

MaxQDA Training Worksheets

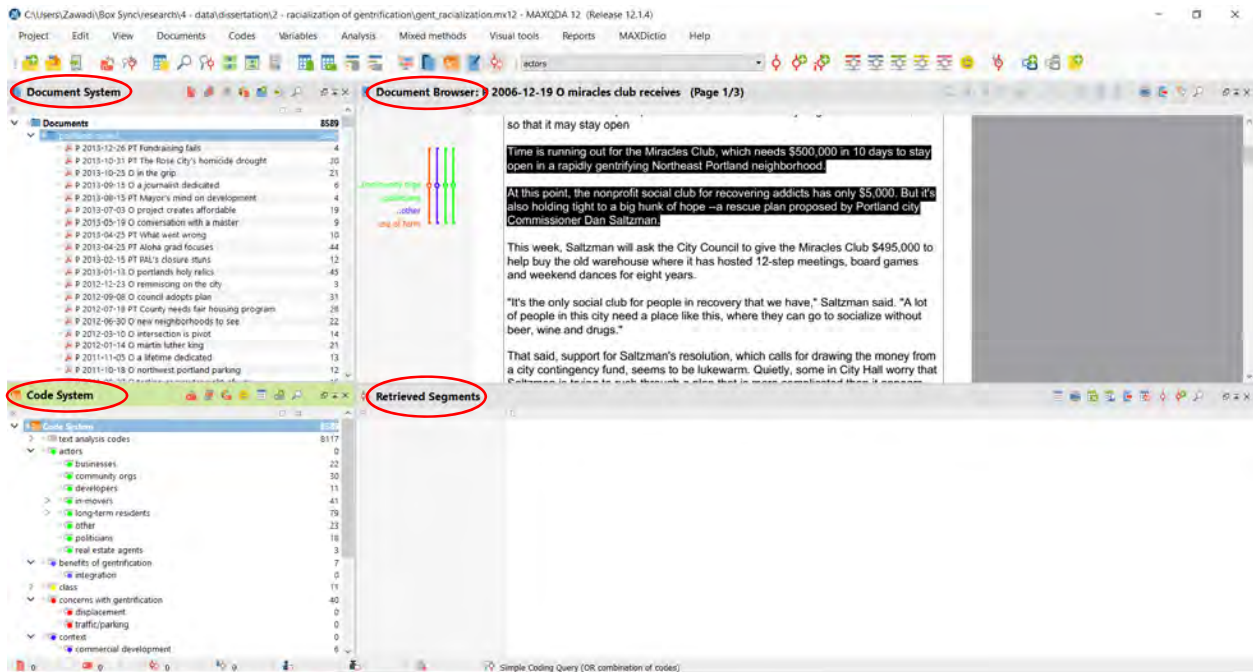
Trainer: Zawadi Rucks-Ahidiana

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

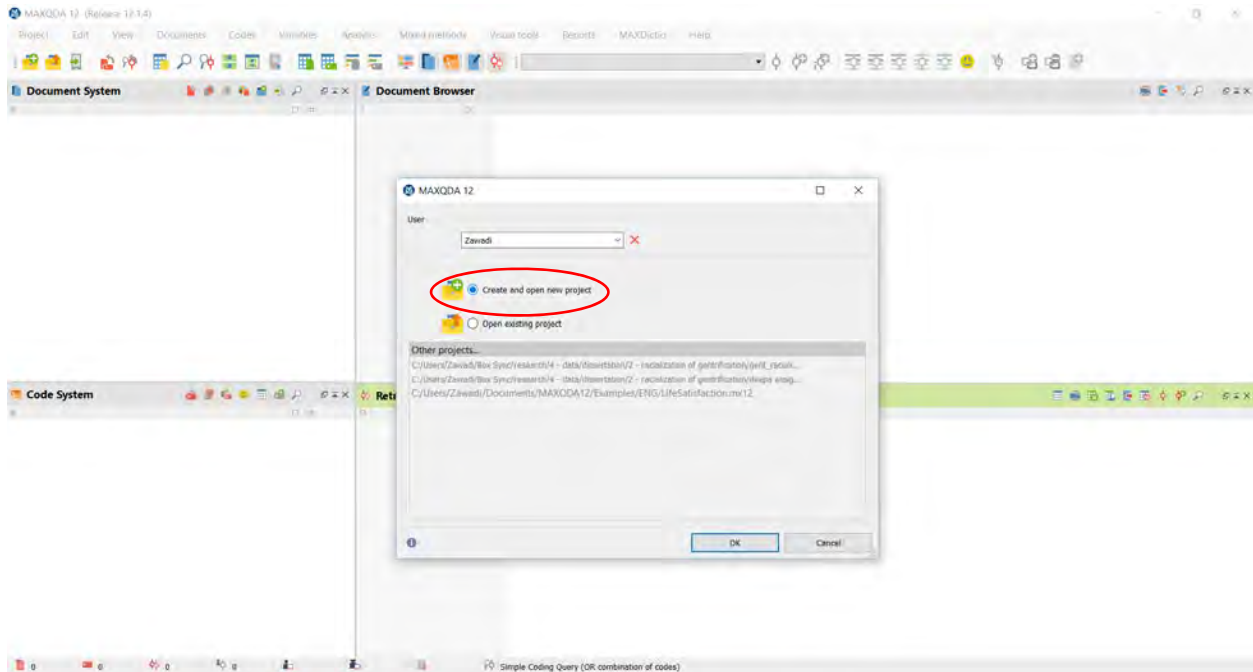
There are four areas that you'll use in the software:

- 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

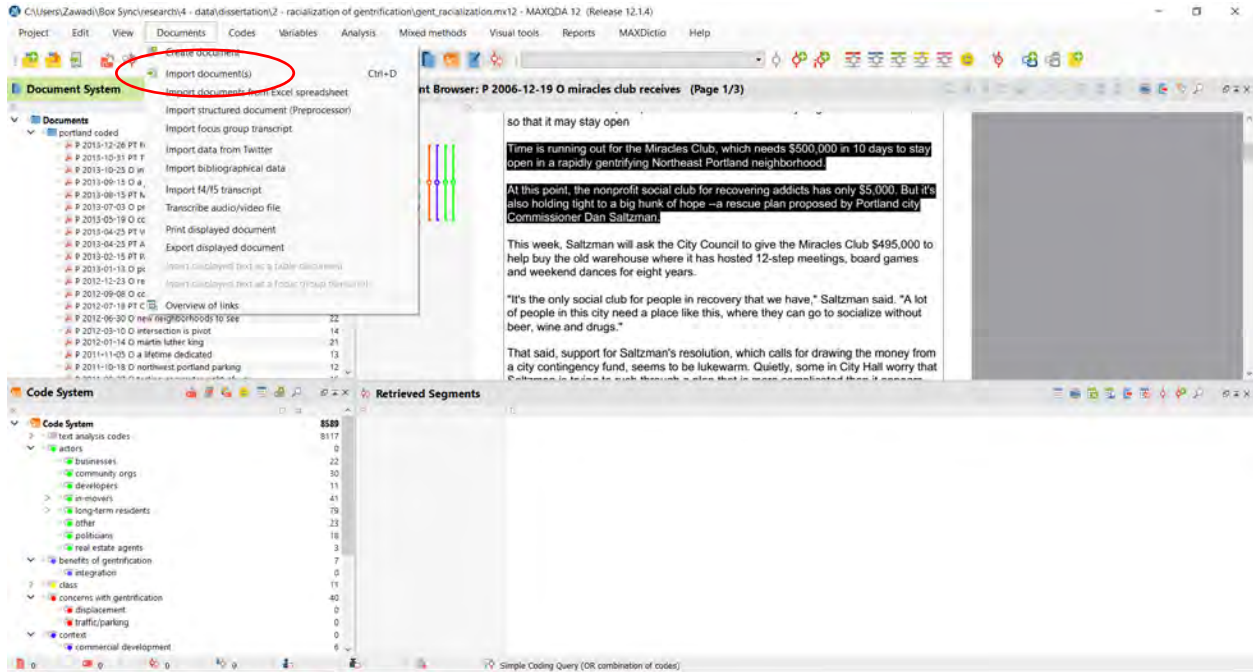
When you first open MaxQDA, choose “Create and open new project.”



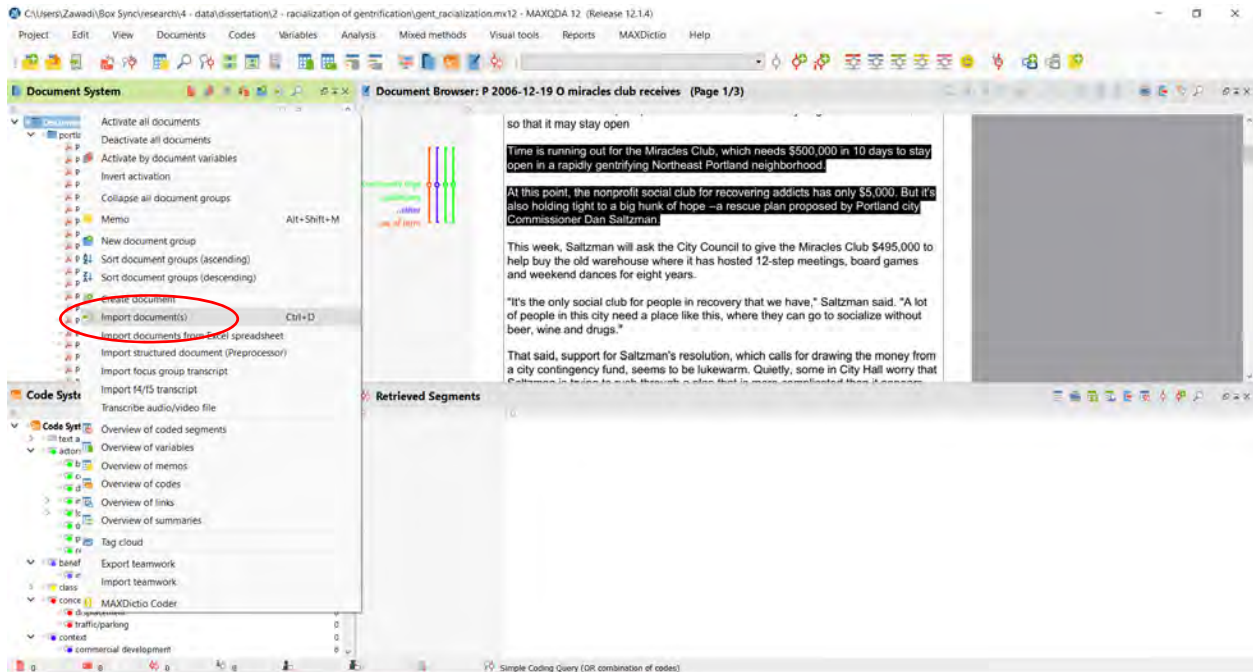
Or when you have a database open, select “New Project” from the “Project” menu.

Importing Documents

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

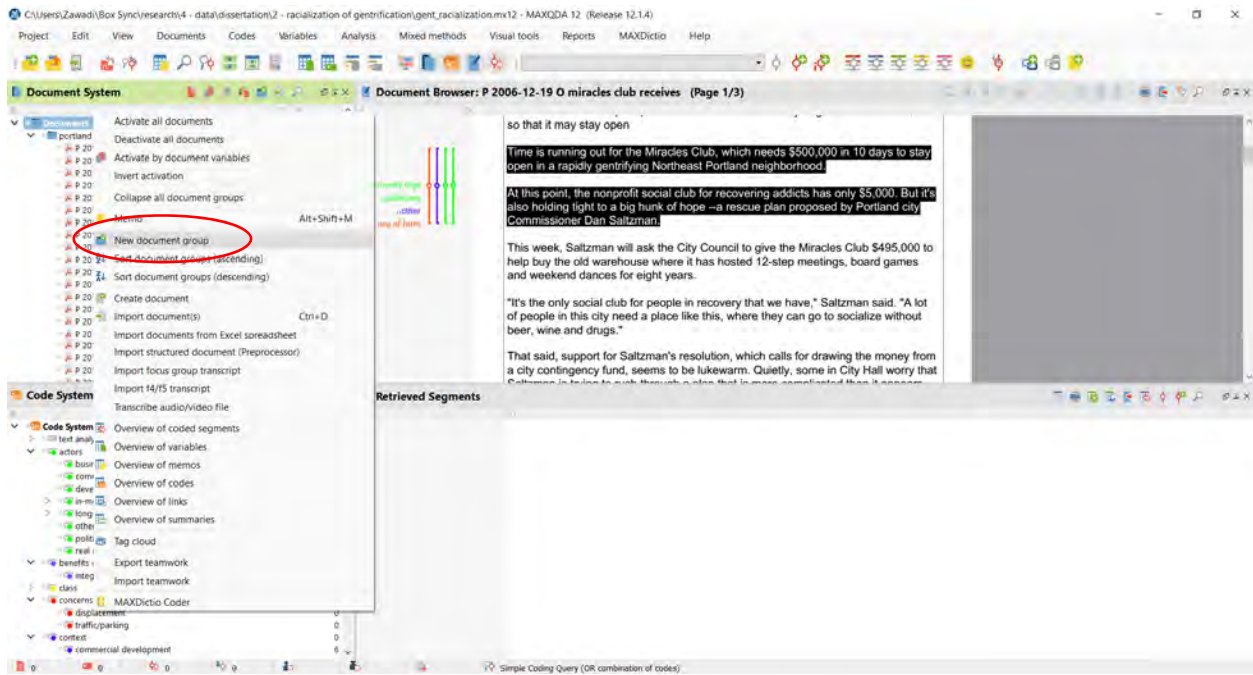


Or right click on “Documents” in the Document System and select “Import document(s).”



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.

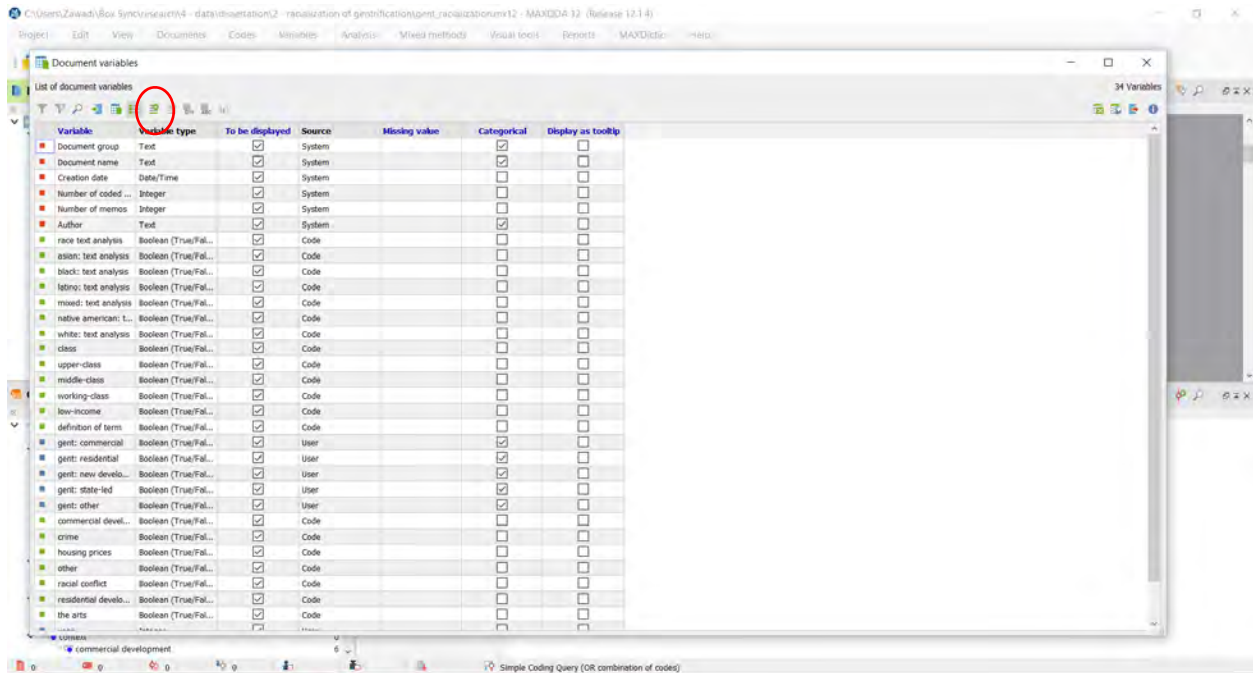


Adding Variables about your Documents

“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.”

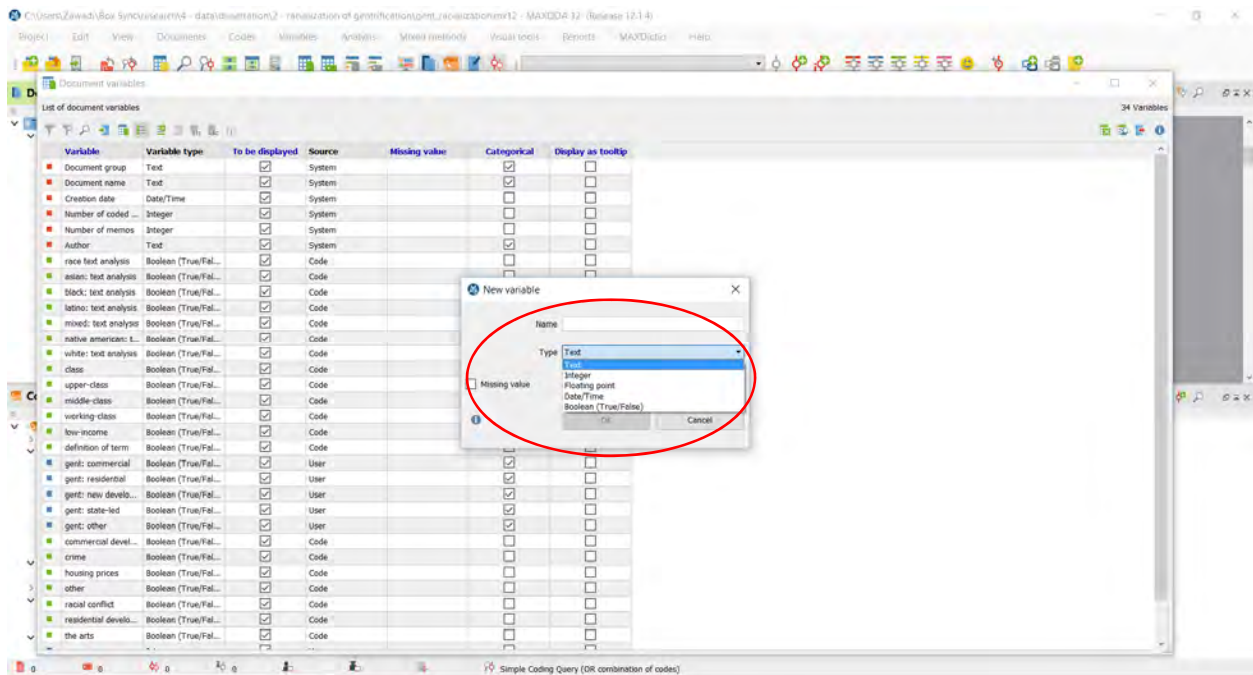
In the list of document variables, click on the “New variable” icon.



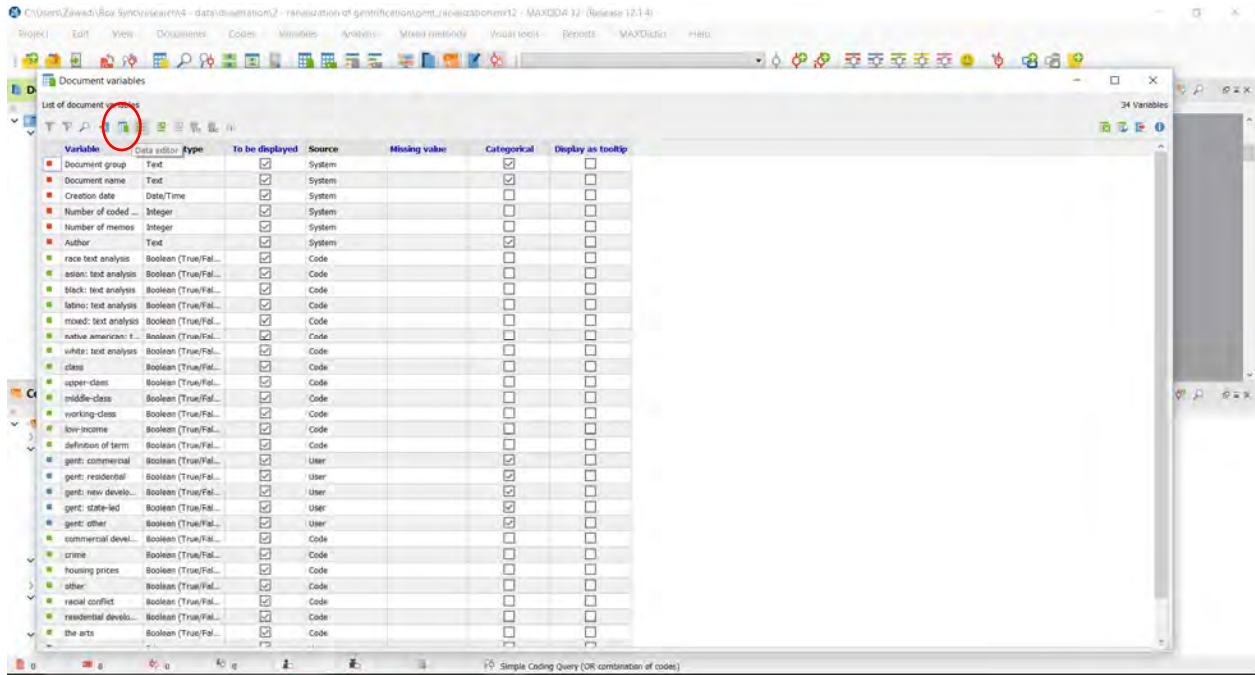
Name the variable and select the variable “type.” The variable types include:

- 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.

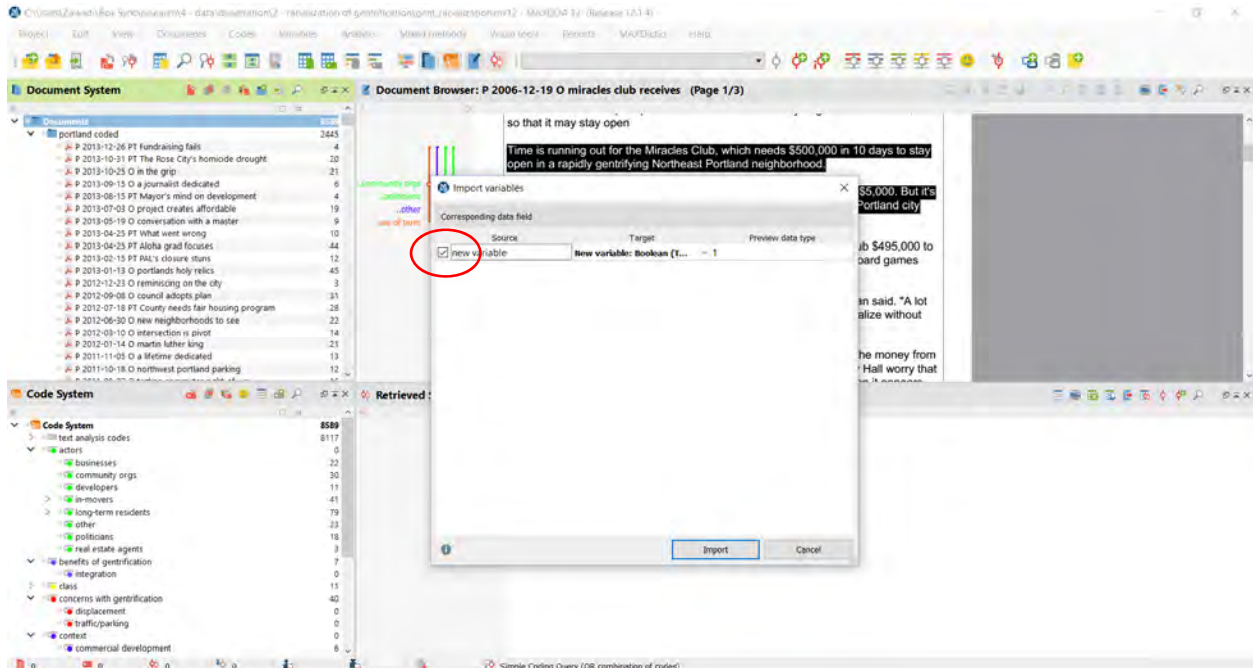


Once you have set up a variable, you can edit the values for each document manually by clicking on the “Data editor” icon, which will display a table with each of your document names in the rows and the variables in columns.



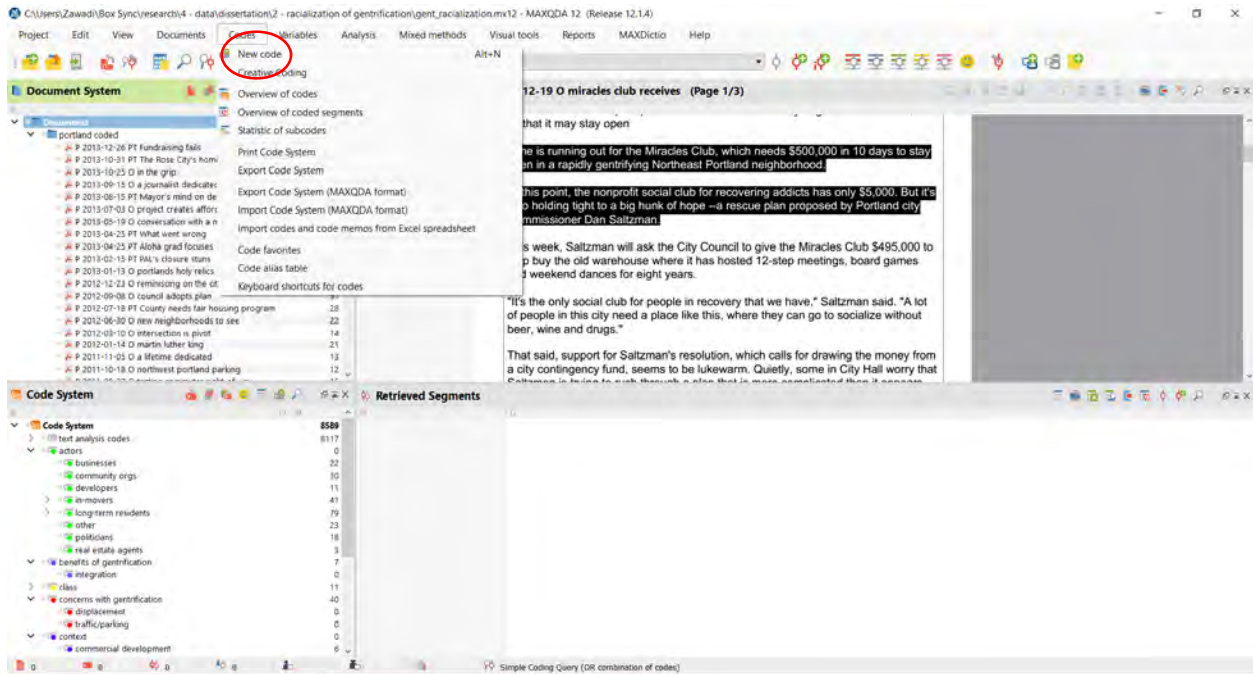
Alternatively, you can import an Excel spreadsheet with variables already predefined. To do this, click on the “Variables” menu and select “Import data.”

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.”

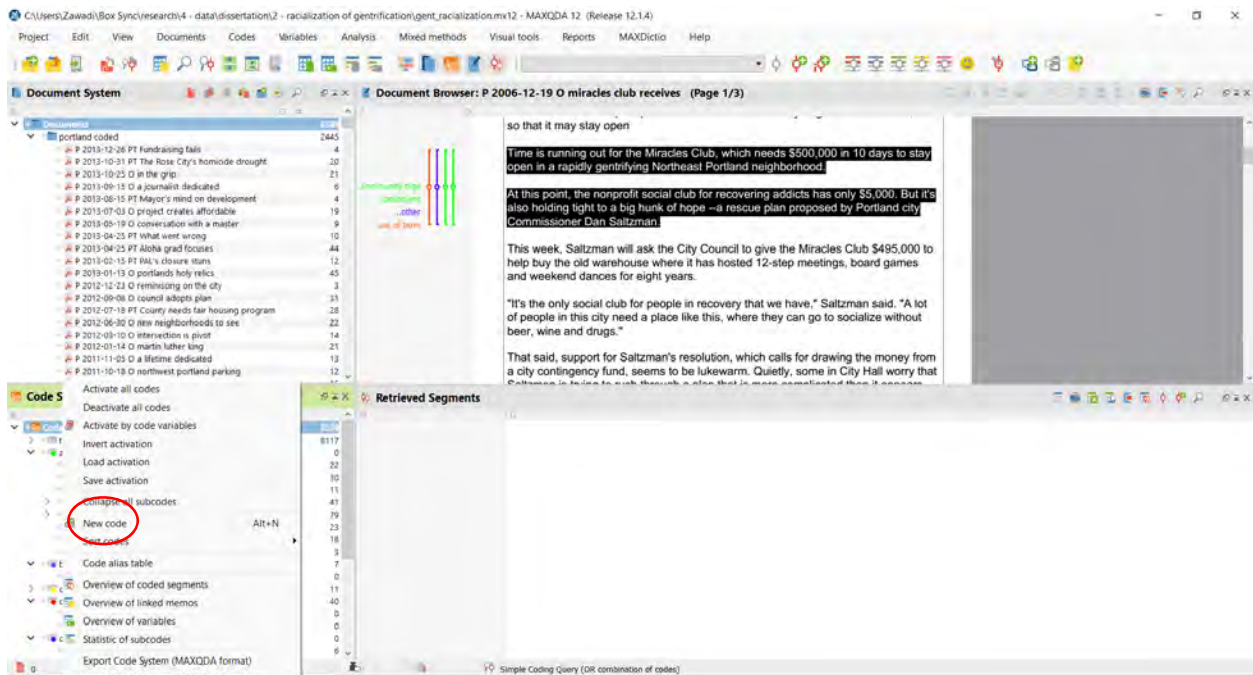


Adding Codes

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.

The screenshot displays the MAXQDA 12 software interface. The main window is titled "Document Browser: P 2006-12-19 O miracles club receives (Page 1/3)". The document content is visible, including a title "Miracles Club receives a gift of... hope", author "JOSEPH ROSE, The Oregonian", and a summary. The text discusses the Miracles Club's need for \$500,000 and the city's rescue plan. A red circle highlights a code assignment: a bracket is placed over a paragraph, and a code "gentrification" is being dragged from the "Code System" to it. The "Code System" window shows a hierarchical list of codes, including "gentrification" under "benefits of gentrification". The "Retrieved Segments" window is currently empty.

Document System

- portland coded 2445
 - P 2013-12-26 PT Fundraising fails 4
 - P 2013-10-31 PT The Rose City's homicide drought 20
 - P 2013-10-25 O in the grip 21
 - P 2013-09-15 O a journalist dedicated 9
 - P 2013-06-12 PT Mayor's mind on development 4
 - P 2013-07-03 O project creates affordable 19
 - P 2013-05-19 O conversation with a master 9
 - P 2013-04-25 PT What went wrong 10
 - P 2013-04-25 PT Aloha grad focuses 44
 - P 2013-02-13 PT OMA's closure starts 12
 - P 2013-01-13 O portlands holy relics 45
 - P 2012-12-23 O reminiscing on the city 3
 - P 2012-09-08 O council adopts plan 33
 - P 2012-07-18 PT Cooney needs fair housing program 28
 - P 2012-06-30 O new neighborhoods to see 22
 - P 2012-03-10 O intersection is pivot 14
 - P 2012-01-14 O martin luther king 21
 - P 2011-11-03 O a lifetime dedicated 18
 - P 2011-10-18 O northwest portland parking 12

Document Browser: P 2006-12-19 O miracles club receives (Page 1/3)

Miracles Club receives a gift of... hope
Oregonian, The (Portland, OR) - Tuesday, December 19, 2006
Author: JOSEPH ROSE, The Oregonian

SUMMARY: Rescue plan | Dan Saltzman will ask the city to give the club \$495,000 so that it may stay open

Time is running out for the Miracles Club, which needs \$500,000 in 10 days to stay open in a rapidly gentrifying Northeast Portland neighborhood.

At this point, the nonprofit social club for recovering addicts has only \$5,000. But it's also holding tight to a big hunk of hope—a rescue plan proposed by Portland city Commissioner Dan Saltzman.

This week, Saltzman will ask the City Council to give the Miracles Club \$495,000 to help buy the old warehouse where it has hosted 12-step meetings, board games and weekend dances for eight years.

"It's the only social club for people in recovery that we have," Saltzman said. "A lot

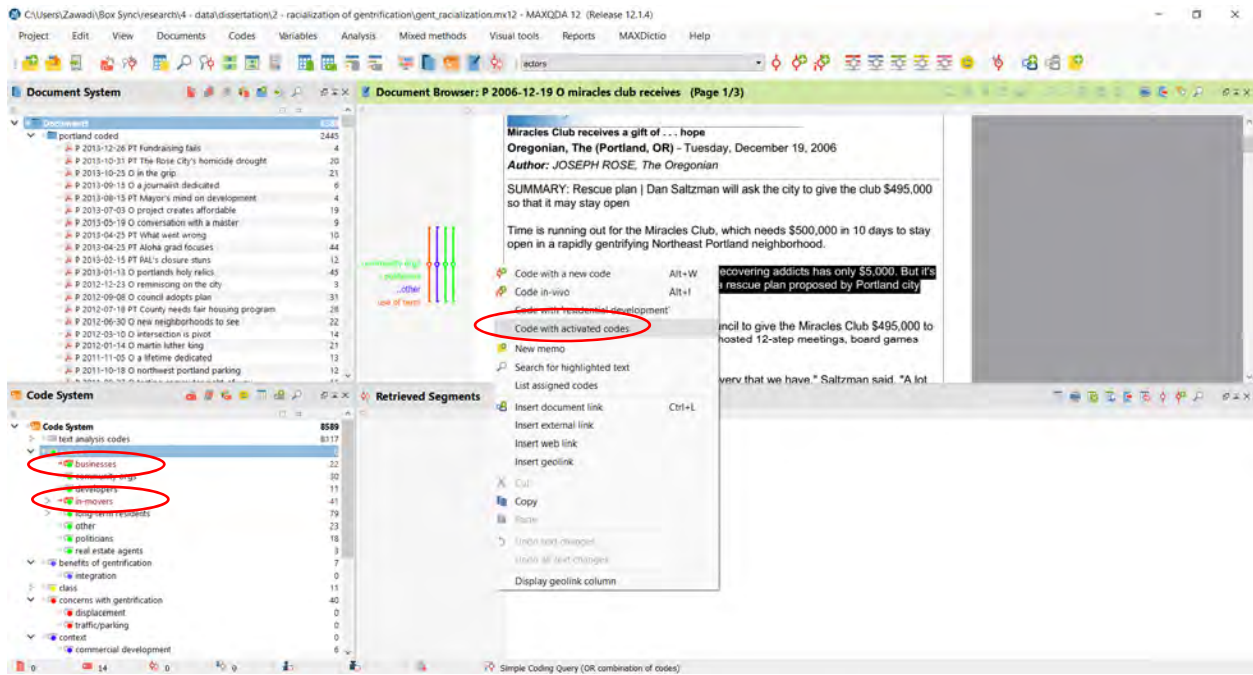
Code System

- Code System 8117
 - text analysis codes 0
 - actors 0
 - businesses 22
 - community orgs 30
 - developers 11
 - drummers 41
 - long-term residents 79
 - other 23
 - politicians 18
 - real estate agents 3
 - benefits of gentrification 7
 - integration 0
 - class 11
 - concerns with gentrification 40
 - displacement 0
 - traffic/parking 0
 - context 0
 - commercial development 6

Retrieved Segments

Simple Coding Query (OR combination of codes)

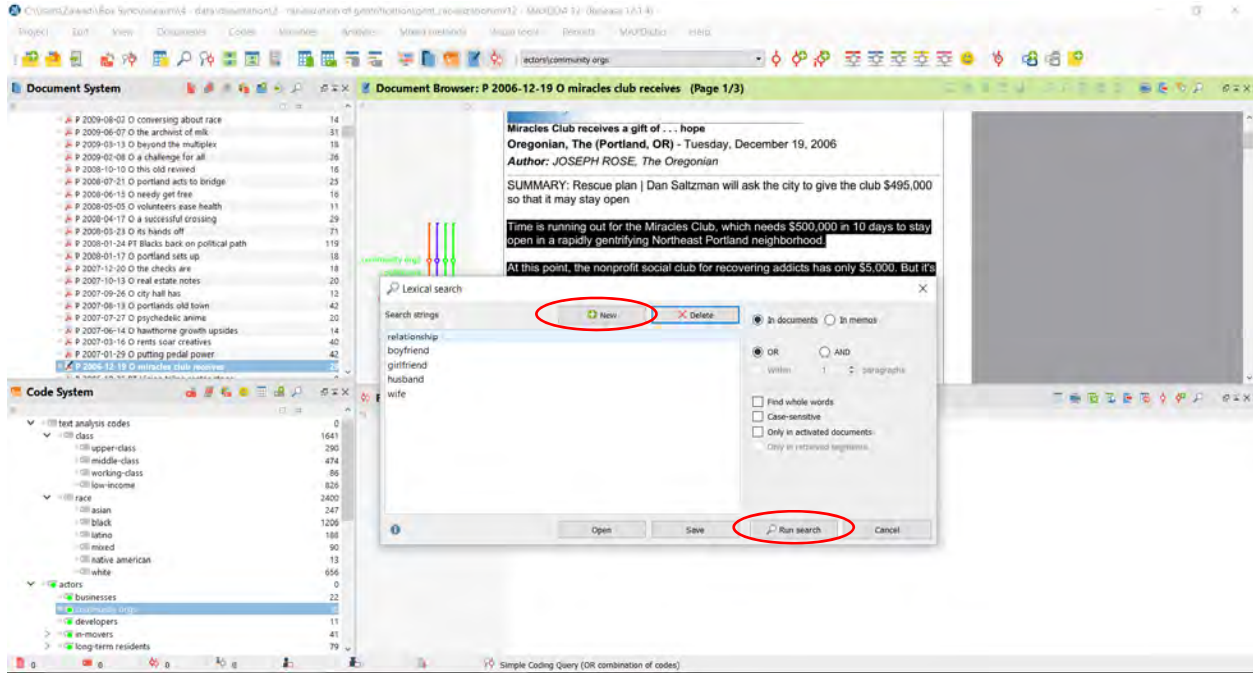
To apply multiple codes, “activate” each desired code by clicking on the code while holding down the control or shift key. The activated codes will appear in red. Then, highlight the passage you would like to code and right click. Select “Code with activated codes.”



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.”

The screenshot displays a software interface with three main panels:

- Document System:** A list of documents on the left, including titles like "P 2009-08-02 O conversing about race" and "P 2009-06-07 O the architect of milk".
- Document Browser:** A window titled "P 1990-07-10 O personalized market cafe (Page 2/4)" showing text from a document. A search results window is overlaid on this text, displaying a table of results.
- Code System:** A tree view on the bottom left showing a hierarchy of codes under categories like "text analysis codes", "class", "race", and "actors".

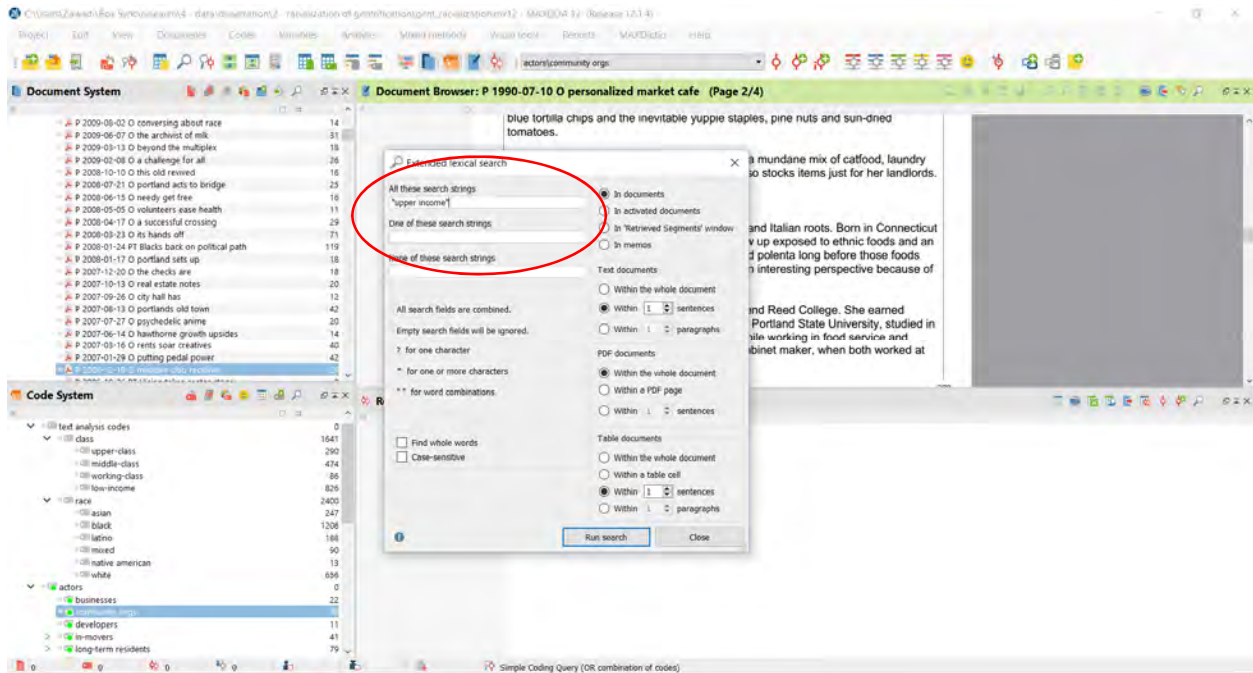
The search results window, titled "Search results", shows the following table:

Document	Search string	Begin	Preview	End
portland codedP ...	husband	2: 2360	service and cater...	2: 2366
portland codedP ...	wife	5: 1576	loyd mechanical ...	5: 1579
portland codedP ...	boyfriend	1: 1257	no job, no prospe...	1: 1265
portland codedP ...	wife	1: 1627	James Mooney, w...	1: 1630
portland codedP ...	wife	3: 398	n Lovthan, 30, s...	3: 401
portland codedP ...	girlfriend	2: 1188	e up. I think he ha...	2: 1197
portland codedP ...	husband	5: 1355	as picked up since...	5: 1361
portland codedP ...	wife	2: 1839	for Garrett, who s...	2: 1842
portland codedP ...	wife	1: 614	neighborhood,"	1: 617
portland codedP ...	husband	1: 1338	n said. Parker liv...	1: 1344
portland codedP ...	wife	4: 772	grocery store, Zav...	4: 775
portland codedP ...	husband	5: 1462	nd when she retu...	5: 1468
portland codedP ...	husband	5: 1803	Washington said...	5: 1809
portland codedP ...	husband	2: 1877	owadays, Cox sai...	2: 1883
portland codedP ...	boyfriend	1: 1692	daughter, Anna, a...	1: 1610
portland codedP ...	husband	1: 1197	in Los Angeles, s...	1: 1203
portland codedP ...	wife	1: 1209	eles, showcases ...	1: 1212
portland codedP ...	husband	2: 1960	community. Sarah...	2: 1966
portland codedP ...	husband	1: 1463	lery that she co-o...	1: 1469
portland codedP ...	husband	2: 2488	just off 14th Aven...	2: 2494
portland codedP ...	husband	2: 982	h school, where S...	2: 988

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.”

The screenshot displays a software interface with three main panels:

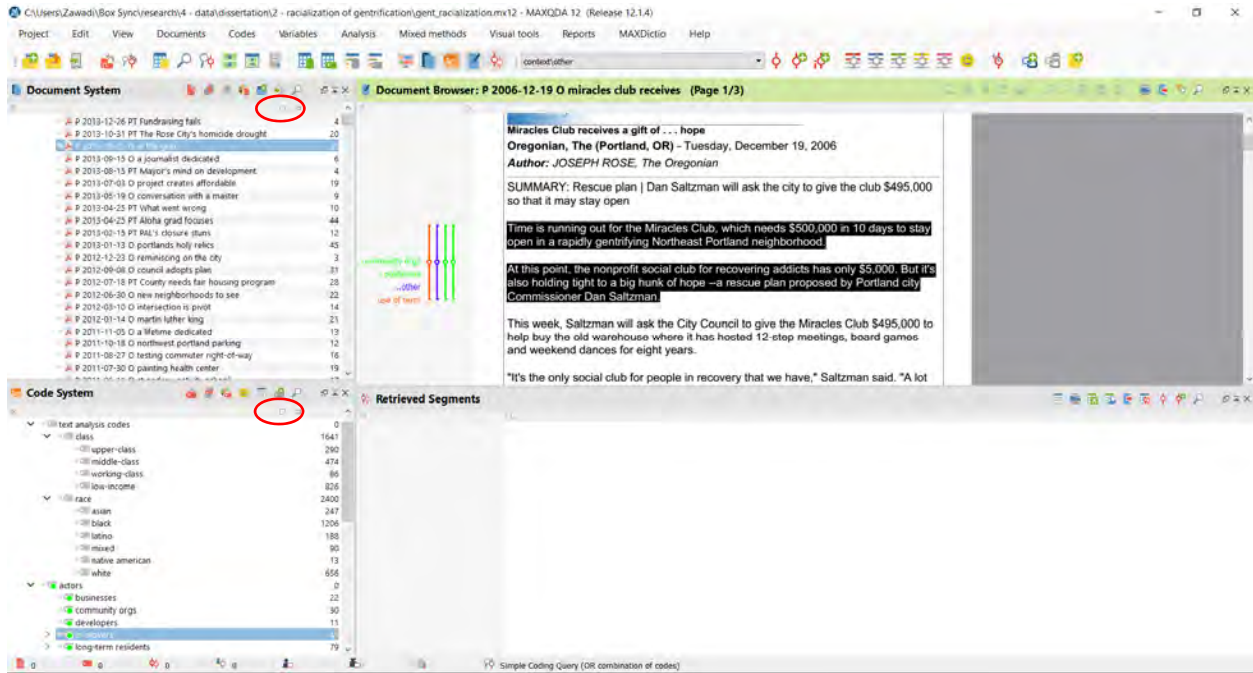
- Document System:** A list of documents with dates and titles, such as "P 2009-08-02 O conversing about race" and "P 2009-06-07 O the architect of milk".
- Code System:** A hierarchical tree structure of codes, including "text analysis codes", "class", "upper-class", "middle-class", "working-class", "low-income", "race", "asian", "black", "latino", "hispanic", "native american", "white", "actors", "businesses", "community types", "developers", "in-movers", and "long-term residents".
- Document Browser:** A window titled "P 1990-07-10 O personalized market cafe (Page 2/4)" showing text from a document. A search results window is overlaid on this browser, displaying a table with columns: Document, Search string, Begin, Preview, and End. The search string is "upper income" and the document is "portland code/P...". A red circle highlights a button in the search results window.

The search results window contains the following table:

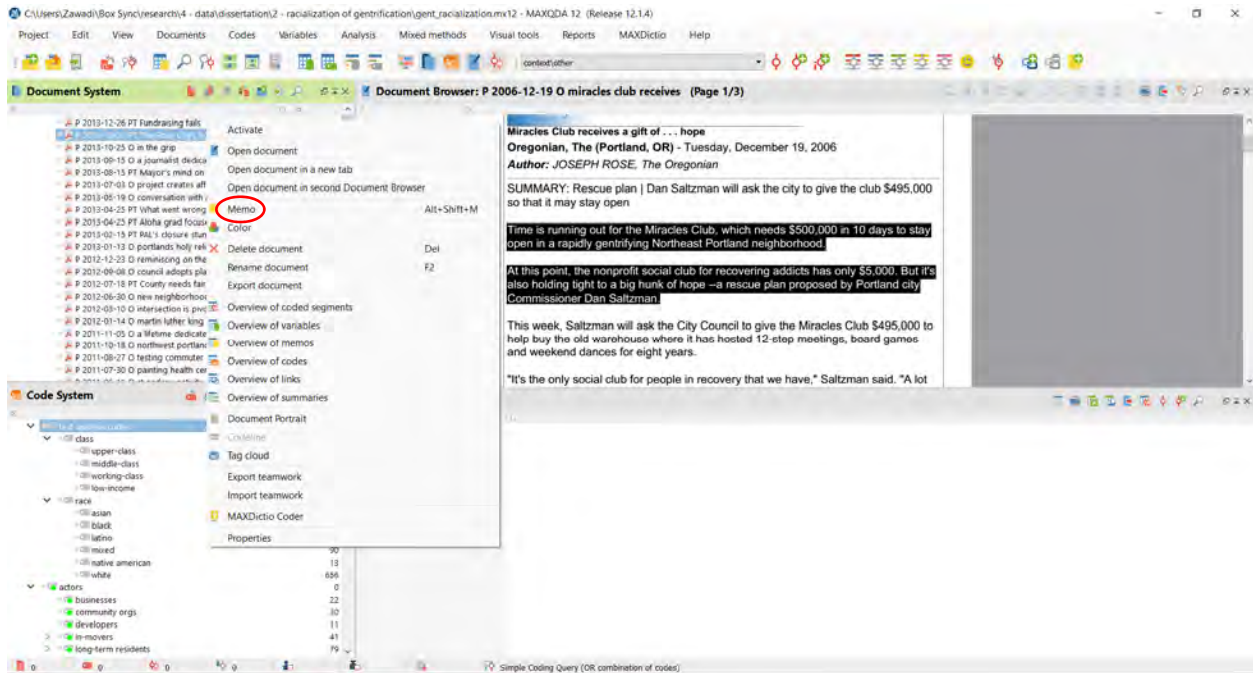
Document	Search string	Begin	Preview	End
portland code/P...	upper income	2: 2132	Richmond, ... B's ...	2: 2143

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.

The screenshot displays the MAXQDA 12 software interface. The top window, titled 'Document System', shows a tree view of documents on the left and a list of coding queries in the center. The 'Coding Query' menu item is circled in red. The right pane shows a document snippet with highlighted text: '... this point, the nonprofit social club for recovering addicts has only \$5,000. But it's holding light to a big hunk of hope—a rescue plan proposed by Portland city commissioner Dan Saltzman'. Below this, another snippet reads: 'This week, Saltzman will ask the City Council to give the Miracles Club \$495,000 to help buy the old warehouse where it has hosted 12-step meetings, board games and weekend dances for eight years.' The bottom window, titled 'Code System', shows a tree view of codes on the left and a list of retrieved segments in the center. The 'Retrieved Segments' menu item is circled in red. The right pane shows two segments: one for 'portland coded' (document P 2012-03-10 O intersect...) and another for 'portland coded' (document P 2012-03-10 O intersect...). The status bar at the bottom indicates 'Simple Coding Query (OR combination of codes)'.

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.

The screenshot displays a software interface with three main panels:

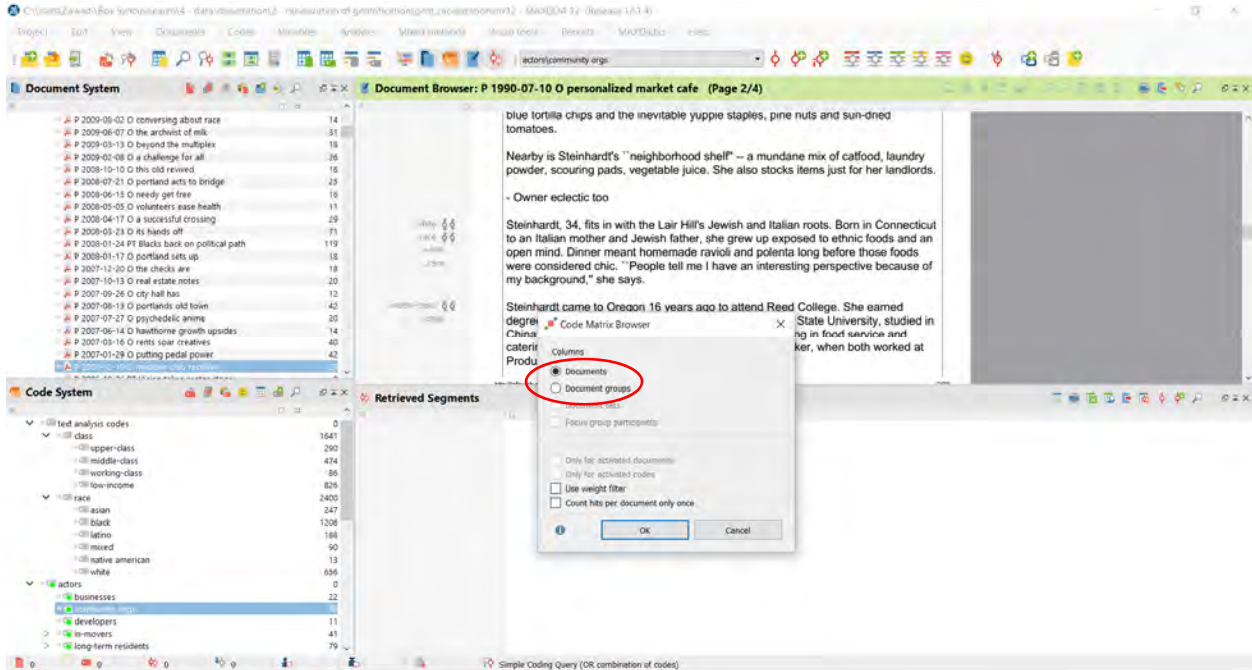
- Document System:** A list of documents on the left, including titles like "P 2013-12-26 PT fundraising fails" and "P 2013-10-31 PT The Rose City's homicide drought".
- Document Browser:** The main window showing a document titled "Miracles Club receives a gift of... hope Oregonian, The (Portland, OR) - Tuesday, December 19, 2006". The author is "JOSEPH ROSE, The Oregonian". A summary is provided: "SUMMARY: Rescue plan | Dan Saltzman will ask the city to give the club \$495,000 so that it may stay open".
- Code System:** A tree view on the left showing a hierarchy of codes. The "actors" category is expanded, showing sub-categories like "businesses", "community orgs", "developers", "in-movers", "long-term residents", "other", "politicians", "real estate agents", "benefits of gentrification", "integration", "class", "concerns with gentrification", "displacement", "traffic/parking", "context", "crime", "housing prices", "racial conflict", and "commercial development".

The "Summary Grid" window is overlaid on the code system, showing a table with columns for "Coded segments" and "Summary". The "Coded segments" column contains a list of codes, and the "Summary" column contains a paragraph of text: "The gentrification of North and Northeast Portland, the number of high-density, low-income apartments in Gresham (49.8 percent of Gresham properties are rentals, the chief said) and the city's accessibility to the MAX light-rail system have drawn gang members east into Gresham, according to police." A link is provided: "3-1514-3-1814 [0] actors/in-movers/LC_poor/low-income".

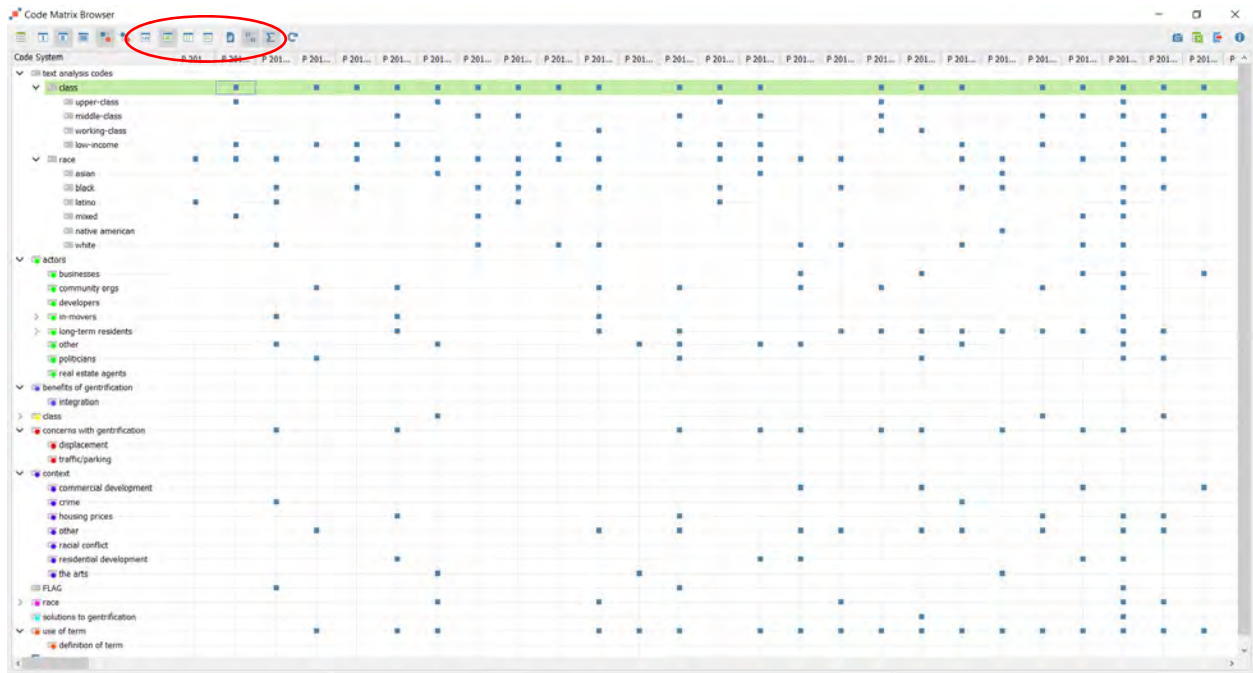
Code Matrix Browser

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.

The screenshot displays the NVivo software interface. The main window shows a document titled "P 1990-07-10 O personalized market cafe (Page 2/4)". The document content includes text about "blue tortilla chips and the inevitable yuppie staples, pine nuts and sun-dried tomatoes" and "Nearby is Steinhard's 'neighborhood shelf' -- a mundane mix of catfood, laundry powder, scouring pads, vegetable juice. She also stocks items just for her landlords." A "Code Relations Browser" dialog box is open, allowing the user to select codes for rows and columns. The dialog has the following options:

- Rows: All codes, Activated codes
- Columns: All codes, Activated codes, Choose top level code
- Type of analysis: Co-occurrence of codes, Near (codes)
- Only for selected documents
- Count hits per document only once

The "Code System" pane on the left shows a tree view of codes with the following counts:

Code	Count
text analysis codes	0
upper-class	290
middle-class	474
working-class	66
low-income	826
race	2400
asian	247
black	1206
latino	188
mixed	90
native american	13
white	656
actors	0
businesses	22
community orgs	30
developers	11
is-movers	41
long-term residents	79

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.”

The screenshot shows the 'Code Relations Browser' window. The interface includes a toolbar with several icons, one of which is circled in red. Below the toolbar is a tree view on the left side, listing various code nodes such as 'class', 'race', 'actors', and 'class'. The main area of the window is a large table with columns representing different code nodes and rows representing relationships between them. The table contains numerous small red squares, indicating the presence of relationships between the nodes. The table is organized into a grid format, with the nodes listed on the left and the relationships represented by the red squares in the cells.

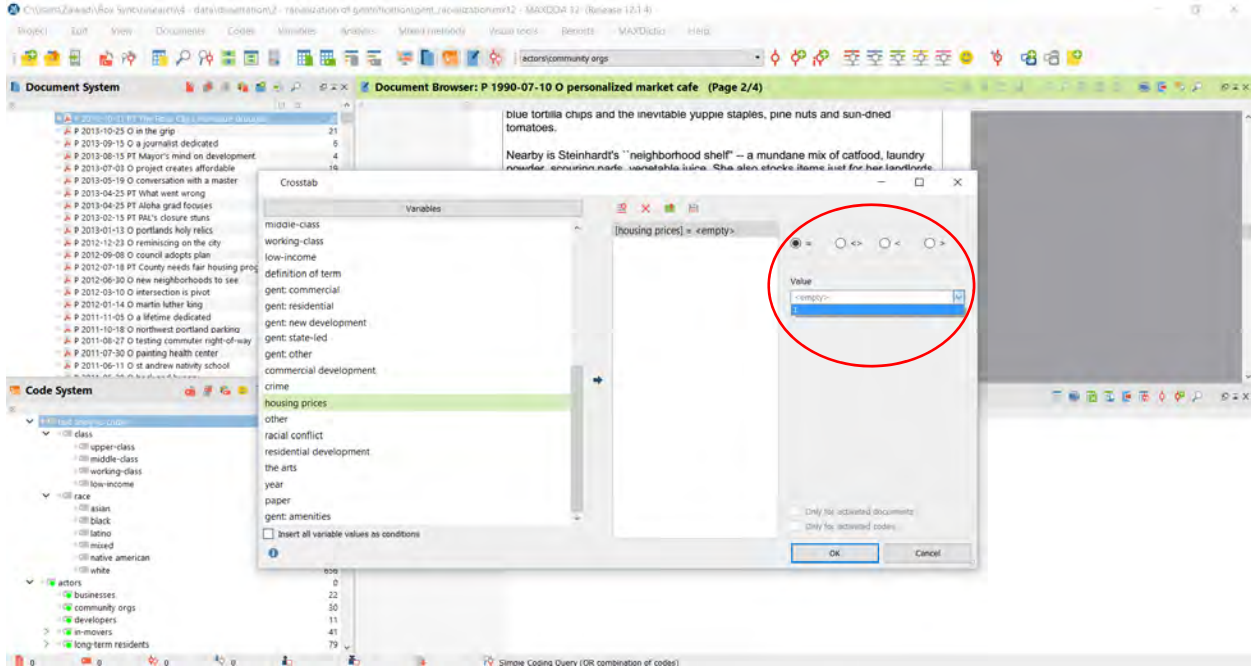
Crosstab

Click on the “Mixed methods” menu and select “Crosstab.”

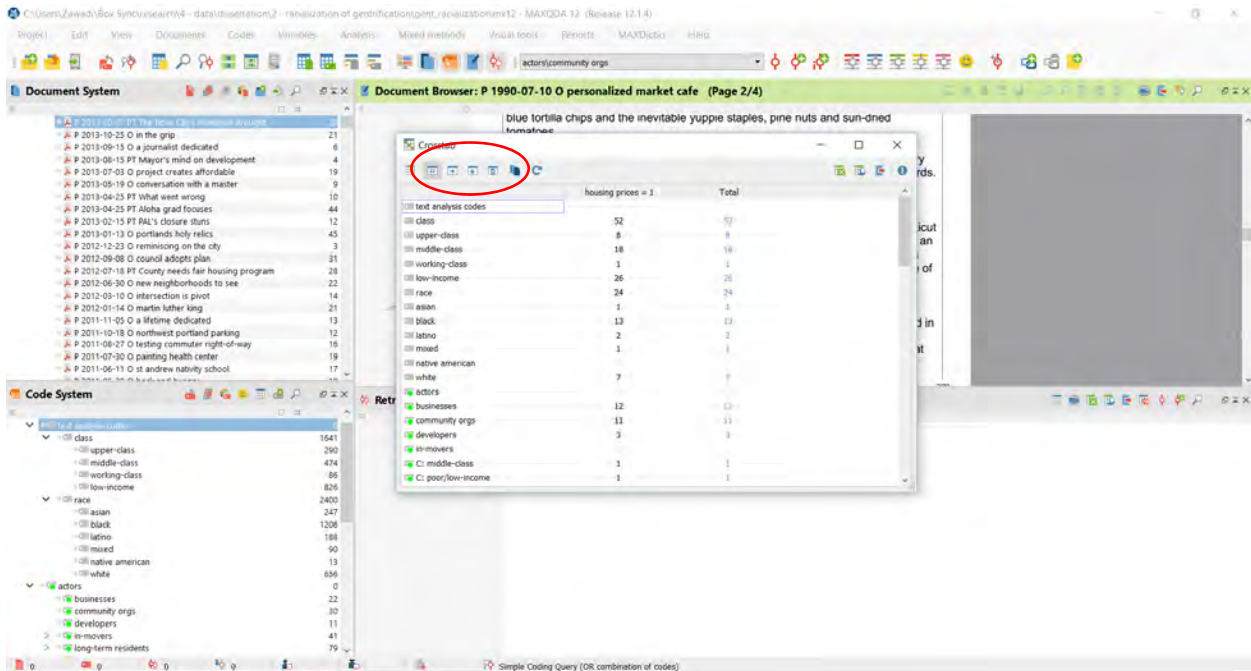
Select the variables of interest and click on the arrow to add them to the report.

The screenshot displays the MAXQDA 12 interface. In the foreground, the 'Crosstab' dialog box is open, showing a list of variables for selection. The variable 'mixed: text analysis' is highlighted, and a red circle is drawn around the right-pointing arrow button next to it. The background shows a document browser window with a list of documents and a code system tree on the left. The code system tree includes categories like 'class', 'race', and 'actors'.

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

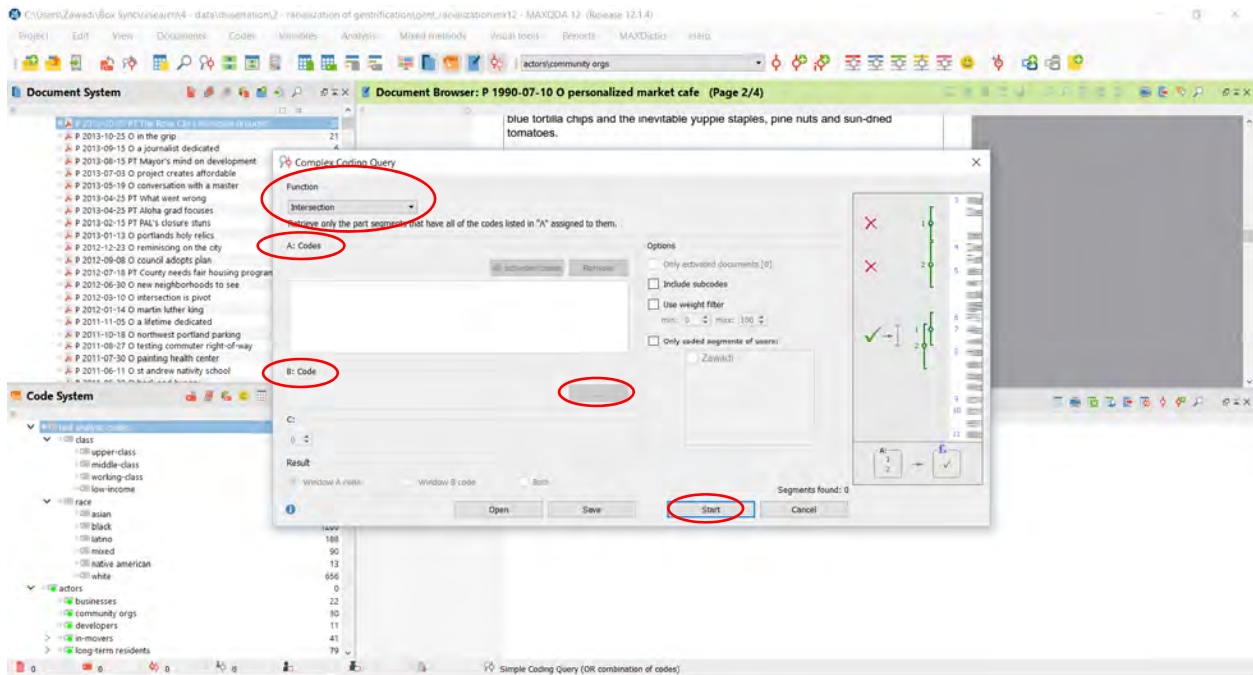
Click on “Analysis” and select “Complex Coding Query.”

Select a “Function” from the dropdown list:

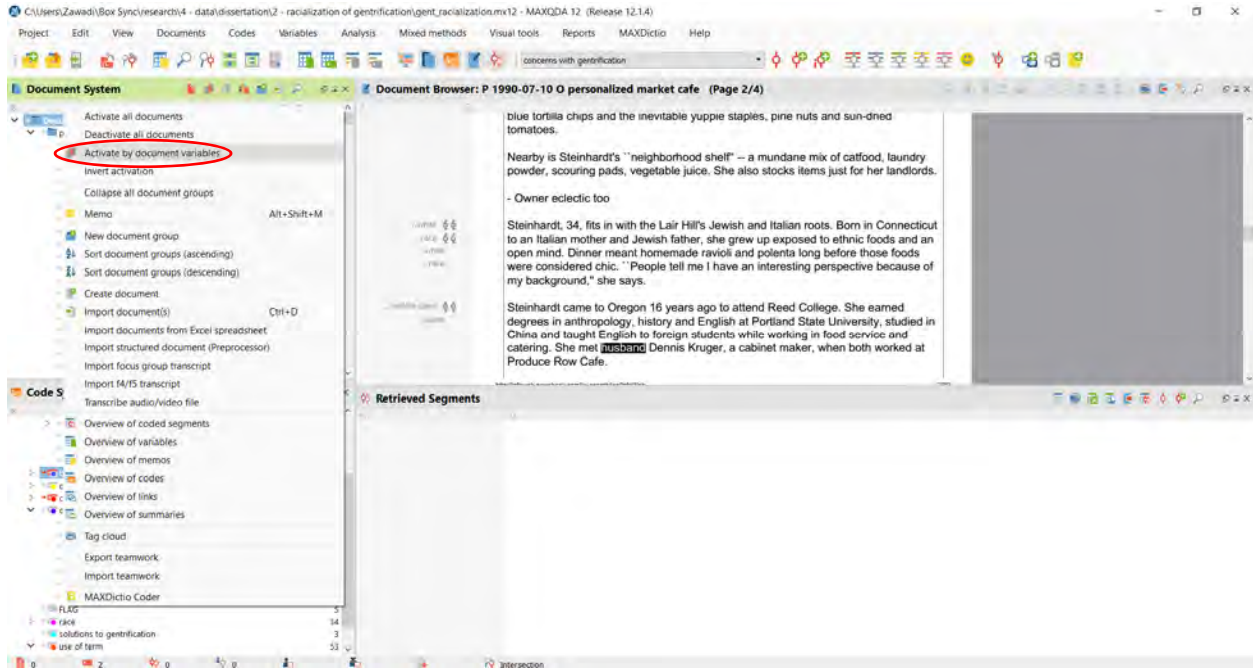
- Boolean functions (and, or, not):
 - Intersection – retrieves passages where the A codes are all used.
 - Intersection (set) – retrieves passages where a specified number of A codes are used.
 - Overlapping – retrieves passages that include either selected code or all A codes.
 - Only one code – retrieves 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 “...”

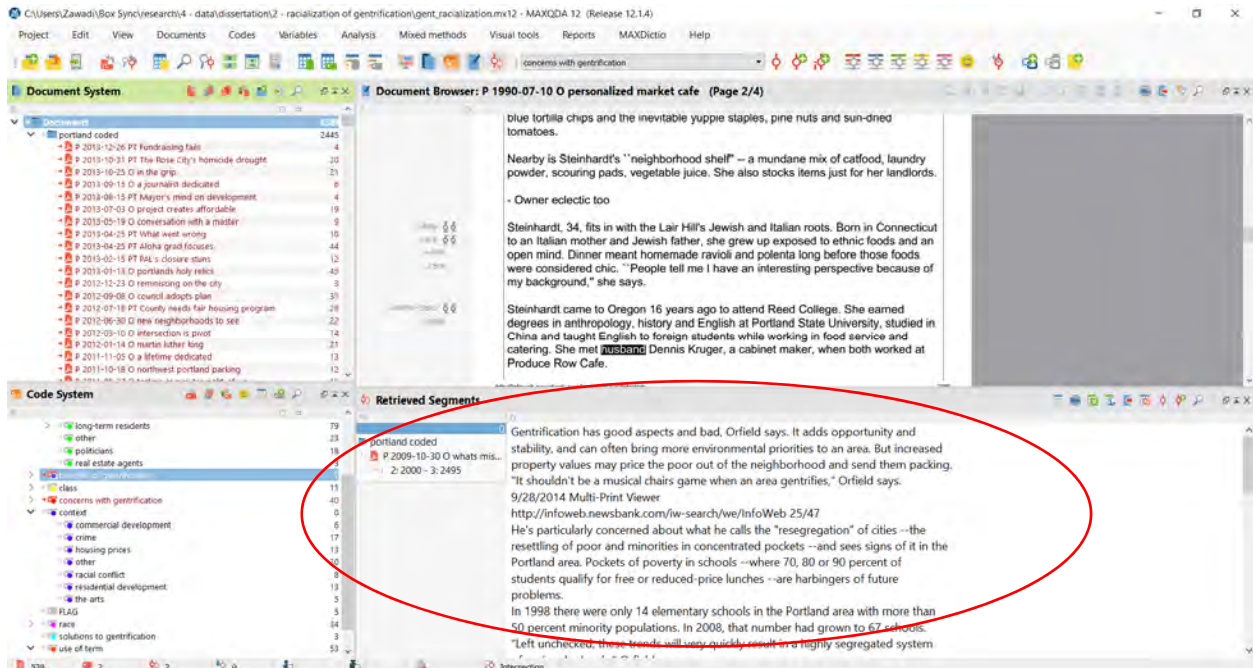
Finally, click on “Start.”



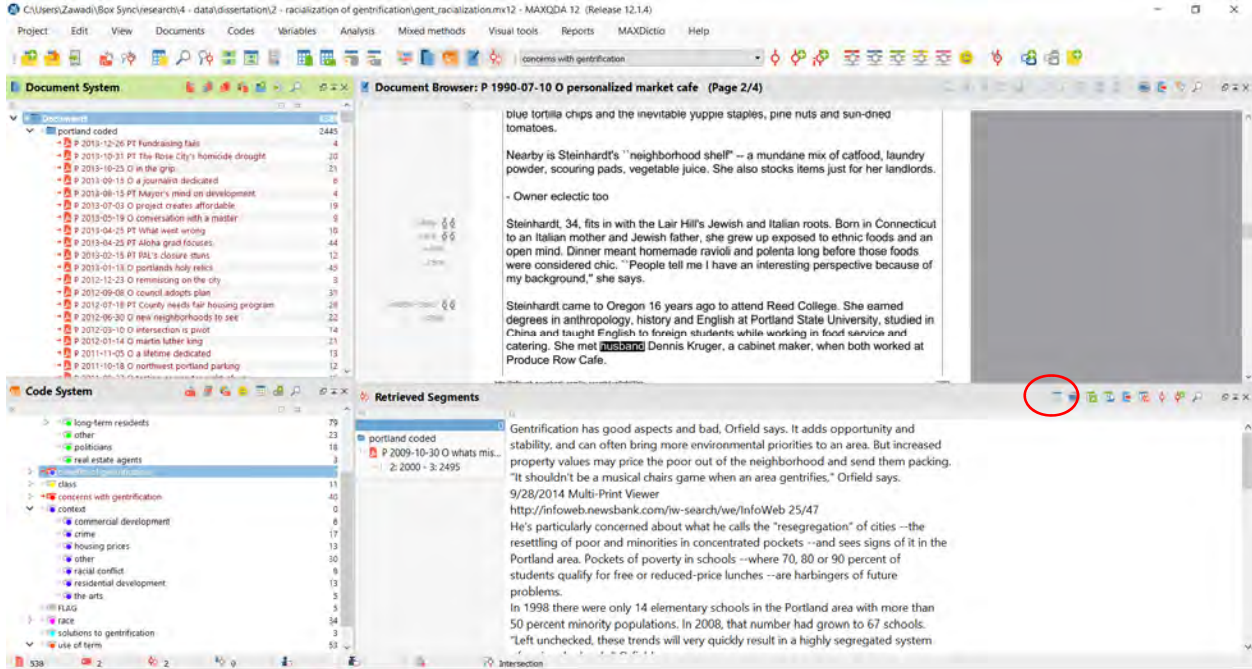
To run a query by a variable value, first select documents by right clicking and selecting "Activate by document variable" for the characteristic of interest. Then, run the query with instructions above.



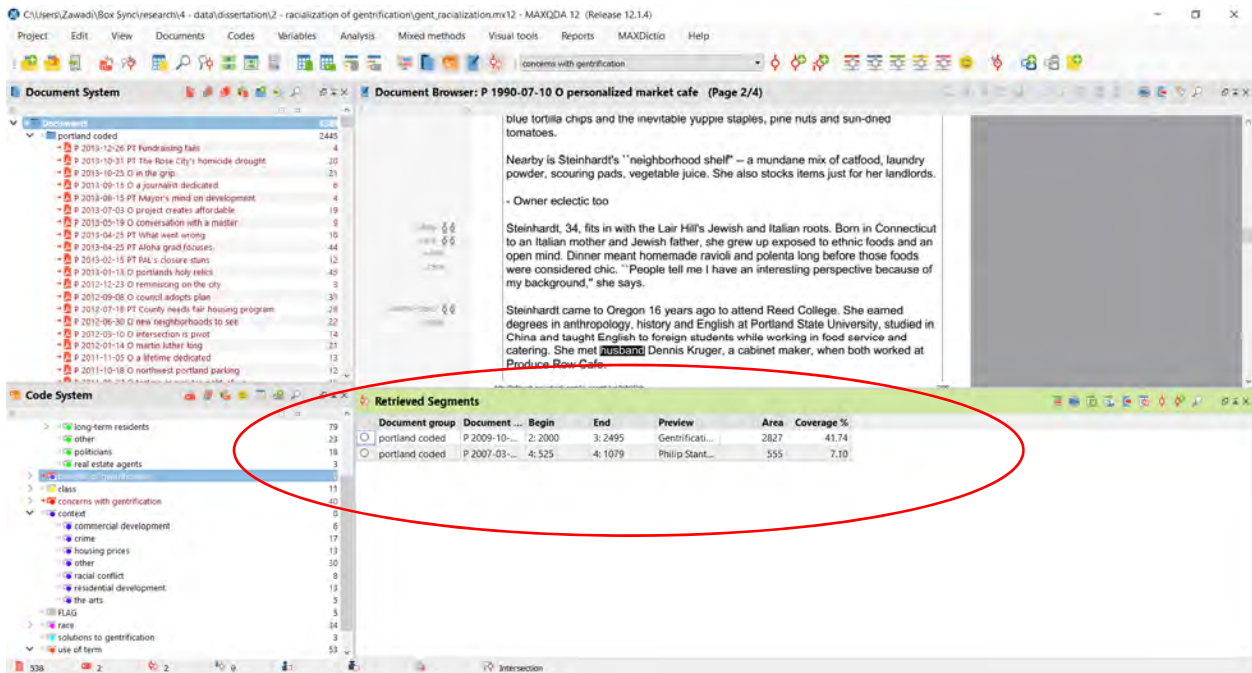
Query results appear in the Retrieved Segments area.



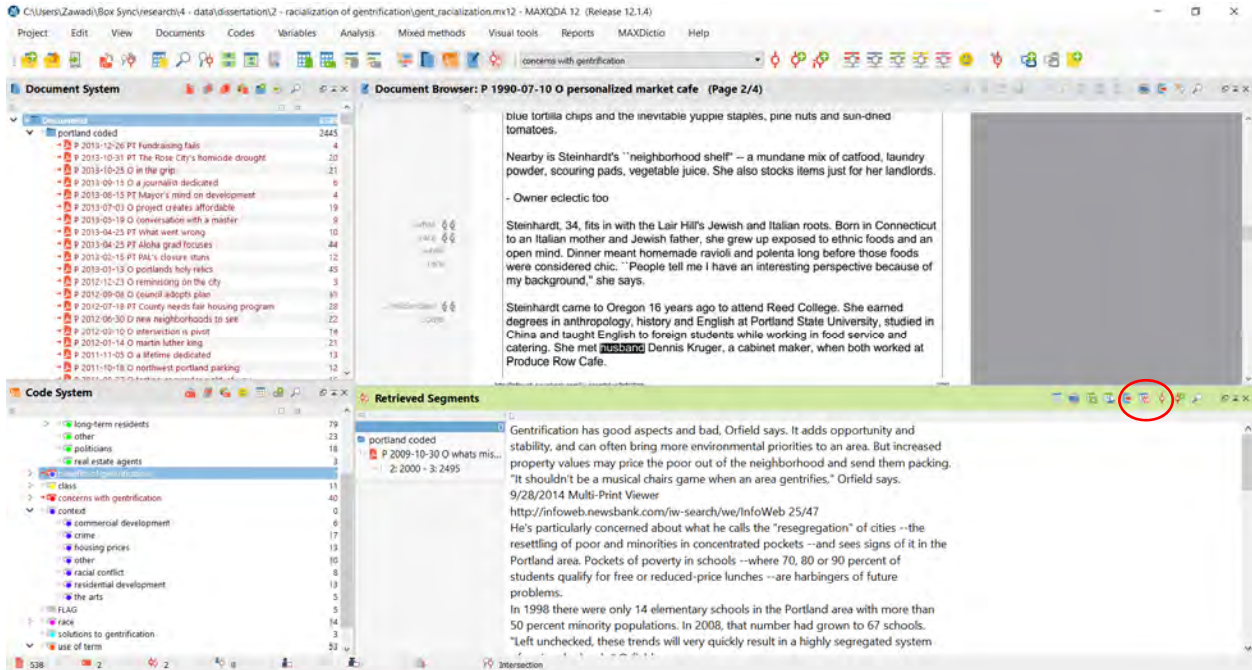
To view a list of documents included in query results, click on the “change to table view” icon.



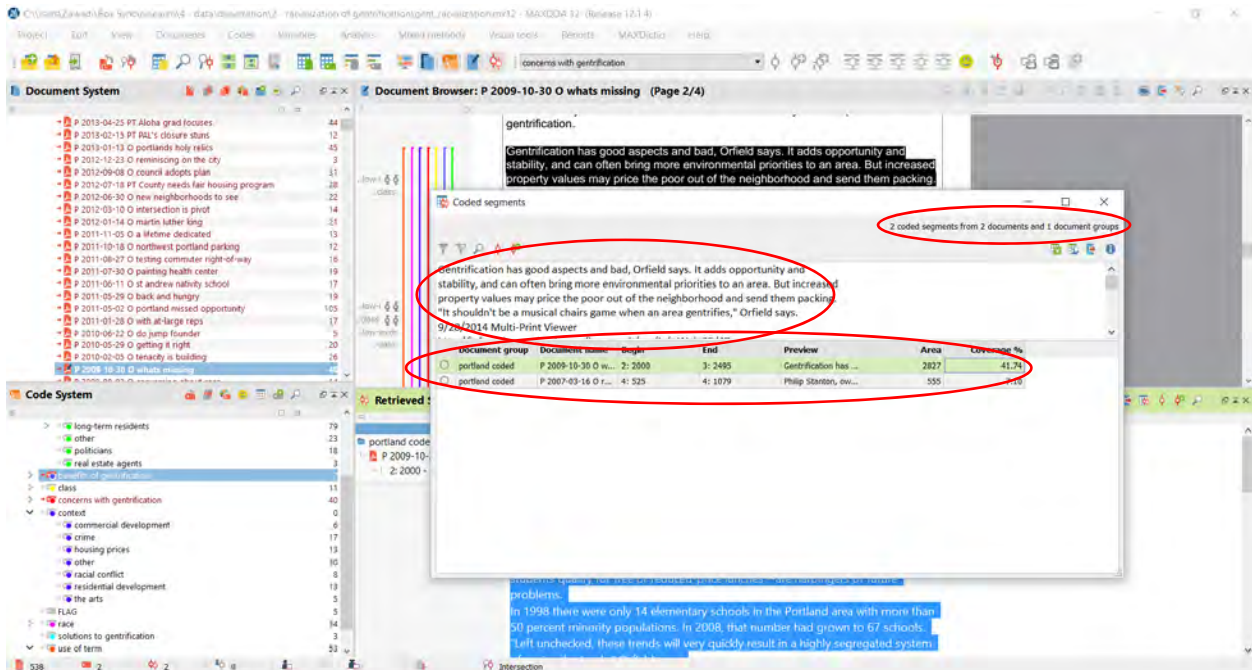
The results are displayed in the Retrieved Segments area.



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



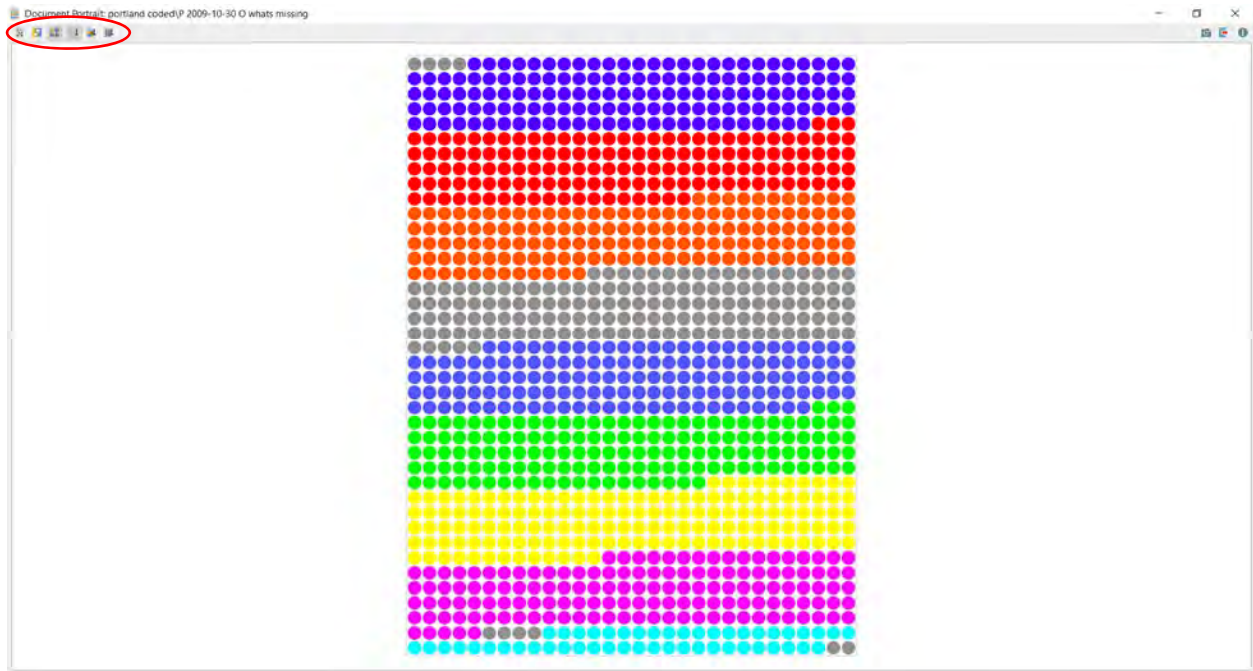
The summary counts appear at the top of the Coded Segments box.



Document portrait

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

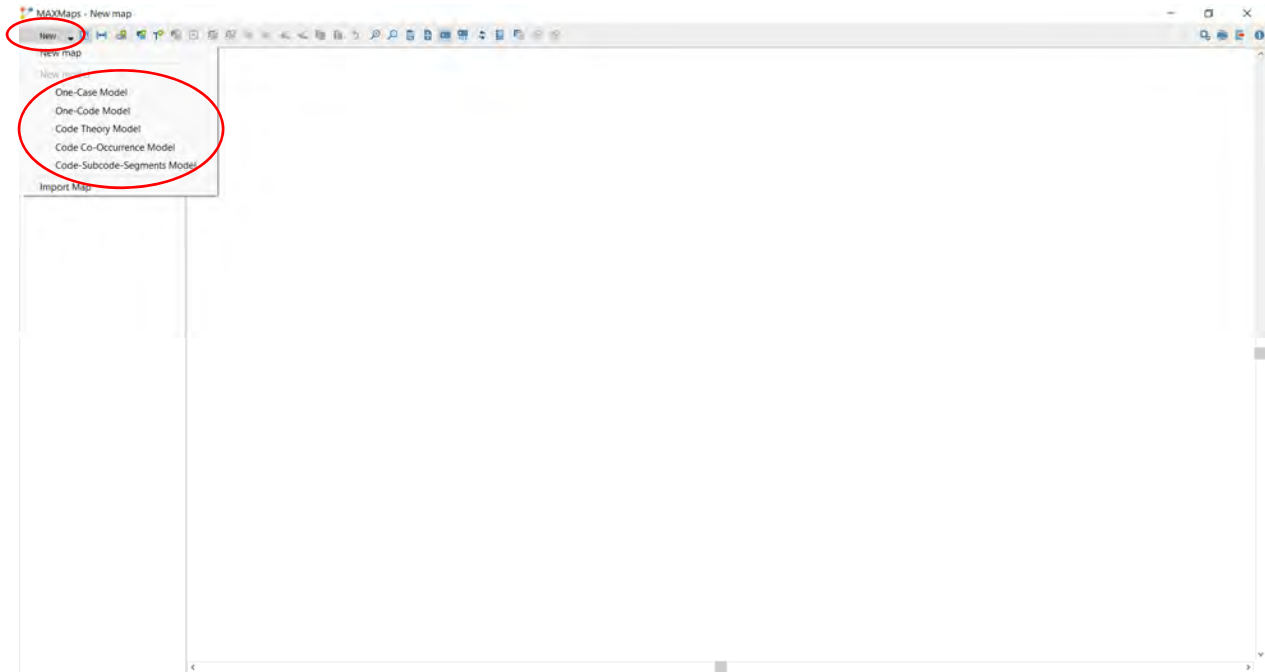
To adjust the display, use the icons at the top of the Document Portrait Viewer to visualize the entire document rather than coded text, change the colors to be mixed where there are overlapping codes, display squares instead of circles, sort by color, or sort by color frequency.



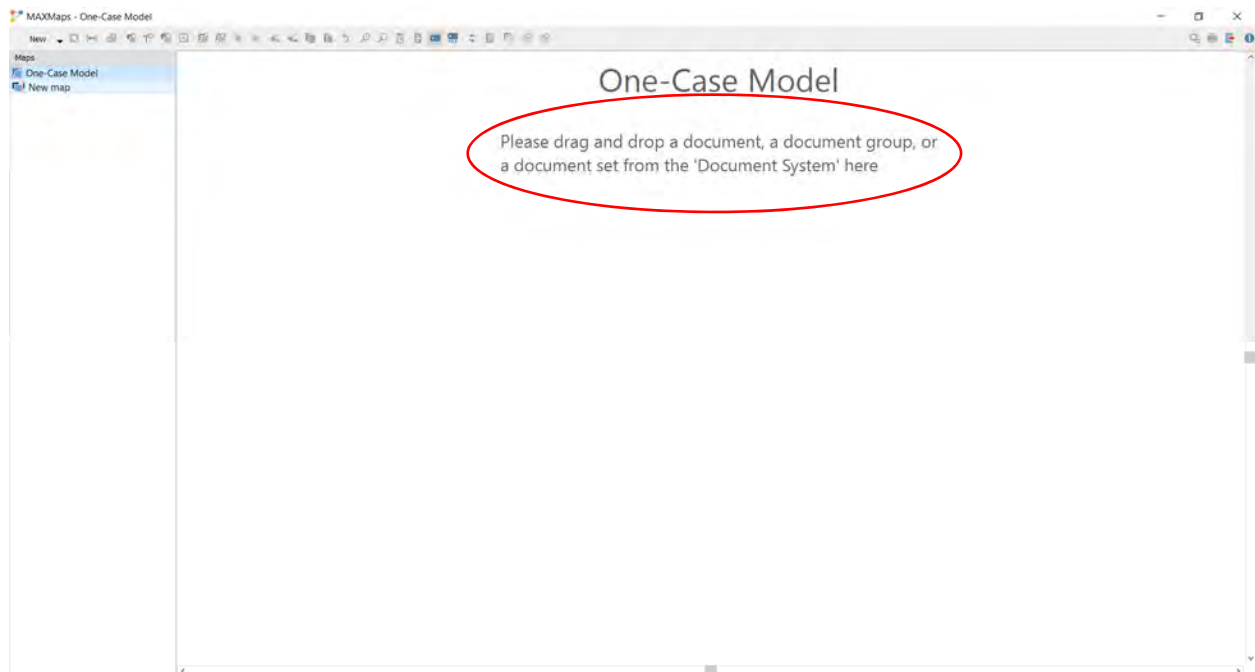
MAXMaps

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.

