


Instructions for using the Excel Template (QR_ExcelControlPanelTemplate.xls) for Level 2, Level 3, and Level 4 Qualitative Coding

The file, QR_ExcelControlPanelTemplate.xlt, is a fully functioning *Excel* file that you will need to modify to suit the needs of your research project.

1. Download the file, QR_ExcelControlPanelTemplate.xls, from www.qrtips.com/chapter8 and save it in a location that you can remember.
2. Open Excel, and then open the downloaded file. *File* ► *Open*, and then navigate to the directory where you saved the file. See pages 38 - 41 to review directory structures if you have problems finding the downloaded file. The interface of My Documents is similar to the interface used to browse for files to open.
3. It is quite likely that your screen resolution will be different than the screen resolution used on the computer that created the template. Change font sizes and column widths (See page 207) to suit your screen resolution.
4. Save the workbook using a new name that is appropriate for your project. *File* ► *Save As...*
5. When the file opens it loses some of the formatting that existed when it was last closed, so you will need to do a minor amount of setup each time you open the file.
 - a. Click on *Window* ► *Compare Side by Side with...*
 - i. This command should cause the two worksheets that are a part of the workbook template to appear. See pages 147 and 210 for an overview of workbooks and worksheets. See pages 149 and 150 for more information on Side-by-side windows.
 - b. Click on the far left icon of the “Compare Side by Side” pane (shown to the right) that appears in the bottom right corner of the workbook after you execute the “compare side by side” command. The far left icon toggles on and off the synchronized scrolling of the two windows. The scrolling should be off.
 - c. The illustration on page 147 shows the configuration of the template, more or less as it should appear after you have completed the steps above.
 - d. When you get things set up the way you like, save the workbook.
6. Refer to Chapter 8 of *Doing Qualitative Research Using Your Computer* for details about setting up and using the template. Instructions for Level 2 coding begin on page 150.
7. Level 1 codes are copied from your *Word* code document to the “A” column in the *Excel* template. Also be sure to copy the text that inspired each code. This text should be pasted into Column C of the worksheet.
8. Only Level 1 and Level 2 code samples are included in the template. Delete the sample codes in the template before proceeding with your own coding. *Highlight the sample codes, and then press the Delete button on your keyboard. The sample codes are completely fictitious. They are meant to represent ethnographic fieldnotes relating to the study of chimpanzees.*