Working with Summaries in MAXQDA

Christina Silver, PhD., FAcSS., SFHEA
christina.silver@qdaservices.co.uk

Linktree: https://linktr.ee/Christina_QDAS
Mastodon: @ChristinaSilver@sciences.social
Twitter: @Christina_QDAS
LinkedIn: linkedin.com/in/christina-qdas/
Instagram: @christina_qdas
Facebook: facebook.com/QDAservices
YouTube: youtube.com/@ChristinaSilverPhD
Podcast: anchor.fm/christina-qdas
Blog: https://www.qdaservices.co.uk/blog
Research Gate: researchgate.net/profile/Christina-Silver
Academia.edu: surrery.academia.edu/ChristinaSilver

Summaries in MAXQDA allow you to work at a more abstract level by summarising data segments that have already been coded and then view, display and analyse your summaries. They can be useful for many different purposes. The MAXQDA Help Menu provides additional information about the idea behind Summaries, as well as instructions for generating and working with them.

MAXQDA 2022 Online Manual: Summary Grid: Create and Edit Summaries - MAXQDA

Summary features in MAXQDA

- **Summary Grid** – allows you to summarise coded-segments in a grid display
- **Summary Tables** – allow you to display your summaries together with Variables
- **Summary Explorer** – allows you to compare summaries according to cases or groups
- **Overviews of Summaries** – allows you to retrieve summaries you have written form different levels within the Document System
Working with Summary Grids

Clicking on the Summary Grid button (in the Analysis Menu) opens the Grid which displays all Codes in rows, and all Documents in Columns (Figure 1). The blue squares in the Grid indicate the presence of coded segments for each Document/Code intersection. Clicking on a blue square displays those coded segments in the middle panel. The right-hand panel is the place where you can write your summary of the displayed coded segments.

If you have selected Documents and/or Codes activated, you can filter the Grid to generate a more focused display using the two icons at the top left of the Summary Grid window.

You can also choose to alter other aspects of the display, including to display comments and/or memos.
The coded-segments displayed in the Summary Grid are interactively connected to the underlying data (Figure 2). This is helpful if you want to use surrounding data context and/or other applied codes to inform the writing of summaries.

Working with Summary Tables

Having written Summaries in the Grid, you can use Summary Tables to display and compare summaries. You build your own Summary Tables (as many as you need) by selecting the Documents and Codes to display and any relevant Variables (Figure 3.)
The Summary Table displays the selected Codes (in the columns) by the selected Documents with Variable information (in rows) (Figure 4).

Figure 4. A Summary Table – displaying selected Documents, Codes and Variables

The summaries displayed in the Table are also interactively linked to the underlying coded segments.
Working with the Summary Explorer

The Summary Explorer allows you to abstract further by comparing the summaries you have written for selected Codes by Documents Groups or Sets as well as by individual Documents (as in Summary Tables). In the example shown in Figure 5, we first created Document Sets using the “Activate by Document Variable” - function (accessed by right-clicking on the top level of the Document System) and then chose those Sets (and selected Codes) in the Summary Explorer. Instead of comparing several selected Codes by individual documents (as is possible in Summary Tables), the Summary Explorer additionally allows focus on codes by groups – in this example – according to whether respondents have children or not.

![Figure 5. Comparing summaries by Document-Sets in the Summary Explorer](image-url)
In addition, you can generate Overviews of Summaries from different levels within the Document System – all Documents, Documents within a Group or Set or for an individual Document (Figure 6).

Figure 6. Summary Overviews across all Documents, by Document Group, Document Set and an individual Document