



# ChatGPT meets MAXQDA: The AI Assist

Andreas Müller

31.08.2023



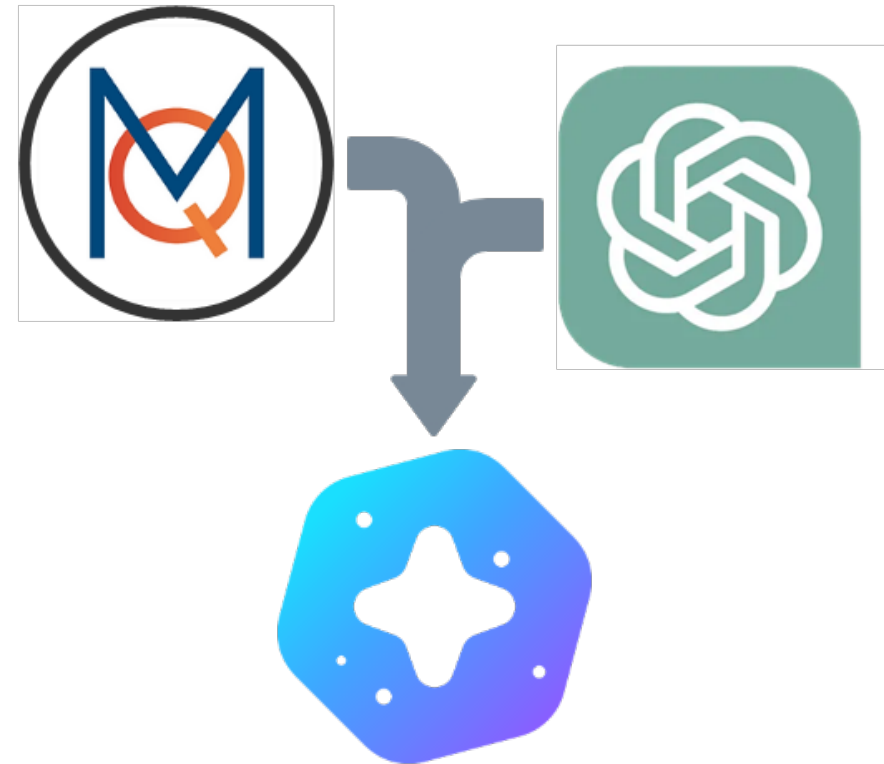
# Goals of this workshop

- Understanding the basic functions of AI Assist
- Exploring how the AI Assist can be integrated into a research project



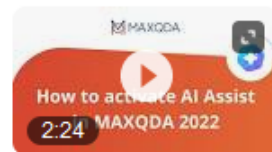
# What is the AI Assist?

- AI Assist integrates GPT-3.5 into MAXQDA2022
- Large language model generates text based on training data and a prompt
- AI Assist uses a deterministic model (limited creativity, less hallucination)
- Currently in Beta!



YouTube  
<https://www.youtube.com/watch>

## How to activate AI Assist in MAXQDA 2022 - YouTube



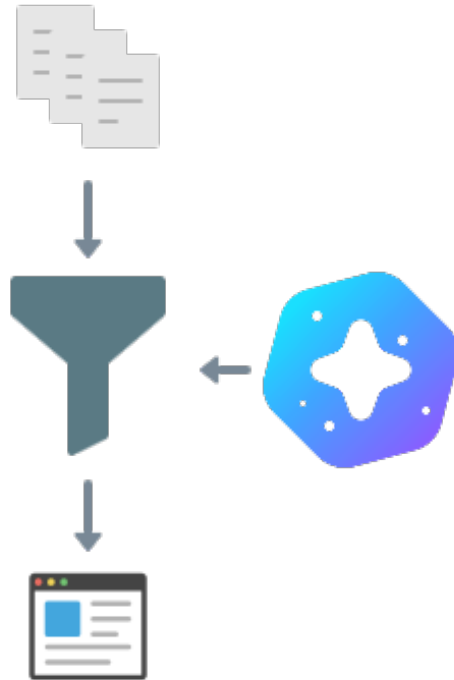
In this video tutorial, we'll show you how to activate the **AI Assist** beta test in **MAXQDA**. Further information on **AI Assist** can be found ...

YouTube · MAXQDA Official Channel · 26.04.2023

# Functions of the AI Assist

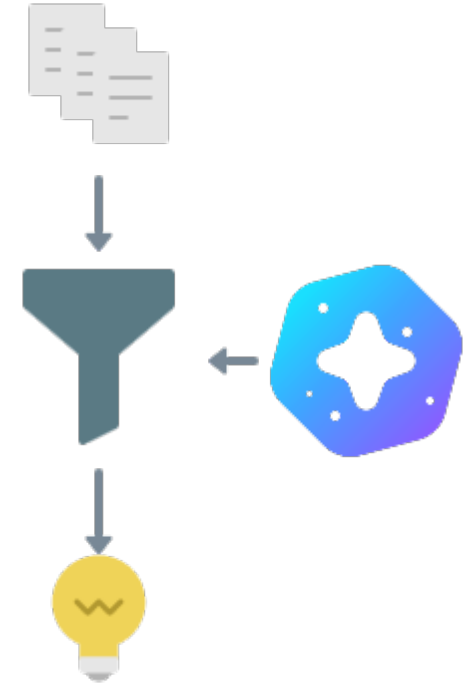
## Summarizing content

- Interviews
- Focus groups
- Literature
- Any text documents



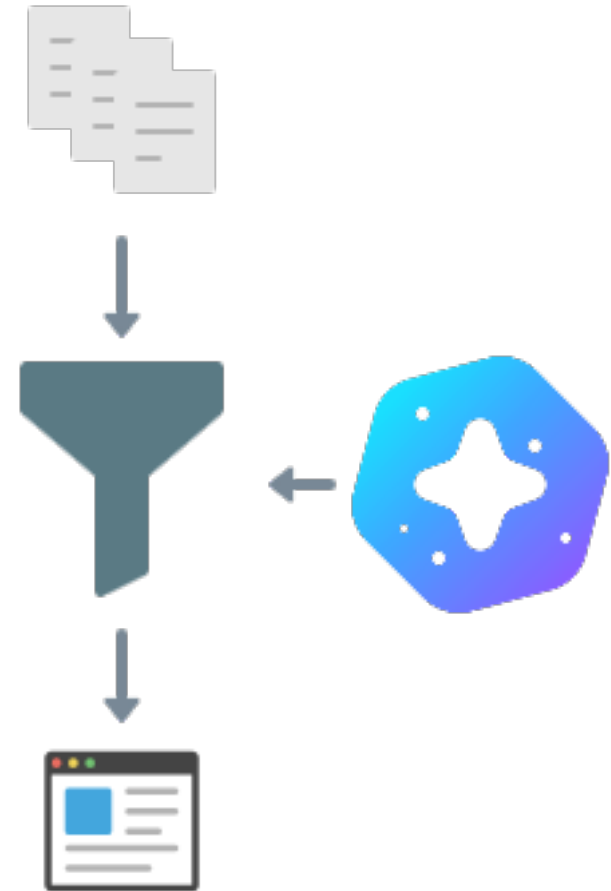
## Gathering ideas

- Codes
- Categories
- Topics
- Keywords



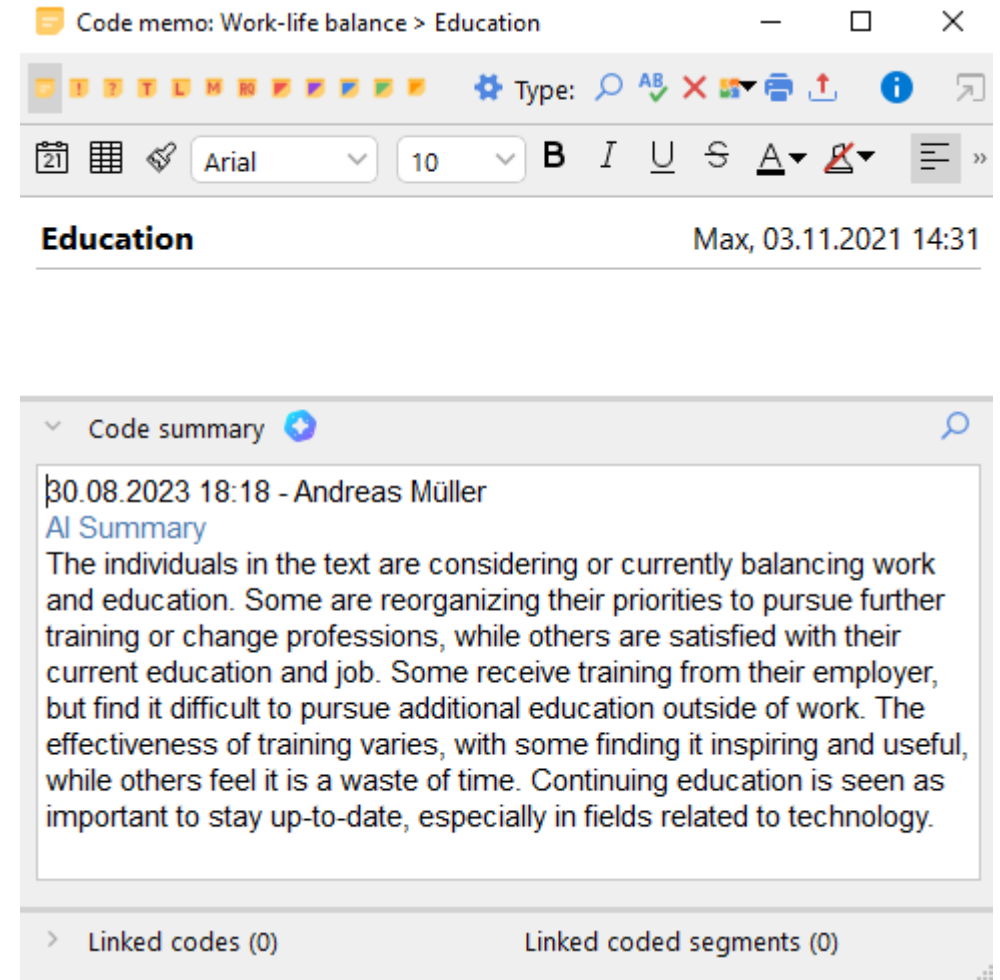
# Functions: Summarizing

- AI Assist can summarize the content of
  - your codes
  - your code summaries
  - your coded segments
  - your in-document memos



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The screenshot displays the MAXQDA software interface. At the top, there is a 'Start' bar with various icons for document and code management. Below this is a 'Summary Grid' window showing a table of coded segments for 'Selim' under the 'Friends & Family' category. The grid has columns for 'Mateo', 'Selim', 'Riley', and 'Thanh'. The 'Friends & Family' row is highlighted with a red dashed box. To the right of the grid is a 'Coded segments (7)' panel showing a list of segments. The first segment is selected, and its content is displayed in a text area. Below the text area is a 'Summary' panel with an 'AI Summary' section.

	Mateo	Selim	Riley	Thanh
Work-life balance				
Education				
Friends & Family				
Work/Life Separation				
Domestic work				
Childcare				
Typical workday				
Free time, self-care				

**Coded segments (7)**

This has decreased since we had our children, because I have to prioritize a little bit. The free time I have, I have to decide whether I spend it with my family or with friends. And then my children and also my wife are more important to me. So, I would like to have more time to be able to divide it up better, because just... I've known my friends since I was a student. But if I have to make a decision then it's for my family.

Interviews > Berlin > Selim, Pos. 15    Work-life balance > Friends & Family (50)

**R:** At the moment I have to say, unfortunately, not very satisfied to dissatisfied simply

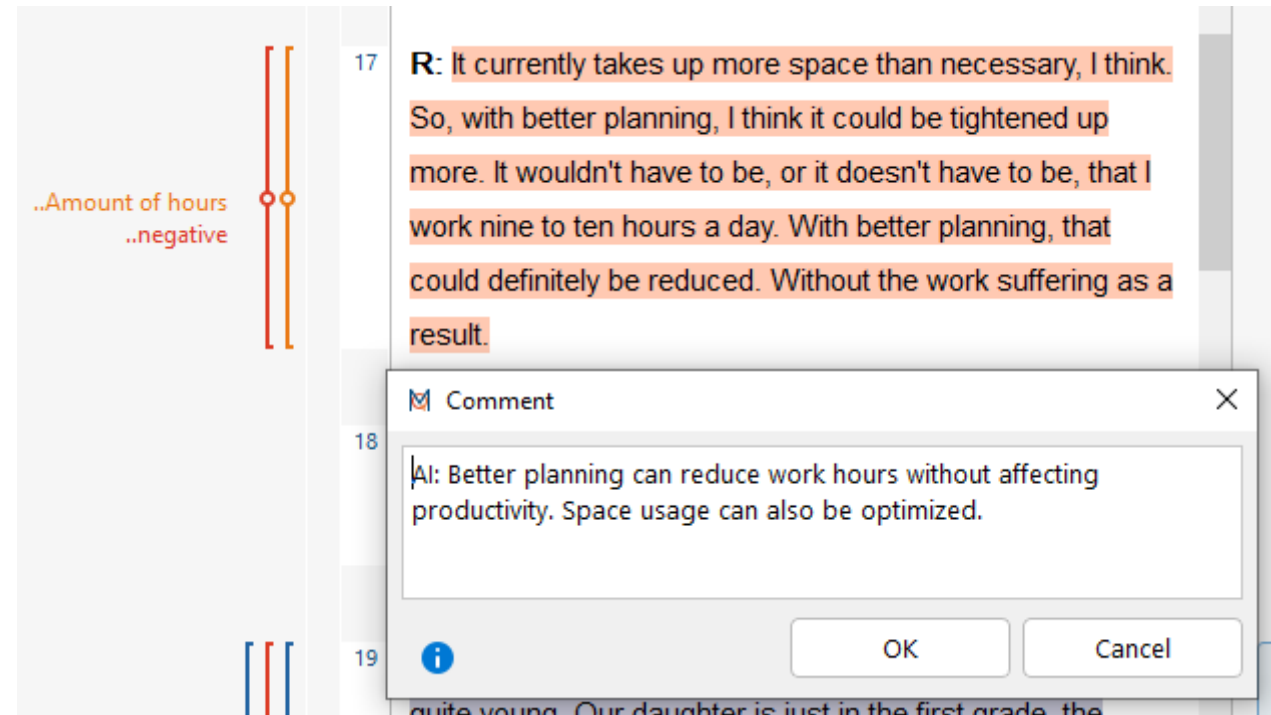
**Summary**

**AI Summary**

The speaker prioritizes their family over friends since having children. They are dissatisfied with their current schedule, which leaves little time for family. They would prefer a job with fixed hours to have more time for family activities. They have a routine of waking up early, having breakfast together, and taking the children to school/ kindergarten. They spend time with their children after work, playing and reading bedtime stories.

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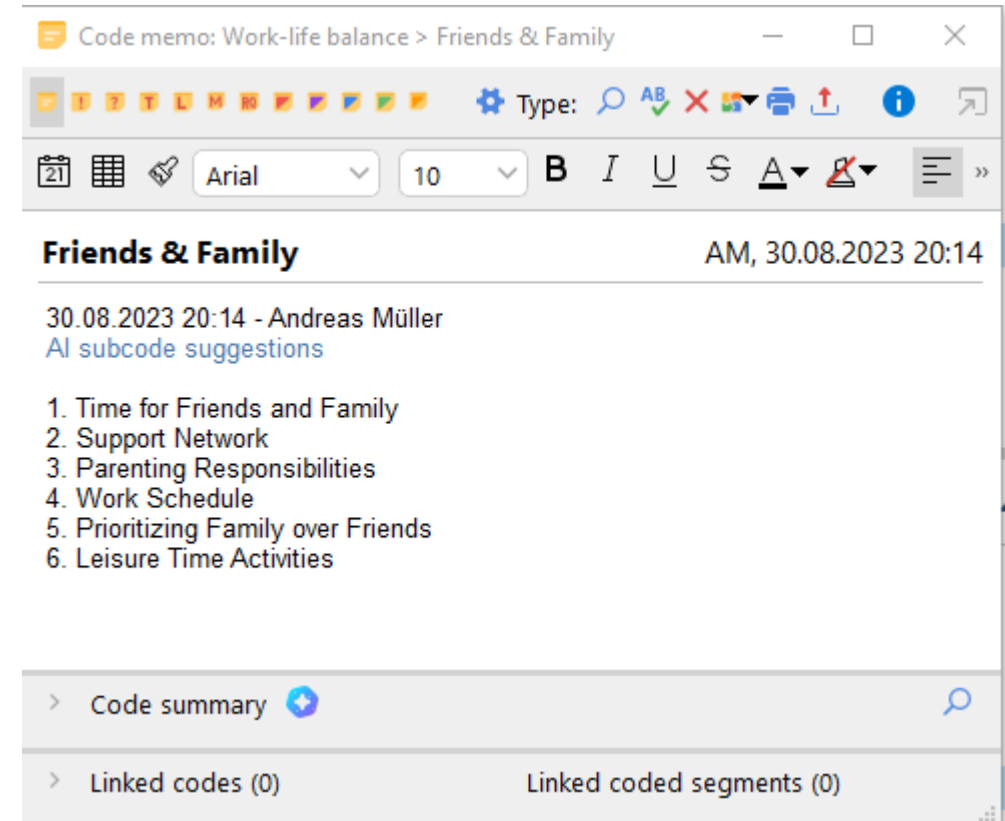
The screenshot shows a text document with a paragraph highlighted in blue. The text reads: "R: As a participant, I would very much like to take advantage of coaching, because I generally have a few issues... or questions how I can better structure my everyday life or I would also like to simply learn how to deal with stress. How do I create a few small oases of relaxation within my everyday life, how can I use the time with my son more intensively? So, I would like to take advantage of coaching myself. But to train myself as a coach? I think that would be utopian."

Below the text is a window titled "In-document memo: Interviews > Hamburg > Tatjana (Pos...". The window contains a rich text editor with a toolbar and a summary of the highlighted text. The summary is titled "Memo 81" and dated "AM, 30.08.2023 20:11". The summary text reads: "30.08.2023 20:11 - AM  
AI Summary  
The author is interested in receiving coaching to improve their everyday life and manage stress. They also express a desire to spend more quality time with their son. However, they do not believe they could become a coach themselves."

At the bottom of the window, there are two sections: "Linked codes (0)" and "Linked coded segments (0)".

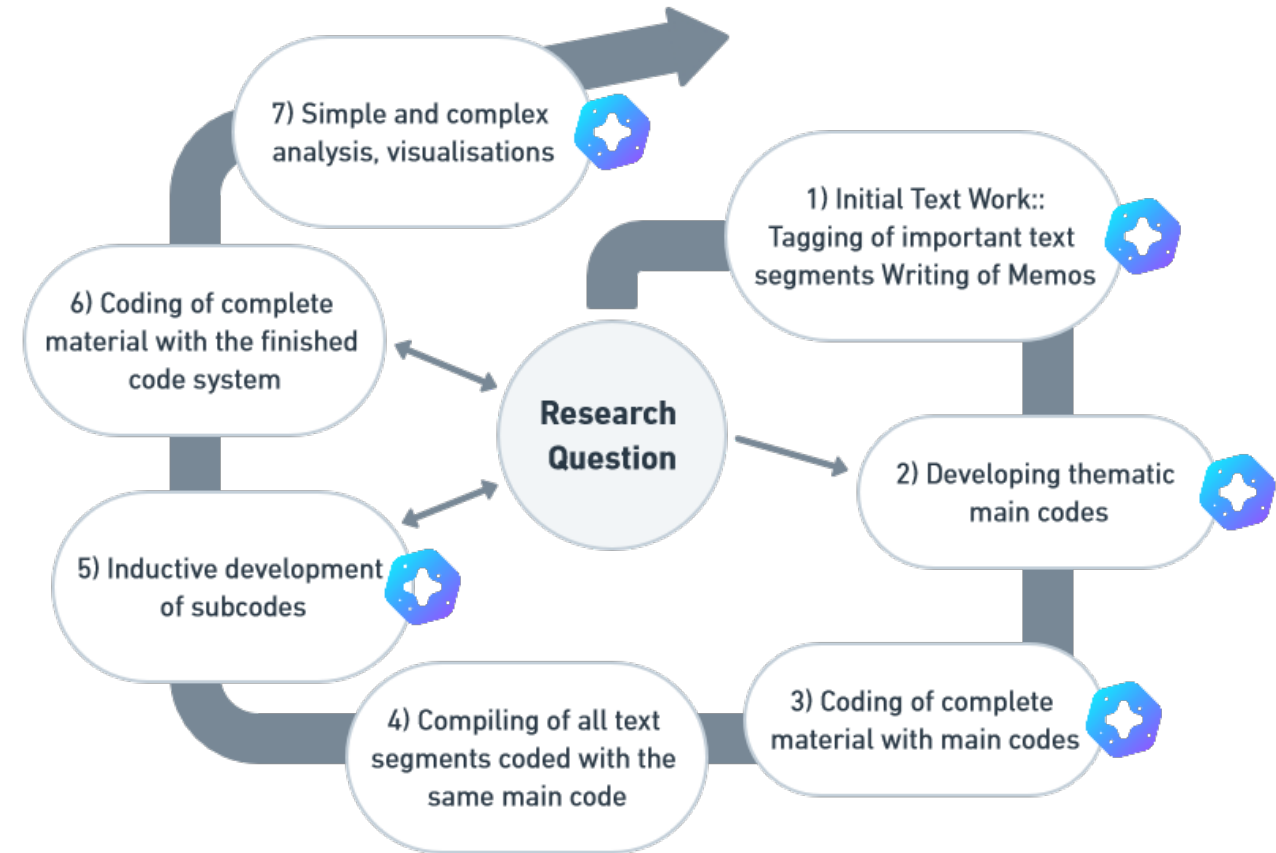
# Functions: Gathering Ideas

- Gather ideas for subcodes
- optional: “with examples for each subcode”



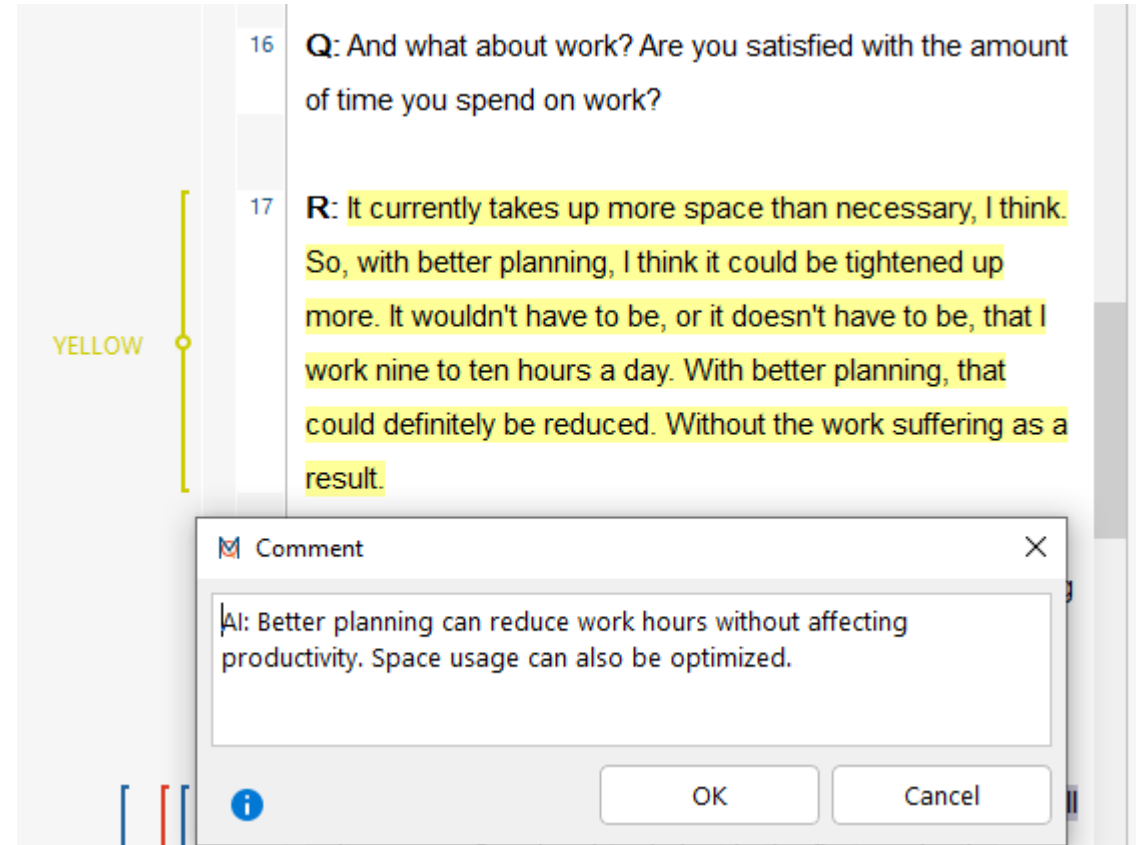
# AI in the research process: An integrated workflow

1. Colour code your data
2. Suggest subcodes based on colour code
3. Apply these codes to the data
4. Create segment comments based on main codes
5. Create Codes via Smart Coding
6. Summarize and quality check your codes with AI Summary



# Optimizing AI Assist usage

- Rather large than small segments
- Meaningful speaker codes
- Comparing groups by activating documents
- Meaningful Code Names



16 Q: And what about work? Are you satisfied with the amount of time you spend on work?

17 R: It currently takes up more space than necessary, I think. So, with better planning, I think it could be tightened up more. It wouldn't have to be, or it doesn't have to be, that I work nine to ten hours a day. With better planning, that could definitely be reduced. Without the work suffering as a result.

YELLOW

Comment

AI: Better planning can reduce work hours without affecting productivity. Space usage can also be optimized.

OK Cancel

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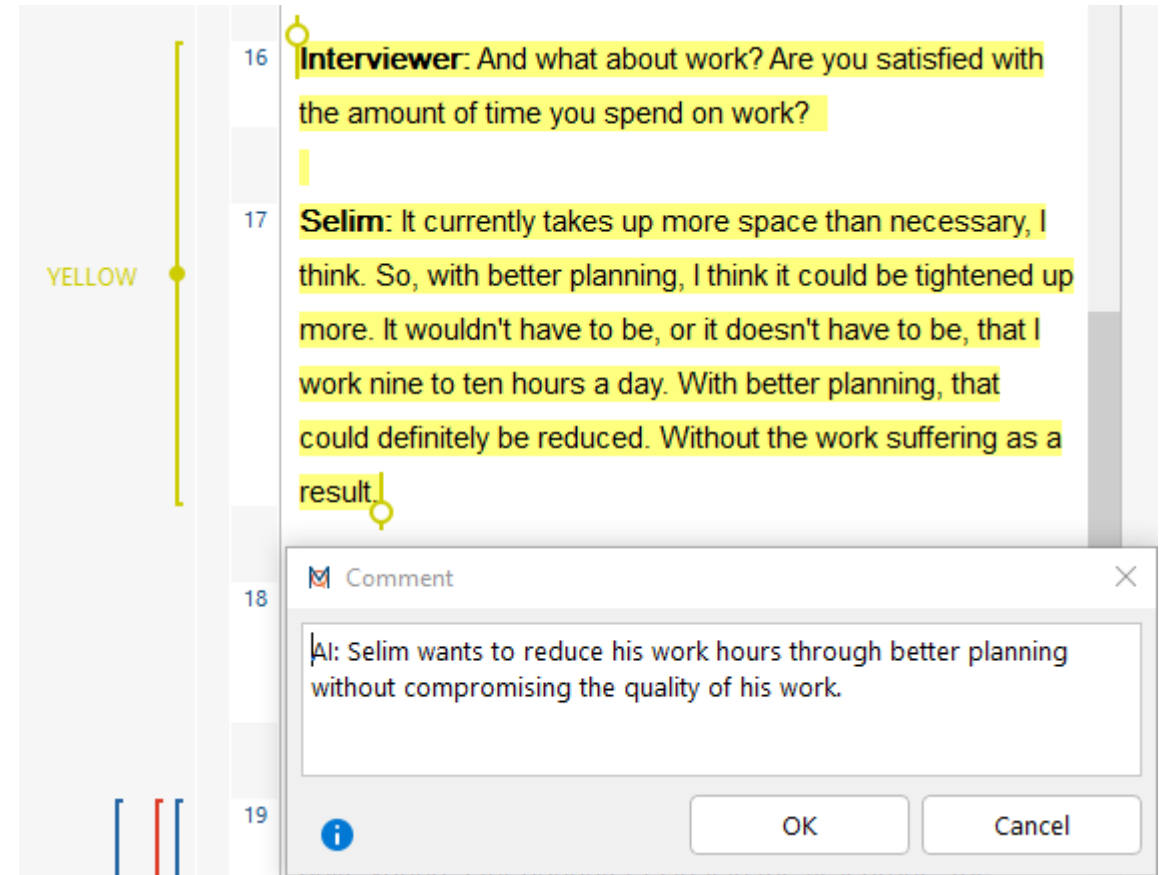
18 Comment

AI: R wants to reduce work hours with better planning without compromising quality.

19

# Optimizing AI Assist usage

- Rather large than small segments
- **Meaningful speaker codes**
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- Comparing groups by activating documents



The screenshot shows a chat interface with a vertical timeline on the left. A yellow vertical line is positioned at the 17-minute mark, labeled 'YELLOW'. The chat history includes:

- 16 **Interviewer:** And what about work? Are you satisfied with the amount of time you spend on work?
- 17 **Selim:** It currently takes up more space than necessary, I think. So, with better planning, I think it could be tightened up more. It wouldn't have to be, or it doesn't have to be, that I work nine to ten hours a day. With better planning, that could definitely be reduced. Without the work suffering as a result.

A comment box is open over the 18-minute mark, containing the text: "AI: Selim wants to reduce his work hours through better planning without compromising the quality of his work." The comment box has an 'OK' button and a 'Cancel' button.

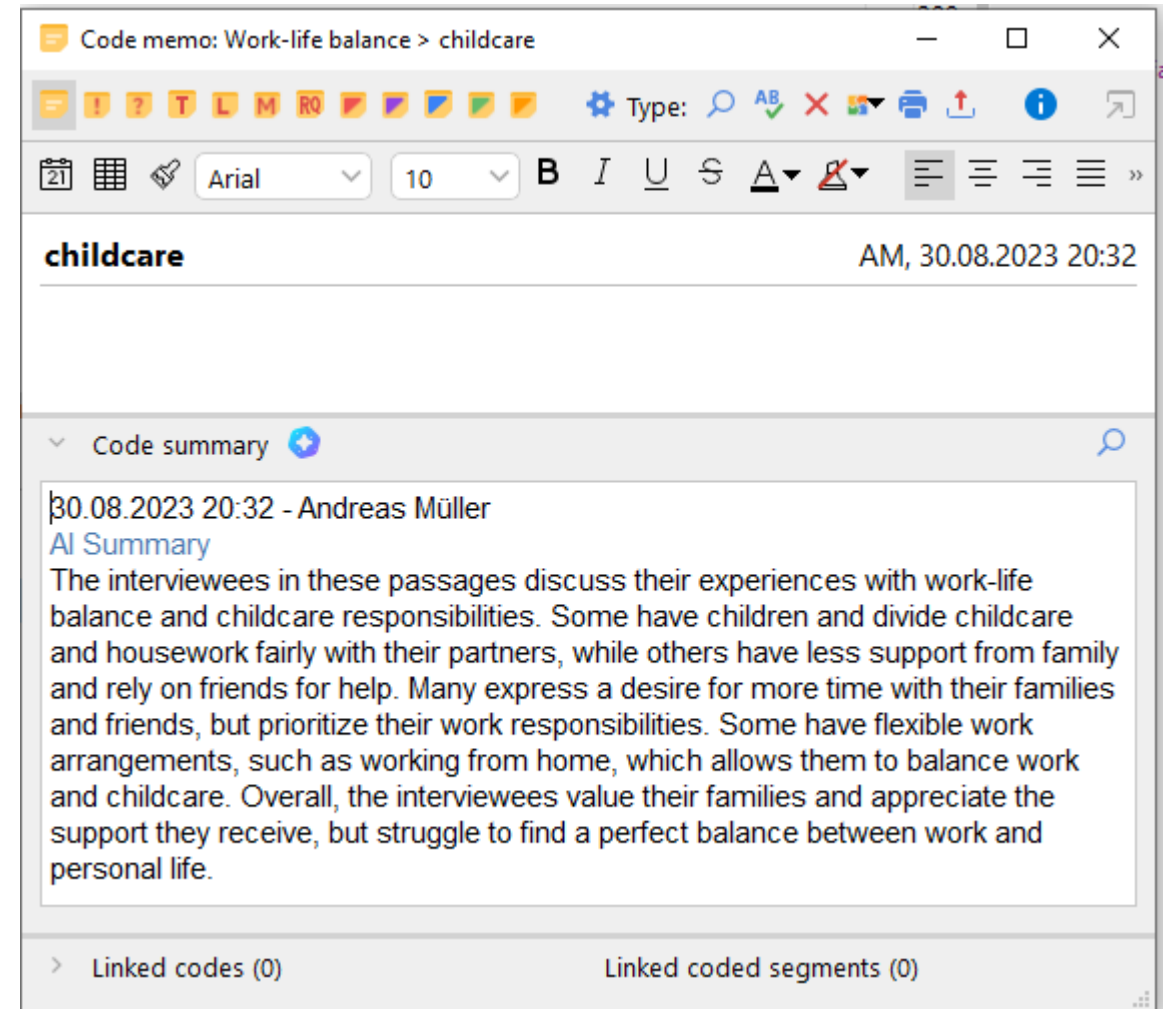
# Optimizing AI Assist usage

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The image shows two screenshots of a software interface. The top screenshot is a window titled "Code memo: YELLOW". It features a toolbar with various icons for editing and navigation, including a search icon, a list icon, and a refresh icon. Below the toolbar, the text "YELLOW" is displayed on the left and "AM, 30.08.2023 20:31" on the right. The bottom screenshot is a "Code summary" window. It shows a search icon in the top right corner. The main content area contains the text "30.08.2023 20:31 - Andreas Müller" followed by a blue link "AI Summary". Below this link is a paragraph of text: "The passages discuss various aspects of the interviewee's daily routine, including their responsibilities around childcare and housework, their desire for more time with family and friends, and their ideal work-life balance. They mention dividing housework fairly with their partner, waking up early to prepare sandwiches for their children, and prioritizing family over friends. The interviewee also talks about their work as a kindergarten teacher and the importance of having a support network of friends and family nearby. They express a desire for more paid vacation and a more flexible work schedule that allows for more time with family." At the bottom of the window, there are two sections: "Linked codes (0)" and "Linked coded segments (0)".

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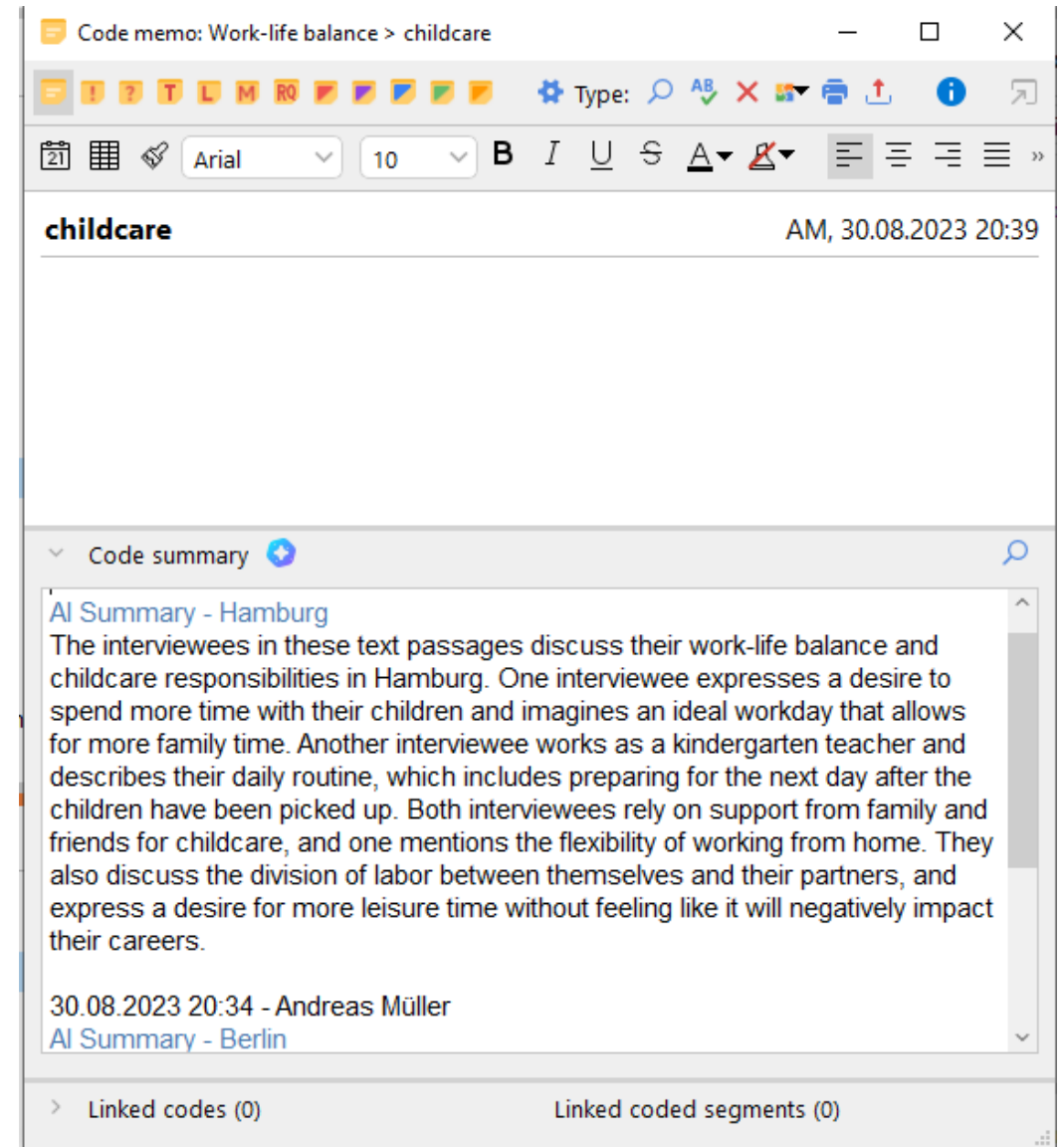


The screenshot displays the MAXQDA software interface. At the top, the window title is "Code memo: Work-life balance > childcare". Below the title bar is a toolbar with various icons for editing and navigation. The main content area shows the code name "childcare" on the left and the date and time "AM, 30.08.2023 20:32" on the right. Below this, there is a section titled "Code summary" with a search icon. The summary text reads: "30.08.2023 20:32 - Andreas Müller" followed by "AI Summary" in blue. The main body of the summary is a paragraph: "The interviewees in these passages discuss their experiences with work-life balance and childcare responsibilities. Some have children and divide childcare and housework fairly with their partners, while others have less support from family and rely on friends for help. Many express a desire for more time with their families and friends, but prioritize their work responsibilities. Some have flexible work arrangements, such as working from home, which allows them to balance work and childcare. Overall, the interviewees value their families and appreciate the support they receive, but struggle to find a perfect balance between work and personal life." At the bottom of the interface, there are two sections: "Linked codes (0)" and "Linked coded segments (0)".



# Optimizing AI Assist usage

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- Meaningful speaker codes
- Meaningful Code Names
- **Comparing groups by activating documents**



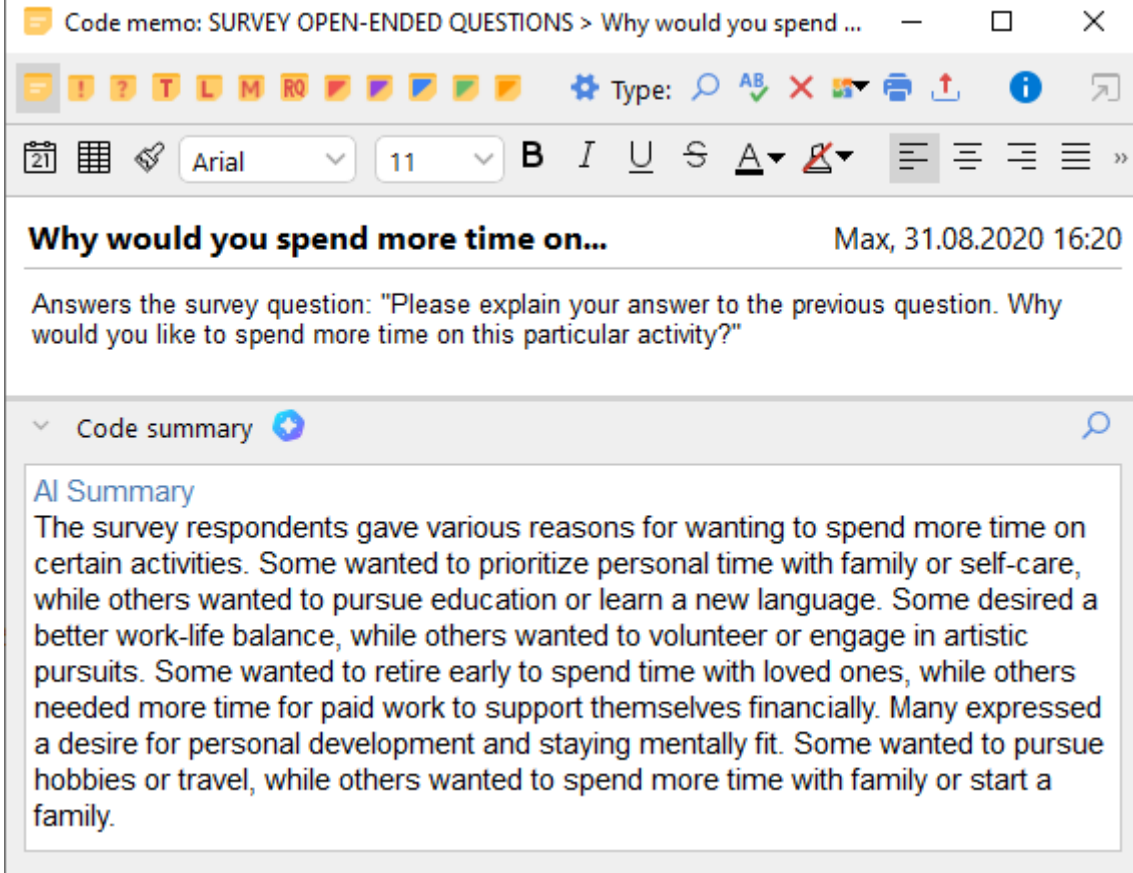
# Two advanced use cases: **Focus Groups & Surveys**

- Summarize the contribution per focus group participant

The screenshot displays the MAXQDA software interface. On the left, a file explorer shows a project structure with folders for 'Documents' (257 items), 'Focus Group' (73 items), 'Survey' (184 items), and 'Sets' (0 items). Under 'Focus Group', there is a sub-folder 'Focus group' containing individual participant folders: Moderator (12), Olga (10), Fatima (11), Andy (12), and Pranav (9). On the right, a 'Code memo' window is open for 'Olga'. The window title is 'Code memo: Focus group > Olga'. The memo content includes the name 'Olga' and the date/time 'AM, 30.08.2023 20:43'. Below this, there is a 'Code summary' section with a plus icon and a search icon. The summary text reads: '30.08.2023 20:43 - Andreas Müller' followed by a blue link 'AI Summary'. The main text of the summary is: 'Olga, a graduate of educational science, started working to gain work experience but now mainly works for financial reasons. She finds it difficult to balance work and studies, as switching between topics affects her university performance. Olga would prefer to work 10 hours a week if she had enough money, as 20 hours is too much. Her work schedule is semi-flexible, but fixed days make it...'. At the bottom of the window, there are two sections: 'Linked codes (0)' and 'Linked coded segments (0)'.

# Two advanced use cases: Focus Groups & Surveys

- Summarize the open questions of a survey
- Be careful about trusting quasi-quantifications („many“, „some“ etc.)



The screenshot shows a web application window titled "Code memo: SURVEY OPEN-ENDED QUESTIONS > Why would you spend ...". The interface includes a toolbar with various icons and a text editor area. The main content displays a survey question: "Why would you spend more time on..." with a timestamp "Max, 31.08.2020 16:20". Below the question, it states: "Answers the survey question: 'Please explain your answer to the previous question. Why would you like to spend more time on this particular activity?'". A section titled "Code summary" is expanded, showing an "AI Summary" box. The summary text reads: "The survey respondents gave various reasons for wanting to spend more time on certain activities. Some wanted to prioritize personal time with family or self-care, while others wanted to pursue education or learn a new language. Some desired a better work-life balance, while others wanted to volunteer or engage in artistic pursuits. Some wanted to retire early to spend time with loved ones, while others needed more time for paid work to support themselves financially. Many expressed a desire for personal development and staying mentally fit. Some wanted to pursue hobbies or travel, while others wanted to spend more time with family or start a family."

# Do's & Don'ts

## ○ Do:

- Use AI Assist for a 2nd opinion
- Explore the general content of well-known data
- Ask for consent of participants

## ○ Potential:

- Solid, descriptive summary of manifest contents
- Analyse a flexible mix of source languages

## ○ Don't:

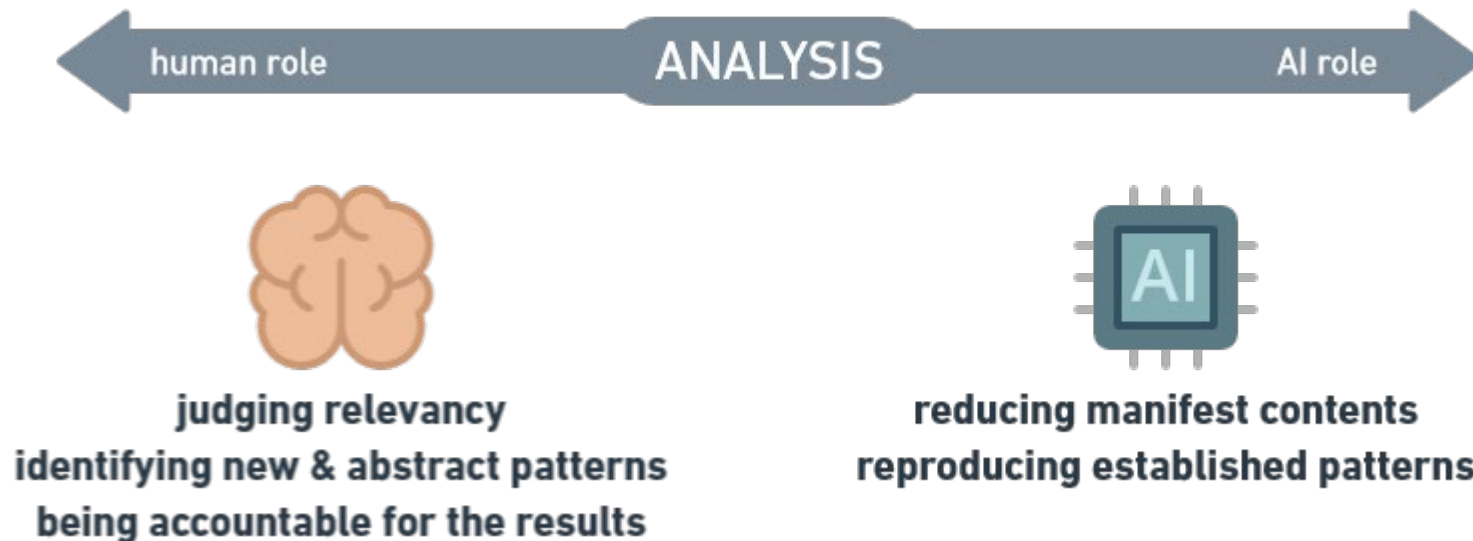
- Blindly trust and re-use AI summaries
- Use AI on data that you are not familiar with
- Use highly sensitive data

## ○ Limitations


- Limited by the amount of processable data
- Question of relevancy relies with the researcher

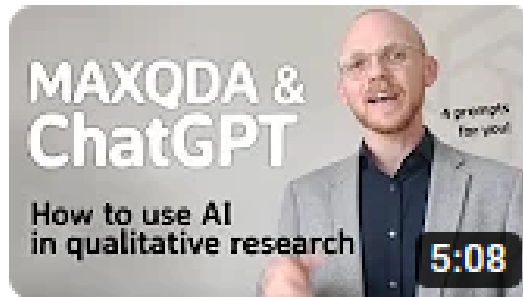
# Conclusion

- AI Assist is an “Assistant” – It is never a good idea to expect an assistant to do all your work



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## ChatGPT & MAXQDA: Qualitative Data analysis with AI

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# Questions or comments?

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