

# QualStage

## Moderator User Guide



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 password provided by your project management team
  - If this is your first time using QualStage, click "**Forgot password?**" to set your own password

### Tech Check

The purpose of the tech check is to evaluate the compatibility of your equipment with the platform. Follow these best practices:

- Test the equipment 24 - 48 hours ahead of the scheduled meeting time
- Use the same equipment and location for the testing as the actual meeting
- Connect to a stable network with bandwidth over 350kbps
- Use a supported device – Mac or Windows computer (laptop or desktop)
- Use a supported browser – Google Chrome, Microsoft Edge, or Mozilla Firefox
- Be sure your camera and microphone are connected and working

### Tech Check Steps

1. Under the Moderator Tools Menu, click **Check Your Network Connection and Device** (fig. 1)
2. Click **Start Test**
3. Scroll down to test Hardware Setup
4. Confirm Video and Audio device selections and **Set Hardware Choices** to save
5. Click **Done**

#### Sign In

Welcome back! Please sign in to continue.

Email Address

Password

[Forgot password?](#)



I'm not a robot



Sign In

Reset

#### If the tech check fails:

- Check your internet connection and devices
  - » If possible, connect directly to your router via Ethernet cable
- Be sure you are using a laptop or desktop computer
  - » Tablets and smartphones are not supported
- Be sure you are using the latest version of Chrome, Edge, or Firefox
  - » Internet Explorer and Safari are not supported
- If tests continue to fail, please email the QualStage alias
  - » Include the project number (R#) in the subject line

## Moderator Tools

The Moderator Tools menu gives you access to several settings and tools. (fig. 1)

1. **Check Your Network Connection and Devices:** Also known as the tech check, this will allow you to test the compatibility of your equipment. Be sure to connect to a stable network and use a supported device and modern browser.
2. **Mic and Camera Settings:** Audio (microphone) and Video (camera) adjustments can be made and saved here at any time. Hardware choices must be set in order to save your selections.
3. **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.
4. **Programs:** Return to the Programs homepage

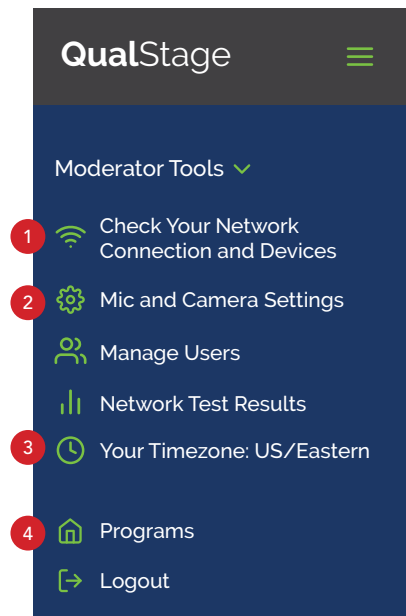


fig.1

## Programs Homepage

The main dashboard lists all programs that you are moderating. Active Programs are prioritized in the left column, alongside access to Upcoming Programs in the right column. Completed programs can be accessed in Archived Programs. (fig. 2)

1. **Today's Programs:** Active programs with interviews in progress
2. **Upcoming Programs:** Active programs where interviews have not yet started
3. **Show Archived Programs:** Programs where the projected end date has passed. If the timeline is edited, programs can return to the Programs Homepage.
4. **Search Programs:** Use this search box to type in the project number (R#), topic, or specified meeting name

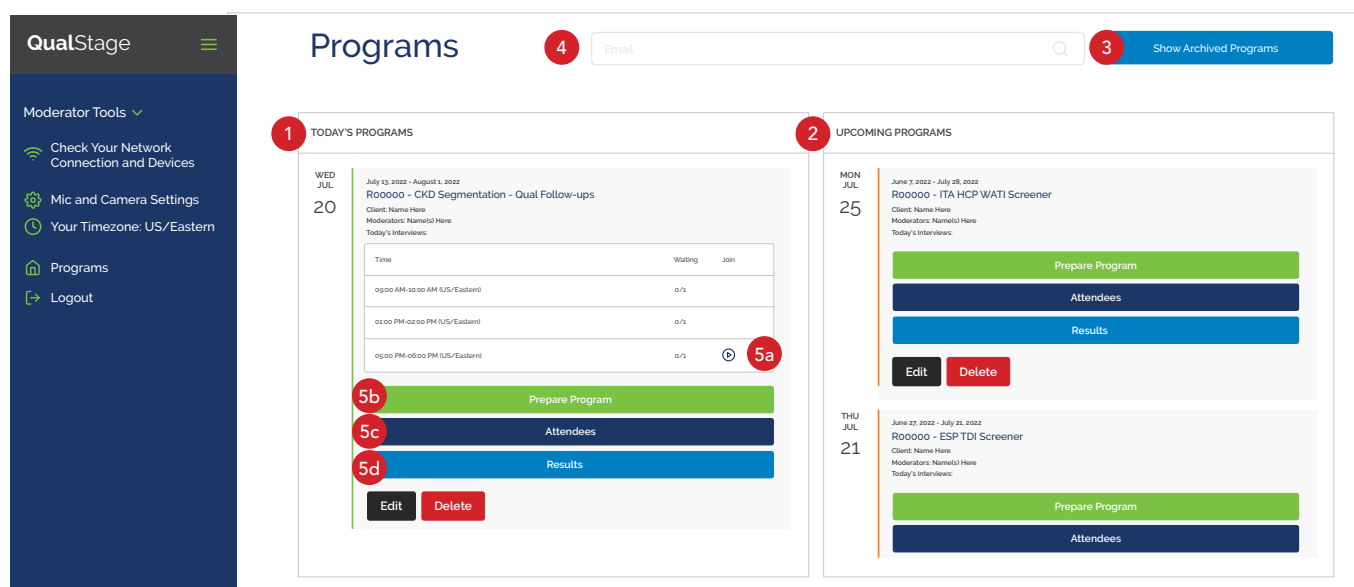



fig.2

## Programs

5. Each program will have a different set of options, depending on their status. Same-day interviews will be listed under Today's Programs in chronological order. (fig. 2)
  - a. **Launch Program:** Click the  icon to start the interview; 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:** Click here to upload research stimuli
  - c. **Attendees:** Add attendees to the backroom for clients and observers to listen to live interview sessions
  - d. **Results:** Play or export interview recordings, as well as view 'Event' and 'Chat' logs

## Prepare Programs Materials

The **Prepare Program** option allows you to upload research stimuli to the program ahead of time. 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. (fig. 3)

### Quick Tips

- QualStage is compatible with audio, 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"

### Convert to Image File

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. Follow these steps to convert a multi-slide presentation into single image files:

#### Multi-Slide Presentation to JPEG

PowerPoint (.PPT)

1. **Open** the PowerPoint presentation
2. **File > Save as... > JPEG**

Google Slides

3. **Open** the Slides presentation
4. **File > Download > JPEG**

Keynote (.KEY)

5. **Open** the Keynote presentation
6. **File > Export to > Images > JPEG**

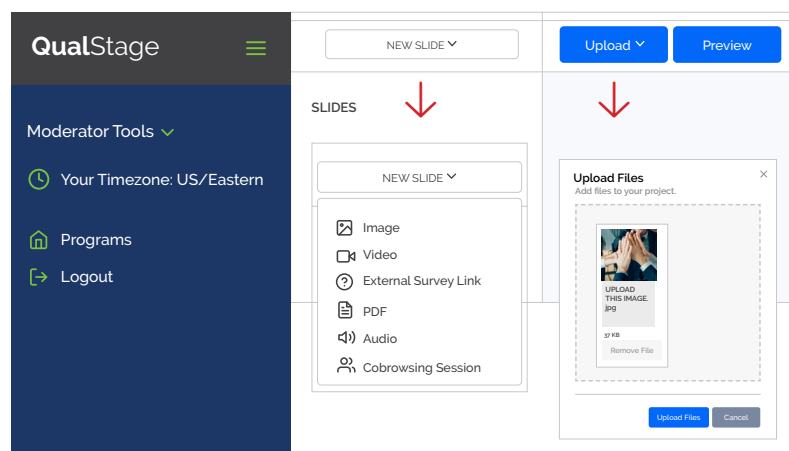


fig.3

## Prepare Programs Materials (cont'd)

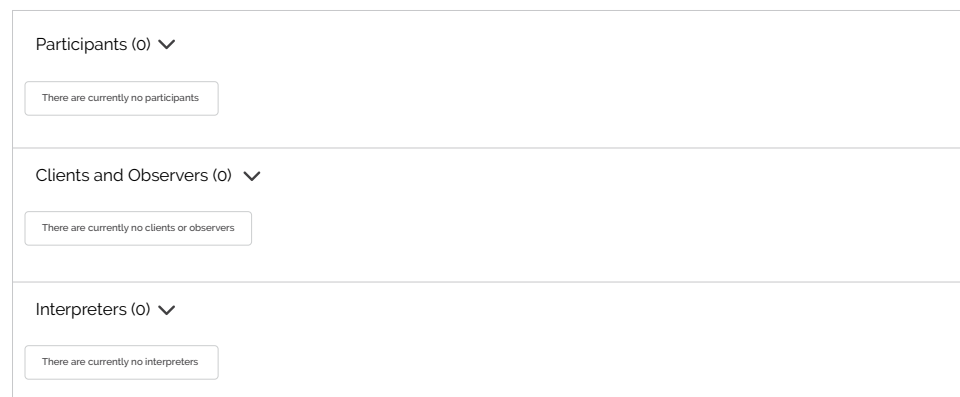
### Upload Stimuli (fig. 3)

1. **New Slide:** Upload materials by clicking **New Slide** and selecting from the format options in the dropdown list. This will automatically add materials to your meeting playlist.
2. **Upload:** You can also bulk upload materials through the **Upload** option. Select or drop the files that you would like to upload from your computer. 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.
3. **Preview:** View stimuli that has been loaded to your playlist

## Attendees

The Attendees option allows you to view attendees that have been added to the program, including participants, clients, observers, and interpreters. (fig. 4)

1. Clients / observers can be given access to the backroom
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
  - **Interpreter:** Can simultaneously translate research, and also participate in the backroom chat
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>



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

fig. 4

## Participants

If M3 is responsible for recruitment, the schedule will be updated automatically as it syncs to M3's proprietary scheduling system. You will only see current and future scheduled interviews under the participants section.

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

## 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.

## Launch Program (fig. 5)

1. **QualStage Menu:** ☰ icon hides the left QualStage banner
2. **End Interview:** Select to close the session (ending the meeting for ALL attendees) and begin processing recordings
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 (fig. 6)
    - 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

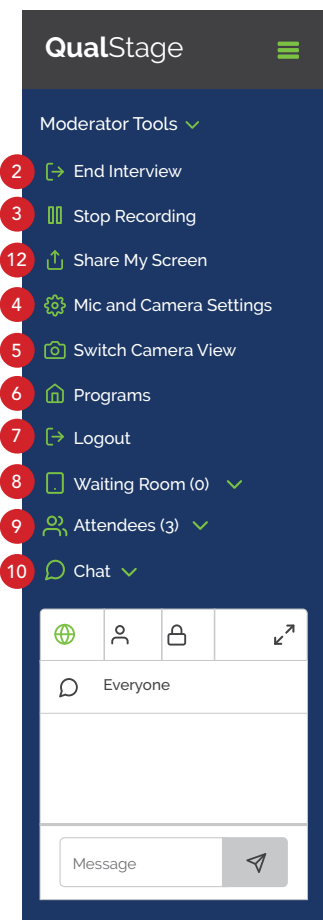


fig. 5

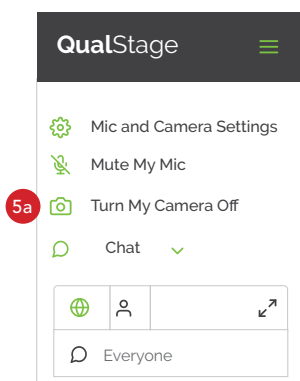







fig. 6




## Launch Program (cont'd) (fig. 5)

8. **Waiting Room:** The moderator is responsible for adding respondents to the meeting, from the waiting room - click the  icon to give them access. You can click on the  icon to unlock the waiting room and allow respondents to come directly into the session

**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 (if needed), and backroom clients and observers. You have access to the following tools to manage respondents:
- Connection strength
  - Mute
  - Camera
  - Allow respondent 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, interpreters and other moderators

Should you pop-out your chat box and need to locate it, simply click on **Go to Chat Window** within QualStage for it to appear

11. **Events:** In the 'Events' section you can highlight specific points within the interview (fig. 9):

- Add a note:** Add notes during the session
- Flag a moment:** Flag an important quote or insight
- Mark an adverse event:** Flag an AE that is identified during the session
- View events:** View any notes or events flagged during the session
- Publish to backroom:** Toggle to give the backroom access to the Notes and Flags features

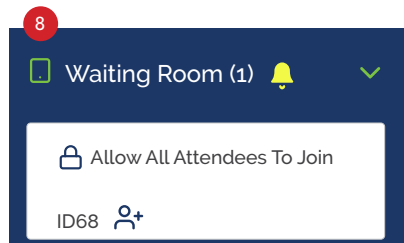


fig. 7

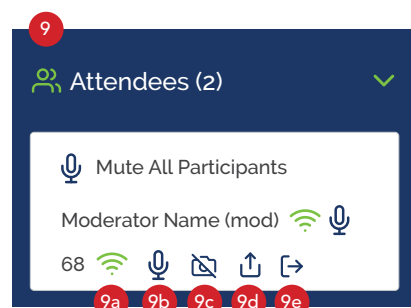


fig. 8



fig. 9

## Launch Program (cont'd) (fig. 5)

### 12. Share My Screen (fig. 10)

- Individuals can choose to share a screen, application window, or web browser tab

#### Moderator Screen Sharing

- Open another tab or new window on your browser
- Select the tab you wish to share
  - We recommend closing all browser tabs not needed
- Return to QualStage and click 'Share my Screen' on the navigation panel
- 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

- Copy / paste the URL or webpage you wish the respondent to open on their screen into the chat box
  - Instruct the respondent to open webpage / URL in a separate browser and close all other windows
  - Ask the respondent to use the "Share my Screen" option on the left hand navigation bar, and select URL or browser to start sharing
  - 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.

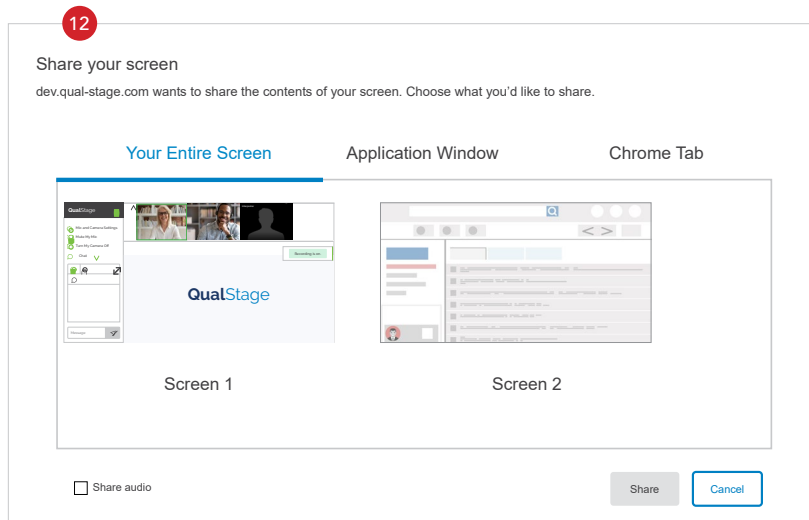


fig. 10

**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.

## Co-browsing Session

### Document Annotation

- This opens a browser window within QualStage in which you can “give control” to the respondent to navigate and annotate an uploaded document, that you can then download
- See Appendix 1 for instructions [here](#)

### Website or Survey Navigation

- This opens a browser window within QualStage in which you can “give control” to the respondent to navigate and click through a provided URL
- See Appendix 2 for instructions [here](#)

## Results (fig. 11)

The recording will begin processing within 10 minutes of the interview being ended by the moderator. Once ready for replay and download, the status will change from **Processing** to **Ready**.

You have the following PLAYBACK options:

1. **Session:** Includes both the Moderator and Respondent(s) perspectives
2. **Individual:** Includes the perspective of either Moderator or Respondent(s) only depending on your selection
3. **Translated video and audio:** Includes the interpreter’s audio output

**Note:** Audio will download as .mp3 files and video will download as editable .mov files.

You have the following logs to view for completed meetings:

4. **Chat Log:** Access to messages exchanged within the chat feature. Only public messages will be available. Individual (private) messages will not be saved.
5. **Notes / Events:** Access notes and timestamped events from the meeting

**Note:** These logs can be viewed and exported into an Excel spreadsheet allowing you to filter the results.

mm/dd/yyyy		Filter By Date	<a href="#">Report Recording Issues (UIRA Form)</a>				
Session	Methodology	Status	Views	Download (Right click, save as)	Chat Log	Notes / Events	
+ Thu Apr 21 2022 12:00PM - 11:59PM	WATI	Ready	View		View	View	
- Mon May 2 2022 12:00 AM - 2:00PM	WATI	Ready	View		View	View	
Moderator [Mod Name]		Ready	View				
Participant 45962		Ready	View				

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

fig. 11