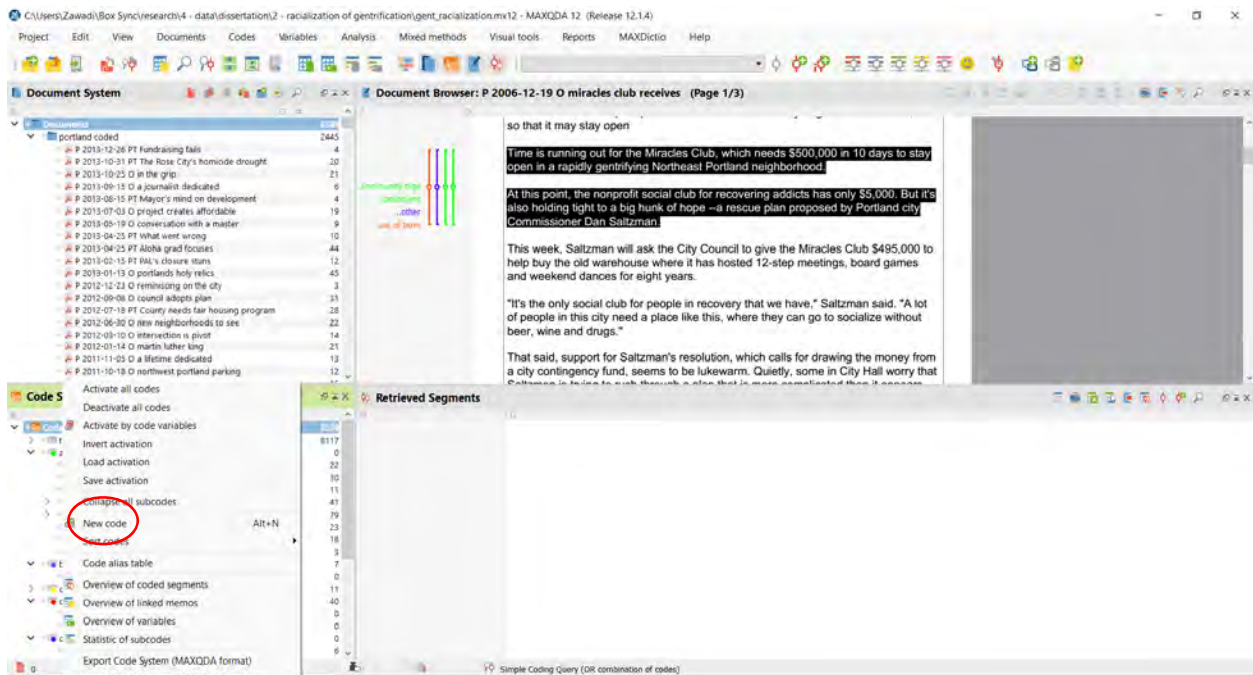
Assigning Codes

To assign a signal code to a passage, highlight the passage then click and drag the code to the passage. The code name will appear next to a bracket beside the coded passage.
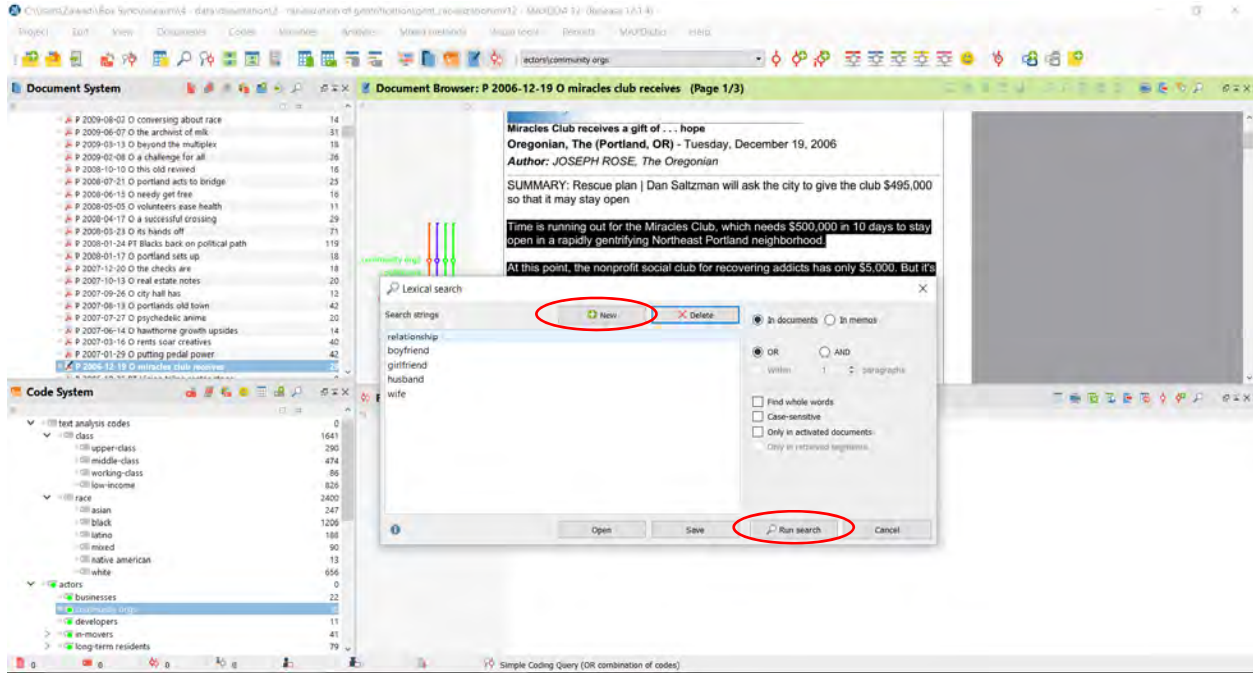
To apply multiple codes, "activate" each desired code by clicking on the code while holding down the control or shift key. The activated codes will appear in red. Then, highlight the passage you would like to code and right click. Select "Code with activated codes."
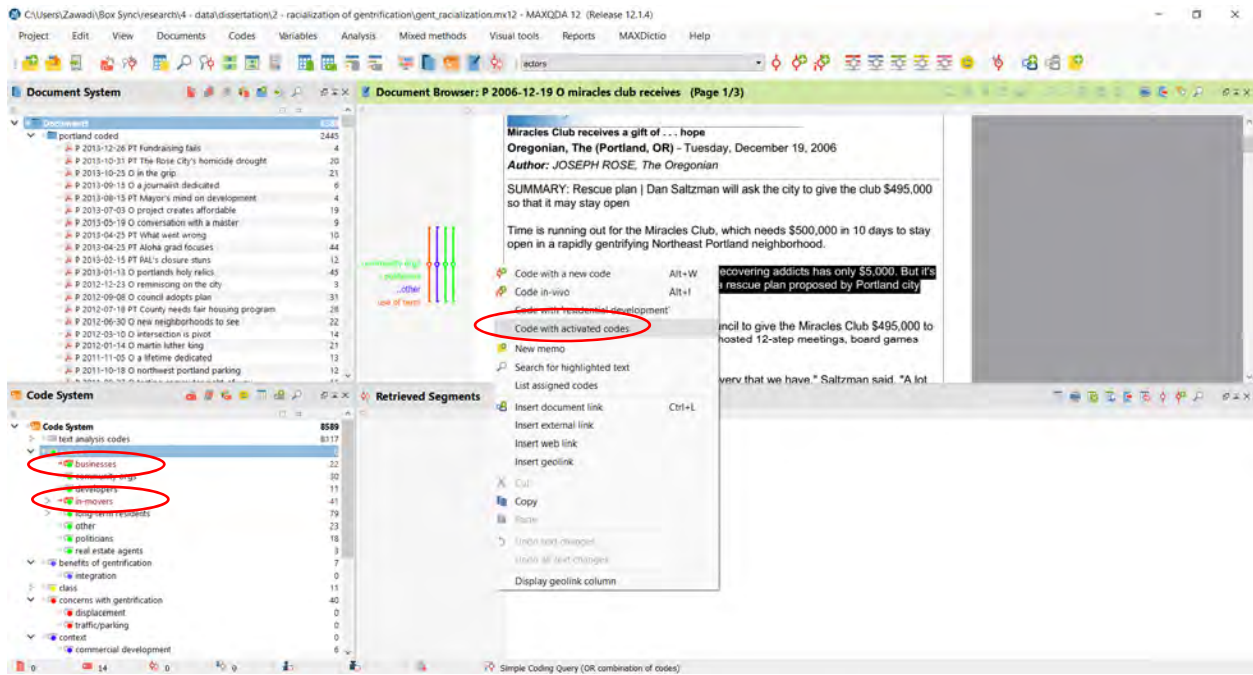
Lexical Search
Click on the "Analysis" menu and select "Lexical search."

To add search terms to the list, click "New" and type additional search terms. Once all of the terms are identified, click on "Run search."

To code the results, click on the button to either "Autocode search results" or "Autocode search results at new code."

Extended lexical search
Click on the "Analysis" menu and select "Extended lexical search."

Type the text you want to search for. Enter single word search terms under "One of these search strings." If your search term includes more than one word, type it in quotes in the text box under "All these search strings" as shown in the example below. Click "Run search."

To code the results, click on the button to either "Autocode search results" or "Autocode search results at new code."

Adding a Memo

Add a memo to a document or code by double clicking in the memo column beside the document or code.
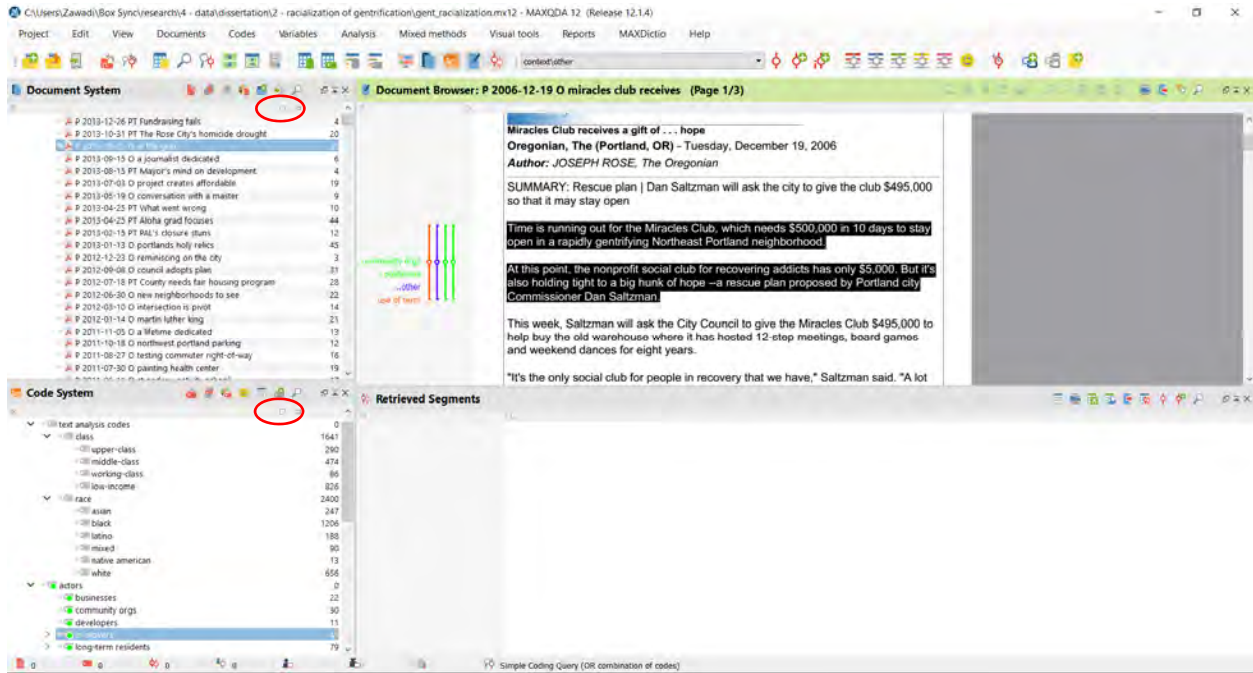
Or right click on the document or code and select "Memo."
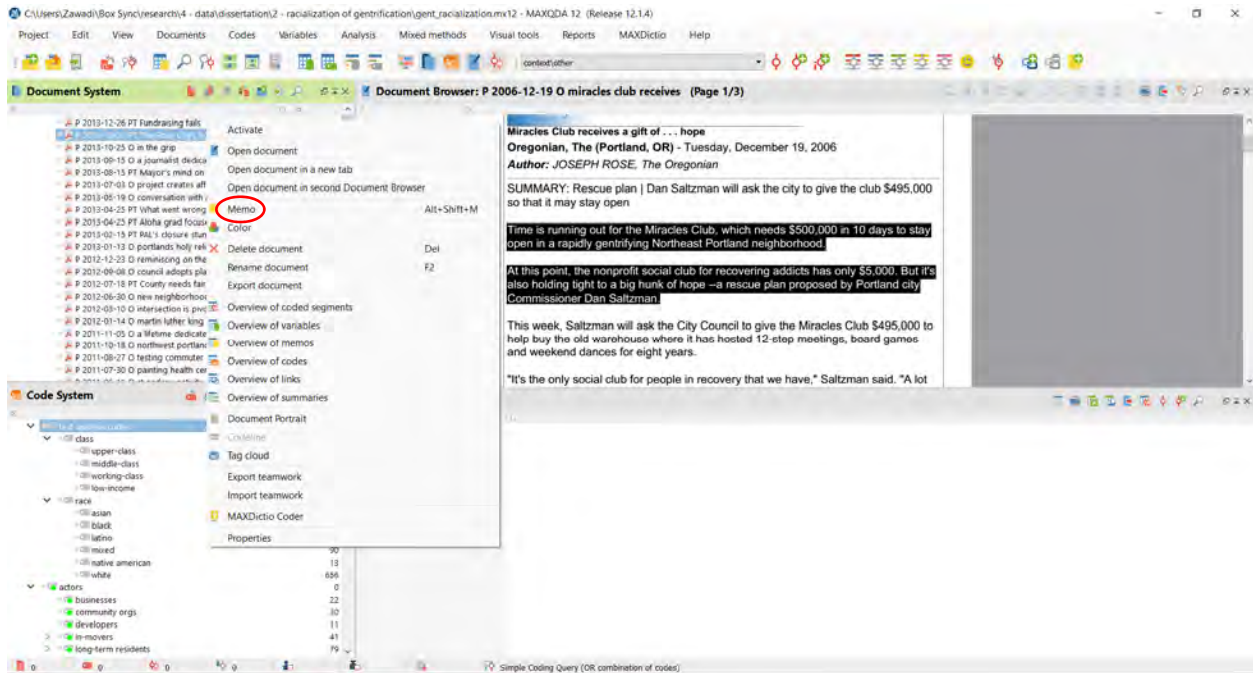
To write a free memo, click on "Analysis" and select "New free memo."

To view all memos, click on the "Analysis" menu and select "Overview of Memos."

Output for One Code

To display the passages coded at a single code in the Retrieved Segments area, activate the code of interest by clicking on the code name while holding down the control or shift key. Then click on the "Analysis" menu and select "Coding Query." Select whether you want the results for all documents or only activated documents and then click "Start." The results will be displayed in the Retrieved Segments area of the program.

Adding Summaries
Click on "Analysis" and select "Summary Grid."

Click on the cell of the document and code of interest. All passages in that document coded at the selected code will be displayed in the "Coded segments" column. Write your summary in the "Summary" column.

Code Matrix Browser
Click on the "Visual Tools" menu and select "Code Matrix Browser."

Select whether you want a matrix by individual documents or a group of documents as organized in a document group.
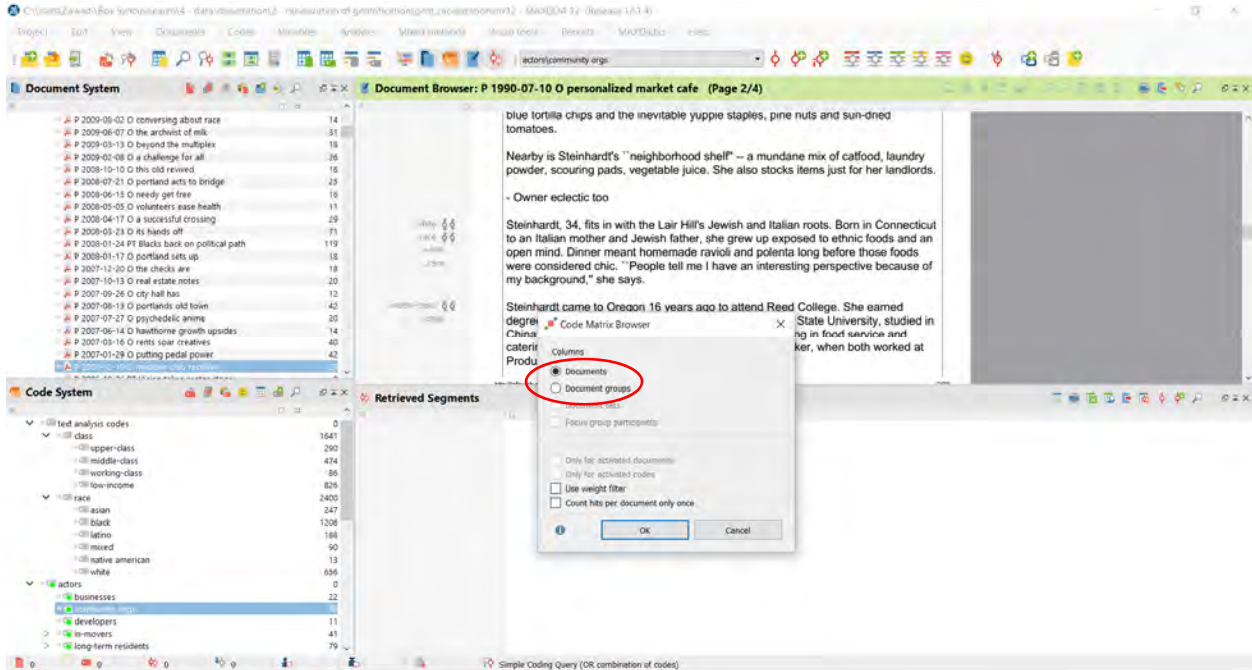
Adjust the information displayed with the icons "Display nodes as values," "Calculation of symbol size refers to all coded documents," "Calculation of symbol size refers to column," "Calculation of symbol size refers to row," "Count hits per document only once," "Binarize view," and "Sum."
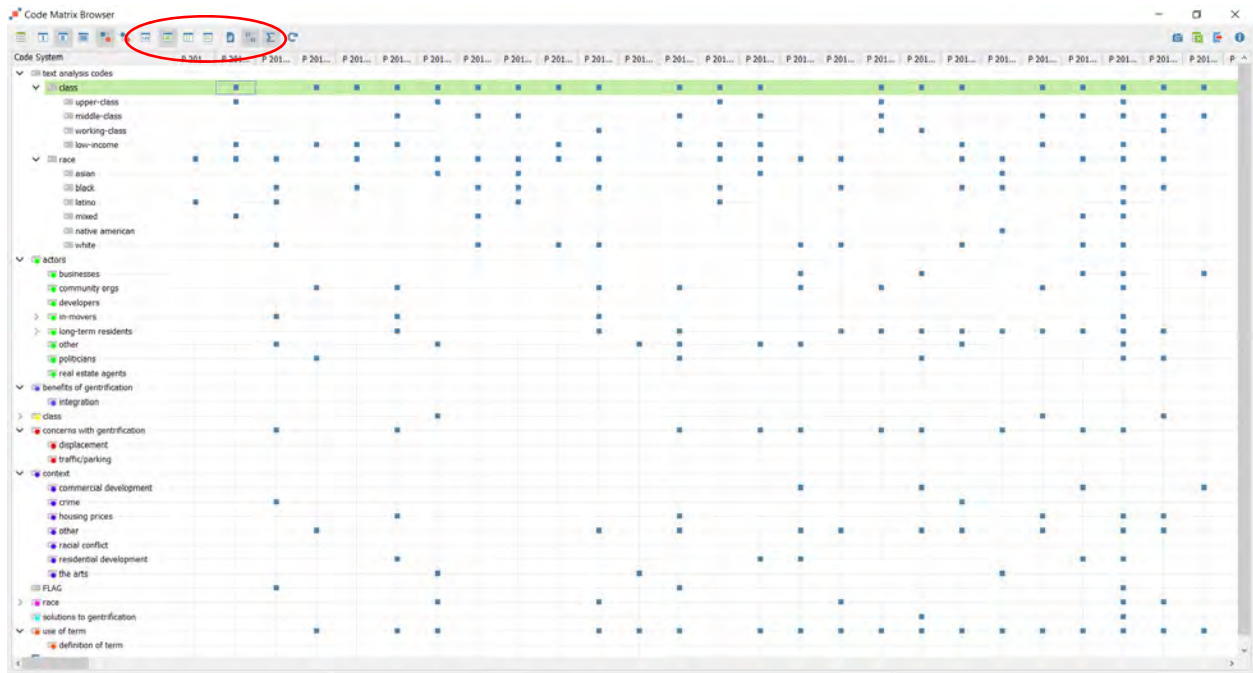
Code Relations Browser

Click on the "Visual Tools" menu and select "Code Relations Browser."

Select which codes you want to display in rows and columns.

In the resulting table, you can adjust the display with the following options: "Display nodes as values," "Co-occurrence of codes," "Near (codes)," "Count hits per document only once," "Binarize view," and "Sum."

Crosstab
Click on the "Mixed methods" menu and select "Crosstab."

Select the variables of interest and click on the arrow to add them to the report.

Then select the value of the variable that you are interested in and click "OK."
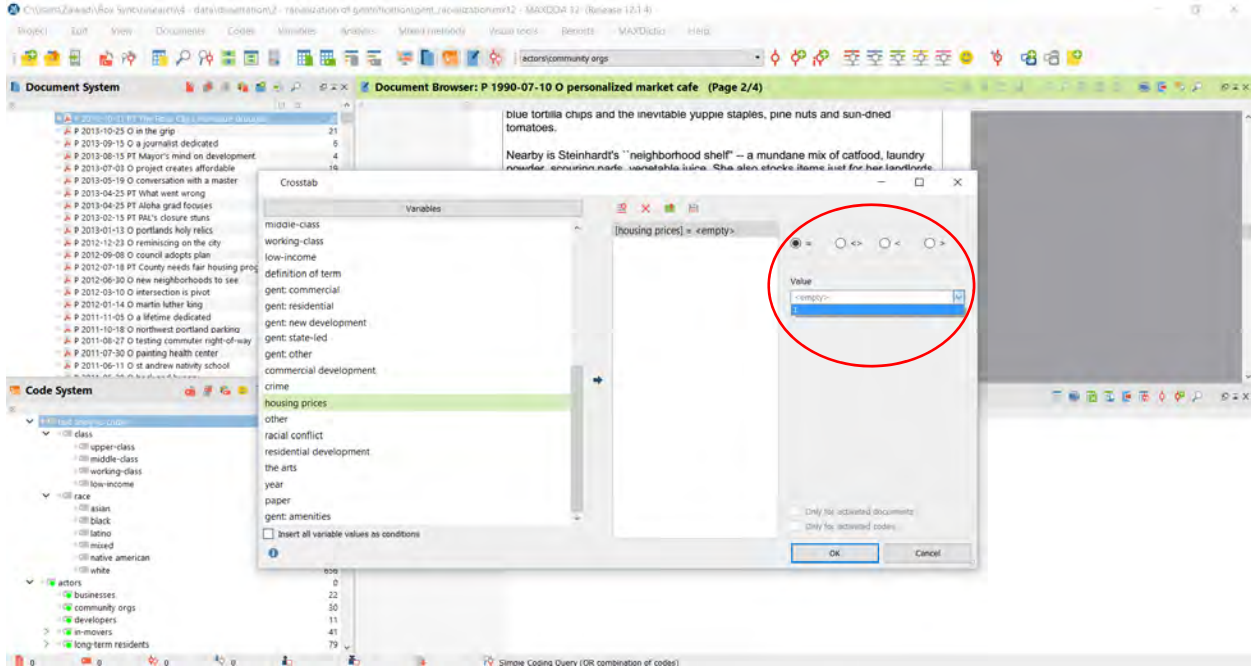
In the resulting table, you can adjust the display with the following options: "Row percentage," "Column percentages based on the sum of coded segments," "Column percentages based on the number of documents," and "Counts hits per document only once."
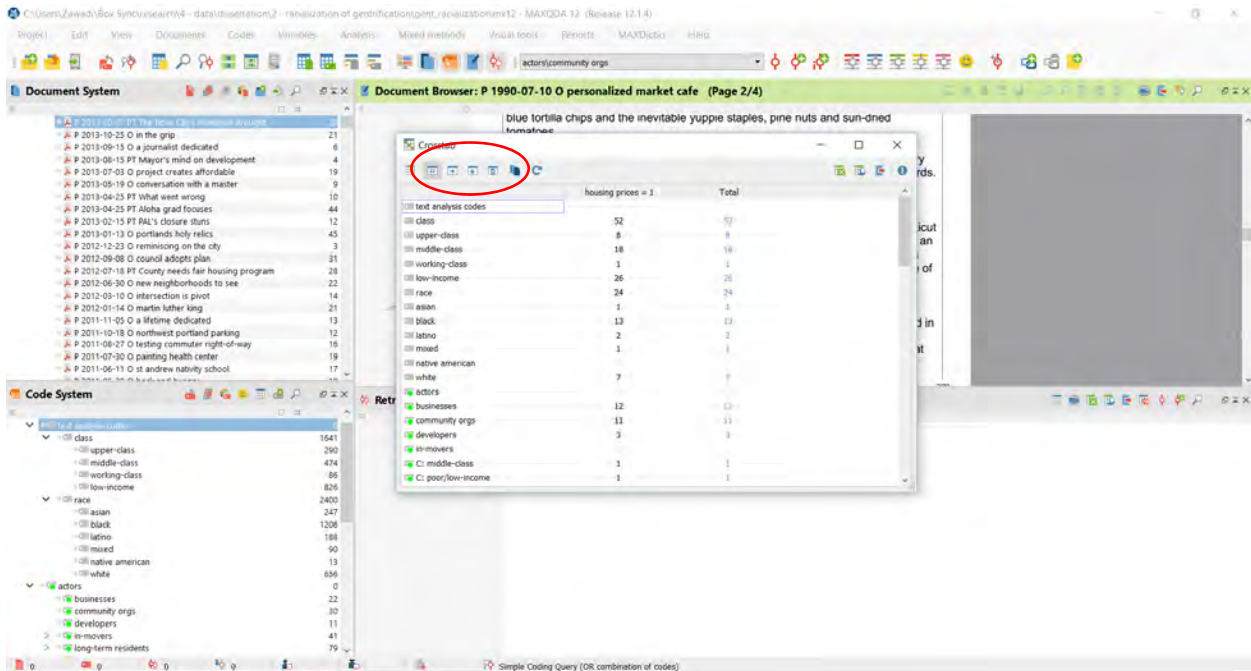
Complex Coding Query

Click on "Analysis" and select "Complex Coding Query."

Select a "Function" from the dropdown list:

- Boolean functions (and, or, not):
    - Intersection – retrieves passages where the A codes are all used.
    - Intersection (set) – retrieves passages where a specified number of A codes are used.
    - Overlapping – retrieves passages that include either selected code or all A codes.
    - Only one code – retrieves passages that include only one of the list of A codes.
    - Only this code – retrieves passages that are coded at the B code, but not with the A codes.
- Proximity functions:
    - IF inside – retrieves passages coded at B that are surrounded by A codes.
    - IF outside – retrieves passages coded at B that surround the A codes.
    - Followed by – retrieves passages where the A codes are followed by the B code.
    - Near – retrieves passages where the A codes are near the B code.

Next, select your A codes by activating them in the Code System and then clicking on "All activated codes." Select your B code by clicking on the "…".

Finally, click on "Start."
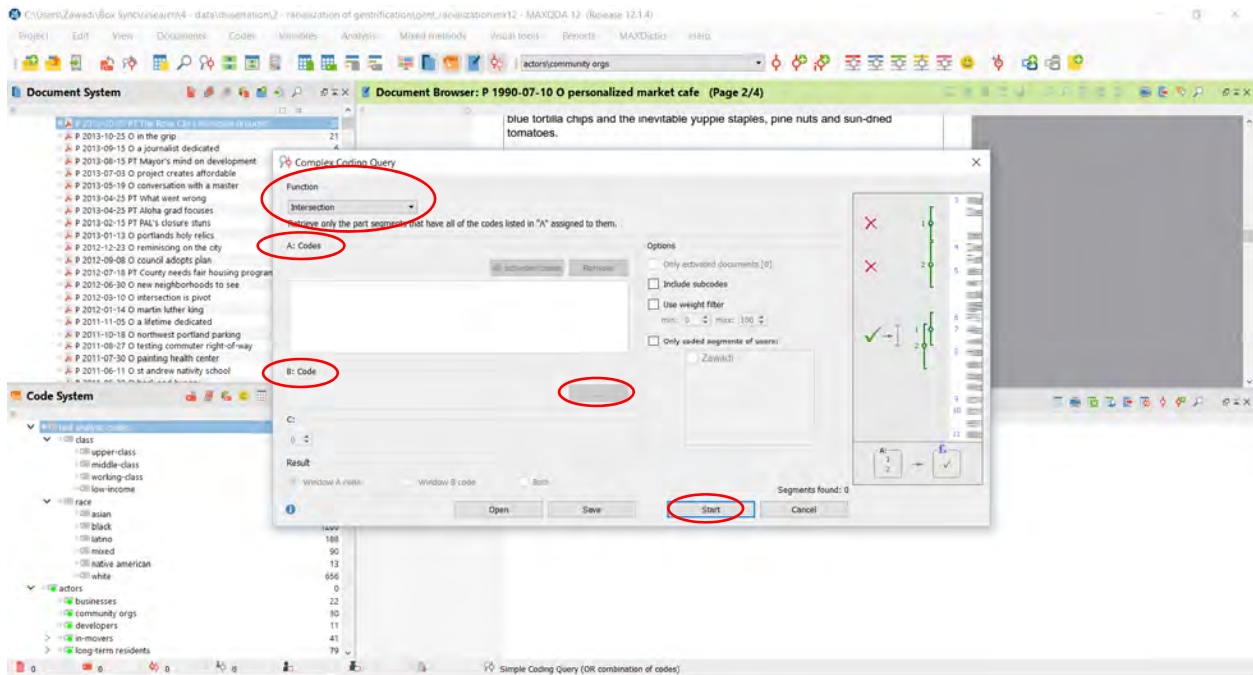
To run a query by a variable value, first select documents by right clicking and selecting "Activate by document variable" for the characteristic of interest. Then, run the query with instructions above.
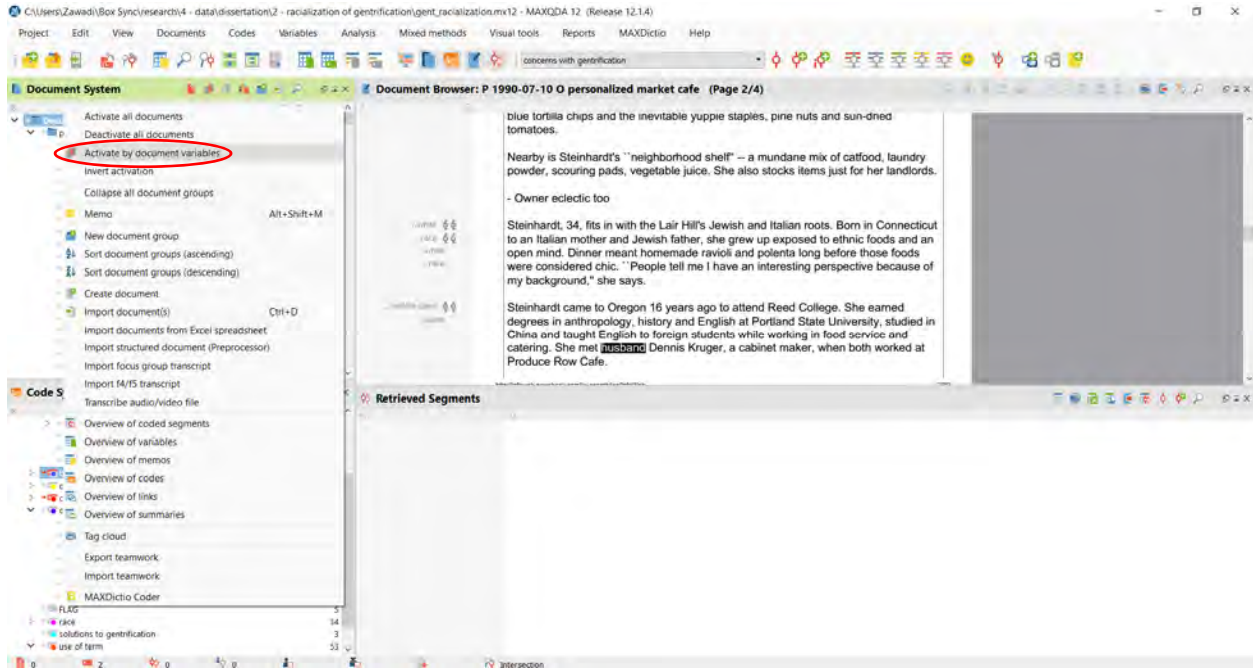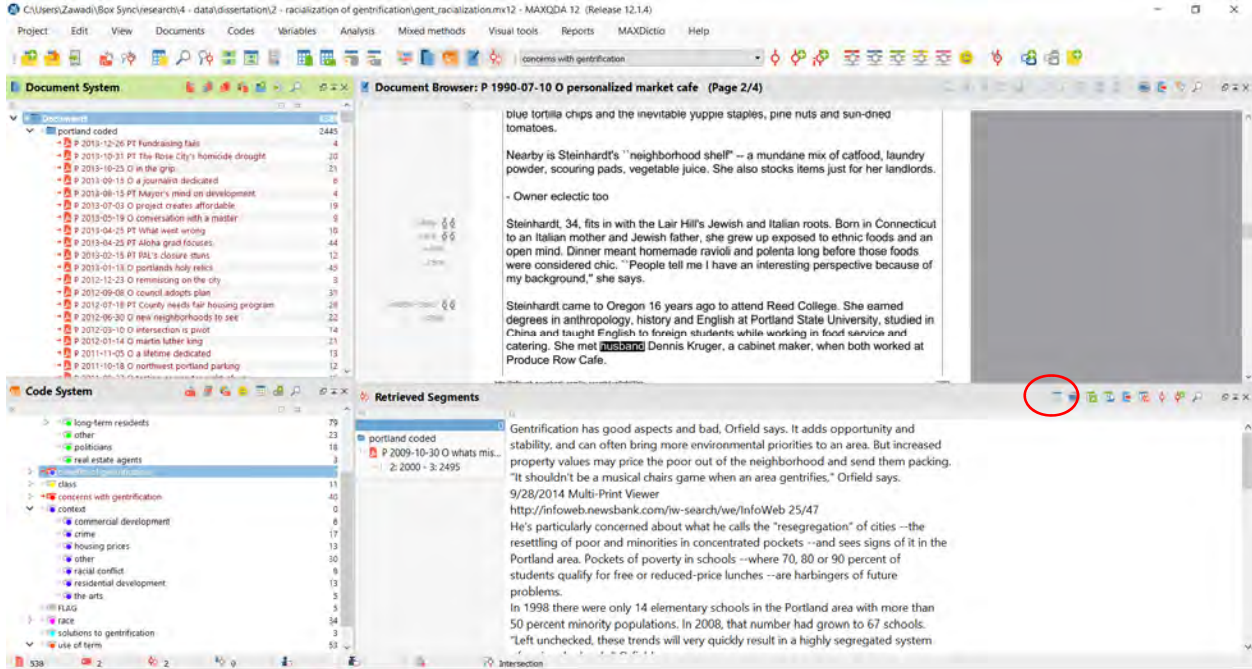

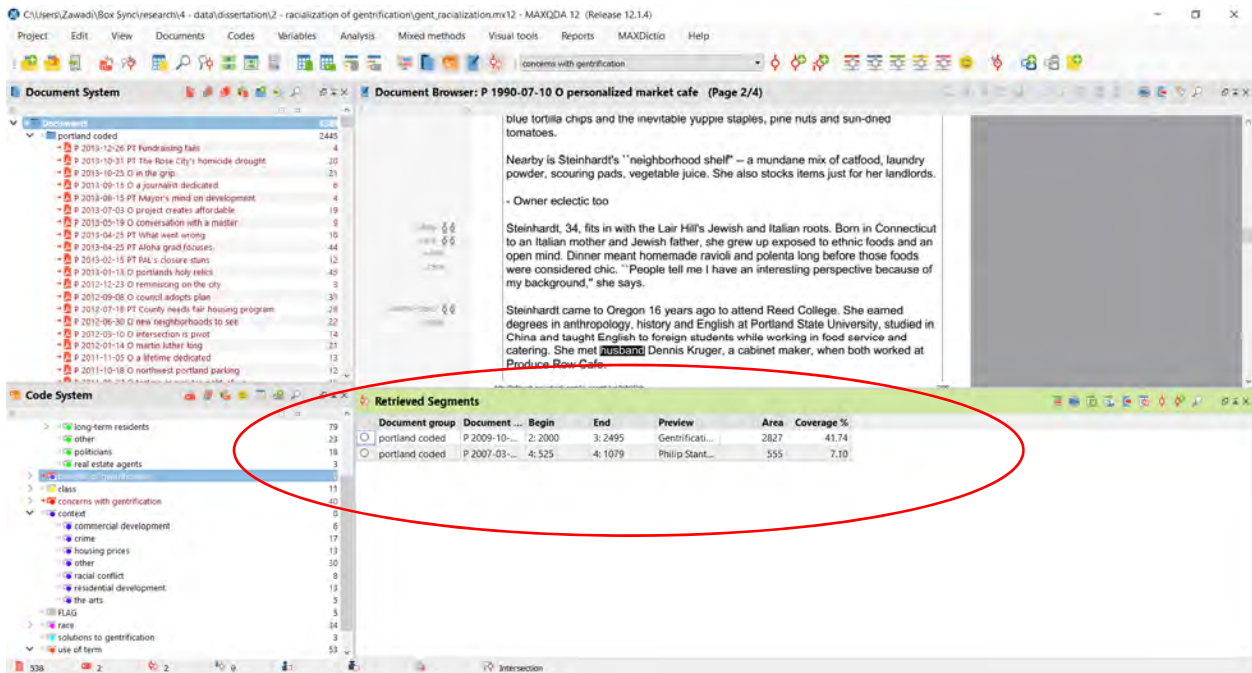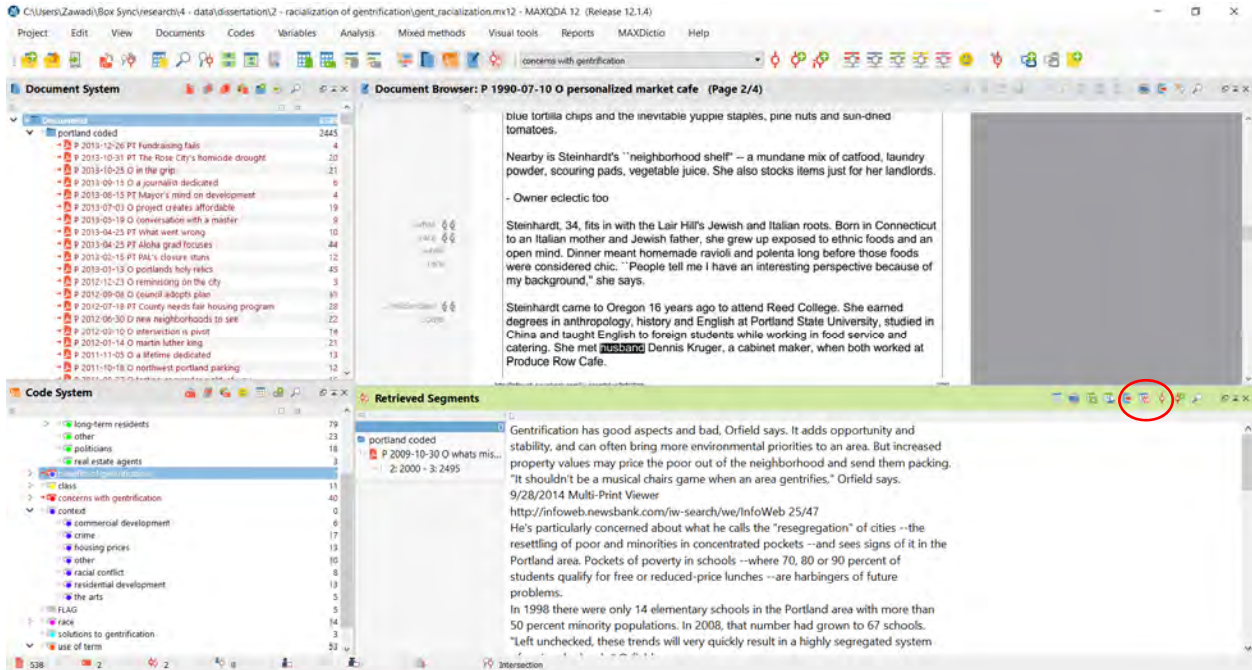Query results appear in the Retrieved Segments area.
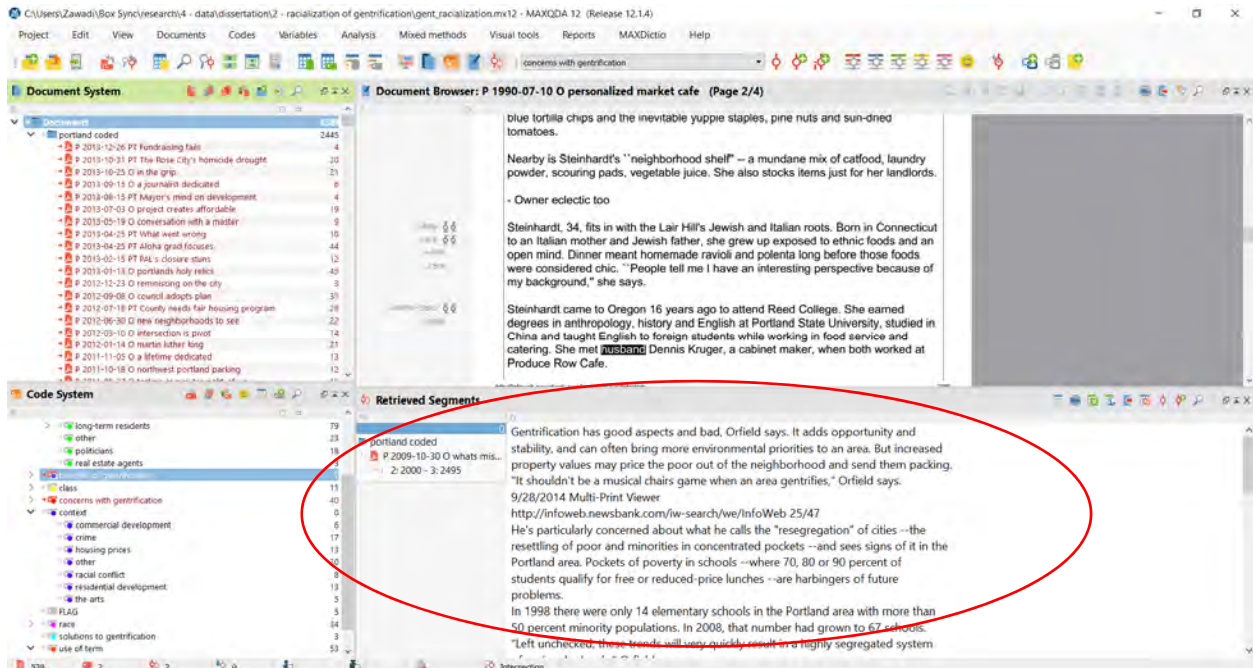
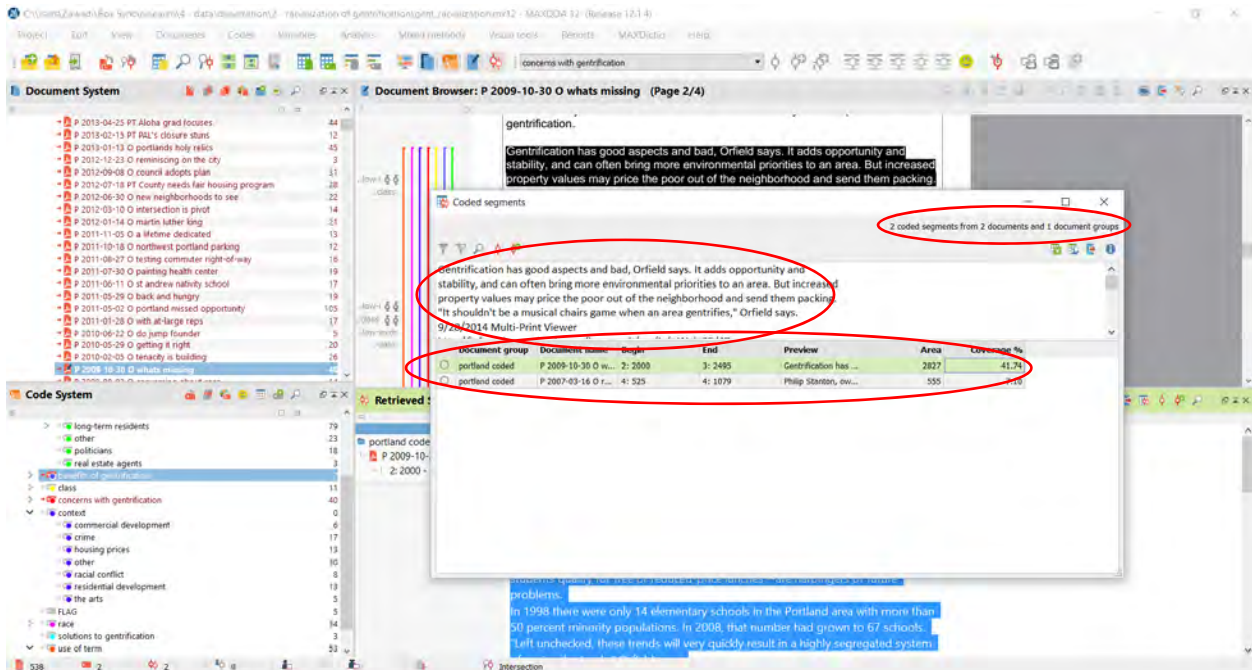To view a list of documents included in query results, click on the "change to table view" icon.

The results are displayed in the Retrieved Segments area.

Click on the "Overview of retrieved segments" to review a combination of the table and segments view, as well as summary counts.

The summary counts appear at the top of the Coded Segments box.

Document portrait
Click on the "Visual tools" menu and select "Document Portrait." NOTE: The report will run for the document you have open.

To adjust the display, use the icons at the top of the Document Portrait Viewer to visualize the entire document rather than coded text, change the colors to be mixed where there are overlapping codes, display squares instead of circles, sort by color, or sort by color frequency.

Document Comparison Chart
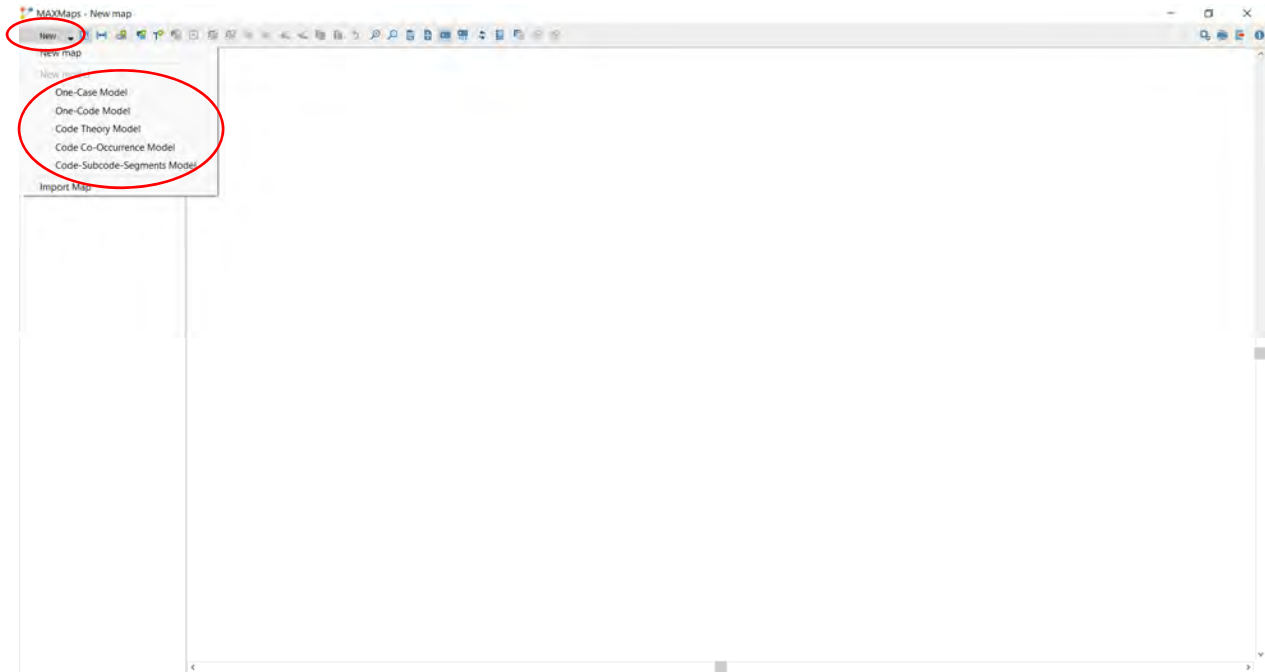
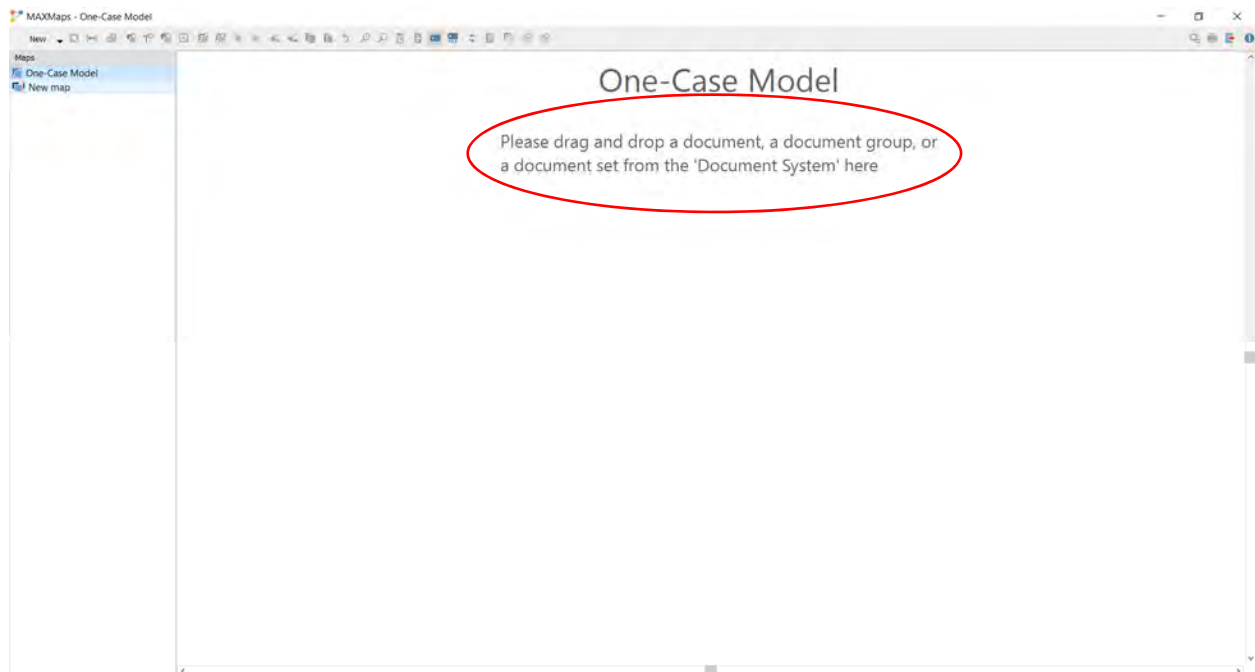Click on the "Visual tools" menu and select "Document Comparison Chart."
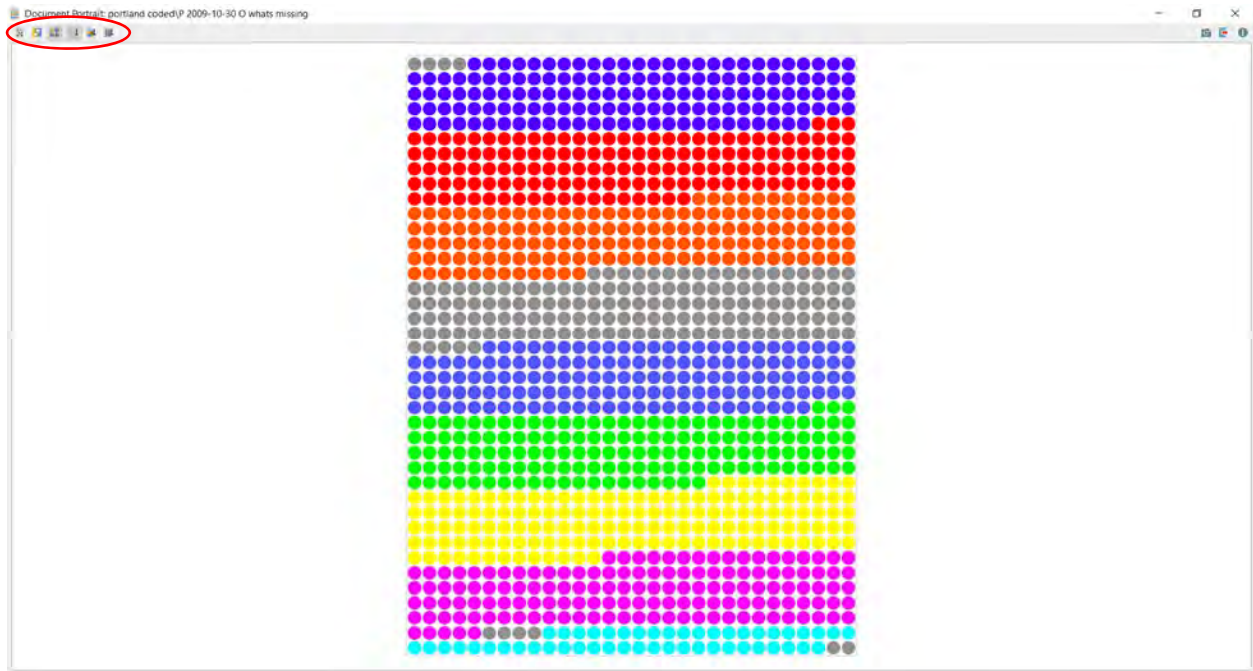
MAXMaps
Click on the "Visual tools" menu and select "MAXMaps."

Click on "New" and select the type of map you'd like to create. NOTE:

Once you select a map type, follow the instructions on the screen.

After you drag and drop the document(s) or code(s) of interest, select what you would like displayed. NOTE: To "Display only activated" codes or documents, you must activate codes or documents before selecting a document or code.