Literature Reviews with MAXQDA

Christina Silver christina.silver@qdaservices.co.uk

MAXQDA has many tools that can be used to facilitate literature reviews. Choosing appropriate tools will depend on your review methodology – e.g. whether you are doing a systematic literature review, scoping review, meta-analysis or meta-synthesis, an in-depth literature review, a critical review, a State-of-the-Art review, etc.

Benefits of using MAXQDA for literature reviews

Literature is a form of qualitative data and reviewing is a form of analysis, so many MAXQDA tools will be helpful for undertaking a literature review. If a literature review is part of a larger study, integrating the analysis of the literature with the analysis of other data will be particularly useful. For example, as shown in Figure 1., if you code across research materials you can retrieve, review and compare coded segments from each source.
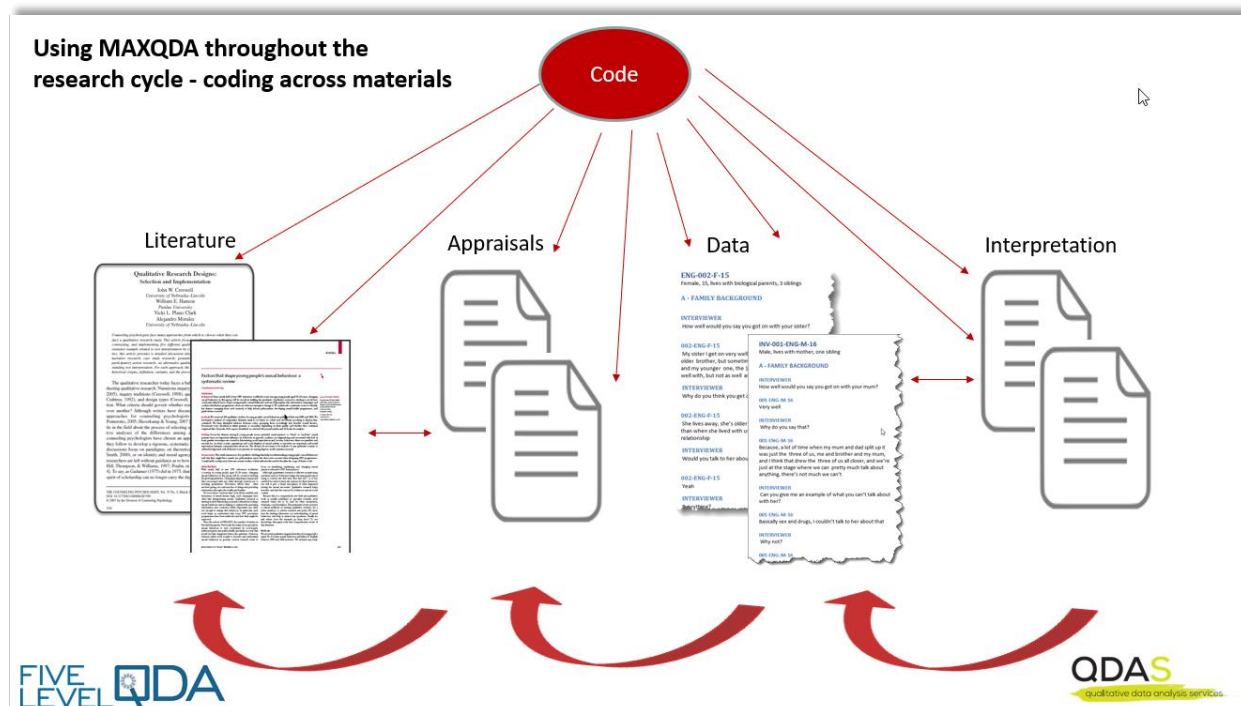

Figure 1. Using MAXQDA throughout the research cycle – coding across materials

Key MAXQDA features for literature reviews

MAXQDA has a range of features that can be used to undertake literature reviews. You might not need to use all these features – and there may be others that you also find useful. It all depends on your literature review methodology, and output requirements.

- Importing and working with PDF files directly
- Importing references and metadata from bibliographic tools (Endnote, Mendeley, Zotero)
- Using documents to create your own critical appraisals that can be analysed
- Searching for salient issues in literature using Lexical search and MAXDictio tools
- Coding to systematise thinking about literature and integrate with other data
- Using Sets to create sub-groups of Literature
- Using Memos to write high-level appraisals of common themes
- Using Summaries to condense and compare
- Using internal links to integrate your writing with the literature and establish connections across references
- Using Document Variables to capture analytic features about literature files
- Using queries and matrix browsers to identify and interrogate patterns
- Using Maps and Models to visually interrogate and display connections
- Outputting to facilitate a rounded write-up

In this spotlight we can only focus on two features (because of the limited time!).

Importing from bibliographic tools

MAXQDA 2020 allows full-text PDF articles that are stored within bibliographic software to be imported along with the associated metadata and other information – e.g. keywords and notes.

First, you must export the collection of files you want to work with inside MAXQDA as an RIS file from Endnote, Mendeley or Zotero. Make sure you have everything correct and equivalent in the bibliographic software first:

- There is not a dynamic relationship between the bibliographic software and MAXQDA, meaning that once you have literature in MAXQDA, if you make any changes to e.g. the metadata in MAXQDA it will not automatically change in the bibliographic software – or vice versa.

- If you do not have information about the literature records equivalent before you import into MAXQDA, you will not be able to undertake the same analytic tasks on all the records. Therefore, you need to spend some time at the beginning, deciding what you need, and making sure everything is equivalent.
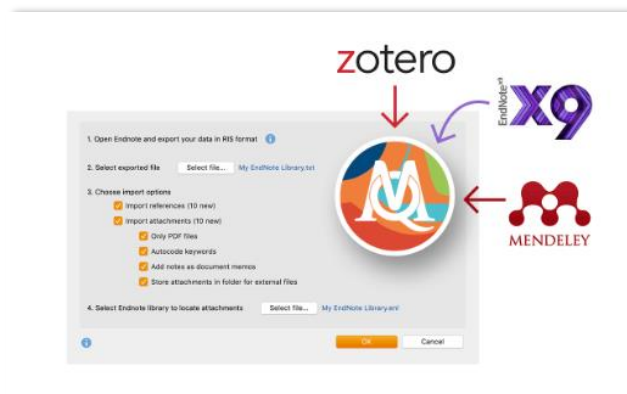

Figure 2. Options when importing an RIS file from bibliographic tools (Source: MAXQDA Help Menu)

What happens when the RIS file is imported?

As you can see in the image above, you have several choices about what to import, and how it will appear in MAXQDA. It's worth experimenting with the options to ensure that what you get is what you need!

Import options

(Mendeley example shown in the Spotlight Session)

- Import references: MAXQDA creates a Document for each reference which contains the metadata information which is automatically coded. The Documents are stored in a Document-Group called 'References'
- Import attachments: MAXQDA imports any full-text PDF files contained in the RIS file and stores them in a Document-Group called 'References > attachments'
  - You can choose whether to import only the PDF files, to auto-code the keywords, to add notes as document memos and to store attachments in a folder for external files
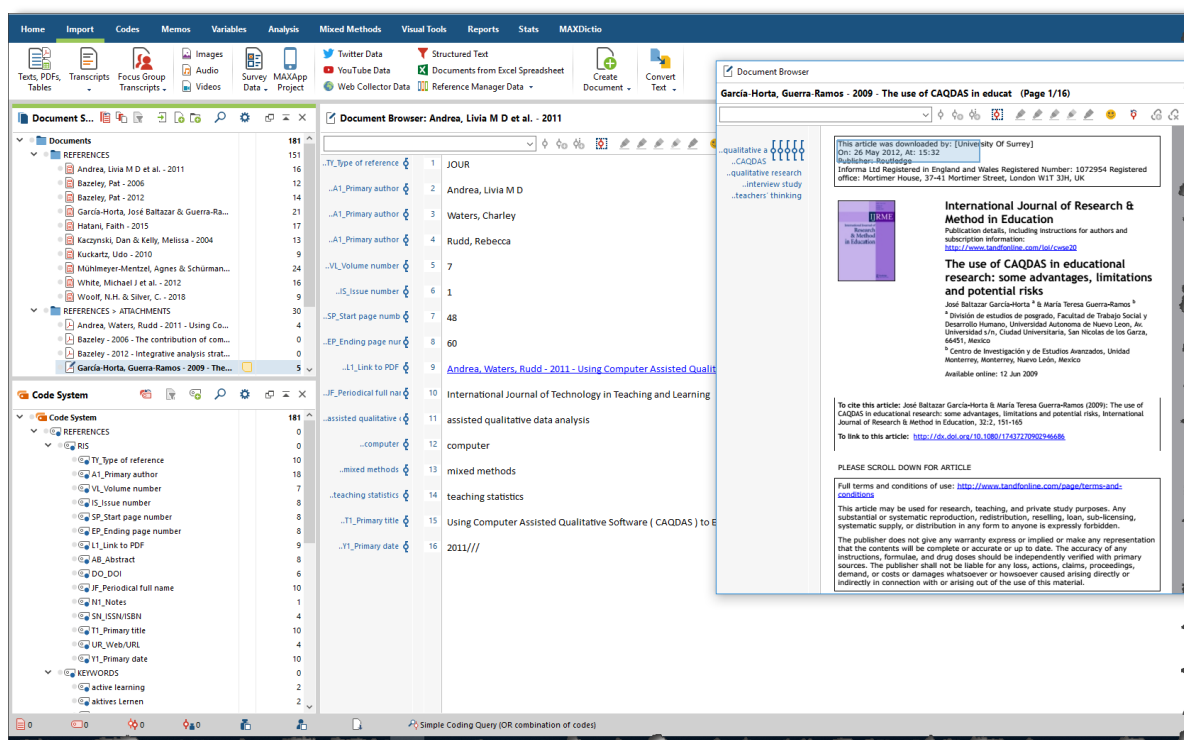
Figure 3. The results of importing an RIS file into MAXQDA – showing imported Documents and Codes

In addition, MAXQDA applies Document Variables to both the References Documents and the full-text PDFs (in the 'references > attachments' Document Group). This allows an additional way to interrogate and group.

Figure 4. Document Variables applied to full-text PDFs and References Documents

Using documents to create critical appraisals that can be analysed

One of the neat things about the import from bibliographic software is that MAXQDA creates a Document as part of the import process, containing the metadata information and automatically coding it. You can then edit that Document, using it to write a critical appraisal of each piece of literature.
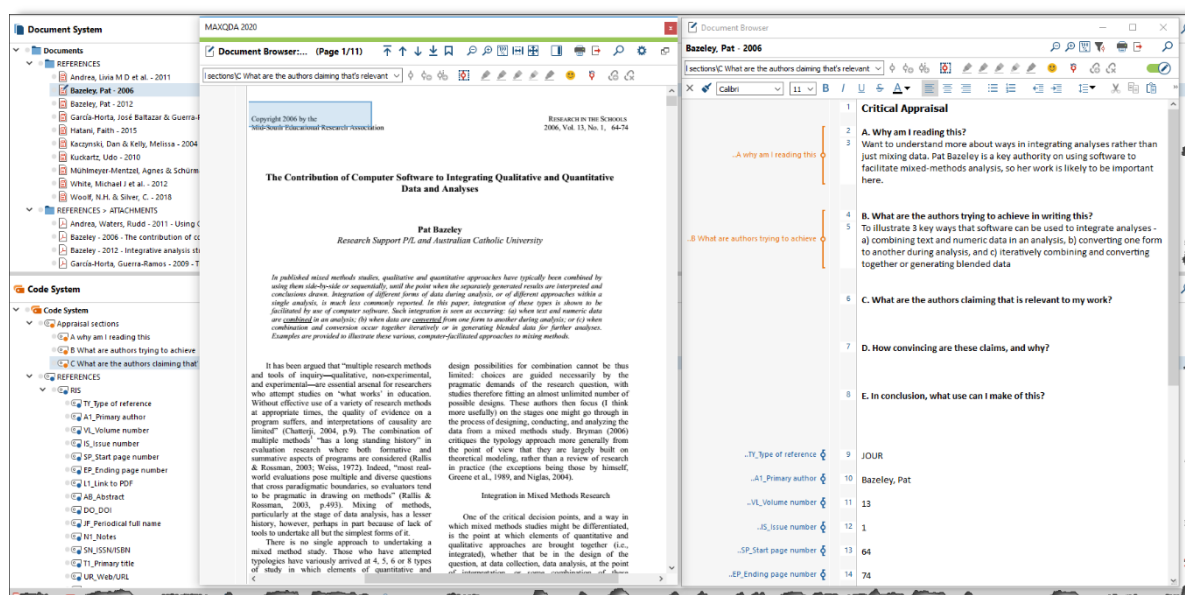

Figure 5. Generating structured Critical Appraisals within MAXQDA Documents whilst reading full text article

If you create a template for your critical appraisal (in a Memo) and copy/paste it into each Reference Document, you can ensure you are taking equivalent notes about each piece of literature and thereby focus your appraisals around review objectives. Those review sections can then be coded, allowing you to later retrieve, compare and analyse your notes about each review section across all pieces of literature – or across sub-sets.
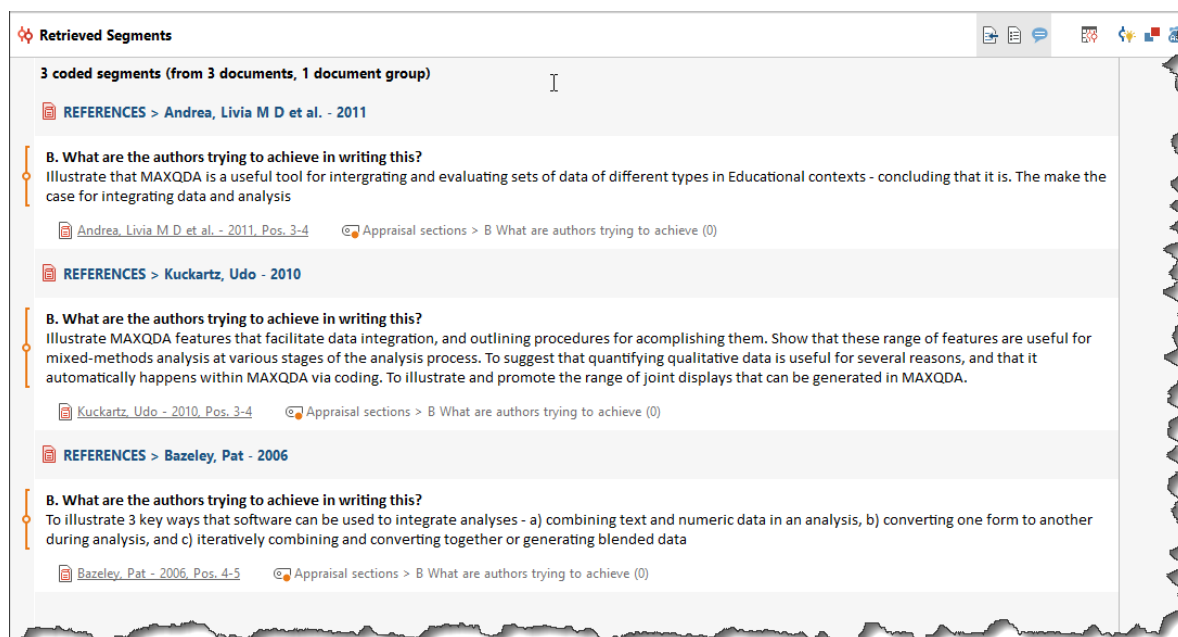
Figure 6. Retrieving notes from Critical Appraisals from one section to review, re-code and compare

Initial considerations in deciding how to work

- What type of literature review methodology are you using?
- To what extent do you need to integrate the analysis of the literature with other data?
- Do you want to work directly with the literature, in-directly, or both?
- What outputs do you need to generate from the literature?

References

Grant, M. J., & Booth, A. (2009): **A typology of reviews: an analysis of 14 review types and associated methodologies.** Health Information & Libraries Journal, 26(2), 91-108.
http://doi.org/10.1111/j.1471-1842.2009.00848.x

Silver, C. (2016): **The value of CAQDAS for systemising literature reviews.**
https://rauli.cbs.dk/index.php/revy/article/viewFile/4973/5403

MAXQDA Help Menu on Working with Literature
https://www.maxqda.com/help-mx20/import/importing-bibliographical-data-from-endnote-etc

Wallace, M. & Wray, A. (2016): **Critical Reading and Writing for Postgraduates**. 3rd edition. Sage Publications.
https://uk.sagepub.com/en-gb/eur/critical-reading-and-writing-for-postgraduates/book245471
Silver, C (2020) **The crux of literature reviewing: structuring critical appraisals and using CAQDAS-packages**
https://www.qdaservices.co.uk/post/the-crux-of-literature-reviewing-structuring-critical-appraisals-and-using-caqdas-packages