Auto coding a transcript by speaker

Hi. I'm Tracey Rosell. I'm a final year PhD student at Cardiff University Business school. I'm going to explain about **auto coding**, something that I've found really useful when handling the data for my own research into leadership of surgical teams.

When you are analysing your data, it is useful to be able to carry out a search for everything that a particular person has said generally or on a particular topic. You can make this easier from the outset, by coding everything to do with them using their name or a unique identifier, for example a number.

A really efficient way of doing this is to autocode any uploaded document related to them, for example a transcript or an observation note. The easiest way is to do this as you import documents into NVivo. You can do it later if you want to but there is one potential glitch if you do so, which I will explain as we go through the steps.

The steps are:

1. Import your document in the usual way.
2. If you are auto coding do NOT click on the 'Create a case for each imported file' box. If you do, when you go on to auto code you will end up with a duplicated case. This can be solved by deleting the first case but it is extra work that you can avoid doing.
3. Open up the document. Here I'm using an interview transcript, but you could do the same process with other documents. You can see here that at the start of each section where a speaker has said something there is a name or anonymized identifying code.
4. On the top, very left, you can see that the tab '**File**' has been chosen and that is indicated by it being shown with a blue background. On the right to that, along the ribbon, there are a group of icons together in a section called '**Coding**'. Click on the icon that says '**Auto code**'.
5. The Auto Code Wizard box opens up. There are three options. For our purposes to identify when a particular person says something, make sure that the button is selected for '**Speaker name**'.
6. Click on the Next button. In the top box, headed '**Enter all speakers**' type in the name or code for the first person. After a very brief pause you will see that all the text in the bottom box is now highlighted in one colour. Text for all speakers appears highlighted. Don't panic! This will change when you then type in the next speaker's name or code in the top box, where it now says 'Click to add speaker'. When you have done so, you will see that a second colour appears in the bottom box to highlight the second speaker. Continue doing this for all the speakers that are in your script. This should include the interviewer as otherwise the interviewer's questions and dialogue will be attributed to one of your other speakers.
7. Click on next and the final box opens. Here is where you allocate your document to a particular type of classification. How this is used in NVivo will be explained in another presentation. For our purposes here, it is enough to know that it is important to make sure that you allocate your document to the correct classification of Case type. You may have set one or more up already. A common one is '**Person**', to describe the interviewer and interviewee. If that is there already select it then click on Finish.
8. If you haven't set up case classifications yet, you can create them here. So in this case this document was not an interview. It was a note made of observations made during a field trip. So, I click on the button for '**Create new classification**' then type in my title for it, which is Observations.

9. In the middle of the box you will see the question, “Where in your project would you like to store your cases?” The default place for this to be recorded is in the Cases folder. But if you want it do go somewhere else in your project records you can click on the Change button then either select one of the folders that is shown or create a new folder.
10. You can now click on the **Finish** button and you are all done. At any point before this you can select Cancel or Back to prevent the auto coding taking place or to go back and amend something.

Now, if we go into Cases, you will see that your participant is listed there. You will see that the interviewer has been classed as a case too. Obviously, the interviewer is not a case, apart from perhaps if you are doing an ethnographic study. If you don’t want everything you have said and done to come up in searches, I recommend that you delete your name or code from the Cases list.

And that is it, we’re done. Good luck with your research and I hope that this has been useful for you.