Getting to Know the Interface of MAXQDA

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After you have clarified your research question(s), created a plan for your project, and perhaps even collected your first set of data, it is time to familiarize yourself with the MAXQDA interface. When you open MAXQDA after launching the program, it may seem similar to opening a toolbox for the first time. You might try to make sense of how it is organized, look into the different compartments, and take a tool or two in hand. There are many different ways to explore the unknown. The software includes tools, menus, and options waiting to be discovered and mastered.

In This Chapter

- Start working with the software: define a user name and create project
- Learn how your work is saved
- Get to know the four-window interface
- Navigate the program via the main menu and context menus
- Use the toolbars in the four main windows
- Have an overview of MAXQDA's basic terminology

MAXQDA's Start Dialog

Once you have launched MAXQDA, a start dialog will appear containing all the tools you need to create new projects or open existing ones. Additionally, this window provides direct access to various online guides to MAXQDA, such as the Getting Started Guide and several video tutorials, as well as to a number of sample projects (Fig. 2.1). You can also submit feedback to the development team from here. When launching the program for the first time, it is important to enter a user name in the field at the top left of the window or at least double-check the name suggested by MAXQDA. This is especially important if several people are working on the same project, because in MAXQDA a lot of performed actions are tagged

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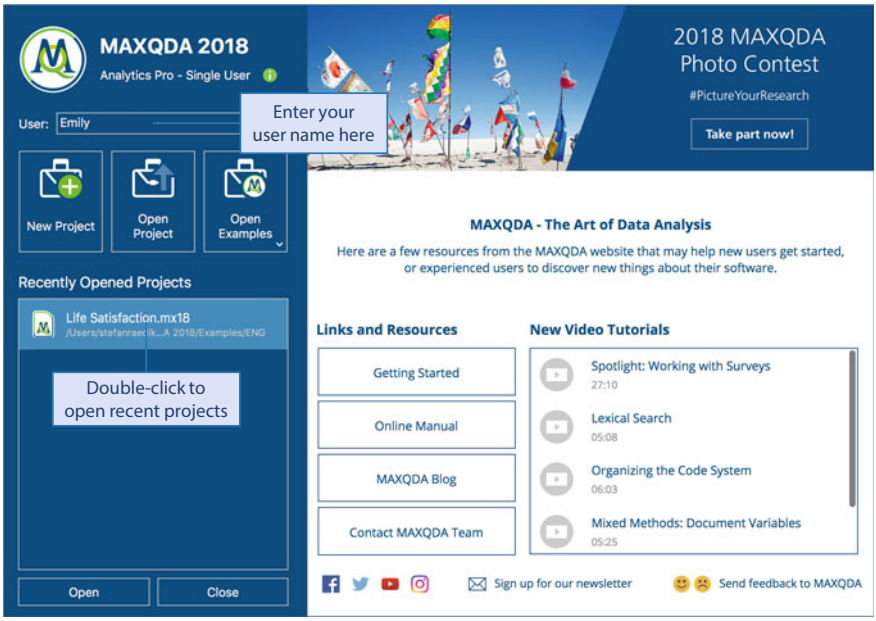

Fig. 2.1 MAXQDA's start dialog

with the respective user name. For this reason, it is best to avoid nicknames or fantasy names when choosing your user name and to use the same one across all devices. For projects with many collaborators who are to be granted different access rights, MAXQDA has a special user management system, which we describe in detail in Chap. 18.

MAXQDA works with *projects* in much the same way as Excel does with *workbooks*. Project files from MAXQDA 2018 always have the file extension .*mx18*; if the file extensions are hidden, you can recognize them by their file type "MAXQDA 2018 Project." (Almost) everything you import as data into MAXQDA is saved as part of your project—for example, transcripts of interviews or focus group discussions, documents, images, tables, and so on. Moreover, everything you create in the course of working with MAXQDA is also saved in the *project*, for example, your entire category system, your category descriptions, all your memos and notes, any links you add, as well as all the graphics and concept maps you create with the visualization tool MAXMaps.

Project files can be saved anywhere, but it is best to avoid opening projects stored in the cloud, on Dropbox, or similar, since unstable or slow network connections can then disrupt your work.

When it comes to saving project files, there is one key feature of MAXQDA which is so central to using the program that we have highlighted it in the following box:

Please Note
MAXQDA automatically saves everything you import into the program and everything you create with it. It is therefore not necessary to actively "save" your projects as you progress with your work.

In principle, the rule "one project = one file" applies to the storage of all your project data, which greatly simplifies data backup and transfer procedures. However, this rule does not apply to the often extremely large media files (a video file can quickly reach 1 gigabyte in size). For PDF files and images, you can specify the file size up to which you would like them to be saved in your project file. The default size is 5 megabytes, and this can be adjusted in MAXQDA's settings, which you can open via the gear symbol at the top right corner of the interface. You can find more detailed information on how to manage files which are not included in your project file, but stored externally, in Chap. 3.

Like all important data, MAXQDA project files should be backed up regularly. A simple method would be to create a copy of the project at the beginning of each working day and then add the current date to the file name. You can duplicate open projects via the main menu by selecting ***Home*** > ***Save Project As.*** Alternatively, you can create file copies using Windows Explorer or Mac Finder. MAXQDA also automatically creates backup copies: when a project is opened, the system checks when the last automatic backup took place and, if necessary, creates a project copy in the set backup folder. You can adjust the backup time interval and define a backup folder in MAXQDA's settings.

MAXQDA lets you open projects created with older MAXQDA versions. To do this, select the corresponding file type in the file dialog box, e.g., MX12 for project files from MAXQDA 12.

MAXQDA's User Interface

Once you have created your first project, you will at first see MAXQDA's distinctive interface—its four main windows will still be mostly empty at this point. At the top, you can see the *main menu* with several ribbon tabs which give you access to all the most important tools and functions in MAXQDA. The ***Home*** tab, for example, contains functions for opening projects, configuring the interface layout, or opening the logbook, in which you can record key insights and analysis steps just like in a research diary. The tabs of the additional modules MAXDictio and Stats are only visible if you have acquired the appropriate licenses. The view shown in Fig. 2.2 is identical on Mac and Windows, but unlike Windows, the Mac version of MAXQDA has an additional menu bar at the top of the screen. Since this menu contains the same options as the MAXQDA tabs, it is not necessarily needed, which is why you can easily switch to full screen mode on Mac and all the important functions will still be readily available. To maximize your working space, you can hide the main menu

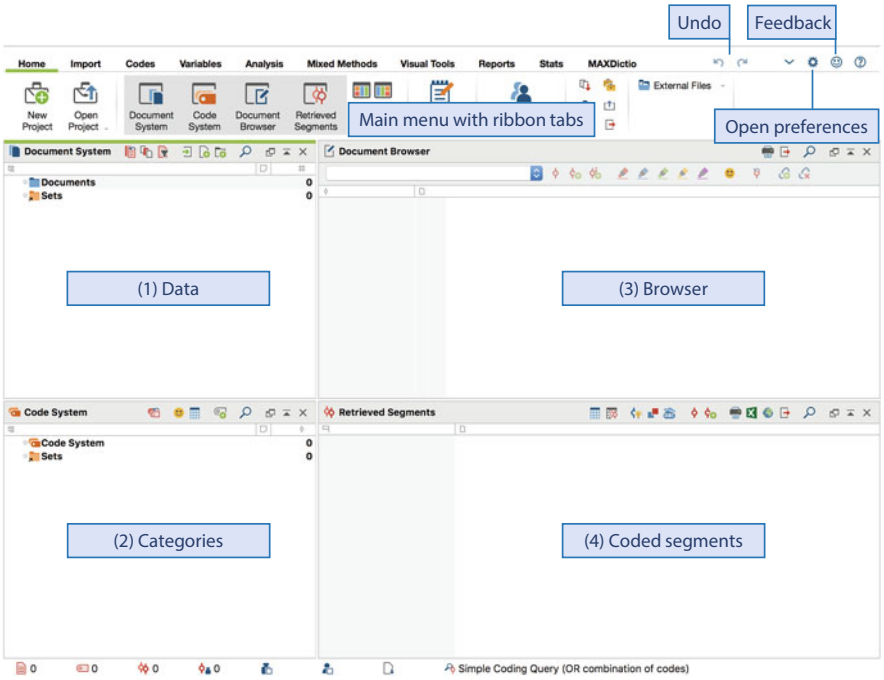

Fig. 2.2 The four-window interface and main menu of MAXQDA

(by clicking the arrow icon at the top right of the interface); clicking the tab names will reveal the menu again at any time.

The window at the top left of the figure (1) is called the "Document System" and will later contain all your data (sources) with which you can work. The second window (2), just below the first, is the "Code System," which will contain your category system. The third window (3) at the top right, the "Document Browser," is a working window in which documents can be viewed and edited. Here you can edit texts, code text passages or parts of images, add memos to texts, or link certain parts of documents with each other. Below this you will see the fourth window (4), the "Retrieved Segments." This is a results window in which coded segments are compiled in later stages of work.

These four windows form the basic structure of MAXQDA. You can change the arrangement of the windows (e.g., the relative window sizes), swap them (the two left windows on the right side), or arrange them in three columns instead of two. This can be done via the ***Home*** tab, which contains four icons for rearranging MAXQDA's main windows. The three-column view is very practical if you are working with a wide screen of an appropriate size.

On the right side of the top toolbar of each main window, there are three window control icons: . For example, you can remove a window from this arrangement to place it on a second monitor. It can also be expanded to its maximum size or

closed. However, at least one of the four main windows will always remain open. The ***Home*** tab can be used to reopen windows that are not currently visible. Directly next to the control icons for adjusting the main windows, you will see *a magnifying glass* icon, which you can click to perform a local search within the respective window.

Below the main window, you will see the *status bar*, in which MAXQDA displays information about your current selections and currently active settings. If you move the mouse over an icon, its respective meaning will be displayed.

The MAXQDA interface can be displayed in numerous languages, including English, German, Spanish, Chinese, and Japanese. You can select your preferred language in MAXQDA's main settings, which you can access via the gear symbol in the top right corner of the interface.

The Context Menus and the Icons in the Main Windows

Context menus can be opened in each of the four main windows via a right mouse click. These menus provide all the functions relevant to the window in question. For example, all functions relating to managing your documents are available in the "Document System" window. These allow you to, for example, create (or delete) document groups and organize your documents in a logical manner. You can import documents of various types, start transcribing audio or video files, and much more. To open a context menu, right-click on the icon for which you want to view the relevant options. When you have just started working on a project and have not yet imported any data, the windows will initially be empty; hence the number of objects you can click this way will be very small. In the "Document System" window, you will only see two icons, for *Documents* and *Sets*. When you right-click on *Documents*, a thorough list of options for working with documents will appear, including import options. The same applies to the "Code System" window: here, too, only two icons will initially be visible. A right-click on *Code System* will display several options for working with codes (Fig. 2.3).

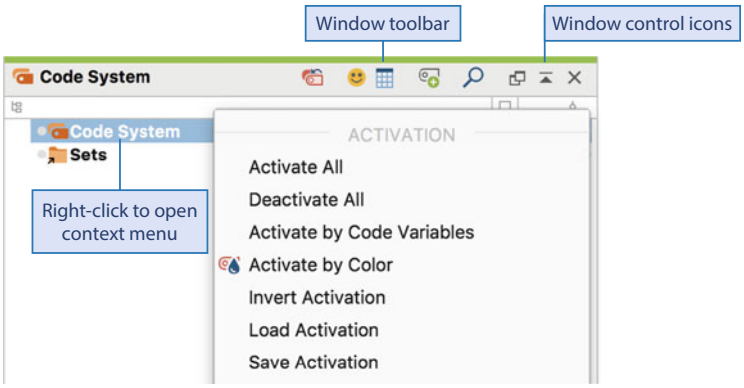

Fig. 2.3 Context menu in the "Code System" window

► **Tip** To right-click on a Mac computer, tap the trackpad with two fingers simultaneously. For some devices, hold down the ***Ctrl*** or ***control*** key and tap on the trackpad with one finger to right-click.

The header of each of the four main windows contains a row of icons that give you easy access to tools related to the window in question. From here you can also start a local search in the window and adjust the window's display settings. Additionally, the "Document Browser" and "Retrieved Segments" windows contain an icon that allows you to export the contents of the window in various formats.

The Undo Function

Almost all the actions you can perform in MAXQDA, from importing a document, to creating and deleting a category, to modifying a memo, can be undone. To do this, there is an icon (a backward arrow) at the top right of the MAXQDA interface. With the icon next to it (a forward arrow), you can restore an action that has been undone.

The Help Functions

At the top right of the MAXQDA menu bar, there is a question mark icon which gives you access to MAXQDA's numerous help options. Clicking the question mark will open a menu with links to MAXQDA's online help manual, the MAXQDA Getting Started Guide, and online video tutorials. The online help manual contains comprehensive information on the content and technical aspects of MAXQDA's individual functions and is well-suited, for example, to looking up the setting options of specific tools. It is also especially helpful that many MAXQDA dialog boxes include a small info icon. Clicking this icon opens context-specific online help at the corresponding location. The help menu also contains a list of available keyboard shortcuts, which can make the program even quicker and easier to use.

If you need further support beyond that available on the MAXQDA website or via the help menu, you may wish to access the MAXQDA user forum. You can register for the forum online and post public questions (www.maxqda.com/en/support/forum/). A search function is also available without registering, through which you can find all the questions, answers, and comments that have already been posted.

Important Terms in MAXQDA

Before we explore the basic functions of MAXQDA in the chapters that follow, we would like to take this opportunity to briefly explain the most important and, above all, most frequently used terms in MAXQDA. While the names and terms in the software are largely based on the standard terminology used in methods literature,

there are nevertheless certain MAXQDA-specific terms. Being familiar with these will prove very helpful when learning how to use the software. Over the next chapters, these terms will then be explained in greater detail in their respective contexts; you can easily leaf back to this chapter at a later stage to gain an overview of this "vocabulary."

Projects are the work and data storage units of MAXQDA. They contain all the data you import (texts, PDFs, images, etc.) or create (categories, coded segments, memos, comments, concept maps, etc.) during your analysis.

Documents are your project's data. Documents can contain different types of data such as interview texts, PDF documents, images, field notes, videos, and much more (see Table 1.1). The "Document System" window gives you access to the data contained within a project.

Document groups let you group documents together in the "Document System." These are comparable to folders on a computer. Usually data is grouped by type (e.g., interviews, focus groups, observations) or by content criteria (e.g., hospital A, B, and C or teachers, children, and parents).

Document sets let you group documents according to any criteria and allow for additional groupings of your data. Document sets are temporary in nature, that is, they can be deleted without deleting their corresponding documents. A document can belong to any number of document sets simultaneously and can also be removed from a document set without further consequences.

Codes are a key analysis tool. They enable you, among other things, to systematize and assign meaning to your data material. They can be assigned to text segments, image segments, or video clips. In MAXQDA all forms of categories are called codes; which underlying category is behind a given code is up to the researcher. The only exception to this rule is MAXDictio, the tool for word-based analysis and quantitative content analysis: here MAXQDA uses the term "category."

Code sets are the counterpart of document sets. They allow you to compile codes and are also temporary in nature, i.e. they can be deleted without deleting the corresponding codes. A code can belong to multiple code sets and be removed from a code set; it will nonetheless remain in the "Code System."

Code System or **code tree** refers to a project's complete set of categories and subcategories, which can be organize hierarchically in MAXQDA's "Code System" window.

Coding is the process of assigning a category (a code) to a currently selected section or part of data material.

Coded segments are the sections or parts of the data to which a code has been assigned.

Coding Query refers to the compilation of coded segments, e.g., all the coded segments on a given a topic.

Memos contain researchers' notes. They can be used to formulate and record assumptions and hypotheses about relationships or important findings in the data material. Code memos can also contain descriptions and instructions about the use of categories.

Comments always refer to specific coded segments and are shorter than memos. They can be used to make suggestions or identify contradictions in the data and can also be useful for category building and teamwork.

Document variables contain standardized information regarding each case, e.g., the level of education and the age of an interviewee.

Links enable you to connect a point or section in your data material to another point in the material, a website, a file, or a geolocation.

Overviews contain table lists of analysis information. There are overviews available for coded segments, memos, document variables, links, and other elements of analysis. Overviews make it easier to keep track of the substantial amounts of data that accumulate over the course of an analysis project.