



We **recommend** using Google Chrome, Firefox, or Microsoft Edge on a computer. QualStage is not compatible with Safari, Internet Explorer, or tablet / mobile devices. Please check to make sure you have latest browser updates installed on your computer. Older versions of Chrome (version 80 or older) and Edge (version 44 or older) may not be compatible.

Signing In

1. Click on this link: <https://www.qual-stage.com/>
2. Sign in with your email address and the password provided by your M3 project manager
 - If you are using QualStage for the first time click "forgot password" to set your own password

2. Sign In
Welcome back! Please sign in to continue.
Email Address
Email
Password
Forgot password?
Enter your password
I'm not a robot
Sign In
Reset
Change current language
English

3. QualStage
Moderator Tools
Your Timezone: US/Eastern
Mic and Camera Settings
Programs
Logout

4. Programs
YOUR CURRENT PROGRAMS
You have no live programs
YOUR UPCOMING PROGRAMS
You have no upcoming programs
YOUR ARCHIVED PROGRAMS
You have no archived programs

5. QualStage
Moderator Tools
Your Timezone: US/Eastern
Mic and Camera Settings
Programs
Logout

Change Your Current Timezone
* Select Timezone
US/Eastern
Set Timezone
Cancel

Homepage Tools


The main dashboard lists all programs. Active programs are prioritised, alongside access to upcoming, or completed programs.

3. **Programs:** Return to the programs homepage
4. **Program Categories**
 - **Current Programs:** Active programs with interviews in progress
 - **Upcoming Programs:** Active programs where interviews have not yet started
 - **Archived Programs:** Programs where the projected end date has passed. If the timeline is edited, programs can return to 'current programs'
5. **Change your Timezone:** By default, your time zone is set to US / Eastern. Edit this setting to see all QualStage interviews displayed in your local time; this can be updated at any time.



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Programs

1. Each program will have a different set of options, depending on their status. Same-day interviews will be listed under current programs in chronological order.
 - a. **Start interview:** Click  icon; the 'waiting' field will show you how many respondents are scheduled as well as the number currently in the virtual 'Waiting Room'
 - b. **Prepare Program:** If you need to upload research stimuli click here
 - c. **Attendees:** Add attendees to the backroom for clients and observers to listen live to interview sessions
 - d. **Results:** Play, or export interview recordings as well as viewing 'Event' and 'Chat' logs

CURRENT PROGRAMS

WED OCT 14

October 14, 2020 - November 19, 2020
Oncology Usability Test
Client: Client name here
Moderators: Ops User
Today's Interviews:

Time	Waiting	Join
07:00 AM-08:00 AM	0/1	 a.

b. Prepare Program

c. Attendees

d. Results

UPCOMING PROGRAMS

FRI OCT 30

October 30, 2020 - November 7, 2020
US and EU - Message Testing
Client: Client name here
Moderators: Ops User

Prepare Program

Attendees

ARCHIVED PROGRAMS

FRI FEB 3

February 3, 2020 - September 29, 2020
US Concept Test - 90 min VFGs
Client: Client name here
Moderators: Ops User

Attendees

Results

2. Prepare Program Materials

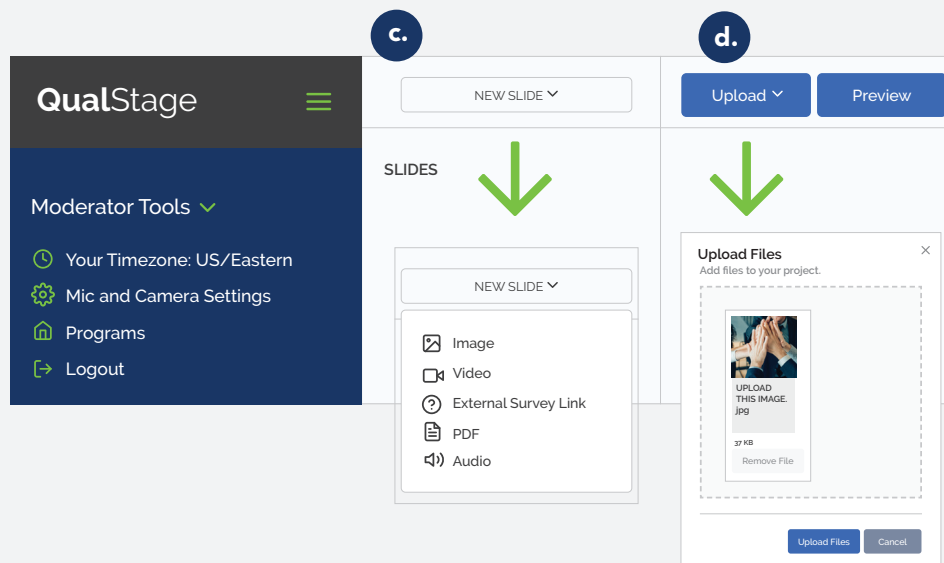
a. Quick Tips

- **Formats:** QualStage is compatible with image, video, and PDF formats
- PowerPoint, Word, and all other file types need to be converted into a compatible format or you can opt to show participants via "Share my Screen" (see next page for "Share my Screen" details)



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- b. If you have a file with multiple pages or slides, we recommend converting each page / slide into a single PDF or image. By doing so, participants will only be able to scroll within the slide. The time spent preparing your slides in advance will make for a cleaner presentation on the day of research, and avoid unnecessary scrolling through multiple files.
 - **Example:** There are three versions of a concept for Product X in the PowerPoint deck (Product X concepts.ppt)
 - » Create a separate file for each version of the concept and name them appropriately (Product X_version 1.ppt) (X_v2.ppt) (X_v3.ppt)
 - » Each file should then be exported as a PDF or an image, and then uploaded to QualStage
- c. Upload materials by choosing 'New Slide' in the dropdown list, which automatically adds materials to your meeting playlist
- d. You can also upload materials through the '**Upload**' option in the dropdown. Materials will then be saved in the programs inventory, accessible within QualStage in case you want to select them, and add to your playlist later.





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Attendees

1. Clients / observers can be given access to the backroom. **Choose 'Click to Toggle Form'** and complete their details
2. Attendee Type Functions (Backroom)
 - **Client:** Can observe research and participate in backroom chat
 - **Observer:** Can observe research, and view chats exchanged, but cannot participate
3. They will then be assigned a meeting access code which they will need to join the session via the platform 'Doorway', accessed here: <https://www.qual-stage.com/backroom-doorway>

Create Attendee

[Click to Toggle Form](#) 1.

[Add Another Row](#)

Email First Name Last Name 2. Attendee Type --Select option-- ✖

[Save](#)

Participants

There are currently no participants

Clients and Observers

There are currently no clients or observers



The QualStage platform is secure in requiring each backroom attendee to have their own unique code.

Respondents

If M3 is responsible for recruitment, the schedule will be updated automatically as it syncs to M3's proprietary scheduling system.

If outside recruitment is being used, respondents can be added to the platform manually. Please contact your M3 project manager.

Interpreter

The interpreter will enter with audio and visual capabilities only. Their video will appear as a silhouette in the room alongside the moderator and respondent. The backroom attendees can toggle between the moderator and respondent(s) speaking in native language, and the interpreter's voice to hear translated audio.

Interpreter toggled ON hear the translated version of the discussion between the moderator and respondent(s)

Interpreter toggled OFF hear the native language of the conversation (moderator and respondent(s)) in real time.



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Launch Program

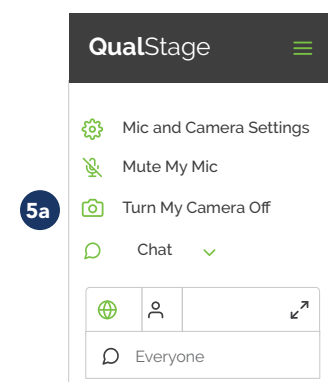
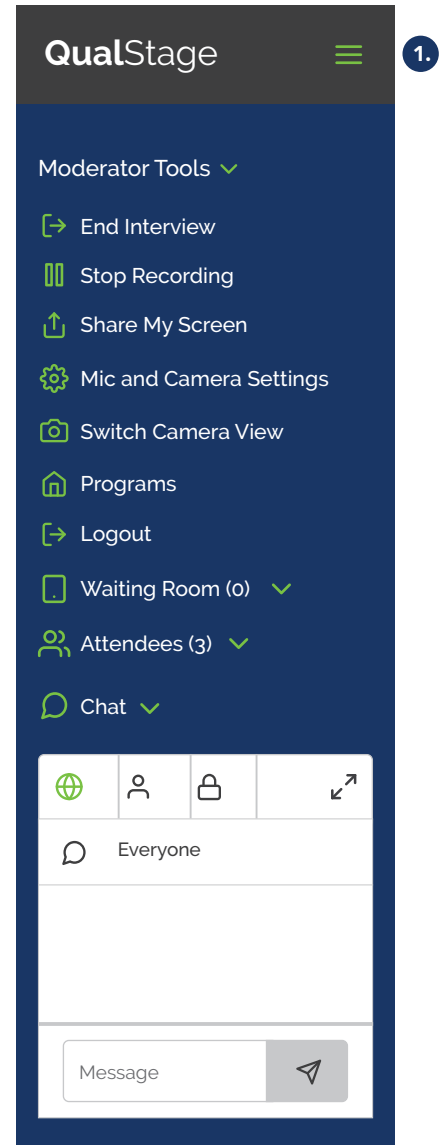
1. **QualStage Menu:** ☰ icon hides the left QualStage banner
2. **End Interview:** Select 'End Interview' to close the session and begin processing recordings. This action will also end the meeting for all attendees.
3. **Begin / Stop Recording:** Recording starts automatically when you launch the interview. You can manually start and stop recording as needed once the session has started.
4. **Mic and Camera Settings:** Set, and save, hardware preferences here at any point

Tip: For your first interview, you must access this page and set your hardware choices to appear in the meeting. Your settings should then be remembered for future sessions.

If at any point you need to turn your camera or mic off, you can use the 'Mic and Camera Settings' within the platform to adjust.


Note: Some projects may have cameras disabled if they are not required.

5. **Switch Camera View:** Switch between slides and respondent video views
 - a. Respondent Camera Settings
 - The camera icon next to each respondent user ID in attendee list can be used to switch the respondent's camera OFF. Respondents will need to switch back on as needed. The moderator can only turn camera off for respondents.
6. **Programs:** Return to the program homepage. This will not affect any active meetings.
7. **Logout:** Leave the QualStage platform

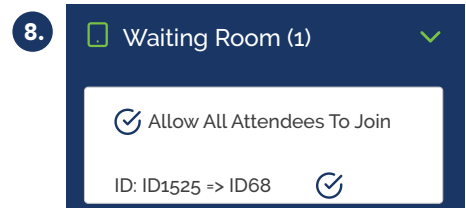




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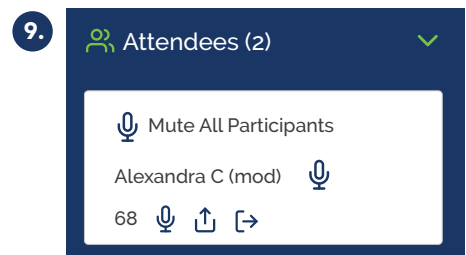
8. **Waiting Room:** The moderator is responsible for adding respondents to the meeting, from the waiting room - click the  icon to give them access.




Note: There may be a short delay (~5 seconds) before they join the meeting. When a new respondent arrives in the waiting room – you will see the bell icon.






9. **Attendees:** The list includes all meeting attendees, including the moderator(s), respondent(s), interpreter(s) (if needed), and backroom clients and observers. You have access to the following tools to manage respondents:

- Mute
- Allow respondents to screen share
- Disconnect respondent



10. **Chat:** When you receive a new message, you will see the  icon, which will disappear as soon as you click within the text box. To view chat outside of the QualStage platform, just select  icon. To send a message, just type into the message box and click  icon to send.

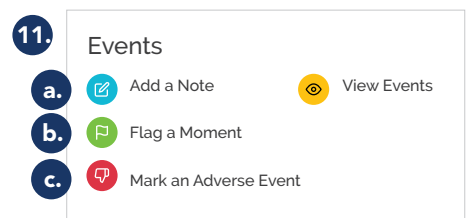
The chat options are as follows:

- Everyone ( icon): Exchange messages with respondents and interpreter(s) (if needed), visible to backroom attendees
- Individuals ( icon): Exchange messages with moderators, respondents, backroom attendees, and interpreter(s) (if needed)
- Backroom ( icon): Exchange messages with backroom attendees, including moderators

11. **Events:** In the 'Events' section you can highlight specific points within the interview:

- Add a note
- Flag a moment
- Mark an adverse event

These can be reviewed at the end of the session by selecting 'View Events', or on the 'Results' page



12. **Share My Screen:** You can choose to share a screen, application window, or web browser tab (more instructions on next page)



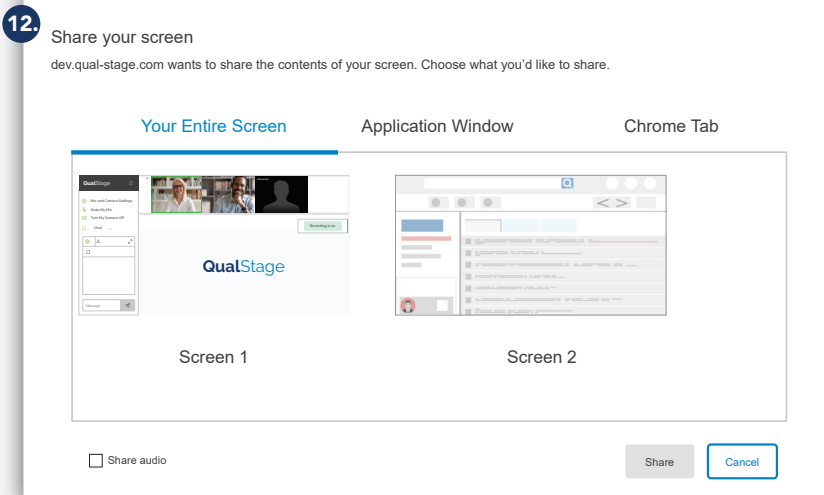
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Moderator Screen Sharing

1. Open another tab or new window on your browser
2. Select the tab you wish to share
 - We recommend closing all browser tabs not needed
3. Return to Qualstage and click 'Share my Screen' on the navigation panel
4. If you need to view both the respondent video and the screen you are sharing you have to have 2 separate tabs / windows open at the same time
 - We recommend using two screens to help navigate screen share and QualStage
 - If you are sharing documents, we recommend saving them and uploading as stimuli rather than using screen share. However, screen share can be used for editing live documents or video files when you want the respondent to see. The file you wish to share needs to be open on your computer in order to share. The file name will appear after selecting 'Share my Screen'.

Respondent Screen Sharing

1. Copy / paste the URL or webpage you wish the respondent to open on their screen into the chat box
2. Instruct the respondent to open webpage / URL in a separate browser and close all other windows
3. Ask the respondent to use the "Share my Screen" option on the left hand navigation bar, and select URL or browser to start sharing
4. As the respondent navigates through the URL, they will not see the moderator's video, but they will be able to hear the moderator's voice. To return to QualStage video, ask the respondent to click back on the QualStage tab.
 - **Important reminder for respondents:** do not click "x" on QualStage tab, that will remove respondent from the meeting. The respondent must have both the QualStage tab, and the other window they are sharing open simultaneously.



Tip: Practise sharing documents before the live interview.

Tip: Share videos as a 'slide' on the QualStage program, adding it to your playlist before you start. If you play a video by sharing your screen attendees will not be able to hear the audio.

Share Audio check box appears on the "Your Entire Screen" tab and the "Web Browser" tab only, not in the application window.



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Results

The recording's status will change from 'processing' to 'ready' when available for review and download.

US WATI Patient Screener						
a. Session	Methodology	Status	Views	Download (Right click, save as)	c. Chat Log	d. Notes / Events
+ Wed Nov 25 2020 10:30AM - 11:30AM		Ready	View		View	View
- Fri Dec 4 2020 10:00 AM - 10:30AM		Ready	View		View	View
b. Moderator (Ali Cameron Mod)		Ready	View			
Participant 8		Ready	View			

**Recordings will be available within QualStage for up to two years. Earlier removal is possible by client request.*

You have the following **PLAYBACK** options:

- Session to include both moderator and respondent(s)
- Perspective of either the moderator or respondent(s) only, based on your selection
- Translated video and audio includes the interpreter's audio output

You also have the following options:

- Chat:** Access messages exchanged within the chat feature
- Notes / Events:** Access the moderator's notes and timestamped events from the meeting