

Summarizing Coded Data with MAXQDA

Summarizing coded data is an important tool in qualitative data analysis. MAXQDA provides several methods to aid in summarizing your coded segments, ranging from:

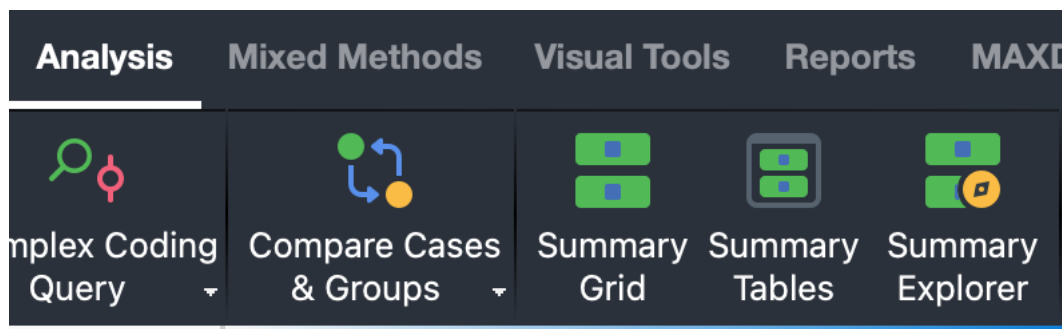
- Adding **code comments** to individual segments
- Paraphrasing text in a document with the **Paraphrase tool**.
- Using the **Summary Grid** to write summaries of several coded segments in a document to be used to create a **Summary Table** or to create a **MAXMAP** using summaries.
- Write an individual document summary in a **Document Memo**

In addition, MAXQDA 24's **AI-Assist** can aid you in your work by using the power of Open AI's large language models to create:

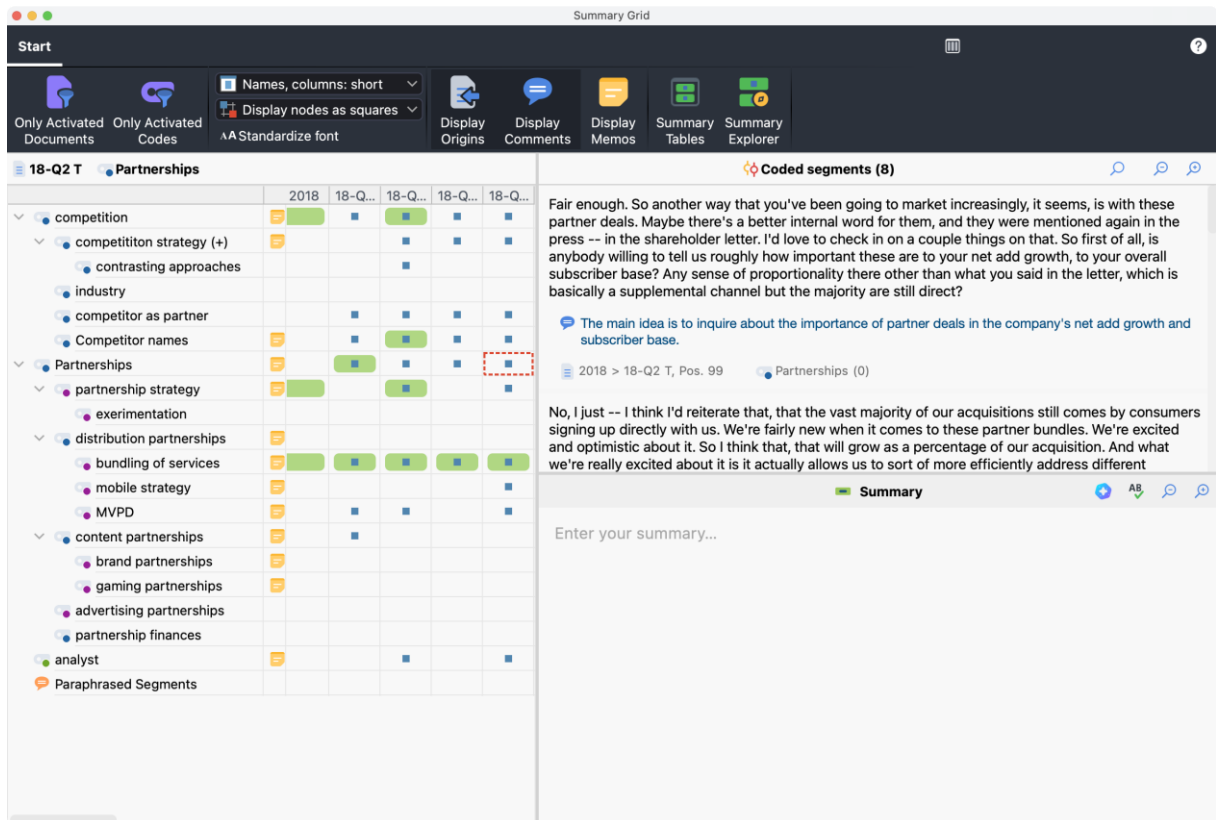
- Summaries of individual coded segments, stored as **code comments** using the **Smart Coding tool**.
- Summaries of selected text as an **in-document memo**
- **Paraphrases** of selected text
- **Summary tables** of coded segments.

Creating Document Summaries

MAXQDA has two tools to create summaries of coded data. The process begins with [Analysis > Summary Grid](#), a matrix that lets the user read the coded segments for individual documents, and then write a summary of the segments. These summaries then become the basis for creating a [Summary Table](#).

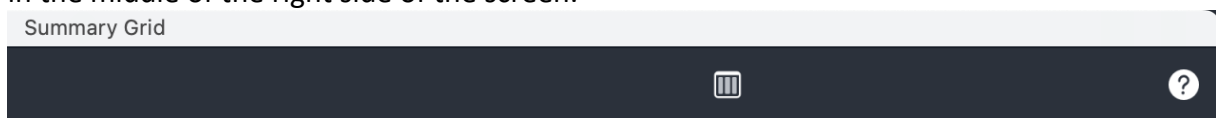


The Summary Grid is where we will start. This is a working matrix in which you can see all of the coded segments for individual documents and can then write a summary for each cell.

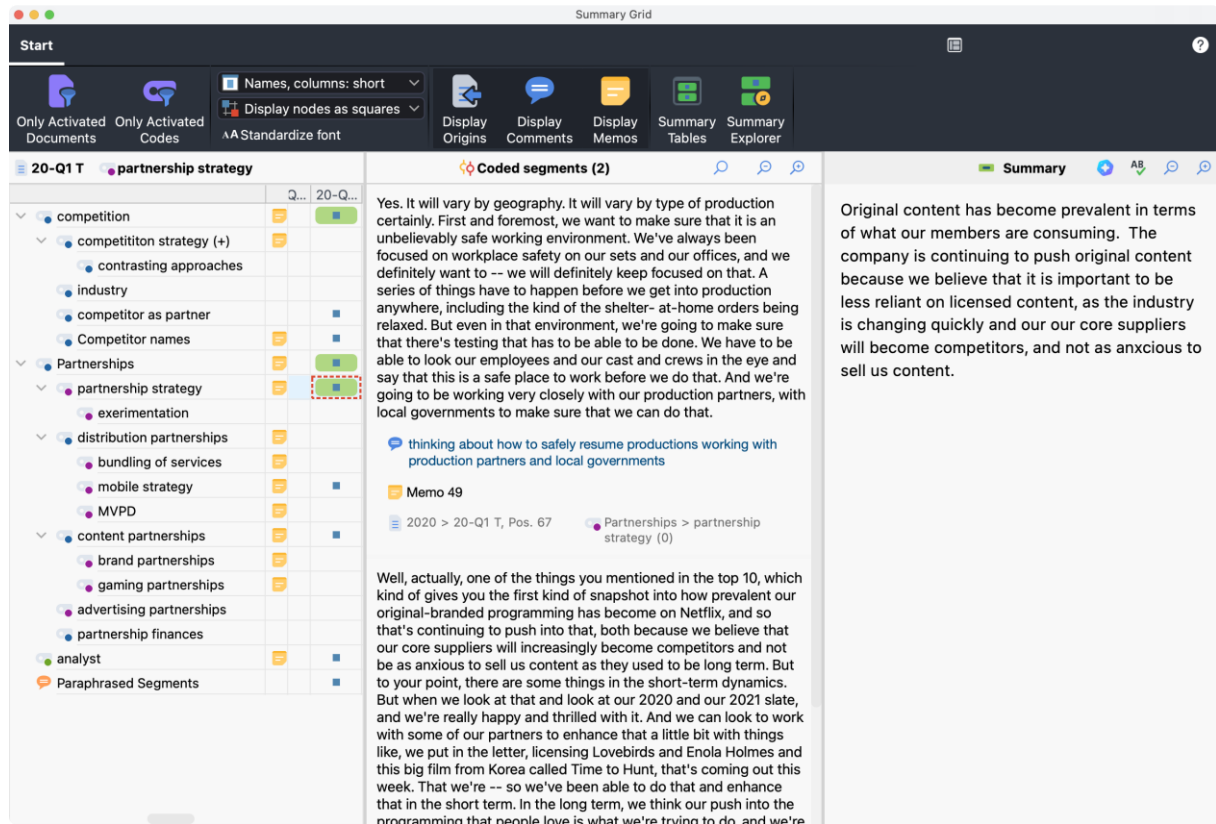


The Summary Grid has three windows, the matrix of documents and codes, the coded segments window, and the Summary window. In the matrix, all blue squares indicate codes that have matching segments. Cells that have a green background have had a summary written.

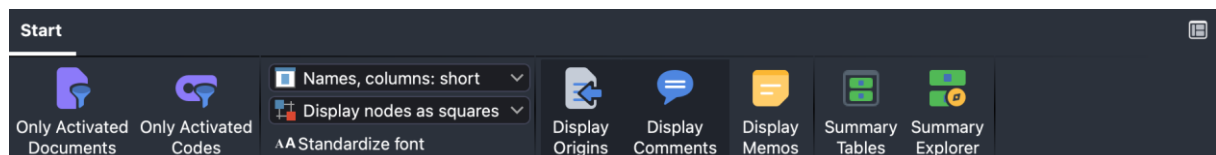
The Coded Segments and Summary windows can be displayed in one column, in two parts, or in three separate columns, if you click the “Switch layout” icon which is in the title menu, in the middle of the right side of the screen.



The column mode lets you display more coded segments at once.



The summary grid has several options you can display, including:



- Limiting the display to activated documents or codes
- Changing the size of the columns
- Displaying nodes as squares, circles, or number of segments
- Use a standardized font
- Display Origins, which includes a hyperlink for the coded segment, so you can instantly view it in the Document Browser.
- Display Comments to view code comments written for each segment
- Display memos
- Links to the Summary Table and Summary Explorer tools

The coded segments and Summary windows also have options:



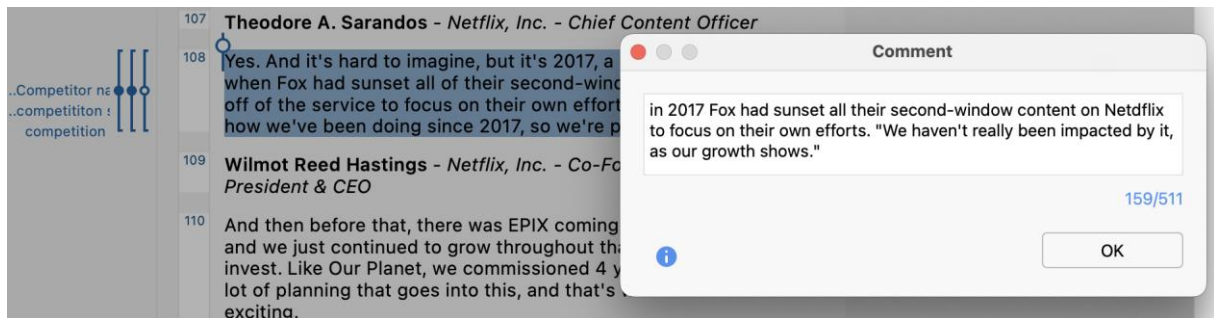
- Search for text within coded segments.
- Zoom tools to change the size of the text.
- Launch AI-Assist in the Summary window.
- Enable or disable the spell checker.
- Zoom tools to change the size of the text

Hints for Writing Summaries

Make use of Code Comments when coding your data.

Code Comments are a powerful tool that lets you add a comment to any coded segment. While code comments might just be used to note text that is important, or raises a question, there is another very useful for writing summaries: use the code comment to summarize the coded segment. This not only captures why you coded the segment, but can help you when analysing the data later, and especially when writing a summary.

Code comments will be displayed in the code segments windows of the Summary Grid. The text of the comment can be highlighted and dragged into the Summary window to be used as part of the summary you write.

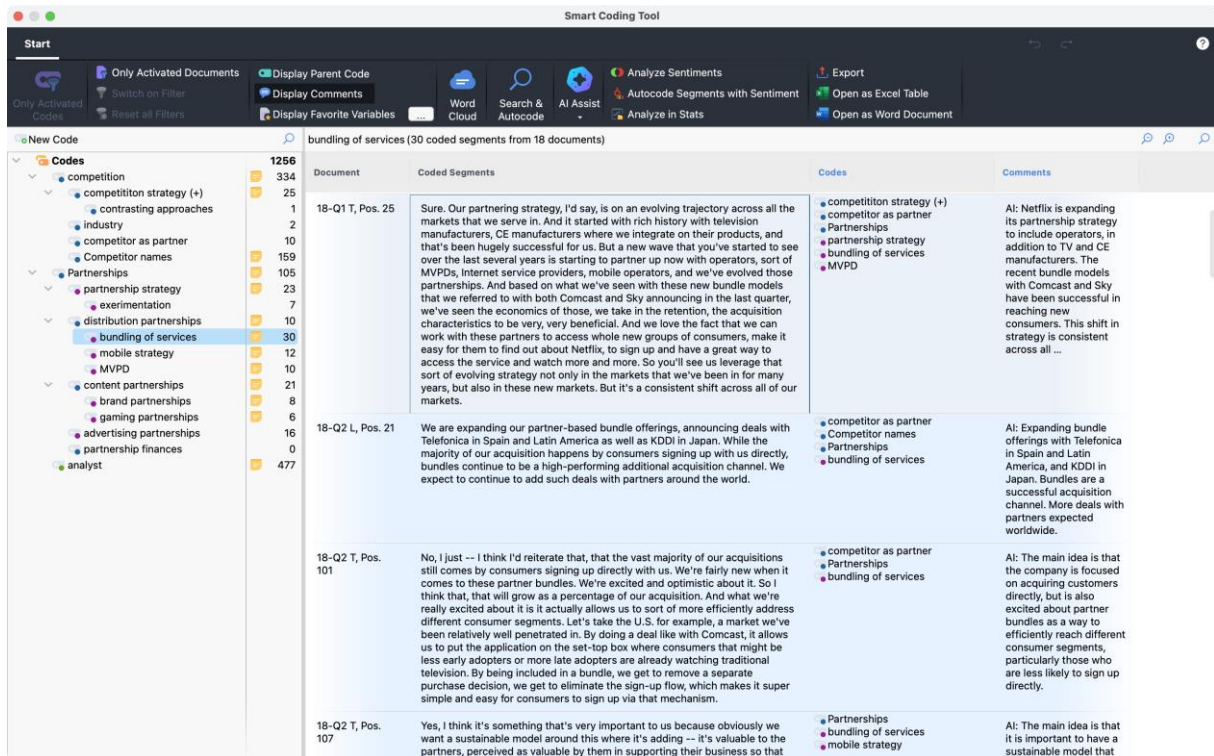
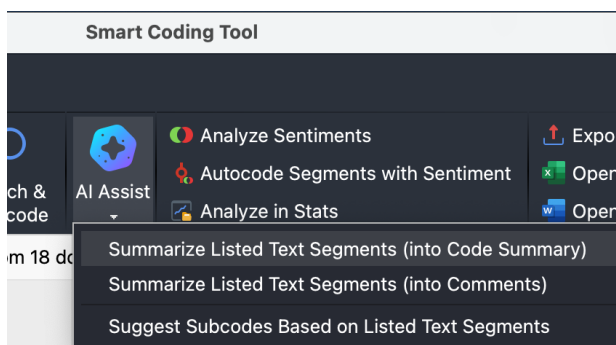


For a real-world example using this technique, see Stefan Rädiker's chapter, "Using MAXQDA's Code Comments for Rapid Analysis: Writing Summaries for Analyzing and Reporting in Evaluation" in *The Practice of Qualitative Data Analysis: Research Examples Using MAXQDA, Volume 2*.

Take advantage of AI-Assist.

AI-Assist lets you take advantage of generative Artificial intelligence to create summaries of coded segments. It is important to note that AI-Assist can only summarize the text it has in the selection and will not always capture information before or after the coded segment but it is a great starting point.

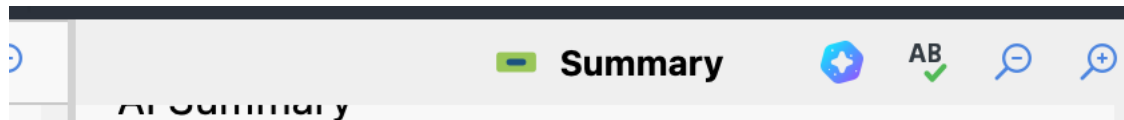
In the Smart Coding Tool, AI-Assist can be used to create summaries of each coded segment as code comment. And from there, those AI summary comments can be manipulated in the Summary Grid as described above.



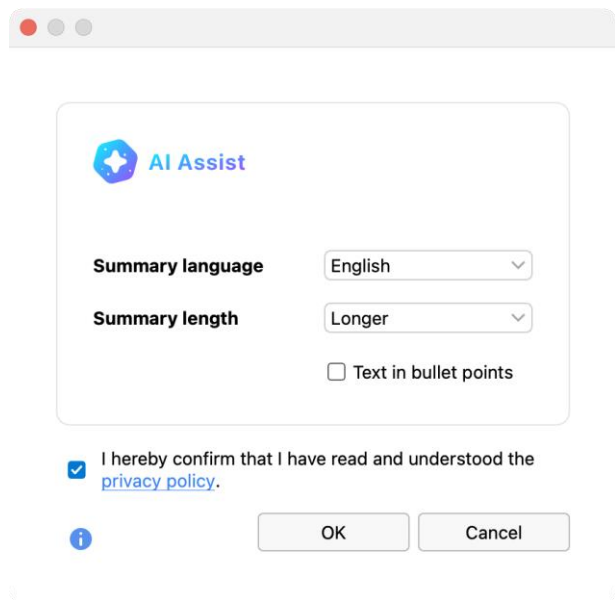
Using AI-Assist in the Summary Grid

The summary grid is the “default” location to create summaries, as it provides you with an easy-to-use matrix to view coded segments, and write a summary from them. You can also use AI-Assist here to create draft summaries of those segments.

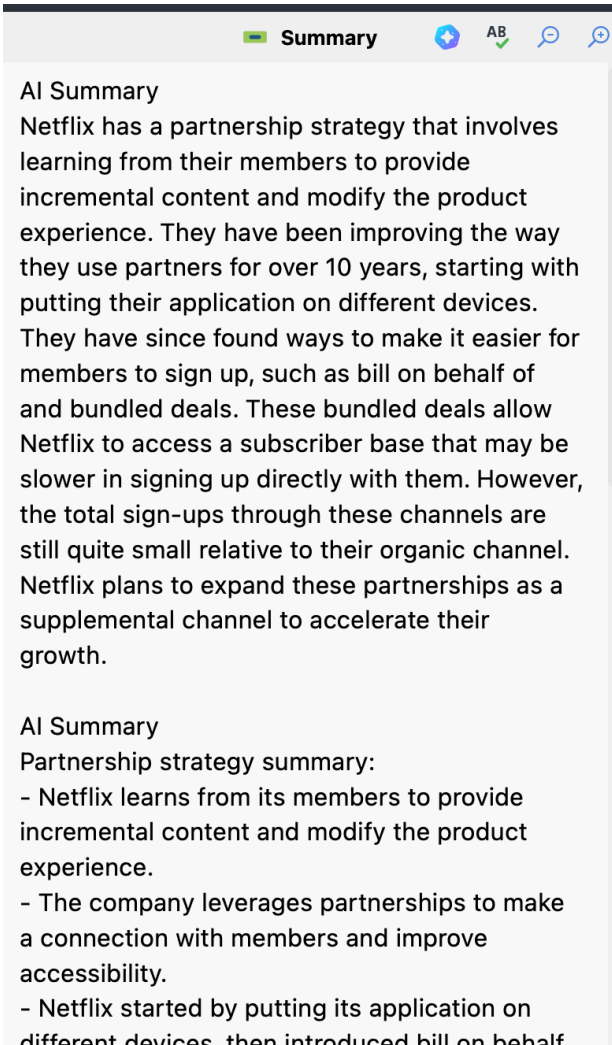
The AI-Assist icon is in the summary window.



When you click on it, there are several options: select from three suggested summary lengths, (shorter, standard, longer), and the ability to have it produce the summary in bullet points.



You can repeat the process to see different results, based on the options. The AI summaries populate the summary window cell. I recommend thinking of it as a starting point. Let AI-Assist create the summary, then review the coded segments (including comments with them) and then decide if they capture what you are hoping to summarize.

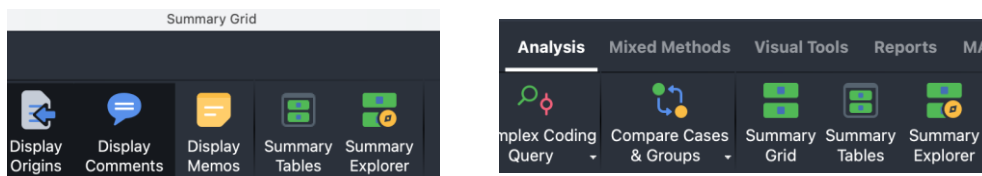


While AI-Assist does not hallucinate in “making up” results as sometimes happens in ChatGPT, the summaries it creates are not necessarily going to be focused on the issues you want to capture. And the summaries are limited to the text of the coded segments selected. If there is context that is missing from the text chosen for the coded segment, there is no way for AI-Assist to know what it is missing.

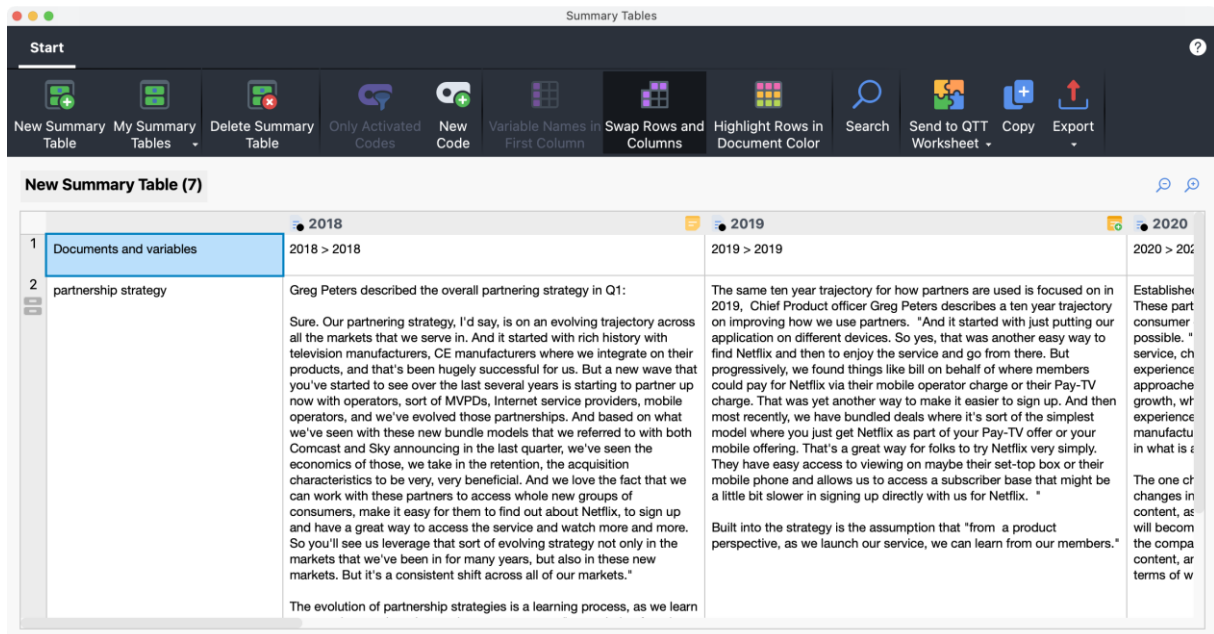
Think of AI-Assist as a research assistant when writing a draft, but not necessarily the final summary you want to create. It is a starting point, not the result.

Creating a Summary Table

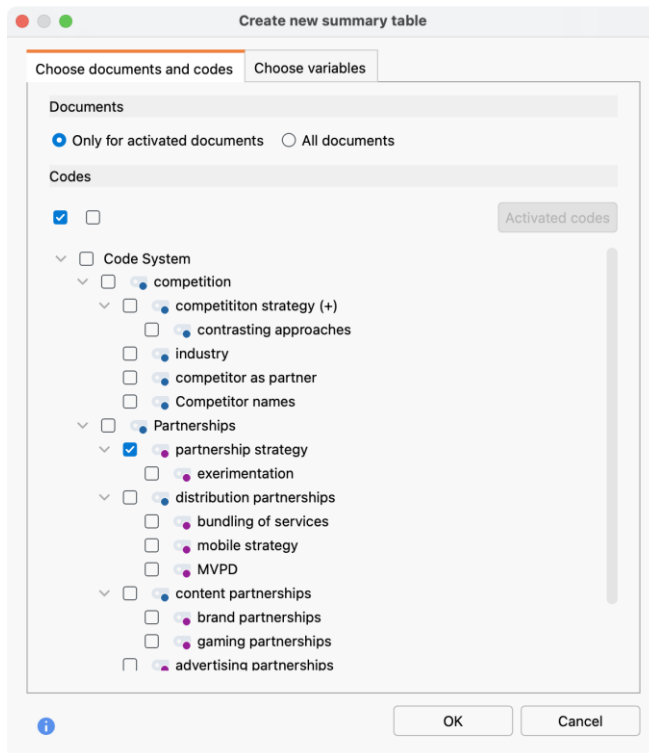
Once you are satisfied with the summaries, you can create a Summary Table. You can access the link to it in the Summary Grid or directly from the Analysis menu.



The summary table feature provides an interface to access any summary table you have created, along with tools to create new tables, tools to edit the view of the current table, and export options.



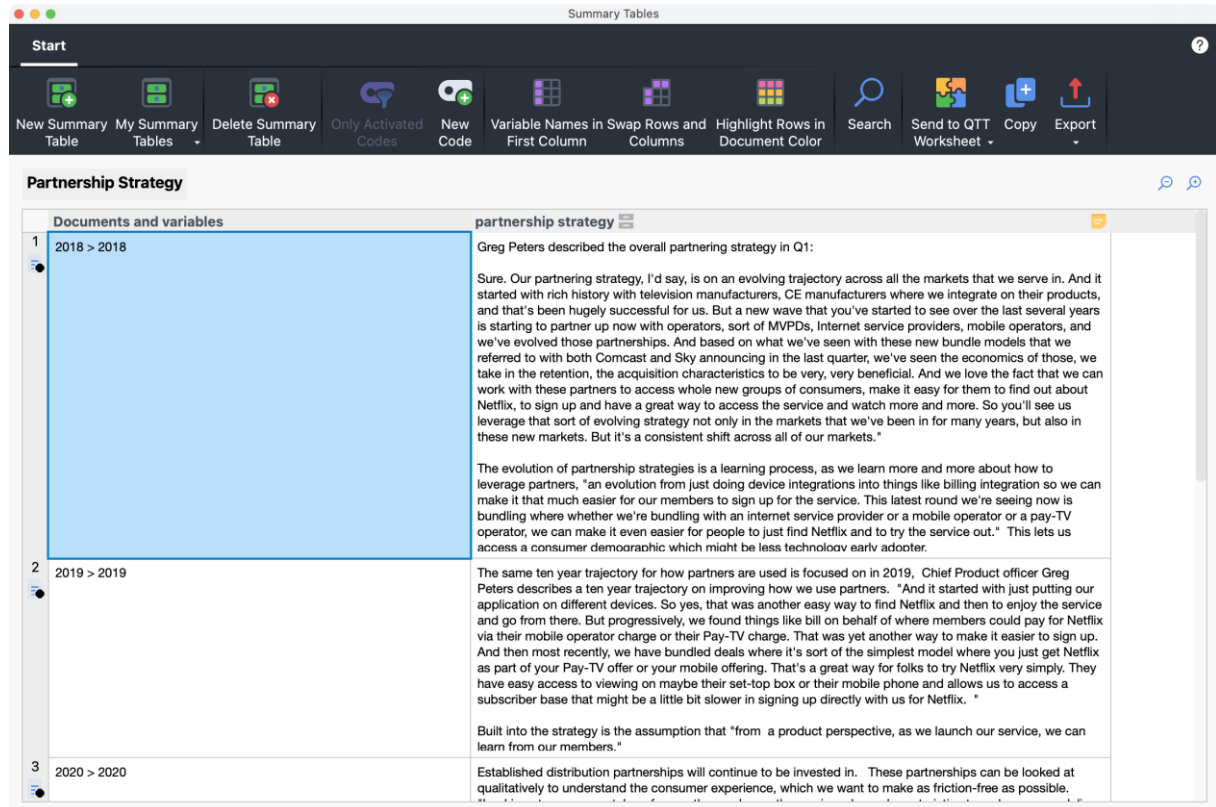
Creating a new summary table



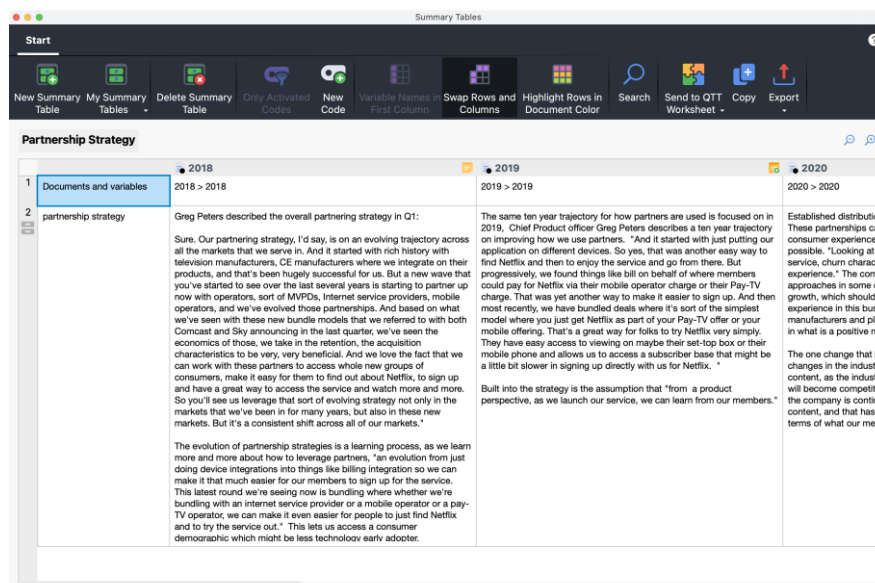
When you click on the icon to create a new summary table, the process is simple:

- Decide what codes you want to have summaries included for.
- Decide if you want to include all documents or a subset of activated documents.
- Decide if you want to include any document variables, and if so, whether you want those variables to include in the first column of the table, or in separate tables.

Begin just with codes. Make it easy. Select a code you have summarized and select it in the list. And click ok. This will create a basic table, with all of the documents in your project (unless you narrow it to activated documents).



You can use Swap Rows and Columns to change the design of the table.

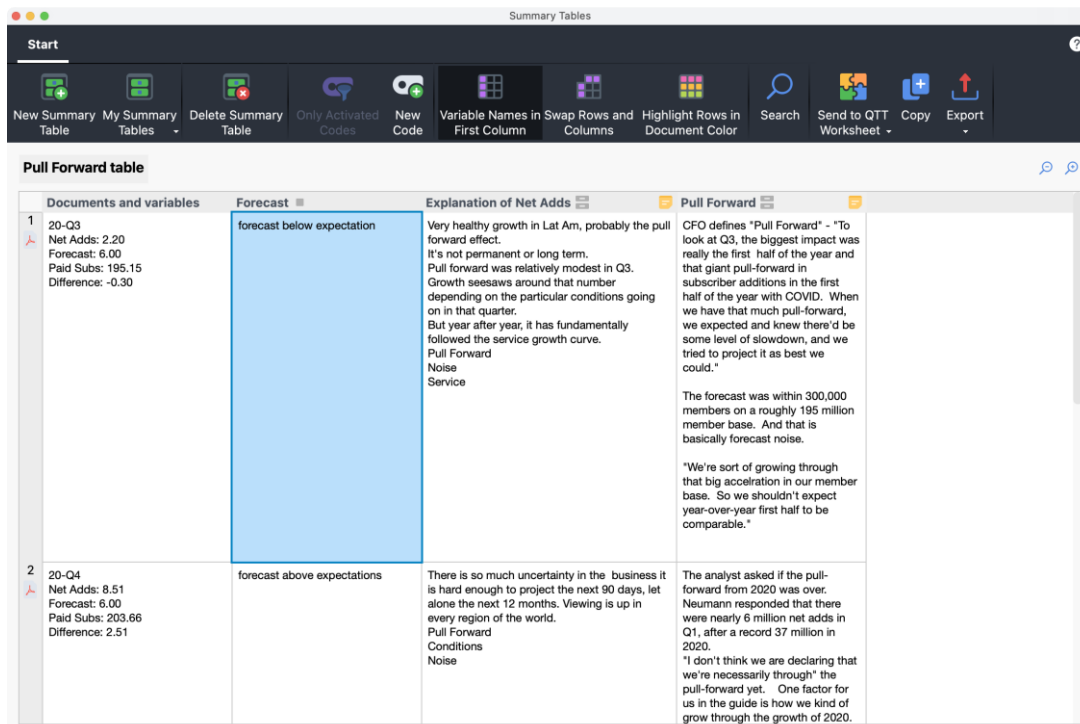


Add variable data to summary tables.



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If you want to add document variables to a table, you can identify the variables you want to include in the table. There are two options, include the table in the first column, and variables you want to have appear in a separate column.



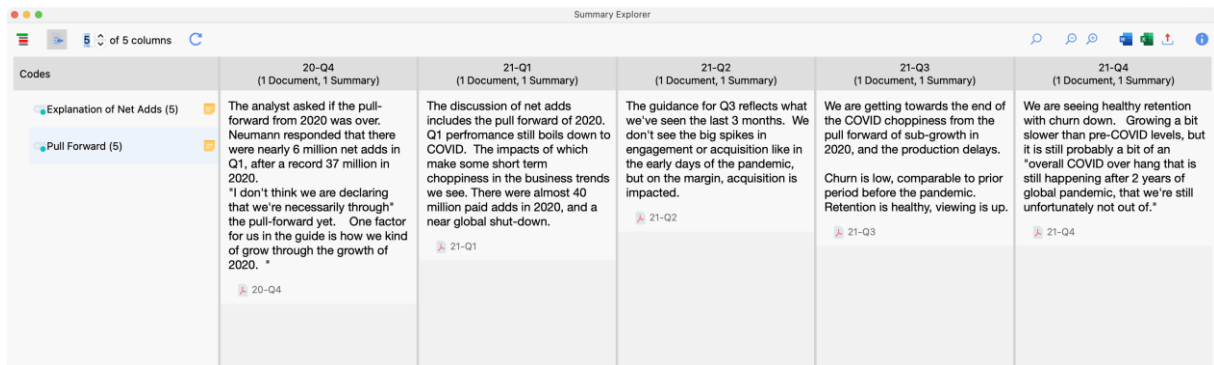
Documents and variables	Forecast	Explanation of Net Adds	Pull Forward
1 20-Q3 Net Adds: 2.20 Forecast: 6.00 Paid Subs: 195.15 Difference: -0.30	forecast below expectation	Very healthy growth in Lat Am, probably the pull forward effect. It's not permanent or long term. Pull forward was relatively modest in Q3. Growth seesaws around that number depending on the particular conditions going on in that quarter. But year after year, it has fundamentally followed the service growth curve. Pull Forward Noise Service	CFO defines "Pull Forward" - "To look at Q3, the biggest impact was really the first half of the year and that giant pull-forward in subscriber additions in the first half of the year with COVID. When we have that much pull-forward, we expected and knew there'd be some level of slowdown, and we tried to project it as best we could." The forecast was within 300,000 members on a roughly 195 million member base. And that is basically forecast noise. "We're sort of growing through that big acceleration in our member base. So we shouldn't expect year-over-year first half to be comparable."
2 20-Q4 Net Adds: 8.51 Forecast: 6.00 Paid Subs: 203.66 Difference: 2.51	forecast above expectations	There is so much uncertainty in the business it is hard enough to project the next 90 days, let alone the next 12 months. Viewing is up in every region of the world. Pull Forward Conditions Noise	The analyst asked if the pull-forward from 2020 was over. Neumann responded that there were nearly 6 million net adds in Q1, after a record 37 million in 2020. "I don't think we are declaring that we're necessarily through" the pull-forward yet. One factor for us in the guide is how we kind of grow through the growth of 2020.

Notice that some variables above are in the first column, with "Documents and variables," and the forecast variable has its own column. You can also drag columns and re-arrange them easily.

Other ways to use summaries

Summary Explorer.

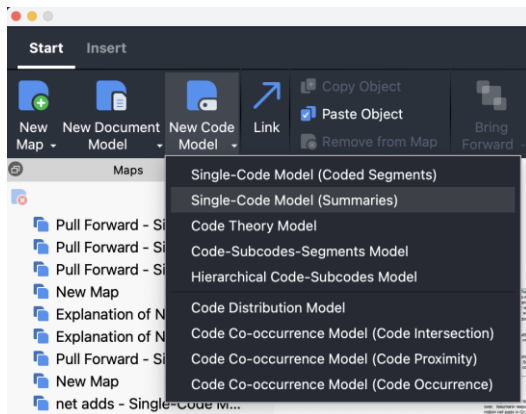
This lets you see the summaries written for selected documents and codes, in a matrix like



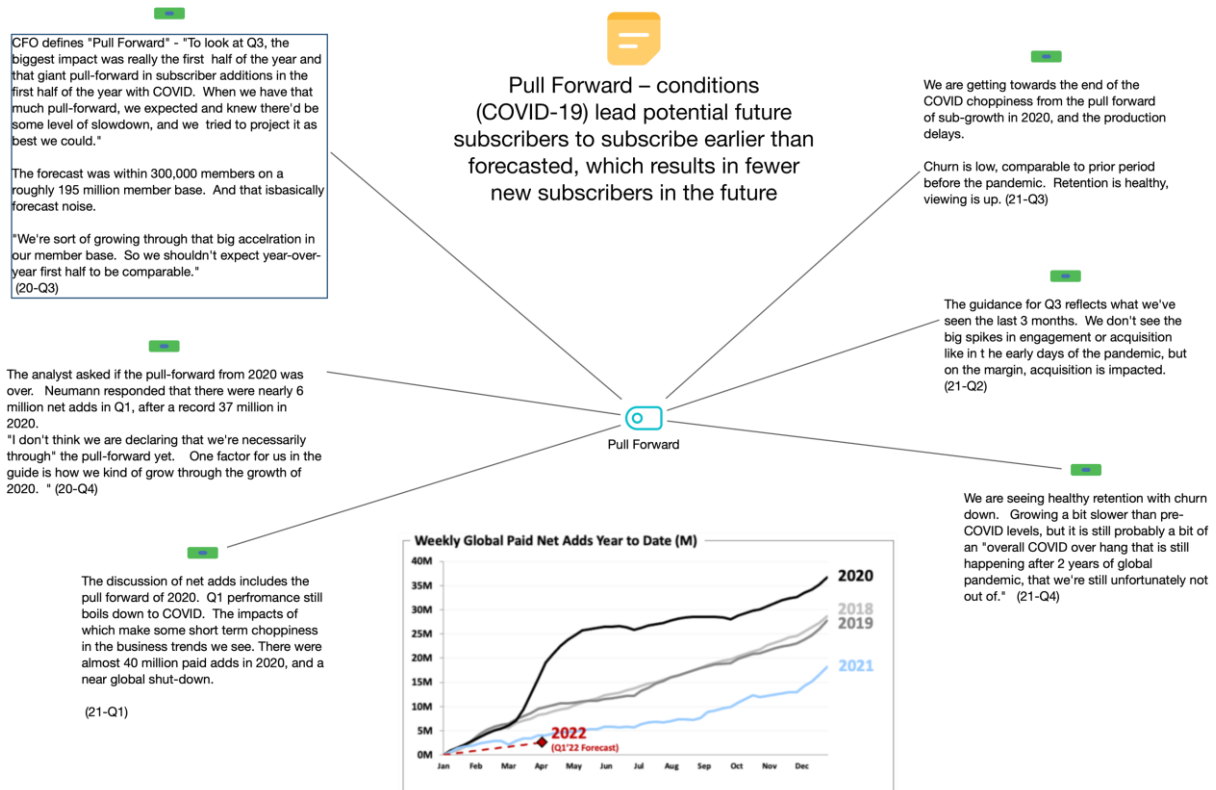
Codes	20-Q4 (1 Document, 1 Summary)	21-Q1 (1 Document, 1 Summary)	21-Q2 (1 Document, 1 Summary)	21-Q3 (1 Document, 1 Summary)	21-Q4 (1 Document, 1 Summary)
Explanation of Net Adds (5)	The analyst asked if the pull-forward from 2020 was over. Neumann responded that there were nearly 6 million net adds in Q1, after a record 37 million in 2020. "I don't think we are declaring that we're necessarily through" the pull-forward yet. One factor for us in the guide is how we kind of grow through the growth of 2020. *	The discussion of net adds includes the pull forward of 2020. Q1 performance still boils down to COVID. The impacts of which make some short term choppiness in the business trends we see. There were almost 40 million paid adds in 2020, and a near global shut-down.	The guidance for Q3 reflects what we've seen the last 3 months. We don't see the big spikes in engagement or acquisition like in the early days of the pandemic, but on the margin, acquisition is impacted.	We are getting towards the end of the COVID choppiness from the pull forward of sub-growth in 2020, and the production delays. Churn is low, comparable to prior period before the pandemic. Retention is healthy, viewing is up.	We are seeing healthy retention with churn down. Growing a bit slower than pre-COVID levels, but it is still probably a bit of an "overall COVID over hang that is still happening after 2 years of global pandemic, that we're still unfortunately not out of."
Pull Forward (5)					

MAXMaps.

There is a Code Map that uses Summaries.



Explaining Pull Forward in Net Subscriber Adds



This shows an example of a map using summaries which I designed for a presentation.

For More information contact. Dr. Michael Gizzi, Certified MAXQDA Trainer

<https://www.4stagesofresearch.com> mgizzi@ilstu.edu or mgizzi@gmail.com

You can also attend one of my longer Document Summary Webinars