

# Excel-lent!

## Some thoughts on Using Excel to Simplify and Speed Up Qualitative Analysis & Report Writing

### Intro

Imagine generating reports in about half the time and with half the effort!

Using Excel to process transcripts may significantly improve your analysis and report-writing performance, as it did mine. From seemingly endless and tortured report-writing sessions to a (relatively) pain-free process has been a welcome improvement for me.

I've tried many approaches to analysis and report writing — from working on the office floor with paper transcripts and coloured markers to annotating PDF transcripts — and, until now, none seemed to either improve the insights or reduce the often staggering number of hours I was spending to generate a final report.

The breakthrough for me occurred as I contemplated the daunting prospect of analysing nearly 300 pages of transcripts from six bulletin board groups. The collective thoughts of the participants consisted of no fewer than 65,000 words.

As I looked at the pages, I realized that the transcript was already *structured*, and was in fact a database table: that is, a series of records ( each citation is a row in the table), each one defined by a number of fields: a unique conversation identifier, time of the response, question number, the target (where the message originated from, whether waiting room, viewing room, focus group room, etc.), and the handle or online name of the sender, in addition to the message/statement itself. (please refer to the sample page, below. The database has been modified to protect the confidentiality of the participants and observers).

Group Num	ConvID	Time	QID	Target	Handle	ResponseMemo
1	38	37312.07	login	WR	MaryK	Entered WR at 12:43.
1	39	37312.07		1WR	Pierre-mod	hi MaryK
1	40	37312.07		1WR	Pierre-mod	that should be 'virtual' not 'vittual' ;-)
1	41	37312.08		1WR	Pierre-mod	hi MaryK, can you read this?
1	42	37312.08	login	VR	DanC	Entered VR at 12:48.
1	43	37312.08		1WR	MaryK	Yes great! Welcome ... happy with the
1	44	37312.08		1WR	Pierre-mod	hockey score yesterday?
1	45	37312.08		1WR	MaryK	You betcha, Canada rules hehe... you're the first one here, waiting for 4 more... what's your
1	46	37312.08		1WR	Pierre-mod	weather like?
1	47	37312.08		1WR	MaryK	Cool, but sunny

## **The Excel Way**

### **Getting Transcripts Into Excel**

The sample transcript used in this article was originally provided by the online facility as a CSV file (the fields are separated by commas), readable directly by Excel. Excel also supports many other file formats, including database files from Access and Quattro Pro. Data in the form of Word table can simply be copied and pasted into an Excel worksheet. Please note that Excel may be of limited usefulness if transcripts are not structured, that is, in the form of tabular data with rows (the citations) and columns (fields).

### **Evolution**

Excel is a program that may be unfamiliar to qualitative researchers unless they also conduct quantitative work. Yet Excel provides many text manipulation features that can be used to simplify and speed up qualitative analysis and report writing. These include such tools as records sorting, auto-completion of entries, viewing the citations in a form other than datasheet view, various text and database functions (such as adding the contents of one column to those of another (concatenation), or removing all leading and trailing spaces), and the standard find function. These features are described briefly below along with instances of when they might prove useful.

#### ***Sorting***

Self-explanatory. Useful to sort records into like categories, on various dimensions. For instance, it might be useful to sort the transcript by topic, or by degree of importance (fields that the analyst might add).

#### ***Auto-completion***

Excel monitors your typing and suggests a value you may have entered before (i.e., if you have previously typed in "positives", as you are typing "P-o-s" Excel will offer "positives" as a suggestion, which you can accept by hitting the Return key. This feature can be useful to enter consistent codes.

#### ***Form view***

Analysts may sometimes wish to eliminate context and view each citation on its own. Excel provides an easy way to view each citation separately.

#### ***Text functions***

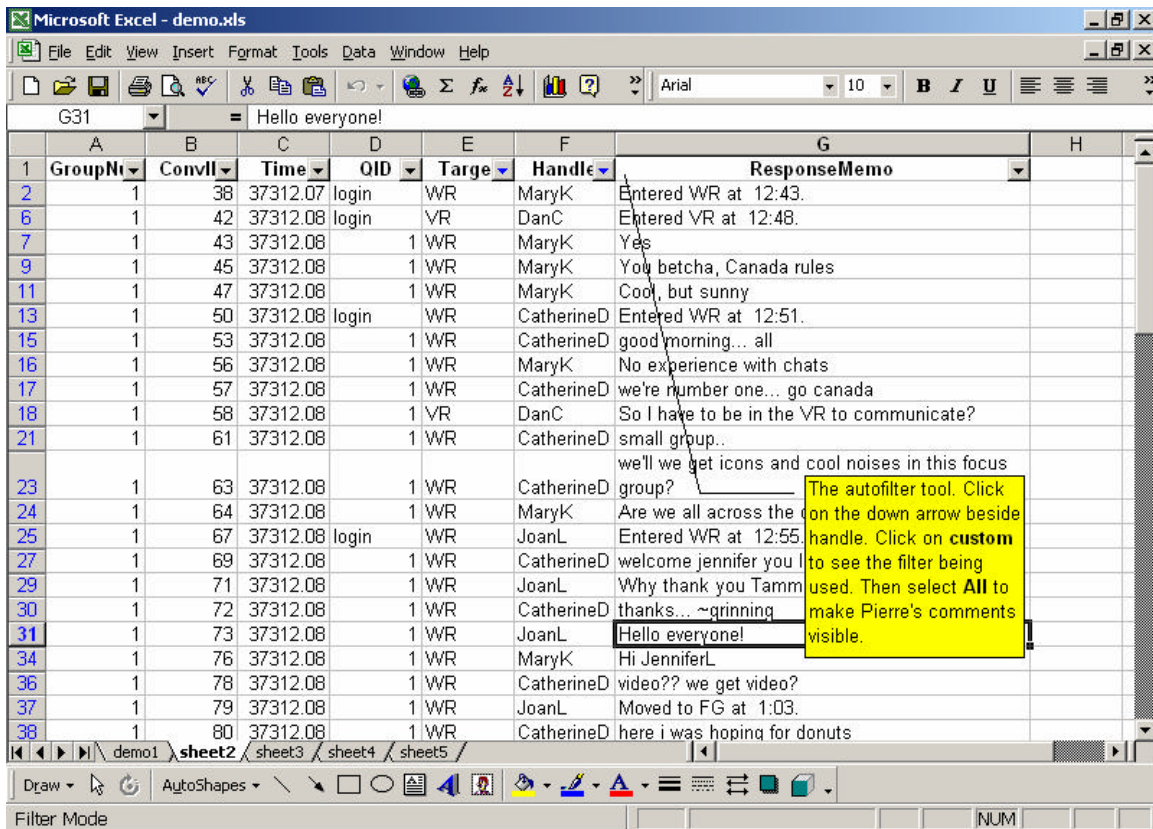
Excel provides numerous text functions, from automatically trimming any leading and trailing spaces in a citation to adding the contents of one column to those of another (concatenation, which can be useful to add authors to citations before exporting them to a final report (e.g., "I didn't like this product at all" [Male, Group 1])

#### ***Autofilter***

The most useful feature, however, may be the Autofilter function.

Autofilter (data/filter/Autofilter) is a built-in feature of Excel that produces a drop-down list of all the unduplicated values in a field (column). By selecting one of the choices offered in the drop-down box, all other values are hidden. Autofilter lets the analyst include or exclude certain records from analysis. For instance, it is possible to view the comments of observers in the Viewing Room, only, by choosing "VR" from the Target list.

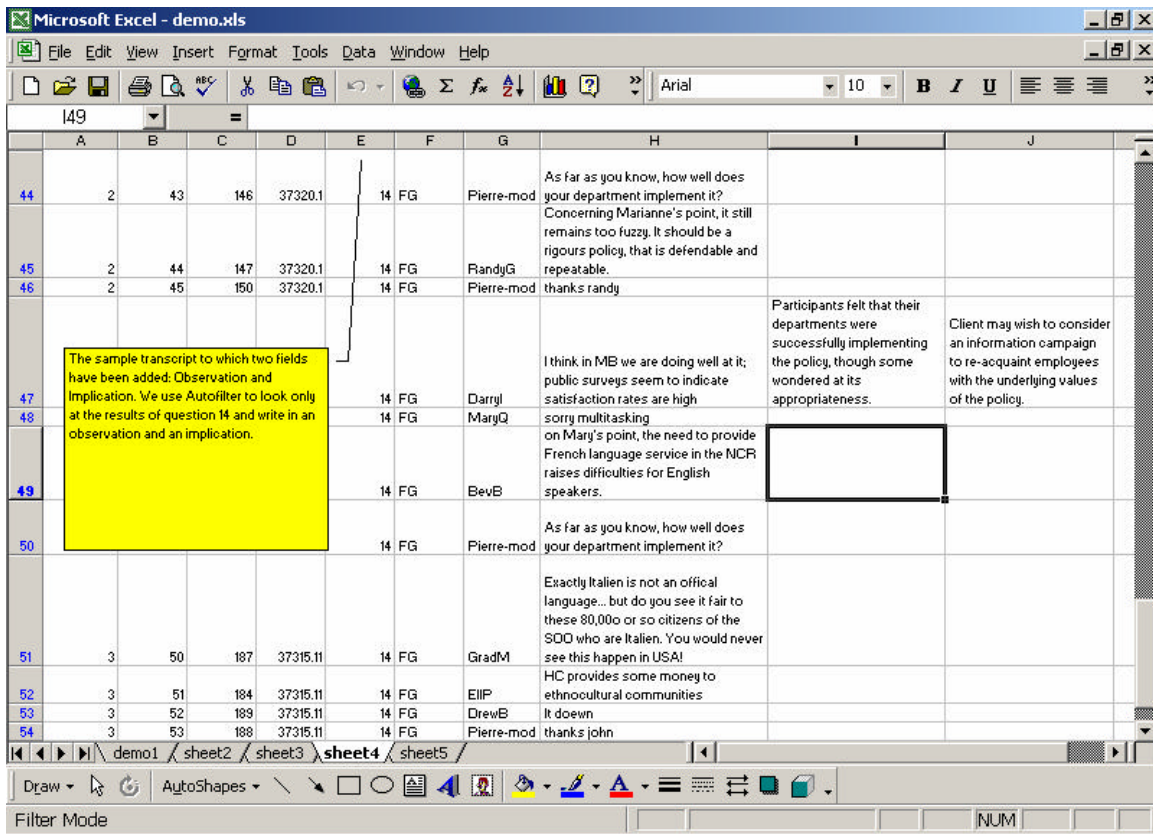
Perhaps more importantly, it allows the analyst to eliminate from view citations that may be unimportant or uninteresting, thereby speeding up the reading process. For instance, I might decide to exclude my own comments by selecting "custom" within the Handle field and making the "does not begin with" condition be "Pierre" (see the screen shot below; notice how rows 3, 4, and 5 - which contain my comments - are hidden from view).



## Revolution: Analysing Across Groups

By using Autofilter to view the responses question by question, across groups, it is possible - in a way that is not with traditional transcripts - to view responses *across* sessions very easily. In other words, rather than read through an entire session, annotating the transcript, selecting and excerpting noteworthy quotes, and repeating this for all the sessions before writing observations and their implications, it is possible to read the answers to one question, across all groups and to make the observations and implications directly in the database (see the screen shot below; note that only responses to question 14 are visible and that the analyst has entered an observation and implication on line 47).

By successively going through question-by-question (rather than session by session), it is possible to generate immediate observations and implications at the time of reading, something I have found to be a tremendous time and energy saver.



### Exporting to a First Draft Report

Since a report is but a re-ordering of the citations and observations by topic or code, it is quite easy to select all non-blank observations, copy them to a new sheet, and order them by topic (i.e., question number), then by citation in reverse order (this will put the observations first, with the citations *sans* observation next). The three columns (citation, observation, and implication) are then copied and pasted into a Word document to begin the report-writing process.

If you have structured transcripts, do give Excel a try. You may find, as I did, significant reductions in the time and effort required, even while improving the quality of the results.

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