Quali^{AI} User Guide

Step-by-step instructions on how to set up a project and use Quali^{AI}
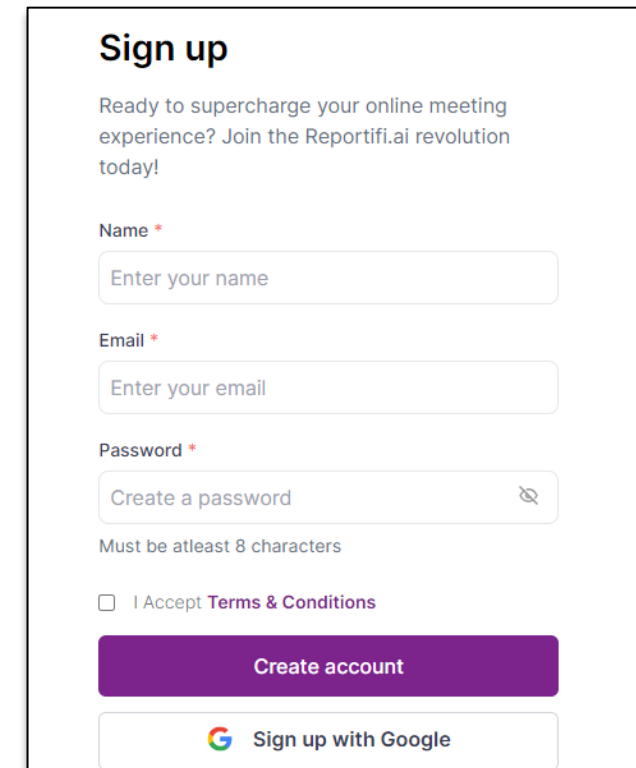for qualitative market research projects

Reportifi.ai

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Step 1: Create an Account on Reportifi.ai

1. **Sign Up for an Account on Reportifi.ai**

   - ✓ Click on the "Sign Up" button located at the top right corner of the homepage.

   - ✓ Fill in the required information: full name, email address, and create a password.

   - ✓ Agree to the terms and conditions and privacy policy by checking the appropriate box.

   - ✓ Click on the "Create Account" button.

2. **Verify Your Email**

   - ✓ Check your email inbox for a one-time verification email from Reportifi.ai.

   - ✓ Open the email and click on the verification link to confirm your account.

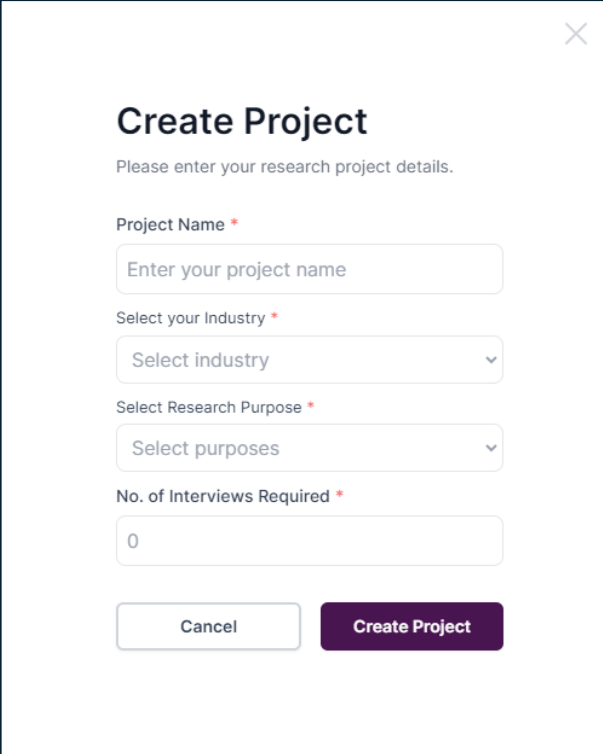   - ✓ Once verified, log in to your account using your email and password

Sign up

Ready to supercharge your online meeting experience? Join the Reportifi.ai revolution today!

Name *

Enter your name

Email *

Enter your email

Password *

Create a password

Must be atleast 8 characters

☐ I Accept Terms & Conditions

Create account

G Sign up with Google

Reportifi.ai

Step 2: Set Up Your Project for Quali^{AI}

1. **Log In to Your Account**

2. **Create a New Project**
   - ✓ Click on the "New Project" button in the top right corner of your dashboard page
   - ✓ Enter the Project Name
   - ✓ Select your Industry
   - ✓ Select the Research Purpose (Academic or Commercial)
   - ✓ Enter the number of interviews required for this project (you can add more later if needed)
   - ✓ Click on the "Create Project" button

Create Project

Please enter your research project details.

Project Name *

Enter your project name

Select your Industry *

Select industry

Select Research Purpose *

Select purposes

No. of Interviews Required *

0

Cancel   Create Project

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Step 2: Set Up Your Project for Quali^AI (cont.)

1. **Upload your Interview Guide in the required format** (see the next page for format requirements & upload options)

2. **Upload a PDF file of your research stimuli, if applicable**

3. **Enter your Research Objectives**
   - ✓ Type in each objective individually and press the "+" symbol to add the objective
   - ✓ You can see the list of all the added objectives in the "Previous Objectives" dropdown under the entry field

4. **Enter your Key Business Questions or Other Questions that you would like summarized from the overall research**
   - ✓ Type in each question individually and press the "+" symbol to add the question
   - ✓ You can see the list of all the added questions in the "Business Questions" dropdown under the entry field

* Any of the project set-up components can be added or changed later in the project.
Summaries won't be generated following interviews until the interview guide and objectives are included.

Step 2: Set Up Your Project for Quali^{AI} (cont.)

2 Options for Uploading Interview (Discussion) Guide*

1. Format the guide in the required format before uploading (select standard upload)

Interview Guide Format Requirements

✓ **The interview (discussion) guide needs to be formatted with <u>interview questions only</u> (Remove all moderator notes, introduction/ closing paragraphs, or other notes).**

✓ **Main questions need to be numbered 1., 2., 3., etc.**

✓ **Sub-questions need to be numbered with a decimal following the main question number (e.g., 1.1, 1.2, 1.3, 2.1, 2.2, etc.)**

OR

2. Upload your existing discussion guide and select the "Format questions with AI" to pull the questions out in the required format

- It may take a few minutes to process the questions. Click Refresh on the Status to check.
- If your topic sections are numbered, remove section numbering from your guide before uploading (incl. Roman numeral numbering)
- Before saving, confirm that all of your questions are extracted appropriately. You can add, delete, or move questions, as necessary
- NOTE: Once you save, you won't be able to see the questions until you generate the question summaries following an interview

*Note: Revised interview guides can be re-uploaded later in the project, if needed

Step 3: Set up Zoom for Transcriptions*

Set up your Zoom account to enable captions and transcription

1. **Log into Zoom**

2. **Go to the Settings – In Meeting (Advanced) tab**

   1. **Select Automated captions**
      - **Set the Automated Captions to English**
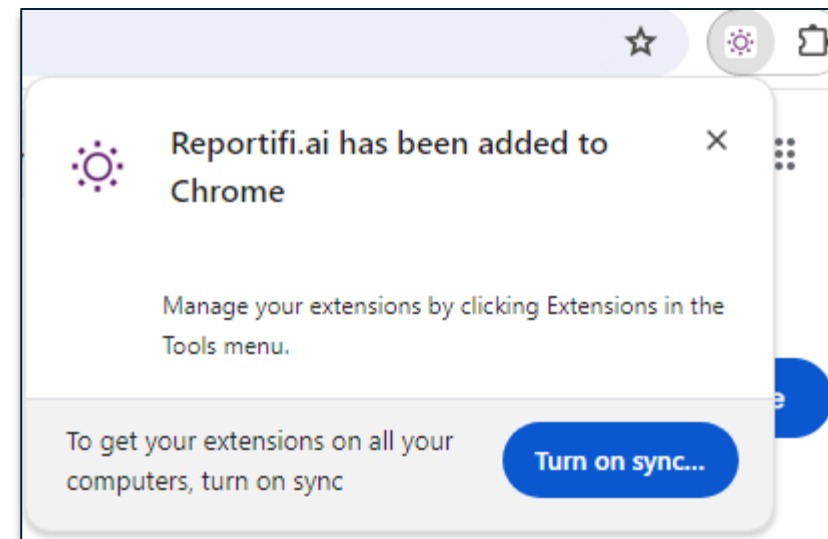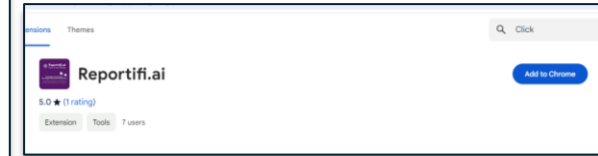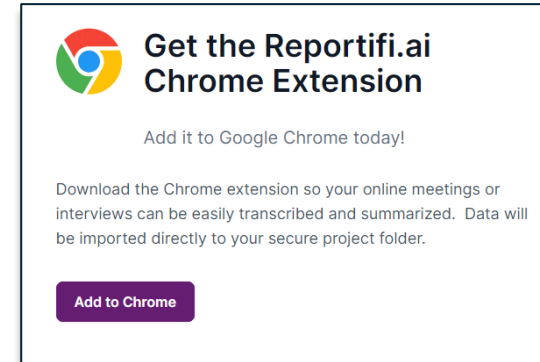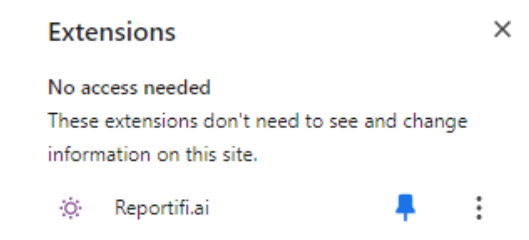   2. **Activate the Full transcript**
   3. **Activate Save Captions**
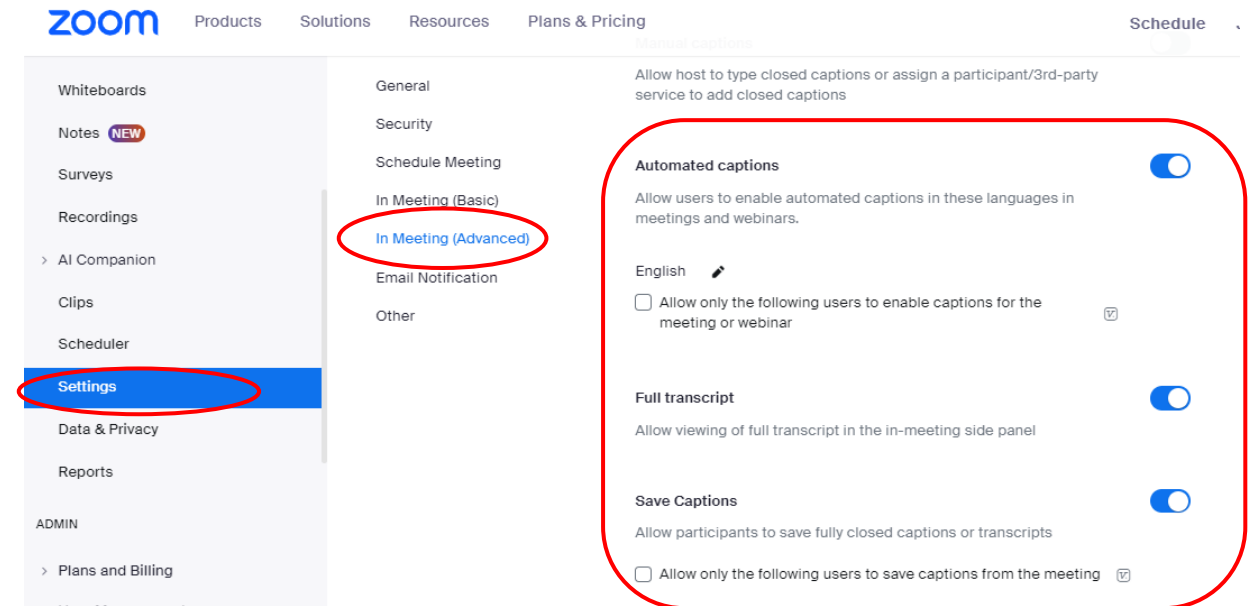
* If using Google Meet, click on Closed Captions in the meeting to enable transcription

Step 4: Download the Reportifi.ai Chrome Extension

1. Click on the "Add to Chrome" button from the Reportifi.ai website or visit the Chrome Web Store and search for Reportifi.ai

2. Click on "Add to Chrome" from the Google Chrome Web Store

3. The Reportifi.ai Chrome Extension will be added to Chrome

Tip: You can pin it, so the icon remains visible!

Get the Reportifi.ai Chrome Extension

Add it to Google Chrome today!

Download the Chrome extension so your online meetings or interviews can be easily transcribed and summarized. Data will be imported directly to your secure project folder.

Add to Chrome

Reportifi.ai

5.0 ★ (1 rating)

Extension   Tools   7 users

Add to Chrome

☆

Reportifi.ai has been added to Chrome   ✕

Manage your extensions by clicking Extensions in the Tools menu.

To get your extensions on all your computers, turn on sync   **Turn on sync...**

Extensions   ✕

No access needed

These extensions don't need to see and change information on this site.

⚙ Reportifi.ai   📌 ⋮

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Step 5: Using the Extension during an Interview

You must open your Zoom or Google Meet meeting in your Chrome browser for the extension to work. Do not open the meeting from the app.
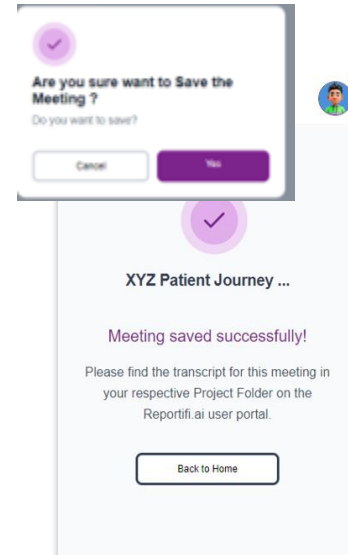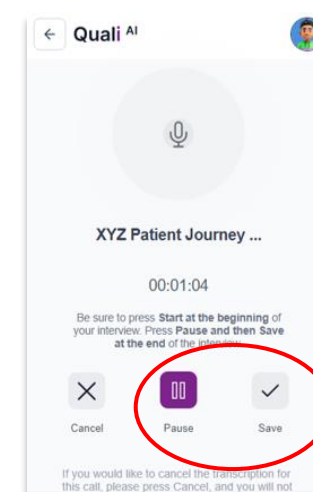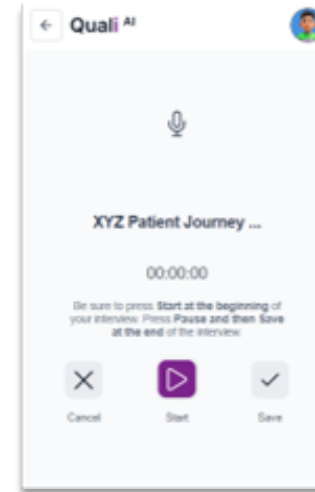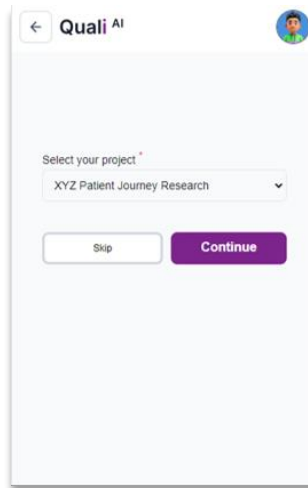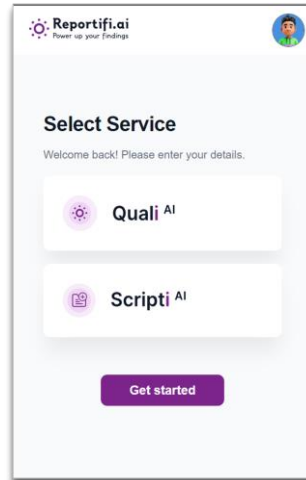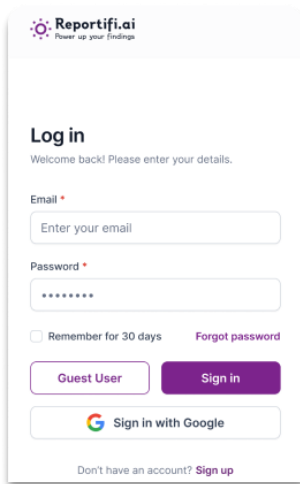
Log in to the Reportifi.ai Extension at the beginning of your interview. You must open the extension while you are in your Zoom or Google Meet meeting

Select Quali^AI and press "Get Started"

Select your project and press "Continue"

Press "Start" to start recording of the transcript before beginning the interview*

At the end of the interview, before you log off, open the Reportifi.ai Extension again and press "Pause" and then "Save"

Click "Yes" to confirm saving. You will see a confirmation that the transcript has been saved.

- Reportifi.ai only records transcripts. Audio recordings will need to be recorded directly from Zoom or Google Meet
- In Zoom, if the Chat window is opened during the meeting, transcripts will pause recording and will only continue when the chat window is closed.

Step 6: See Results in Your Project Folder

Log back in to your Reportifi.ai account. In your project folder, you will have Transcriptions, Summaries (Executive, Interview Questions, and Key Business Questions Summaries) and Top-line slides*

Transcripts

Summaries

Top-Line Slides

* Transcriptions will read Completed when transfer is complete. Summaries and slides can take up to an hour to generate. When new interviews are added, you can refresh the summaries when you wish to update them.

Step 6: See Results in Your Project Folder

Summaries and slides can take up to an hour to generate. When new interviews are added, you can refresh the summaries when you wish to update them.
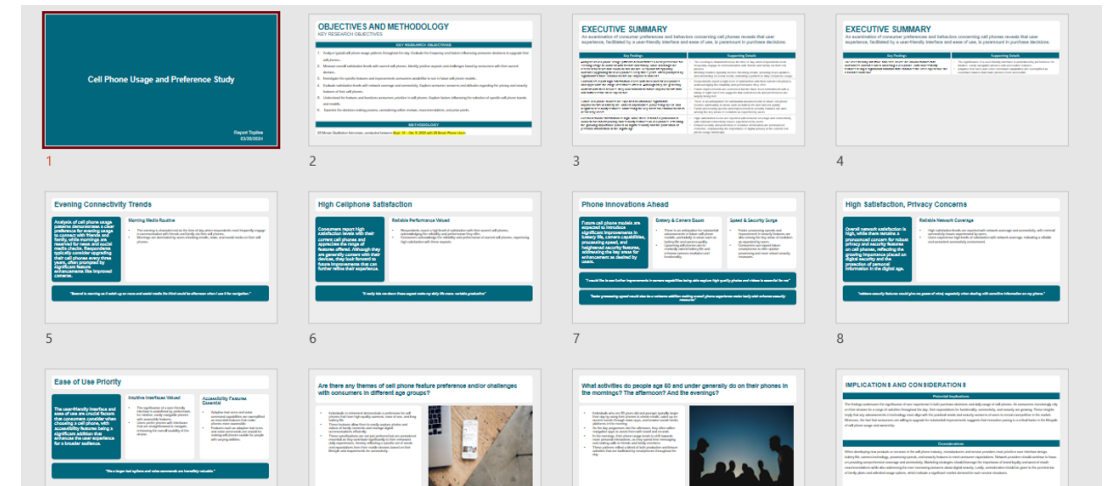
Step 6: See Results in Your Project Folder (cont.)

Transcripts, Responses, Summaries, and Slides are all downloadable!

Summary and Response grid is downloadable to a .xlsx file

Top-Line Slides are downloadable to a .pptx file (you can customize color and fonts before download)

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Navigating the Dashboard

When you select your project, the project will show in the purple left-hand bar

Access your Transcripts, Summaries (including question responses), and Report Slides

Purchase additional interview credits

app.reportifi.ai/projects?currentPage=1

Reportifi.ai
Power up your findings

+ New Project

Reportifi Dashboard

Project Details

Search

Projects	Start Date	Industry	No.Of.Trans	Progress
X XYZ Patient Journey Project 2	Jun 22, 2024, 12:45 PM	Healthcare & Pharmaceuticals	0/7	

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Transcripts

Slides

Review/ Edit Project inputs

Summaries

Archive Project

Quali AI

XYZ Patient Journey

Transcriptions

Summaries

Report Slides

Scripti AI

Archive

Account Settings

Payment

Quali AI

Add Interviews
You have used 0 % of your available Transcription. Need more?

3
No of interviews

2
Interview remains

Add more

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Purchasing Interview Credits

1. **Your first 3 interviews are free with Qualii^{AI}.* You will need to use your free interviews before purchasing. Once you make a purchase, the free interview credits are not accessible.**

    ☑ The outputs (transcripts, summaries, and slides) are not downloadable with the free interviews. They are downloadable once an additional interview purchase is made.

    ☑ The free interview credits are not shown in the Quali^{AI} interview counter on the dashboard page.

2. **There are several ways to purchase additional interviews, either:**

    ☑ On the Reportifi.ai website, click on **"Get Started"** near the Quali^{AI} pricing options.

    ☑ On the Reportifi.ai app dashboard, click on **"Add more"** to the Quali^{AI} interview counter.

    ☑ On the Reportifi.ai app dashboard, click on **"Payment"** to purchase additional interviews.

3. **After your first 3 free interviews, before starting your 4th interview using the Chrome Extension, you will need to have interview credits available in your account.**

    ☑ Otherwise, you will get a message on the Extension to purchase additional credits for your account.

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Tips for Conducting Interviews on Zoom

- ✓ Log in to your Zoom meeting on your Chrome browser ~5-10 minutes before your interview starts.
  - Be sure to be logged into your Chrome browser with the email that matches your Google account where you downloaded the Extension
  - Ensure you don't have any other Zoom sessions open from previous meetings
- ✓ Ask participants/observers to put their initials or first name only in their Zoom profile when they join and to remove any profile pictures. Or, as the host, you can also rename any guests that join when they are in the waiting room before they join the meeting
  - To rename a participant, click More next to their name. In the drop-down menu, click Rename, enter their initials or first name, then click Change
  - Rename participants before starting transcript recording. **Do not revise names mid-way through the meeting, as you may lose part of your transcript**
- ✓ Be sure to inform your participants that you are recording transcripts for the interview (if you want an audio recording, it will need to be recorded from the meeting platform). A notification also comes up to make participants aware.
  - Start the audio recording from the meeting platform.
  - To start transcription, Log-in to the Reportifi.ai Chrome Extension, select Quali^{AI} and select your project. Remember to press <u>Start</u> before starting an interview. You will see the timer activated when it begins. Don't close the Extension window until you see the timer start.

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Quali^AI Demo

Demo of XYZ Patient Journey Research

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Project Set-up for XYZ Patient Journey

1. **Existing Interview Guide was uploaded and formatted with the AI formatter. The section Roman Numeral numbers were removed from the Guide before uploading (see next slide)**

2. **PDF of Research stimuli was uploaded. Stimuli image will show in the appendix slides of the report**

3. **The following Research Objectives were added:**
   - Develop a personality profile of the patient and to gain an understanding of the patient's current lifestyle and environment
   - Develop an understanding of the patient's current state of health and their level of knowledge XYZ, identify their current attitudes, beliefs, and opinions about general health and living with XYZ
   - Develop a deeper understanding of the patient experience with diagnostic testing, doctor visits, and managing their treatment plans
   - Understand the patient experience with accessing medications and to identify potential barriers to adhering to prescribed medications
   - Identify patient treatment goals and desired features and benefits of potential new products indicated for the treatment of XYZ
   - Understand patient's perspective on the use of a potential new treatment option for XYZ

4. **Key Business Questions were added:**
   - How does medication and treatment cost impact treatment per the patients' perspective?
   - What are the current treatments that patients are currently taking to treat their XYZ? How satisfied are they with these treatments?
   - How do patients feel about their current treatments?
   - What is an unmet need for treatment of XYZ?
   - How does having XYZ impact patients emotional well being?
   - What do patients discuss with their physician during a routine exam?
   - What routine lab tests do patients typically get and how frequently do they get them?

XYZ Patient Journey
Healthcare & Pharmaceuticals

No. Of Interviews: 7

Project Unicode: VGC60292

Interview Guide *
* please see sample file above for required format

Sample file ⓘ

○ Format questions with AI   ● Standard Upload

☁ **Click to upload** or drag and drop
DOCX

Objectives *
Enter each research objective individually, and press the + to add each one. Objectives will be listed in the drop down below after added

Enter objectives   +
0/500

Previous Objectives ⌄

Research stimuli *

☁ **Click to upload** or drag and drop
PDF

Key Business or Other Questions *
Enter each question individually, and press the + to add each one. Questions will be listed in the drop down below after added

Enter your question   +
0/500

Business questions ⌄

+ Add new User ⓘ   Cancel   Continue

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Discussion Guide uploaded for XYZ Patient Journey

Uploaded Existing Discussion Guide (removed section numbers)

Example Discussion Guide

Respondent introduction – Let's take a few minutes and talk a little about yourself. As we go through the interview, please know that there are no right or wrong answers. We simply seek your honest, candid feedback. Please be as detailed as possible in your responses.

Objective: Primarily to develop a personality profile of the patient and to gain an understanding of the patient's current lifestyle and environment.

1. Tell me a little about yourself.
   a. Are you married or single?
   b. Who currently lives at home with you?
      i. Children? Grandchildren? Others?
   c. How do you spend your free time...What are your hobbies? What kinds of things do you enjoy doing during your free time?
   d. Describe the area where you live (rural, suburban, urban)?

2. Are you currently employed?
   a. Full-time, part-time?
   b. How long have you been in your current job?
   c. What do you like most/least about what you do?

3. Thinking about your family and friends, those that are closest to you, how would they describe your personality?

4. What has been the proudest accomplishment in your life? How long ago did this happen?

Objective: Develop an understanding of the patient's current state of health and their level of knowledge of XYZ, identify their current attitudes, beliefs, and opinions about general health and living with XYZ.

5. In your own words, describe for me what you think it means to be healthy?

6. Thinking about your overall health, rate your current health on a 10-point scale, how good or bad would you rate your health today, in your opinion? The best state you can imagine would be marked 10 and the worst state you can imagine would be marked a 1.
   a. _____ (1-10) Please explain your rating. [Moderator – Probe to understand why the respondent gave this particular rating and what it means to the patient to be "healthier".]
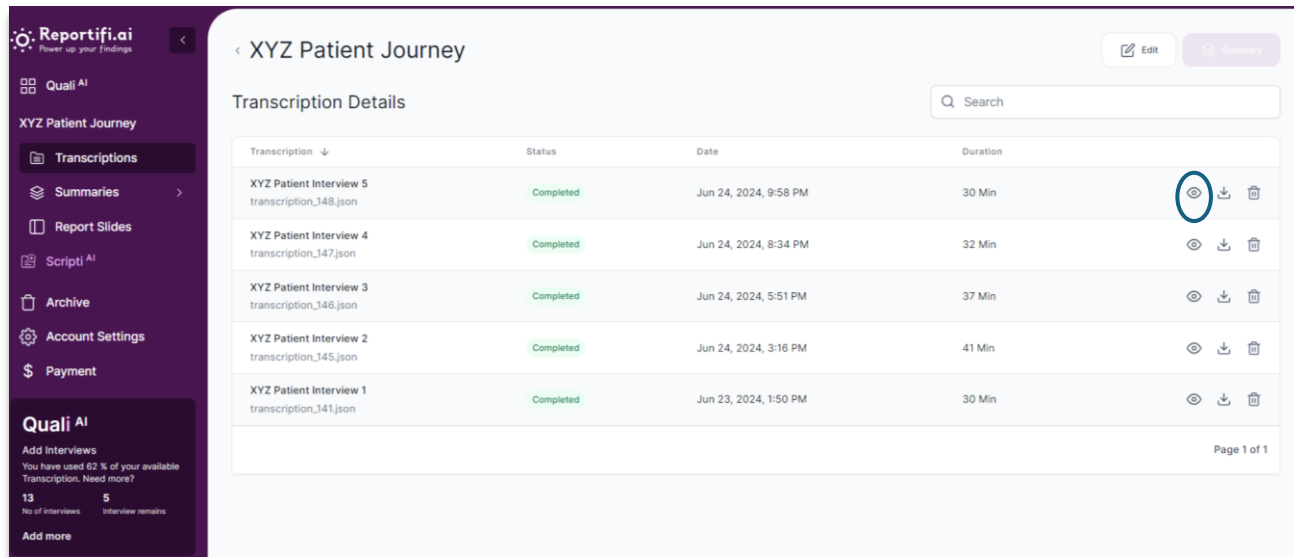
Questions were auto formatted for Quali^AI using the AI formatter

Interview Question   🔍 Search

1 Tell me a little about yourself. ⌄
   1.1 Are you married or single?
   1.2 Who currently lives at home with you?
   1.3 Children? Grandchildren? Others?
   1.4 How do you spend your free time...What are your hobbies?
   1.5 What kinds of things do you enjoy doing during your free time?
   1.6 Describe the area where you live (rural, suburban, urban)?

2 Are you currently employed? ⌄
   2.1 Full-time, part-time?
   2.2 How long have you been in your current job?
   2.3 What do you like most/least about what you do?
   2.4 If today, you could pick any job you wanted, which job would you pick? Why do you prefer this job? What keeps you from doing this job today?

3 Thinking about your family and friends, those that are closest to you, how would they describe your personality? ›

4 What has been the proudest accomplishment in your life? How long ago did this happen? ⌄

5 In your own words, describe for me what you think it means to be healthy? ⌄

6 Thinking about your overall health, rate your current health on a 10-point scale, how good or bad

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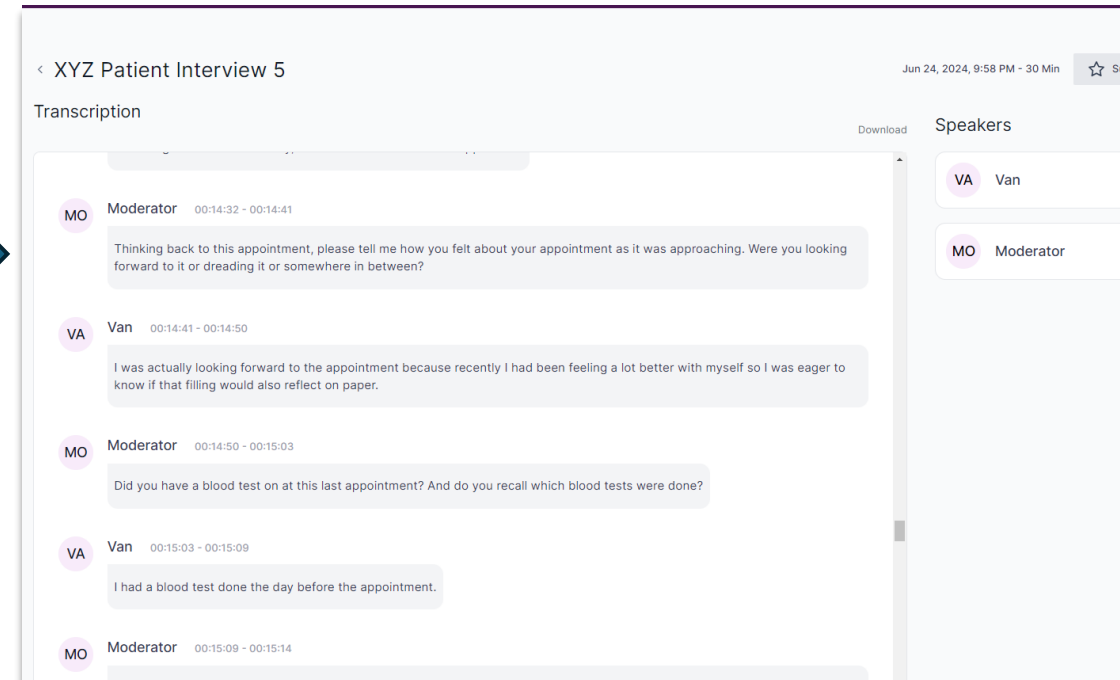
Output following 5 interviews conducted on Zoom

Transcriptions

1. **Transcripts identify speakers and timestamps**

2. **Each transcript is downloadable to a .docx file.**

3. **Interview name (e.g., XYZ Patient Interview 5) is pulled from the Zoom meeting name**

Output following 5 interviews conducted on Zoom

Executive Summary

Output following 5 interviews conducted on Zoom

Interview Question Response Organization and Summaries

Output following 5 interviews conducted on Zoom

Key Business Question Summaries

Key Business/Other Questions

Transcriptions | Report Slides

Questions

Search

1. How does medication and treatment cost impact treatment per the patients perspective? >

2. What are the current treatments that patients are currently taking to treat their XYZ? How satisfied are they with these treatments? ∨

3. What is an unmet need for treatment of XYZ? ∨

4. How does having XYZ impact patients emotional well being? ∨

5. What do patients discuss with their physician during a routine exam? ∨

6. What routine lab tests do patients typically get and how frequently do they get them? ∨

7. How did patients feel about their current treatments for XYZ? ∨

Respondent Answers

Export to Document

Questions Summary

Responses indicate varied experiences with medication and treatment costs and their impact on patient care from negligible to substantial. One respondent is unaffected due to comprehensive health insurance that pays for all expenses, eliminating out-of-pocket costs. In contrast, others experience considerable financial strain, with treatment costs constituting a significant portion of their earnings, as high as 20%, or leaving them with heavy out-of-pocket expenses even after insurance contributions. Expenditures range from $700 annually to $3,000-$4,500 per visit every few months, and can skyrocket to $5,000-$12,000 for treatments for one individual without insurance at all. These costs can create extreme pressure and necessitate financial planning, particularly for those from middle-class backgrounds. While one respondent is not heavily burdened by costs, they are still mindful of expenses. Overall, cost is a critical factor affecting treatment adherence and decisions for most patients.

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Summaries and organized reponses are all downloadable into one workbook file

Downloaded Spreadsheet Workbook (.xlsx) Includes:

- ✓ Executive Summary tab that includes summaries aligned to research objectives and potential implications and considerations

- ✓ Interview Questions Summaries tab that include organized responses from all interviews

- ✓ Key Business & Other Questions Summaries tab

Output following 5 interviews conducted on Zoom

Top-Line Report Slides Generated For This Research Included:

- ✓ 1 Objectives and Methodology slide
- ✓ 3 Executive Summary Slides
- ✓ 7 Key Findings Slides (includes some quotes from the research)
- ✓ 6 Slides summarizing the findings to Key Business Questions (note, images are FPO only)
- ✓ 2 slides summarizing potential implications and considerations
- ✓ 1 slide showing the research stimuli

Slides are downloadable to a .pptx file

It is important to note that slides are AI generated so please don't expect that they will be perfect and ready to use for client presentation. Slides are intended to serve as a starting point for *human* analysis & reporting.

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Thank you for learning more about Quali^{AI}!

Please email support@reportifi.ai with any questions.