

# QINSIGHTS' GUIDE



## AI-Powered Qualitative Analysis

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## Introduction

QInsights is an AI-powered platform for qualitative data analysis. It is designed for researchers, evaluators, consultants, and insight teams who work with unstructured data such as interview transcripts, focus groups, open-ended survey responses, reports, audio, and video files.

QInsights was built on a simple idea: AI can support qualitative analysis, but it should not replace the researcher's judgment. Good analysis requires interpretation, reflection, and methodological care. For that reason, QInsights is not a one-click solution that produces polished answers without showing how they were reached. Instead, it is an interactive analysis environment in which AI supports the user in exploring patterns, asking focused questions, comparing perspectives, and developing insights that remain linked to the underlying data.

The platform is designed to make qualitative analysis more accessible and more efficient without sacrificing rigour. It helps users move from raw material to meaningful findings through a guided yet flexible workflow. You remain in control of the process at every step: defining the focus, reviewing responses, checking references, refining questions, and deciding how to interpret the results.

A central principle of QInsights is transparency. Insights generated in the platform are grounded in the uploaded material and linked back to the original data segments used to support them. This allows users to inspect, validate, and challenge the output rather than simply accept it. In this way, QInsights supports a form of human-AI collaboration in which the strengths of both come together: the speed and pattern-recognition capabilities of AI, and the contextual understanding, critical thinking, and responsibility of the researcher.

QInsights supports different ways of working with qualitative data. You can upload and organise your material, add metadata, explore themes, analyse conversations in more depth, compare responses across cases, and follow up on emerging findings through dialogue with the system. Whether you are working on academic research, evaluation studies, market research, or organisational learning, QInsights provides a structured environment for turning unstructured data into defensible insights.

This manual explains how to work with QInsights step by step. It introduces the main features of the platform, shows how to set up and manage projects, and provides guidance on how to use the available analysis options effectively. The aim is not only to help you operate the software, but also to support you in using it well.

## Project Creation

After logging in, you are taken to the dashboard. To create a new project, click **Add New Project** on the right side of the screen.

Over time, you may accumulate a larger number of projects. To locate a specific project more quickly, use the search field at the top of the dashboard and enter the project name.

The screenshot below also shows a user avatar. You can add or change your avatar in Settings. This is explained in the **Settings** section of the manual.

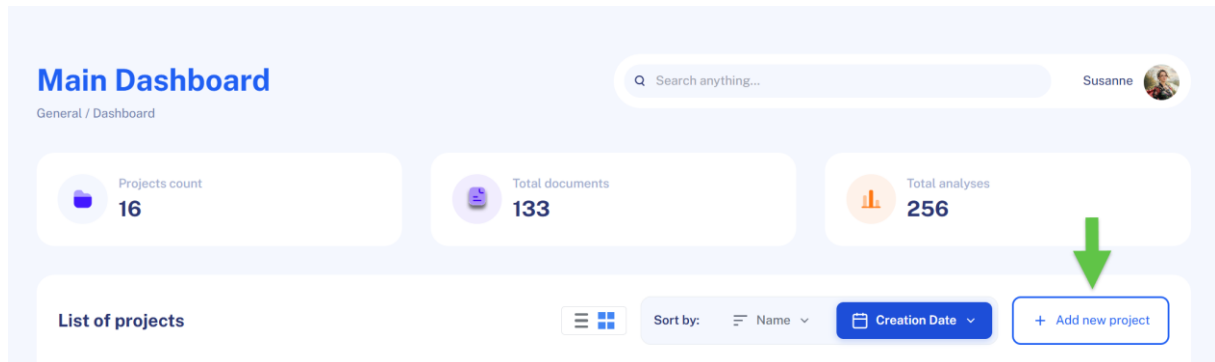


Figure 1: Add a new project

After you clicked on Add new project,

- enter a name for your project and **add contextual information**.

This information is provided as context with every request to your AI assistant Q.

Important contextual information can be your research questions, information about the respondents and details about your project.

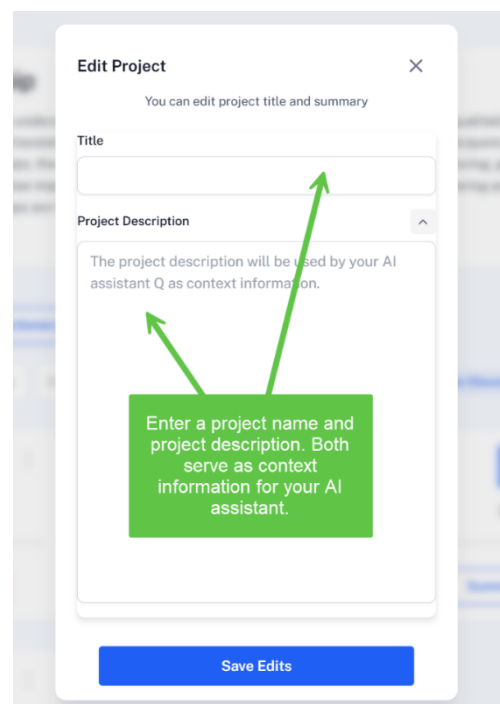


Figure 2: Enter a Project Name and Description

After opening a project, you see your project description on top:

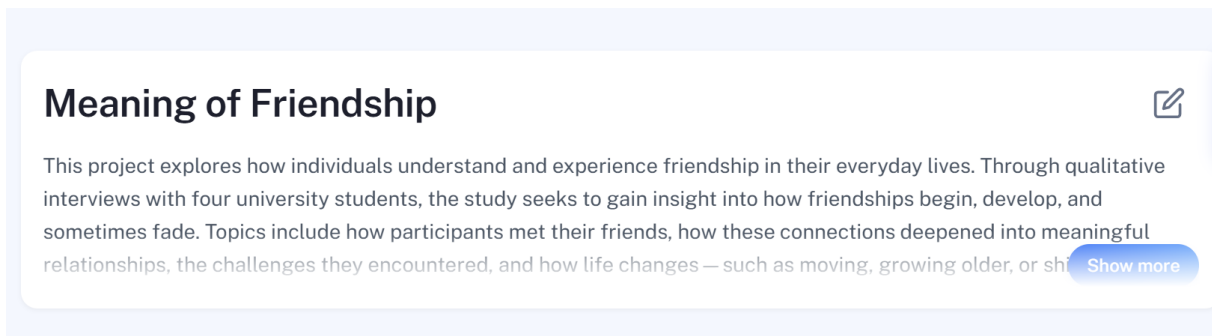


Figure 3: Display of project description inside your project

- If your description is a bit longer, click on **Show more** to see the full description.
- Click on the **Edit** button, to modify the description.

### **Tipp**

As the project description provides context for Q, your AI assistant, for every analysis you can think which context might be relevant. Later in your analysis, you might want to test a theoretical concept, instead of adding it to each prompt every time, you can just add it to the project description. This applies to any additional context information that might be useful for a specific analysis or analysis step.

## Supported Document Formats

QInsights currently supports the following document formats:

- Audio files (mp3, m4a), up to 50 MB
- Text: docx, txt
- PDF
- Excel: xlsx, csv (we recommend xlsx)

When you upload an audio file, we transcribe it (see **Uploading and Transcribing Audio Files**). When you analyse the data, you will be working with the transcript.

## Supported Language

QInsights supports most commonly used languages that are recognized and processed by the underlying AI model. In general, QInsights works best when the language used in the source material, the project description, and your prompts is clear and consistent.

### Automatic language recognition

When you upload documents, QInsights recognizes the language of the source text automatically. If you create a **Summary** or run a **Theme Analysis**, the output is normally generated in the language of the source document, because these analysis types are completed without a user prompt.

For example:

- a Spanish document will usually produce a Spanish summary
- a German document will usually produce German themes
- an English document will usually produce an English summary

### Prompted analysis

In analyses that involve direct prompting, such as **Conversational Analysis**, the language of the response usually follows the language of your prompt.

For example, if the source text is in English but you ask your question in German, QInsights will usually answer in German while still analysing the English source material.

This can be useful when you work with data in one language but want to discuss or report findings in another.

### If the output appears in the wrong language

If QInsights returns an answer in a different language from the one you want, simply enter a follow-up prompt such as: *Please write the answer in German.*

**Note:** Use the project description carefully

The **Project Description** is treated as contextual information about the project and is taken into account during analysis. For that reason, it should describe the project, the data, the research focus, or other relevant background information.

Do not use the project description to enter instructions that are unrelated to the analysis itself, such as personal reminders about writing the final report in another language. This can create confusion about which language QInsights should use during summaries or analysis.

## Data Security and Privacy

See our [privacy page](#) for further information on data handling and data security. The abridged version is: Your data is protected by highest security standards, it is never used for training, and the servers we use are compliant with major privacy standards like GDPR, ISO/IEC 27701, or HIPAA.

We've added an extra layer of protection: you can now enable **Multi-Factor Authentication (MFA)** in Settings. It's a simple way to keep your account more secure.

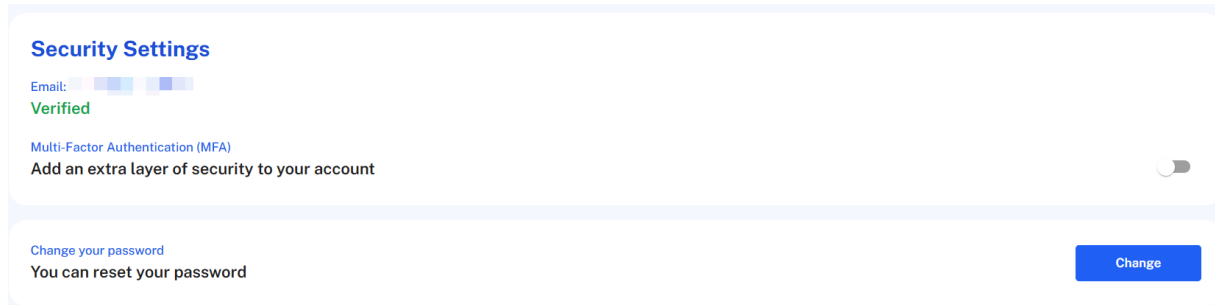


Figure 4: Security Settings

If you need more detailed information, e.g. for ethic or data security clearance, please download the following documents:

[Data Protection and Data Security at QInights](#)

[QInights: Privacy and Security Fact Sheet](#)

## Automatic Logout After Inactivity

For security reasons, QInights automatically logs users out after **30 minutes of inactivity**.

If you plan to step away for a longer period, for example for lunch or a meeting, please be aware that your session may expire while you are away. When you return, you may need to log in again before continuing your work.

# Preparing Documents for Analysis

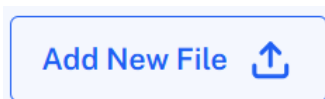
## Uploading and Transcribing Audio Files

QInsights can transcribe audio files directly, so you can work with spoken data — interviews, focus groups, recorded conversations — without needing to prepare a transcript in advance.

**Supported format:** Audio files (mp3, m4a) up to 50 MB.

Currently, we do not yet support the upload of multiple audio files at once. You need to process one file at a time.

**Step 1:** Select **Add New file**.



Select your audio file from the file browser as you would any other data source. Once selected, the **Custom Dictionary** dialog opens automatically before transcription begins.

## Improving the Quality of the Transcript

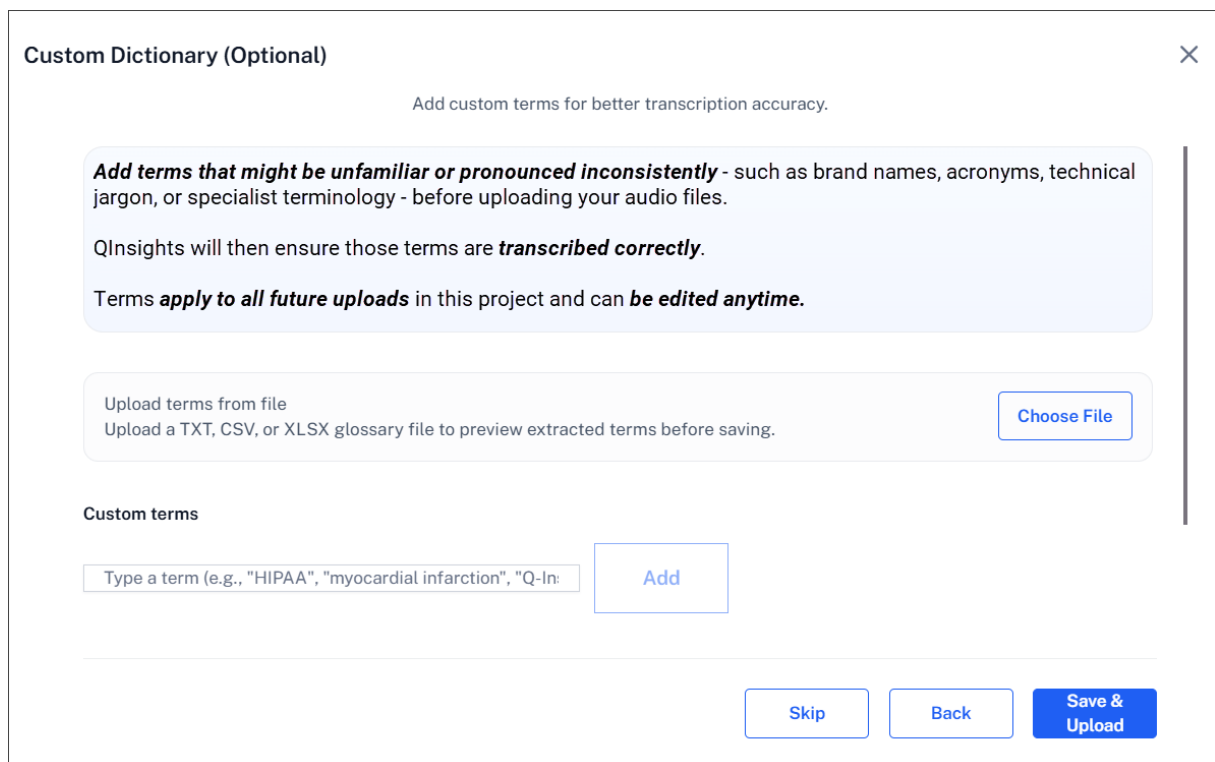


Figure 5: Custom Dictionary

## Step 2: Set Up Your Custom Dictionary (Optional)

The Custom Dictionary lets you improve transcription accuracy by providing terms that may not be recognized correctly out of the box — for example, brand names, specialist terminology, medical terms, or the names of people involved in the study.

Upload a text or Excel file that contain the terms (one word per row) or click + to add words one at a time.

When you're done — or if you'd like to skip this step — click **Save & Upload** to start the transcription.

If you do not want to add any words to the dictionary, click Skip.

## Step 3: Transcription and Speaker Recognition

QInsights transcribes your audio and automatically detects distinct speakers. Each speaker is labelled sequentially in the transcript: **Speaker A**, **Speaker B**, and so on.

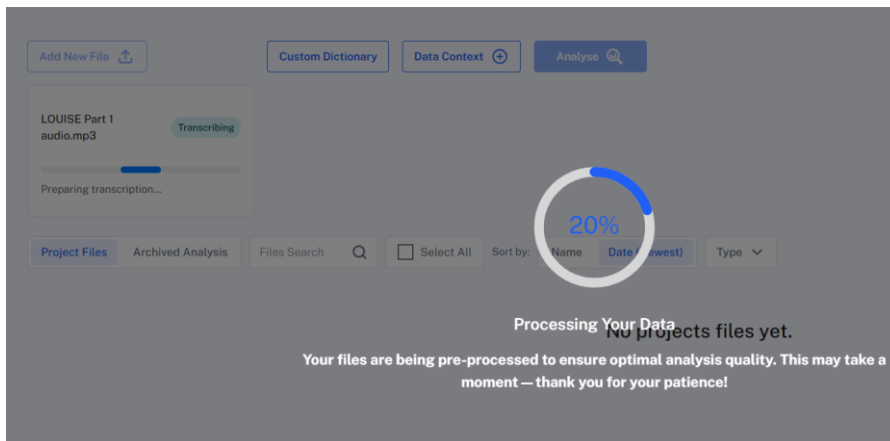


Figure 6: Transcribing your audio file.

## Step 4: Assign Speaker Roles

Once transcription is complete, the **Data Context** panel opens automatically. Here you assign a role to each detected speaker so that QInsights knows how to treat their contributions during analysis.

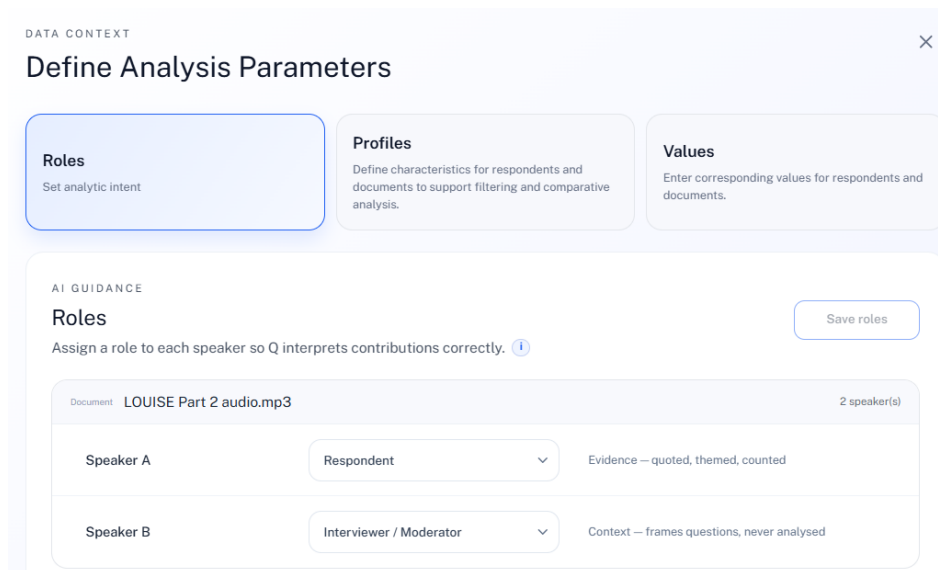


Figure 7: Assign speaker roles

Three roles are available:

- **Respondent** — the speaker's text is treated as primary data and is available for quoting, theming, and counting.
- **Interviewer / Moderator** — the speaker's text is retained as contextual background but is not analysed as data.
- **Exclude** — the speaker's contributions are removed from analysis entirely. This is useful for, say, a brief exchange with someone who walked into the room mid-recording.

Once you have assigned roles, click **Save Roles**. You can then close the panel or continue to the **Profiles** tab to enter characteristics for your respondents. → See

### Tip

We recommend shortening long open-ended questions used as column headers in order to save space on your screen. Do not include the full question text in the header if it is very long.

### Example

**Full question:** What qualities, abilities or skills do we need to develop to build a sustainable future for people and planet? Please add three suggested qualities/abilities/skills below. You may suggest more later. Only give one or a few words here, more space to explain these suggestions will follow.

**Shorten version:** What qualities, abilities or skills do we need to develop?

You can include the full-length questions in the QInsights' project description, if you think it is relevant for the AI-assistant to have this information.

## Adding an Excel File to a Project

To add an Excel file,

- Click on **Add New File**.
- A screen pops up. Do not select anything and click **Proceed**.
- Next you see a window that displays the list of columns contained in the file.

At this stage, you define which columns should be treated as **profile data** and which columns contain the **text data to be analysed**.

For each column, decide whether it should be added to the **Data Context**. To do so, select **is a variable** for all columns that contain background information, identifiers, ratings, or other metadata you want to use later for filtering, comparison, or subgroup analysis.

Examples of columns that are often added as variables include:

- gender
- age
- education
- marital status
- number of children
- ratings or recommendation scores

Columns that contain the actual text responses to be analysed, such as answers to open-ended questions, review text, comments, or feedback, should not be marked as variables.

For each selected variable, you also need to define the **type** of profile characteristic:

- **Text** for categories or labels such as gender, education, or department
- **Number** for numeric values such as age, year, score, or number of children
- **Boolean** for values with two possible states, such as yes/no or true/false

After you have made your selection, click **Save**.

Once saved, the selected variables are added automatically to the **Data Context** and can later be used for comparison, and subgroup analysis.

This step is important because it tells QInsights which parts of the spreadsheet provide analytic context and which parts contain the material to be analysed.

### Tipp

Classify case IDs or other identifiers as data to be analysed and not as variables. This way you can ask to include case IDs or other identifiers as references in a chat answer.

## Subgroup Analysis for Excel Data

**Note:** QInsights supports subgroup analysis for Excel data in different ways, depending on the analysis type.

In **Conversational Analysis**, subgroup analysis is the most flexible. You can refer directly to profile data in your prompt, for example by asking about responses from women, younger participants, or respondents with a certain rating. QInsights can then use this contextual information to focus the analysis on the subgroup you specify.

For **Sentiment Analysis**, subgroup exploration is often most useful in a **follow-up chat**, where you can ask more targeted questions about specific respondent groups or profile characteristics.

For **Theme Analysis**, respondent filters set in advance are recognised during the analysis. This allows you to run the analysis on a defined subset of the Excel data. At present, however, the applied filter is not shown in the exported results. For clarity, we therefore recommend including the filter setting in the file name when exporting the analysis.

In practice, this means:

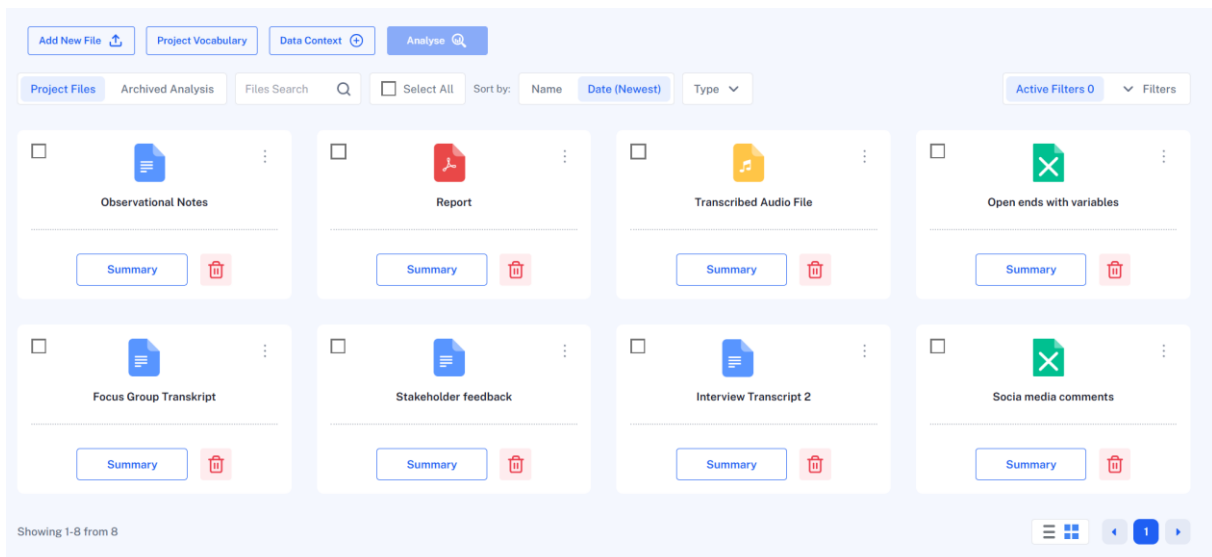
- use **Conversational Analysis** when you want the most flexible subgroup analysis for Excel data
- use **follow-up chats** to explore subgroup differences after a **Sentiment Analysis**
- include the applied filter in the file name when exporting the results of a **Theme Analysis**

## Project View After Data Are Uploaded

Below you see a project containing examples of all supported file types.

In practice, **we recommend creating a separate project for survey data** stored in Excel files. Excel data are processed differently from Word, PDF, audio, or video files, and they cannot be combined with these other file types in a single analysis.

Keeping Excel-based survey data in a separate project also helps keep the **Data Context** manageable. Additional variables from the spreadsheet are imported automatically, and if a file contains many columns, this can quickly make the data context more complex.



## Document Cards

Each uploaded file is displayed as a **document card** in the project view. The document card shows basic information about the file and provides quick access to actions such as viewing a summary, deleting the file, or opening additional options from the three-dot menu.

**Note:** If the Summary Button in document cards for Word and PDF file faded, this means that no summary was created during import. It is best to remove the document and upload it again. The summary for Excel files will appear upon reload.

## Three-dot menu

When you click on the three dots, in a document card for **Word, PDF or Excel files**, you have the following options:

- Opening a preview of the document.
- Rename the document.
- See the speakers that have been identified in the document.

The **document card for transcript** has an addition option: Edit document, in case you want to make changes to your transcript. See **Uploading and Transcribing Audio Files** for further details.

## Deleting Project Documents

### Deleting a single document:

- Click on the bin icon in the document card.

### Deleting multiple document:

- Select the documents you want to delete.
- Click on the bin icon in the document card.

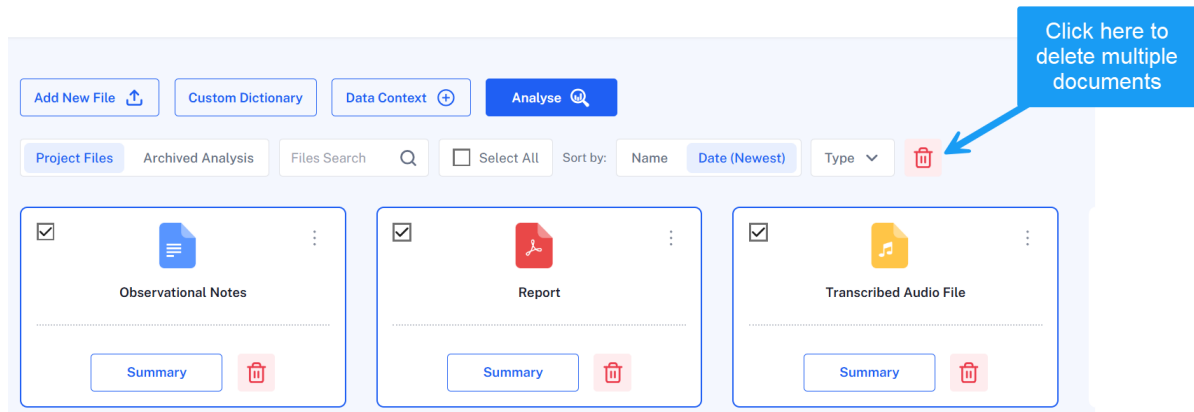


Figure 16: Deleting multiple documents at once

## Sorting Documents

You can sort document cards in the project view to change the order in which uploaded files are displayed.

The following sort options are available:

### **Name (A–Z)**

Displays documents in alphabetical order by file name.

### **Date (Newest)**

Displays the most recently uploaded documents first.

### **Date (Oldest)**

Displays the earliest uploaded documents first.

Sorting can help you find documents more quickly, especially in larger projects with many uploaded files.

Data Context for details.

**NOTE:** You might first have to open the preview of the document to see which of the speakers is the interviewer and which one the respondents. If you got it wrong, you could always edit the roles later.

Speaker A: All right, that should be us. Okay, so the way the interview is going to go is I've got like a full on interview schedule here that I'm going to follow. But I would rather it sort of went as a conversation than a sort of question and answer session. So I'll refer to it a bit. But if we chop about and change and all that sort of stuff, I really don't mind. So we're looking at friendship and so a good way to start maybe would be to ask you to tell me about one of your friends and sort of tell the story of how you

Speaker B: came to meet them. Right. Suppose I talk about my best friend. I mean, I used to live in Austria for 15 years and my parents separated and my mum took us over to England. So quite strange new big school. I mean I was accepted in Austria in basically a 95% girls school which was heaven for me.

Speaker A: Brilliant.

Speaker B: To golf every day of the year to. To being accepted in, which is an all boys school, only six of them allowed to girls. So I was like the girls. It's quite strange, quite a new experience. School year.

Speaker A: How long ago was this going on?

Speaker B: About seven years ago coming up. Seven years.

Speaker A: So you were sort of in the middle of high school type?

Speaker B: I got into year 10. I finished one set of school in Austria and then I went into year 10 in England, which we never had coursework in Austria. It was like that. So it's quite difficult. So each school uniform we did was all new experiences and a class of 30. I can't remember names, I don't know anyone. So one of my mates, I met him in our history class. He was next to him and he's now my best friend. We went out to school together. Stuff like that and he took me under his wing and. Yeah, nice last

Figure 8: Document Preview

### Transcript Document Options

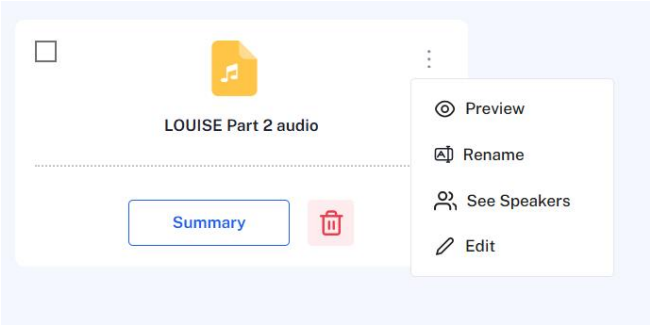


Figure 9: Options for transcripts

After transcription, you can access several options by clicking **the : (three-dot) menu** on the document card:

Option	What it does
<b>Preview</b>	Opens a read-only view of the transcript.
<b>Rename</b>	Lets you give the document a meaningful name instead of the auto-generated file name.
<b>See Speakers</b>	Shows the detected speakers and lets you rename them — for example, to anonymise participants or assign real names.
<b>Edit</b>	Opens a basic text editor for correcting transcription errors. Note that editing is currently plain-text only; without timestamp anchoring, larger edits can be disorienting. We recommend using this for targeted corrections rather than extensive restructuring.

### Adding Existing Transcripts to a Project

When analysing interview and focus group transcripts, you may want to attach meta data to the various speakers like age, gender, region, educational level, profession, etc. These meta data can be used for filtering documents by selected criteria or simply be evoked on a prompt: “Do respondent from different educational backgrounds differ with regard to their response to.....”

QInsights can recognize speakers reliably when you use the following format for speaker IDs: Name followed by a colon (Alexander :). In the following you see an interview excerpt:

INT: How long ago was this?

ALEXANDER: About seven years ago, coming up seven years.

INT: So, you were kind of in the middle of high school type thing?

ALEXANDER: Em I'd got into year ten, finished one set of school in Austria and came into year ten in England which, we never had course work in Austria and stuff like that so it was quite difficult so em, school uniform we didn't have, so it was all new experiences, and out of a class of thirty, I can't remember names, I just didn't know anyone, so em one of my mates, I met him in our history class and I sat next to him and he's now my best friend you know, we went out to em school discos and stuff like that and he took me under his wing and, yeah nice lad.

Figure 10: Excerpt from a transcript with speaker IDs

To add existing transcripts,

- Click on **Add New File**.
- In the following screen that pops up, check **“Detect speakers”**.
- Then click **Proceed**.

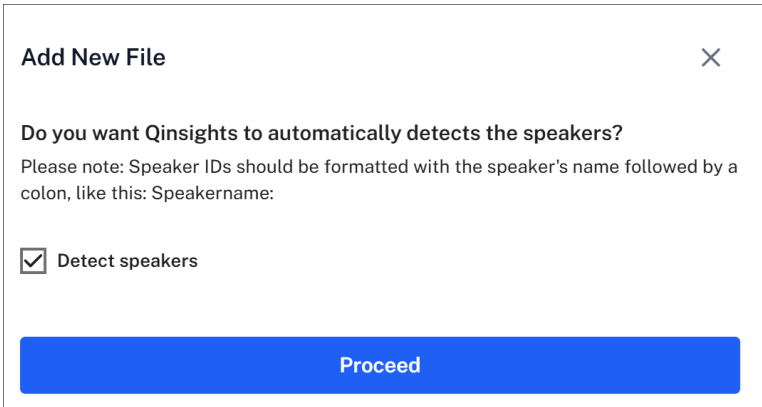


Figure 11: When uploading transcript, select the detect speaker option

**Tipp**

**✗ Don't** use a generic speaker ID for respondents.

When recommend that you **do not use generic names** like R: for respondent, speaker 1 and speaker 2, or speaker A and speaker B. This will make it difficult for you in the analysis to distinguish the speakers/respondents from various documents or focus groups.

When you transcribe the data yourself, or get transcription from another service, you may want to anonymize the data. Instead of using generic names, you can make up random names

that DO NOT link back to the original respondents. This way you have unique names for each respondent, which will facilitate the analysis.

### Adding Reports, Notes, etc in Word or PDF format

Besides transcripts, you can also analyse other text data in Word or PDF format like reports, observational notes, newspaper or journal articles, etc.

If you add those document, you do not select the Detect Speaker option and simply click **Proceed**.

### Preparing Excel Files

Excel files are well suited for analysing short to medium-length text entries that are organised row by row. This includes classic open-ended survey responses, but also many other types of qualitative feedback such as social media comments, customer reviews, evaluation comments, app or game feedback, and similar text-based responses.

In general, we recommend working with files of up to about 1,000 cases per Excel file. Slightly larger files may still work, depending on the length and complexity of the responses, but very large datasets should be split into smaller files.

**Please prepare Excel files as follows:**

- Remove all header and footer information.
- The Excel file should contain only one sheet.
- Each row should represent one case, response, or unit of analysis.

	A	B	C	D	E
1	column header 1	column header 2	column header 3	column header 4	column header 5
2	data	data	data	data	data
3	data	data	data	data	data
4	data	data	data	data	data
5	data	data	data	data	data
6	data	data	data	data	data
7	data	data	data	data	data

Figure 12: Required input for Excel files

Column headers may include case IDs, names, variable names, numbers of likes for social media data, titles of open-ended questions, columns containing customer reviews, or other text data you want to analyse.

**QInsights reads these columns automatically and adds them to the Data Context**, where they can be used for filtering, comparison, and subgroup analysis.

	A	C	D	E	F	G	H
1	Case ID	Gender	Number of children	Marital status	Education	Q1: Reasons for having children	Q2: Reasons for not having children
2	case 1	male	1	divorced	highschool	Children whittle away your time in ways that are ultimately beneficial: they have an uncanny knack for getting rid of the meaningless hobbies that used to consume you.	Responsibility. All of life's prior responsibilities pale in comparison. If you decide to have a child, that new person must absolutely be your top priority. As your child will remind you when he or she is older and something goes wrong, "I didn't ask to be born." A child is a life long commitment to a person who is in 0cent of this choice.
3	case 2	female	0	single	some college	To Fulfill my devotion to children: so far I am a favorite aunt and my heart breaks a little bit every time my nieces and nephews walk out your door and into their parent's car. It's time for me to be the favorite mom instead.	Caring for a child takes a lot of physical and emotional energy, made all the harder by babies that only sleep for ninety minutes at a time. Many parents of much older children seem to forget how hard the first few months were as they look at the past with rose colored glasses. Don't believe them. Parents need sleep to work well, and they often can't get it.
4	case 3	female	2	divorced	university degree	We are both past age 35 and are concerned that if we put off having children any longer, I might have trouble getting pregnant or have complications in pregnancy or delivery.	A baby takes so much time and attention that spouses must already have a great friendship and work well together before the baby arrives. It is a certainty that one spouse will disagree with the other about decisions on how to care for the child. It is likely that one spouse will resent the lost time with the other. A marriage with some difficulties will get much worse when a baby is crying and the parents are sleep deprived.

Figure 13: Example input: Survey with two open ended questions

### Tipp

We recommend shortening long open-ended questions used as column headers in order to save space on your screen. Do not include the full question text in the header if it is very long.

### Example

**Full question:** What qualities, abilities or skills do we need to develop to build a sustainable future for people and planet? Please add three suggested qualities/abilities/skills below. You may suggest more later. Only give one or a few words here, more space to explain these suggestions will follow.

**Shorten version:** What qualities, abilities or skills do we need to develop?

You can include the full-length questions in the QInsights' project description, if you think it is relevant for the AI-assistant to have this information.

### Adding an Excel File to a Project

To add an Excel file,

- Click on **Add New File**.
- A screen pops up. Do not select anything and click **Proceed**.

- Next you see a window that displays the list of columns contained in the file.

The screenshot shows a 'Columns List' window with a close button (X) in the top right corner. The window contains a table of columns with the following details:

Column Name	is a variable	Data Type
Case ID	<input type="checkbox"/>	text
Gender	<input checked="" type="checkbox"/>	text
Number of children	<input checked="" type="checkbox"/>	text
Marital status	<input checked="" type="checkbox"/>	text
Education	<input checked="" type="checkbox"/>	number
Q1: Reasons for having children	<input type="checkbox"/>	text
Q2: Reasons for not having children	<input type="checkbox"/>	text

At the bottom of the window, there are two buttons: 'Close' and 'Save'.

Figure 14: Classify column as data context or data to be analysed

At this stage, you define which columns should be treated as **profile data** and which columns contain the **text data to be analysed**.

For each column, decide whether it should be added to the **Data Context**. To do so, select **is a variable** for all columns that contain background information, identifiers, ratings, or other metadata you want to use later for filtering, comparison, or subgroup analysis.

Examples of columns that are often added as variables include:

- gender
- age
- education
- marital status
- number of children
- ratings or recommendation scores

Columns that contain the actual text responses to be analysed, such as answers to open-ended questions, review text, comments, or feedback, should not be marked as variables.

For each selected variable, you also need to define the **type** of profile characteristic:

- **Text** for categories or labels such as gender, education, or department
- **Number** for numeric values such as age, year, score, or number of children
- **Boolean** for values with two possible states, such as yes/no or true/false

After you have made your selection, click **Save**.

Once saved, the selected variables are added automatically to the **Data Context** and can later be used for comparison, and subgroup analysis.

This step is important because it tells QInsights which parts of the spreadsheet provide analytic context and which parts contain the material to be analysed.

### **Tipp**

Classify case IDs or other identifiers as data to be analysed and not as variables. This way you can ask to include case IDs or other identifiers as references in a chat answer.

## Subgroup Analysis for Excel Data

**Note:** QInsights supports subgroup analysis for Excel data in different ways, depending on the analysis type.

In **Conversational Analysis**, subgroup analysis is the most flexible. You can refer directly to profile data in your prompt, for example by asking about responses from women, younger participants, or respondents with a certain rating. QInsights can then use this contextual information to focus the analysis on the subgroup you specify.

For **Sentiment Analysis**, subgroup exploration is often most useful in a **follow-up chat**, where you can ask more targeted questions about specific respondent groups or profile characteristics.

For **Theme Analysis**, respondent filters set in advance are recognised during the analysis. This allows you to run the analysis on a defined subset of the Excel data. At present, however, the applied filter is not shown in the exported results. For clarity, we therefore recommend including the filter setting in the file name when exporting the analysis.

In practice, this means:

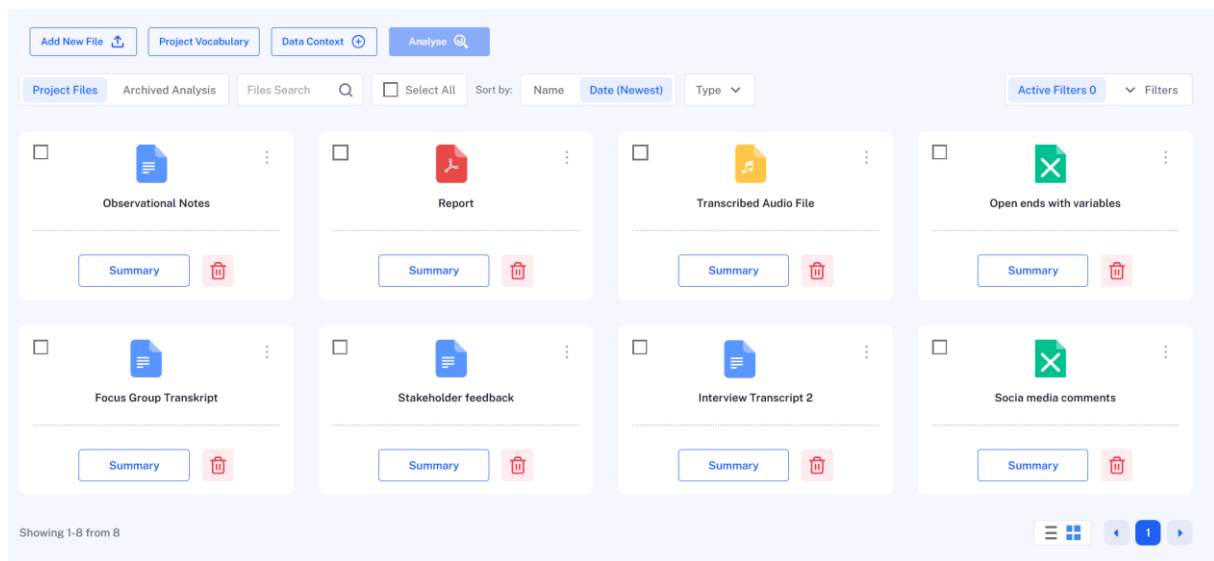
- use **Conversational Analysis** when you want the most flexible subgroup analysis for Excel data
- use **follow-up chats** to explore subgroup differences after a **Sentiment Analysis**
- include the applied filter in the file name when exporting the results of a **Theme Analysis**

## Project View After Data Are Uploaded

Below you see a project containing examples of all supported file types.

In practice, **we recommend creating a separate project for survey data** stored in Excel files. Excel data are processed differently from Word, PDF, audio, or video files, and they cannot be combined with these other file types in a single analysis.

Keeping Excel-based survey data in a separate project also helps keep the **Data Context** manageable. Additional variables from the spreadsheet are imported automatically, and if a file contains many columns, this can quickly make the data context more complex.



## Document Cards

Each uploaded file is displayed as a **document card** in the project view. The document card shows basic information about the file and provides quick access to actions such as viewing a summary, deleting the file, or opening additional options from the three-dot menu.

**Note:** If the Summary Button in document cards for Word and PDF file faded, this means that no summary was created during import. It is best to remove the document and upload it again. The summary for Excel files will appear upon reload.

## Three-dot menu

When you click on the three dots, in a document card for **Word, PDF or Excel files**, you have the following options:

- Opening a preview of the document.
- Rename the document.

- See the speakers that have been identified in the document.

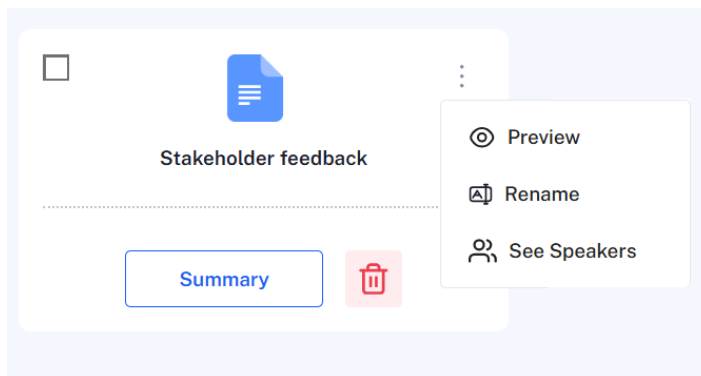


Figure 15: The three-dot menu für Word and PDF files

The **document card for transcript** has an addition option: Edit document, in case you want to make changes to your transcript. See **Uploading and Transcribing Audio Files** for further details.

## Deleting Project Documents

### Deleting a single document:

- Click on the bin icon in the document card.

### Deleting multiple document:

- Select the documents you want to delete.
- Click on the bin icon in the document card.

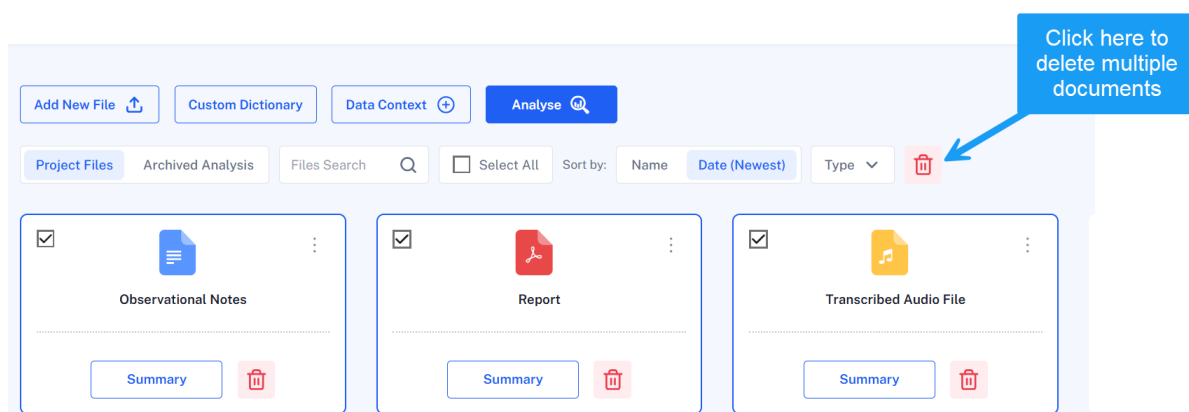


Figure 16: Deleting multiple documents at once

## Sorting Documents

You can sort document cards in the project view to change the order in which uploaded files are displayed.

The following sort options are available:

### **Name (A–Z)**

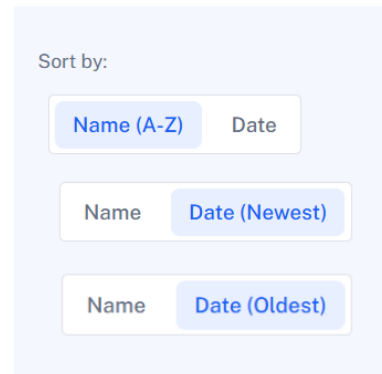
Displays documents in alphabetical order by file name.

### **Date (Newest)**

Displays the most recently uploaded documents first.

### **Date (Oldest)**

Displays the earliest uploaded documents first.



Sorting can help you find documents more quickly, especially in larger projects with many uploaded files.

## Data Context

Data Context helps you define how QInsights should understand and organise your data before analysis. It allows you to assign speaker roles, create characteristics for speakers or documents, and enter the corresponding values. This provides important context for the AI and supports more precise comparisons, filtering, and interpretation.

DATA CONTEXT ×

### Define Analysis Parameters

**Roles**  
Set analytic intent

**Profiles**  
Define characteristics for respondents and documents to support filtering and comparative analysis.

**Values**  
Enter corresponding values for respondents and documents.

---

AI GUIDANCE

#### Roles

Assign a role to each speaker so Q interprets contributions correctly. i Re-detect respondents Save roles

Document	2024_03_14_LautesDenken_LK5.docx	2 speaker(s)
Interviewer	Respondent	Evidence – quoted, themed, counted
LK5	Interviewer / Moderator	Context – frames questions, never analysed

Document	LOUISE Part 2 audio.mp3	2 speaker(s)
Speaker A	Respondent	Evidence – quoted, themed, counted
Speaker B	Interviewer / Moderator	Context – frames questions, never analysed

Figure 17: Set your data context

Use Data Context when you want to distinguish between different speaker roles, describe respondents or documents with relevant characteristics, or prepare your project for subgroup analysis.

### Roles

In the Roles section, you assign a role to each speaker in a document. This helps QInsights interpret contributions correctly during analysis.

For interview and focus group data, this distinction is especially important. Contributions from respondents are treated as analytic evidence and can be quoted.

Contributions from interviewers or moderators are treated as contextual material that frames the conversation but is not analysed as data.

## Profiles

In the Profiles section, you define the characteristics you want to use for speakers or documents. A profile can be applied either to a speaker or to a document and can have one of three data types:

- Text
- Number
- Boolean

Create profiles for any characteristic that may later help you compare cases, filter data, or build meaningful subsets.

Examples of document profiles include source, document type, year, location, organisation, or project.

Examples of speaker profiles include age, gender, profession, role, affiliation, stakeholder group, or interview experience.

## Values

In the Values section, you enter the actual values for the profiles you created. You can switch between document view and respondent view, depending on whether the characteristic applies to documents or speakers.

This is where you specify, for example, that a respondent is 34 years old, works in healthcare, and belongs to a particular stakeholder group, or that a document comes from a certain country, year, or source.

These values make it possible to compare groups, focus on subsets of data, and conduct more targeted analysis.

### **Why Data Context matters**

Adding context improves the quality of analysis. It helps QInsights distinguish between evidence and framing, interpret responses in relation to speaker or document characteristics, and support comparisons across groups or data sources.

- Data Context is particularly useful when:
  - you work with interviews or focus groups involving multiple speakers,
  - you want to compare responses across participant groups,
  - you analyse mixed datasets from different sources,
  - or you work with larger datasets and need structured filtering options.

## Assigning Speaker Roles

### To assign speaker roles

1. Open **Data Context** (when uploading interview or focus group transcript, QInsights will automatically open the data context for you).
2. Select the **Roles** tab.
3. For each document, review the listed speakers.
4. Use the dropdown menu next to each speaker name to assign the correct role.
5. Click **Save roles**.

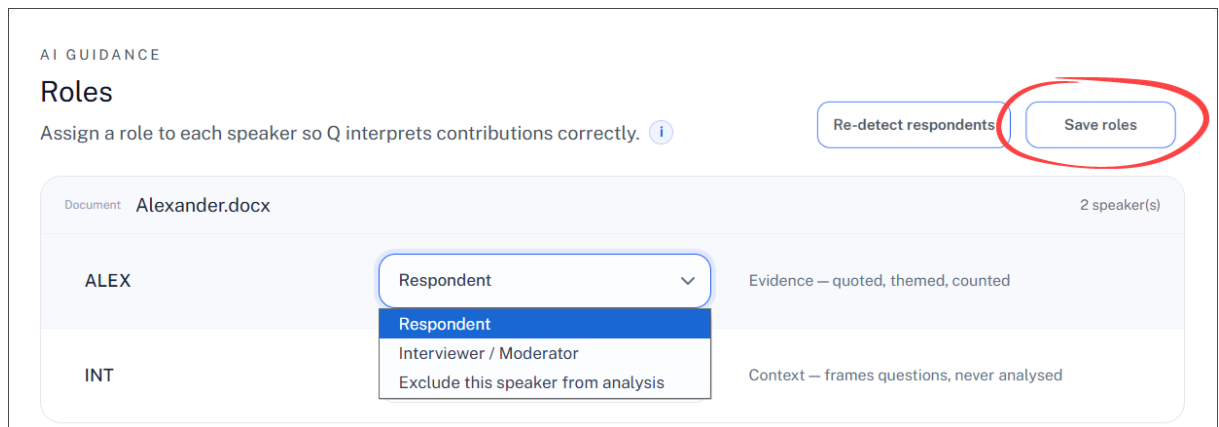


Figure 18: Assign roles

**Note:** If speakers are missing or you think they have not been properly identified, you can re-run the process by clicking **Re-detect respondents**.

## Creating Respondent or Document Profiles

1. Open **Data Context**.
2. Select the **Profiles** tab.
3. Click **Add Characteristic**.
4. Enter a name for the characteristic.
5. Select the **Type**:
  - **Text**
  - **Number**
  - **Boolean**
6. In the column: **Applies to** select whether the characteristic belongs to a **Speaker** or a **Document**.
7. Click **Save**.

DATA CONTEXT

## Define Analysis Parameters

**Roles**

Set analytic intent

**Profiles**

Define characteristics for respondents and documents to support filtering and comparative analysis.

**Values**

Enter corresponding values for respondents and documents.

1. Add characteristic.
2. Define Type: Text, Number, Boolean.
3. In the column **APPLIES TO** select whether a characteristic describes a respondent (e.g., age, role, education) or a document (e.g., source).

NAME	TYPE	APPLIES TO	
<input type="text" value="Source"/>	<input type="text" value="Text"/>	<input type="text" value="Document"/>	<input type="button" value="🗑"/>
<input type="text" value="Age"/>	<input type="text" value="Number"/>	<input type="text" value="Speaker"/>	<input type="button" value="🗑"/>
<input type="text" value="Gender"/>	<input type="text" value="Text"/>	<input type="text" value="Speaker"/>	<input type="button" value="🗑"/>
<input type="text" value="Likes chocolate"/>	<input type="text" value="Boolean"/>	<input type="text" value="Speaker"/>	<input type="button" value="🗑"/>

Figure 19: Create respondent or document profile

## Data types

### Text

Use for categories or labels such as gender, department, role, source, or country.

### Number

Use for numeric values such as age, year, income, or score.

### Boolean

Use for values with two possible states, such as yes/no, true/false, or present/not present.

### Examples of document profile characteristics

- Source / Document type / Year / Country / Organisation / Department / Project phase

### Examples of speaker profile characteristics

- Age / Gender / Role / Profession / Affiliation / Stakeholder group / Level of experience

**Note:** Create only those profiles that are relevant for later comparison or filtering. Too many unnecessary fields make the setup more complex without improving the analysis.

## Adding Values to Document or Respondent Characteristics

Use the **Values** section to enter the actual values for the profiles you created.

DATA CONTEXT

### Define Analysis Parameters

**Roles**  
Set analytic intent

**Profiles**  
Define characteristics for respondents and documents to support filtering and comparative analysis.

**Values**  
Enter corresponding values for respondents and documents.

Use the view toggle to switch between documents and respondents views to enter attribute values

VIEW BY

Documents Respondents All changes saved

FILE	RESPONDENT ↓	AGE ↓	GENDER ↓	LIKES CHOCOLATE ↓
1	ALEX	23	male	false
3	DEBORAH	24	female	true
4	SHAZIA	20	female	false
2	TREVOR	31	male	true

Figure 20: Adding corresponding values for each characteristic

You can switch between **Documents** and **Respondents** view, depending on whether the profile applies to documents or speakers.

### To enter values

1. Open **Data Context**.
2. Select the **Values** tab.
3. Choose the appropriate view:
  - **Documents** for document-level profiles
  - **Respondents** for speaker-level profiles
4. Locate the document or respondent in the table.
5. Enter the relevant values in the corresponding columns.
6. Repeat this for all relevant rows.

Changes are saved automatically once entered.

## Making Use of Respondent and Document Profiles

Profile data gives QInsights important context about your documents and respondents. The AI assistant can take this information into account during analysis, even when no filter is set. For example, you can ask directly about differences by gender, role, department, or any other profile characteristic included in your data context.

Filters are therefore not required in order to analyse group differences. **Their main purpose of using filters is to create subsets of the data and reduce the scope of analysis when this is helpful.**

Working with subsets can be useful when datasets are larger or more diverse. If too much data is analysed at once, answers may become more general, nuanced differences may receive less attention, and some aspects of the data may be flattened or left out. In addition, very large outputs can become harder to review and interpret.

Using filters allows you to focus on a selected part of the data, for example one respondent group, one department, one region, or one document type. This can make the analysis more manageable and help you examine patterns in greater depth. In practice, it is often easier to work step by step with smaller, meaningful subsets than to analyse a very large volume of data all at once. See also **Querying All Data vs. Subsets: Striking the right balance in analysis.**

## Analysing Data

### Selecting Documents for Analysis

Before you can start an analysis, you need to select the documents that should be included. The **Analyse** button becomes active only after at least one document has been selected.

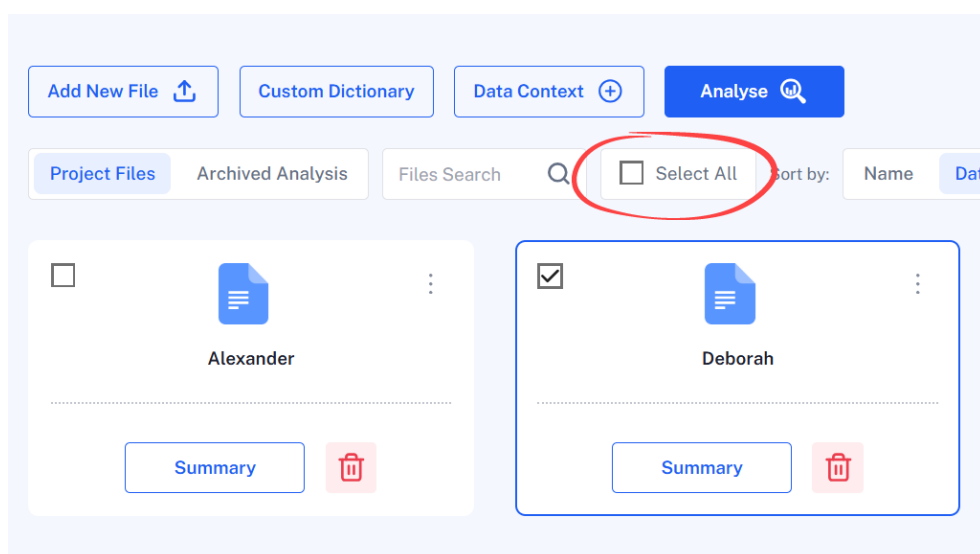


Figure 21: Selecting documents for analysis

To select individual documents, click the small checkbox in the upper-left corner of each document card. A check mark indicates that the document is included in the analysis.

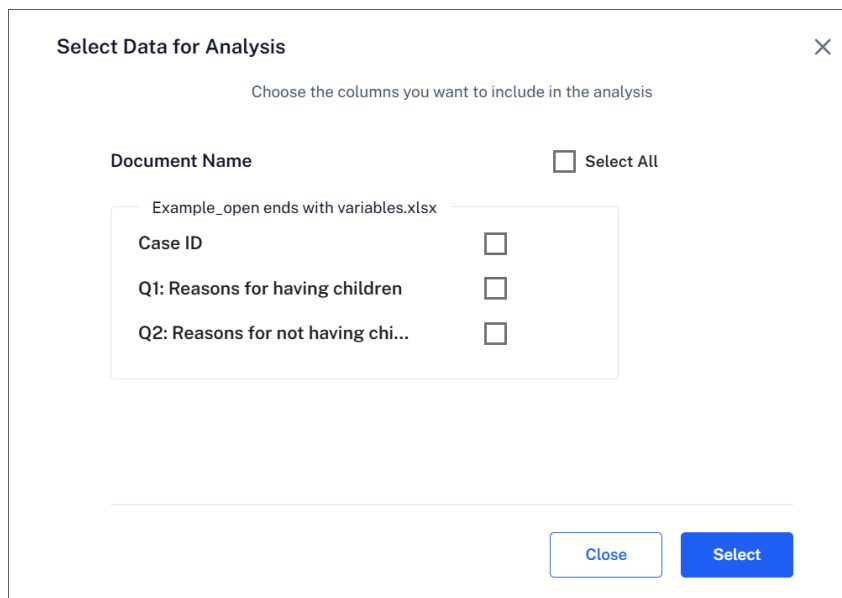
If you want to include all documents currently displayed in the project view, click **Select All**.

Another way to define the set of documents for analysis is by using **Filters**. This is especially useful in larger projects. When working with 10 or more documents, filters are often the easier way to create a meaningful subset. In smaller projects, manual selection is usually quicker. See **Selecting Documents Via** for further detail.

Use manual selection when you want to choose a few specific files directly. Use filters when you want to include documents based on shared characteristics, such as document type, profile data, or another defined subset.

## Selecting What to Analyse in Excel Files

When you start an analysis with an Excel file, QInights asks you to select which columns should be included in the analysis.



The screenshot shows a dialog box titled "Select Data for Analysis" with a close button (X) in the top right corner. Below the title is the instruction "Choose the columns you want to include in the analysis". The main area is titled "Document Name" and contains a list of columns with checkboxes: "Case ID", "Q1: Reasons for having children", and "Q2: Reasons for not having chi...". There is also a "Select All" checkbox. At the bottom are "Close" and "Select" buttons.

Figure 22: Selecting what to analyse in Excel files

This step is necessary because it often does not make sense to analyse all columns, e.g. all answers to open-ended questions together.

In the **Select Data for Analysis** window, QInights displays the available data columns for the selected Excel file. Use the checkboxes to choose the columns that contain the text you want to analyse. You can select individual columns or use **Select All where it makes sense** to include all available text columns at once.

Adding the **Case ID** column to the analysis allows you to include the case ID as reference if you ask for direct quotes.

After making your selection, click **Select** to continue with the analysis.

## Selecting Documents Via Filters

**Note:** The filter setting currently cannot be used in combination with a Grid Analysis. Also see the recommendation for Excel files (Subgroup Analysis for Excel Data)

To set one or multiple profile characteristics as filter:

- Navigate to the **Filter** button on the right-hand side of the screen to set a filter.
- Select either **Document** or **Speaker Filter**.

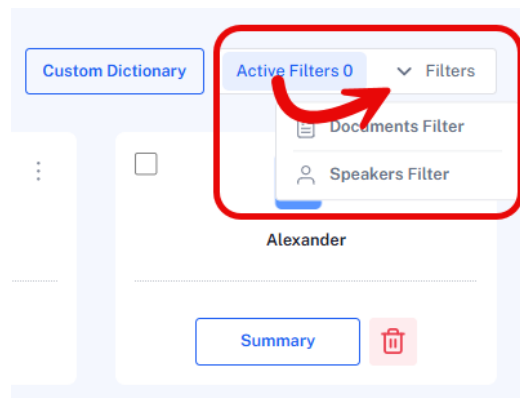


Figure 23: Setting a filter

Depending on which filter you have chosen, a window opens listing the available profile characteristics. If you have not yet entered any, see **Data Context** for further information:

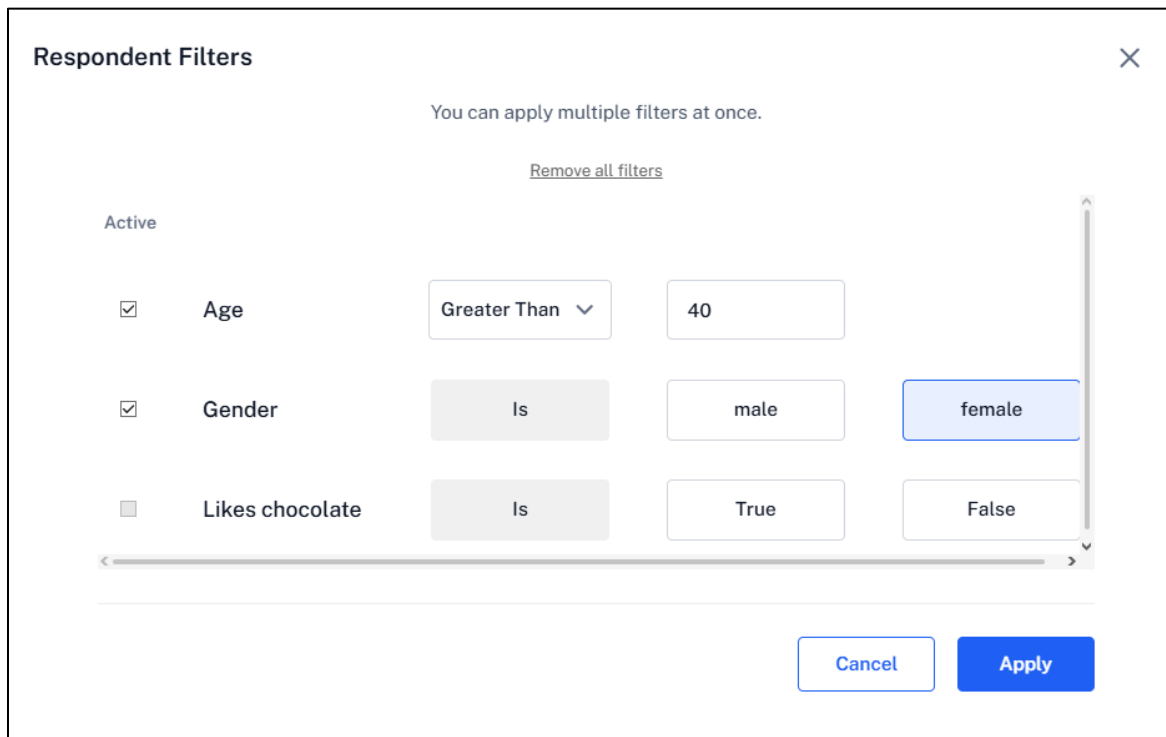
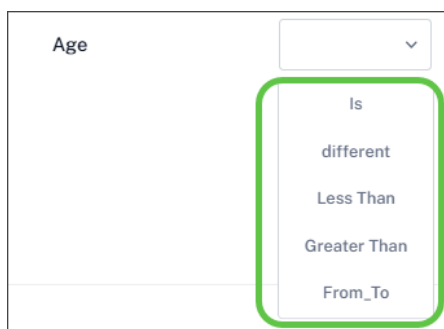


Figure 24: Setting a filter. Here the user wants to focus the analysis on all female respondents, age 40 or older.

When setting a characteristic of type **text**, all values that you entered will be shown.

When setting a characteristic of type text or **Boolean** as filter, the options are True or False.

If you select a characteristic of type **number**, you can select the following options: is, different, less than, greater than, from\_to:



*Figure 25: Options when selecting a numeric value as filter*

You can select values of multiple characteristics like Gender and Age: all women [Greater Than] 40 for “all woman older than 40”, as shown in the screenshot.

- Make your selection.
- The selected characteristic is activated automatically.
- Next click **Apply**.

All documents that pass the filter will remain in the subsequent analyses, all others will be filtered out and hidden from view.

## Display of Active Filters

The filter that has been applied is displayed at the top of the documents list in your project and in any analysis that you now run (with the exception of Grid Analysis). The number of filters that have been applied is displayed in the **Active Filters** tab.

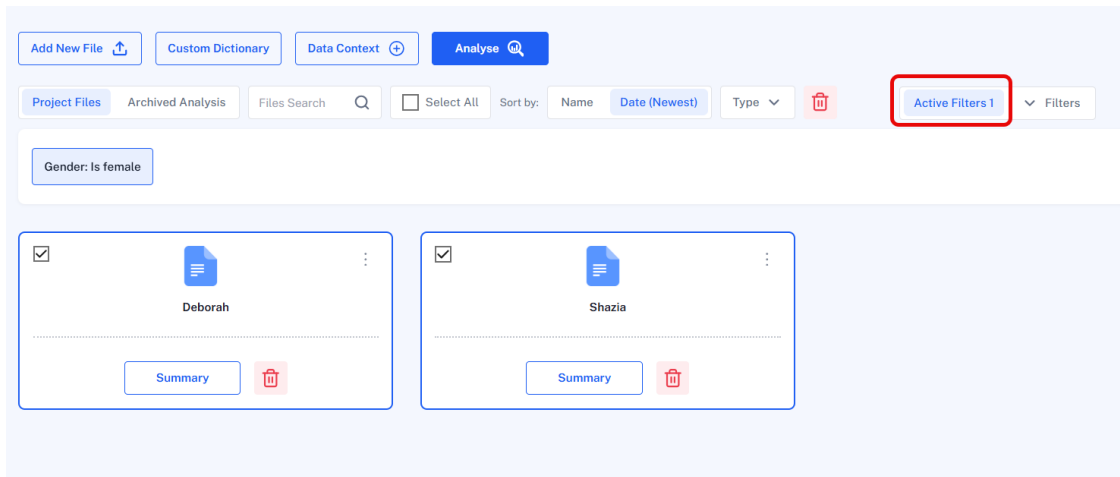


Figure 26: Display of active filter setting

## Removing a Filter

To remove a filter,

- Click on the **Filters** tab and select Document or Speaker Filter.
- Click “**Remove all filters**” and click **Apply**.

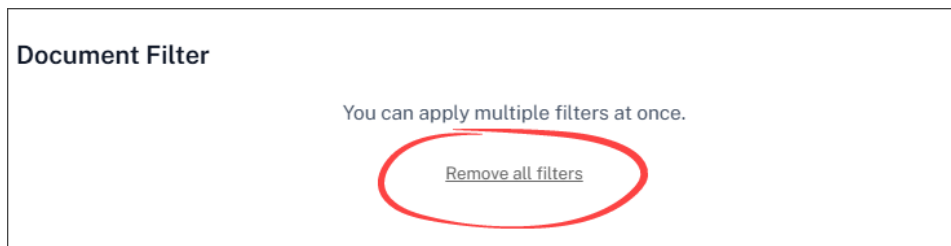


Figure 27: Remove a filter

## The Five Analysis Options

QInsights offers five analysis options to support different types of qualitative data and different analytic goals. Some options are designed to give you a structured overview of your material, while others support a more focused or interactive exploration of the data.

Which option you choose depends on the type of data you uploaded and what you want to find out. You may want to identify broad patterns across a dataset, compare what individual respondents have said, explore the material through targeted questions, or examine evaluative language in open-ended responses.

The analysis options are not all built for the same purpose. Each one supports a different analytic task and is suited to particular data formats. The overview below introduces the available options and indicates which file types are supported.

The screenshot shows a 'Select Analysis' interface with five radio button options, each with a title and a brief description. At the bottom right, there are two buttons: 'Back' and 'Analyse'.

- Theme Analysis**  
Extract themes & ask further questions
- Conversational Analysis**  
Interact with your data through dialog
- Guided Conversational Analysis**  
Interact with your data through guided dialog
- Grid Analysis**  
Ask a question and view the results displayed in a table format organized by respondents. Tailored for interviews and focus groups
- Sentiment analysis**  
Customizable: Define your own classification criteria (Requires a single .xlsx or .csv Document!).

Buttons: [Back](#) [Analyse](#)

Figure 29: Overview of analysis options

### Theme Analysis (docx, PDF, Excel)

Theme Analysis scans your data to identify recurring topics, ideas, and patterns. QInsights groups related content into themes, generates a title for each theme, and provides a short description supported by references from the data. It is useful when you want a first structured overview of the main issues in a dataset.

## Grid Analysis (docx, PDF)

Grid Analysis helps you compare what individual respondents have said about a question or topic. The results are displayed case by case, making it easier to review similarities, differences, and patterns across interviews or focus groups. It is especially useful when the respondent perspective needs to remain visible.

## Conversational Analysis (docx, PDF, Excel)

Conversational Analysis is an open, interactive way of working with your data. You ask questions, refine them, and follow up on emerging insights while QInsights retrieves and analyses relevant material from the dataset. It is useful when you want to explore the data in a flexible and researcher-led way.

## Guided Conversational Analysis (docx, PDF, Excel)

Guided Conversational Analysis supports you step by step in exploring a theme or topic in more depth. Instead of starting with your own prompt, QInsights guides the process by suggesting a structured sequence of analytic questions. This helps you move from an initial overview to a more focused interpretation of patterns, differences, and underlying meanings in the data.

## Sentiment Analysis for semi-structured data (Excel)

Sentiment Analysis for semi-structured data examines evaluative expressions in open-ended responses. Rather than limiting the analysis to positive, negative, or neutral, QInsights allows you to define the dimensions you want to analyse, such as satisfaction, frustration, or trust, in relation to a specific topic. This is especially useful for survey comments and other short-text feedback.

## Analysis Archive

The **Analysis Archive** stores all completed analyses within a project. It allows you to return to earlier results, review previous work, and organise analyses in a way that supports ongoing research.

To access the archive:

- Click on **Archived Analysis** option in your project menu.

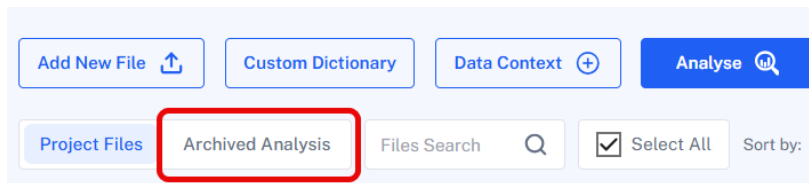


Figure 30: Open the Analysis Archive

You can view the archive in two different ways:

### List View

List View displays all archived analyses in a single list. This view is useful when you want to scan analyses by name, file, date, analysis type, or status.

### Folder View

Folder View allows you to organise analyses into folders. This is useful when you want to group analyses by topic, research question, phase of the project, or any other logic that helps structure your work.

To switch between views, click **View** and select either **List View** or **Folder View**.

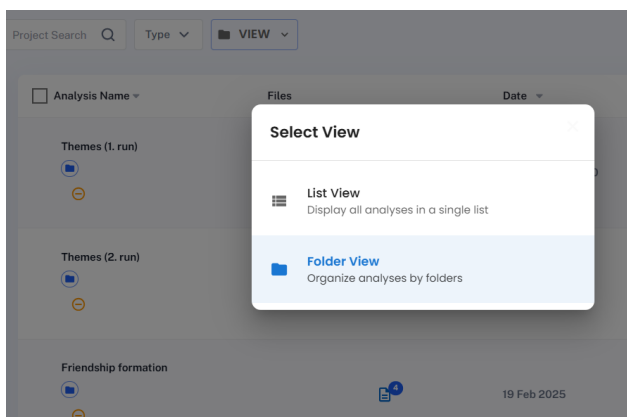


Figure 31: Switching the Archive View between Folder and List View

Below you see the archive in folder view:

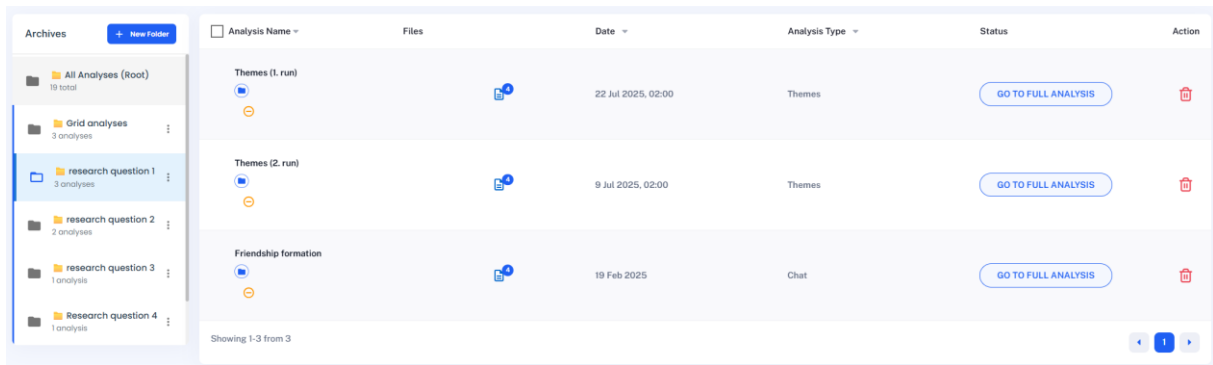


Figure 32: Analyses Archive

## Archive Options

Click on any of the column headers to sort the analysis by date, type of analysis name.

You can continue a chat or extend a grid analysis by opening an analysis in the archive. Click on **Go to Full Analysis** to open a previously conducted analysis.

In the Files column, the number indicates how many documents are included in the analysis. If you click on it, it will show the list of documents:

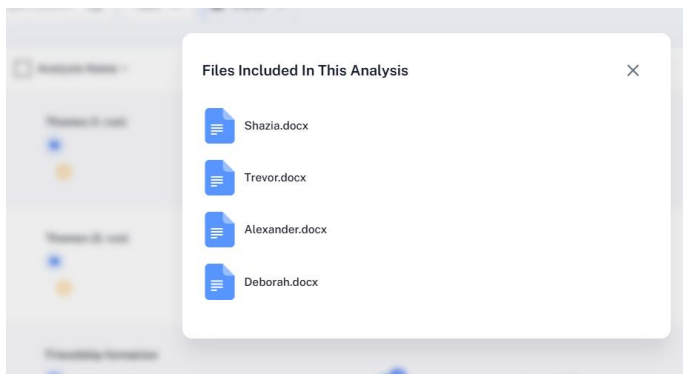


Figure 33: Inspect the documents on which an analysis is based on

**To rename an analysis**, right click in the name field and edit the name.

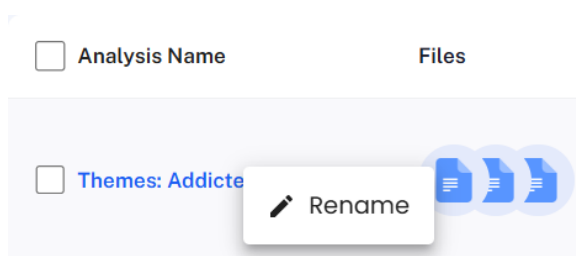


Figure 34: Renaming an analysis

Not all analyses are named in the same way.

For **Theme Analysis**, names are generated automatically, for example `theme_1`, `theme_2`, and so on. You can rename these analyses to make the archive easier to read and manage.

For **Conversational Analysis and Grid Analysis**, you normally enter a name yourself when starting the analysis. An exception is a Conversational Analysis that is auto-saved after an accidental closure or a system crash. In that case, the analysis name is generated automatically from the first words of the first query.

Renaming analyses is useful when you want to make repeated runs easier to distinguish. For example, you may want to rename analyses as Theme Analysis (Run 1) and Theme Analysis (Run 2), or include the subset used, such as Theme Analysis – Female Respondents or Grid Analysis – Department A.

Clear names also make the archive easier to sort and navigate. Since analyses are listed in alphabetical order, a consistent naming convention helps keep related analyses together and makes them easier to find later.

Use names that are short but informative enough to show the type of analysis, the run number, or the subset of data used.

## Follow-up Chats in the Archive

For **Theme Analysis**, **Grid Analysis**, and **Sentiment Analysis**, you can start a **follow-up chat** to explore the results in more depth.

A follow-up chat opens an interface that looks like the regular **Conversational Analysis** view. The difference is that it does not start from scratch. Instead, it builds on the analysis that has already been completed.

This allows you to ask additional questions about the existing results, clarify specific findings, examine certain themes or respondent patterns more closely, and continue working from the context of the original analysis.

Use a follow-up chat when you want to go beyond the first output without running a completely new analysis. For example, you may want to:

- ask for more detail about one theme
- compare specific respondents or groups
- explore exceptions or contradictions
- deepen the interpretation of a sentiment category

Because the follow-up chat is linked to the previous analysis, it helps you continue the analytic process in a focused way while keeping the earlier results as your starting point.

## Display of Follow-Up Chats in the Analysis Archive

If a Theme Analysis, Grid Analysis, or Sentiment Analysis includes one or more follow-up chats, an arrow is displayed in front of the analysis name. Beneath the name, you also see the number of follow-up chats linked to that analysis.

**Click the arrow to expand the entry** and display the available follow-up chats.

This allows you to see which follow-up explorations belong to a particular analysis and to reopen them directly from the archive.

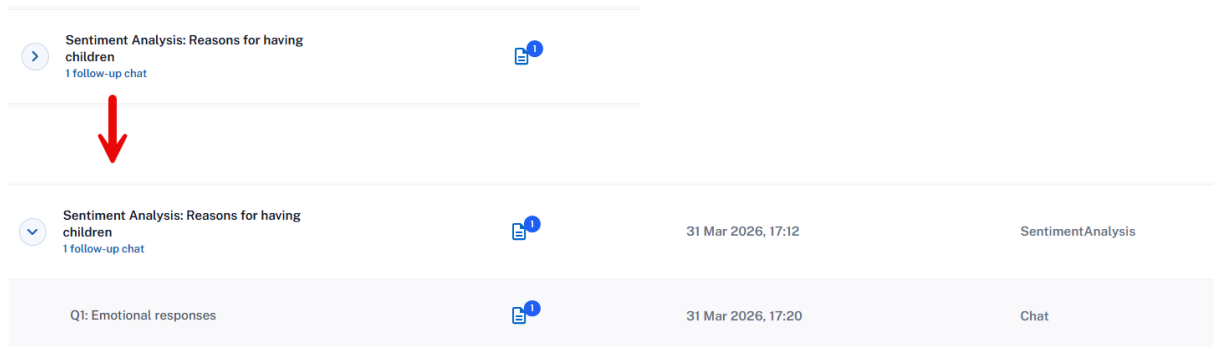


Figure 35: Display of follow-up chats

## Theme Analysis

QInsights can extract themes from Word, PDF, and Excel files, each serving different purposes:

**Word files** are typically used for interview or focus group transcripts.

**PDF files** often contain articles and reports.

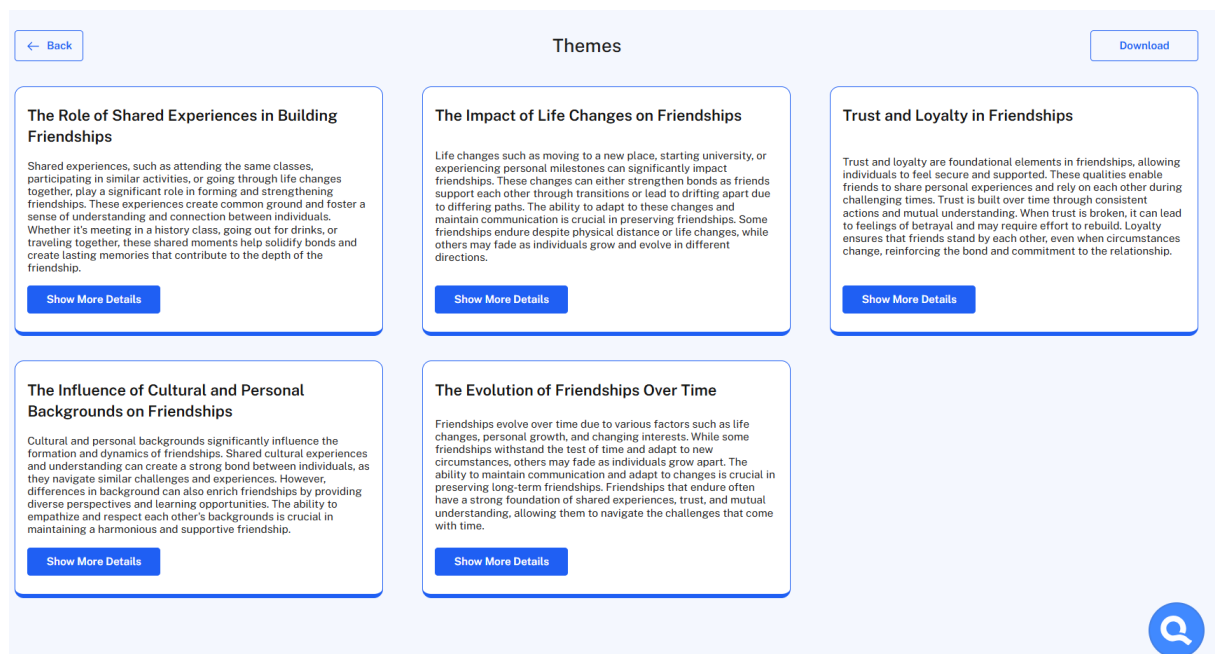
**Excel files** are ideal for analysing open-ended responses from surveys, discussion boards, stakeholder feedback, or social media comments.

### A Content Mapping Approach

Theme Analysis provides you with a **high-level overview of your data** by identifying key topics or content areas within the uploaded documents. Think of it as creating a content map of your data, highlighting areas of interest to guide deeper exploration.

While the term "theme" may evoke associations with thematic analysis approaches like those of Clarke and Braun, in QInsights themes are data-driven insights that surface early in the process to help you navigate and explore your material.

The themes are exploratory and designed to provide pragmatic, actionable starting points. It enables you to interact with your data in a meaningful way while retaining control over the direction and depth of the analysis.



The screenshot displays a user interface titled "Themes". At the top left is a "← Back" button and at the top right is a "Download" button. The main area contains five theme cards, each with a title, a short paragraph of text, and a "Show More Details" button. The themes are:

- The Role of Shared Experiences in Building Friendships**: Shared experiences, such as attending the same classes, participating in similar activities, or going through life changes together, play a significant role in forming and strengthening friendships. These experiences create common ground and foster a sense of understanding and connection between individuals. Whether it's meeting in a history class, going out for drinks, or traveling together, these shared moments help solidify bonds and create lasting memories that contribute to the depth of the friendship.
- The Impact of Life Changes on Friendships**: Life changes such as moving to a new place, starting university, or experiencing personal milestones can significantly impact friendships. These changes can either strengthen bonds as friends support each other through transitions or lead to drifting apart due to differing paths. The ability to adapt to these changes and maintain communication is crucial in preserving friendships. Some friendships endure despite physical distance or life changes, while others may fade as individuals grow and evolve in different directions.
- Trust and Loyalty in Friendships**: Trust and loyalty are foundational elements in friendships, allowing individuals to feel secure and supported. These qualities enable friends to share personal experiences and rely on each other during challenging times. Trust is built over time through consistent actions and mutual understanding. When trust is broken, it can lead to feelings of betrayal and may require effort to rebuild. Loyalty ensures that friends stand by each other, even when circumstances change, reinforcing the bond and commitment to the relationship.
- The Influence of Cultural and Personal Backgrounds on Friendships**: Cultural and personal backgrounds significantly influence the formation and dynamics of friendships. Shared cultural experiences and understanding can create a strong bond between individuals, as they navigate similar challenges and experiences. However, differences in background can also enrich friendships by providing diverse perspectives and learning opportunities. The ability to empathize and respect each other's backgrounds is crucial in maintaining a harmonious and supportive friendship.
- The Evolution of Friendships Over Time**: Friendships evolve over time due to various factors such as life changes, personal growth, and changing interests. While some friendships withstand the test of time and adapt to new circumstances, others may fade as individuals grow apart. The ability to maintain communication and adapt to changes is crucial in preserving long-term friendships. Friendships that endure often have a strong foundation of shared experiences, trust, and mutual understanding, allowing them to navigate the challenges that come with time.

At the bottom right of the interface is a circular search icon.

Figure 36: Themes as a map of contents

## The Value of Theme Analysis

The value of Theme Analysis extends beyond simple identification and exploration. With the insights gained from the initial themes, you can make informed decisions on how to allocate

your research efforts effectively. This could mean choosing to delve deeper into highly prevalent themes or exploring fewer common topics that could uncover unique insights.

Ultimately, Theme Analysis in QInsights is not just about understanding what your data contains; it's about strategically using that knowledge to drive your research forward. Whether you're conducting academic research, market analysis, or evaluating user feedback, the themes provide a robust foundation for developing deeper, actionable insights that can influence real-world decisions and strategies.

By mapping out the main themes and their connections, you can develop a comprehensive understanding of your data landscape, which empowers you to navigate through your data with precision and purpose. It equips you with a content map that is both a snapshot of your current data and a compass guiding your future research directions.

With this content mapping approach, QInsights not only simplifies the complex process of data analysis but also amplifies your ability to extract and utilize knowledge, turning unstructured data into a structured opportunity for growth and discovery.

## How Theme Analysis Works

**Initial Suggestions:** QInsights analyses the provided dataset and identifies 2 to 10 themes, each representing a significant topic or pattern in the data. These themes are automatically extracted using state-of-the-art AI, leveraging the documents' content to highlight potential areas of interest.

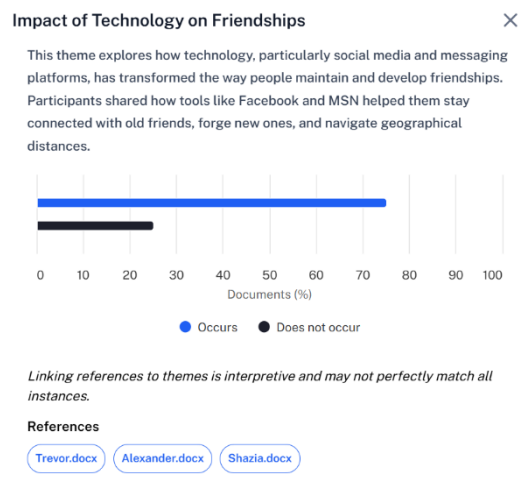
### Theme Summaries

For each identified theme, QInsights provides a short description that summarizes the topic, offering you an immediate understanding of its relevance.

### Show Details (Word and PDF)

Click **Show more Details** to see how many documents each theme appears in for transcripts, Word, and PDF files. You can also review the exact source passages where the theme is grounded

**Frequency of Occurrence:** From the figure below, we can see that the theme occurs in 60% of the documents that are in the analysis. However, always take these numbers with a grain of salt as we are dealing here with Large Language Models. If you run the analysis again, the results could change slightly. Don't use them as objective facts but as an indication for how prevalent a theme is across documents.



## Theme References (Word and PDF)

Click on any document name to open a preview showing the data segments that contribute to the theme. These segments are highlighted in yellow. Use **Previous** and **Next** to navigate through the highlighted passages.

If no highlights are visible—which can occasionally happen due to display issues, you can use the search field that you find on top of the preview.

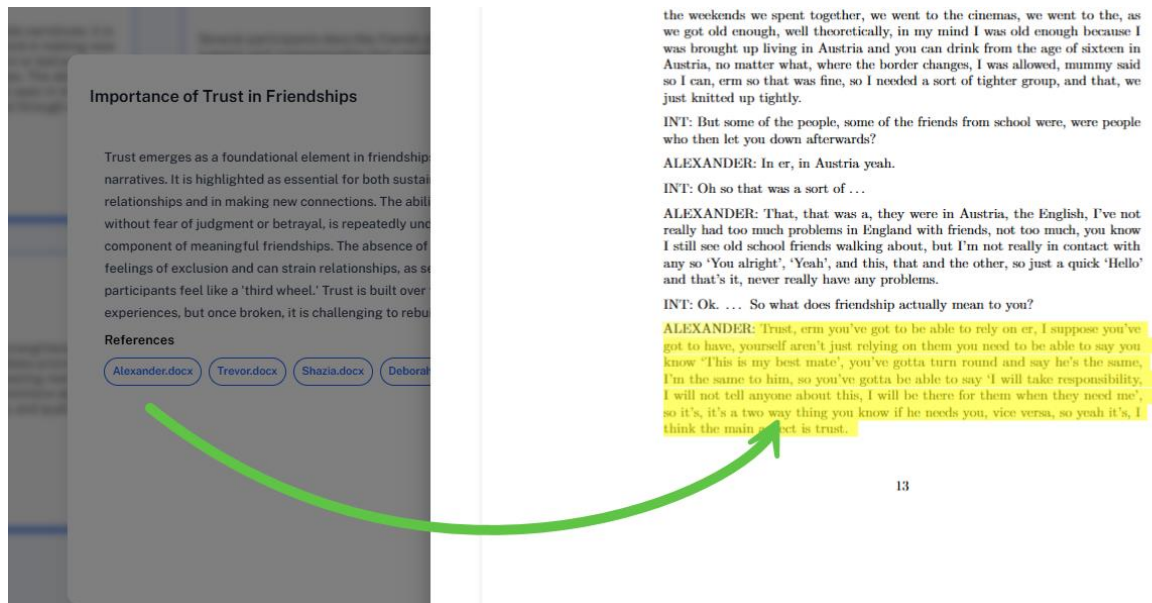


Figure 37: Validating themes in source files

The highlights show the parts of the transcript that were most relevant to the answer. They are not like “coded segments” and should not be treated as such. Sometimes you will see only half a sentence or a small fragment highlighted. Think of the highlights as pointers to the right region of the document, not as precise markings. Their purpose is to help you validate the AI’s answer against your data.

## Show Details (Excel)

If you click on '**Show More Details**' for Excel files, you can export all data segments that belong to a specific topic as an Excel file:

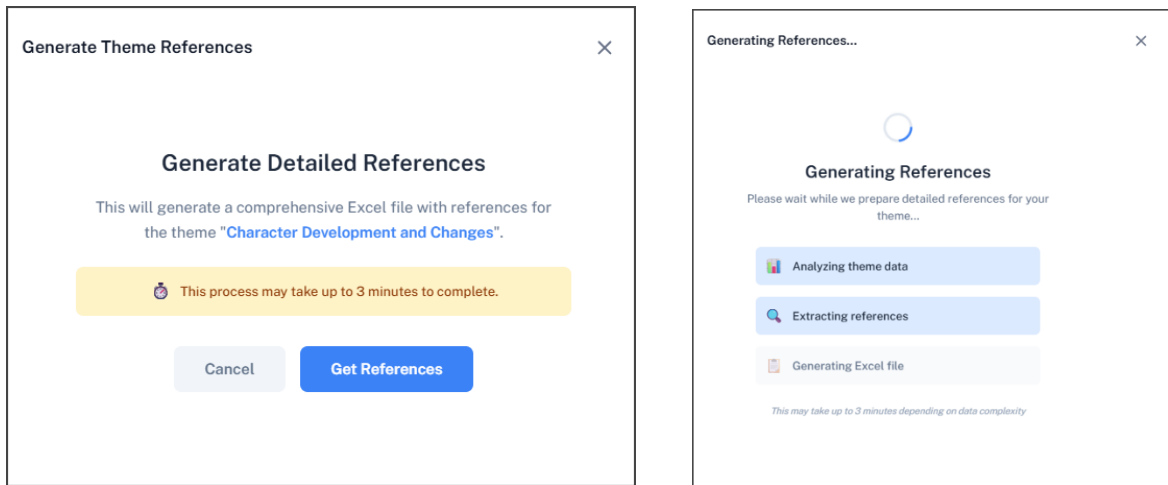


Figure 38: Generate references for themes

QInsights then begins to process your data and to fetch the references for the selected theme. Before you export the results you can inspect them. All variables that are included in your Excel file are also shown in the output.

- Click on **Download** to save the results as Excel file.

The image shows a screenshot of a table titled 'Decline in Quality Over Time' with a close button (X) in the top right. Above the table is a blue 'Download' button. The table has four columns: 'Year', 'Rating', 'Comment', and 'Header'. The first row shows a rating of 10 for the year 2013, with a comment about the show's quality and a header 'Sheldon!!'. The second row shows a rating of 8 for the year 2013, with a comment about the show's humor and a header 'Fun, Comical, and Well Written, though It Seems To Have Overstayed Its Welcome For Some...'. Below the table is a 'Generated Excel xlsx with references' label.

Year	Rating	Comment	Header
2013	10	It is so so fun!!! However I think it has lost it's edge.. It is not as good as it used to be two seasons ago. Nevertheless, still very funny. And no offense to the other characters, that are all extremely funny and well-played by their respective actors, Sheldon is the one that stands out!!! He is awesome, one of the best characters in a comedy!! ("Sheldon can I ask you something? I would not prefer it, but I would not go as far as to forbid it!!!!") (My score represents the previous seasons)	Sheldon!!
2013	8	The Big Bang Theory is an amusing comedy about a bunch of nerds. Being a nerd myself, I can relate to the characters at times and enjoy some of the nerdy humor the show presents, which admittedly may go over some people's heads occasionally. It has quite a few nerd culture references too, which entertains people like me even more. Some of the jokes are repeated, and it may get a little old to some, plus the focus on relationships in the show may be a turn-off for some, but the well-written humor with a great premise still manages to make me laugh.	Fun, Comical, and Well Written, though It Seems To Have Overstayed Its Welcome For Some...

Figure 39: Preview of theme references

## Interactive Exploration: Follow-up Chats

Once the themes are identified, you can ask follow-up questions about specific themes or explore the data further to refine their understanding and extract deeper insights. Thus, the themes identified by QInsights are not an endpoint but a starting point for analysis. They serve as a guide to help you:

- Identify potential topics of interest to explore further.
- Prioritize areas for deeper investigation based on the prevalence of themes.
- Save time by quickly highlighting what your data is "about" before diving into more detailed analysis.

Follow-up conversations will be linked to the corresponding theme analysis in the analysis archive.

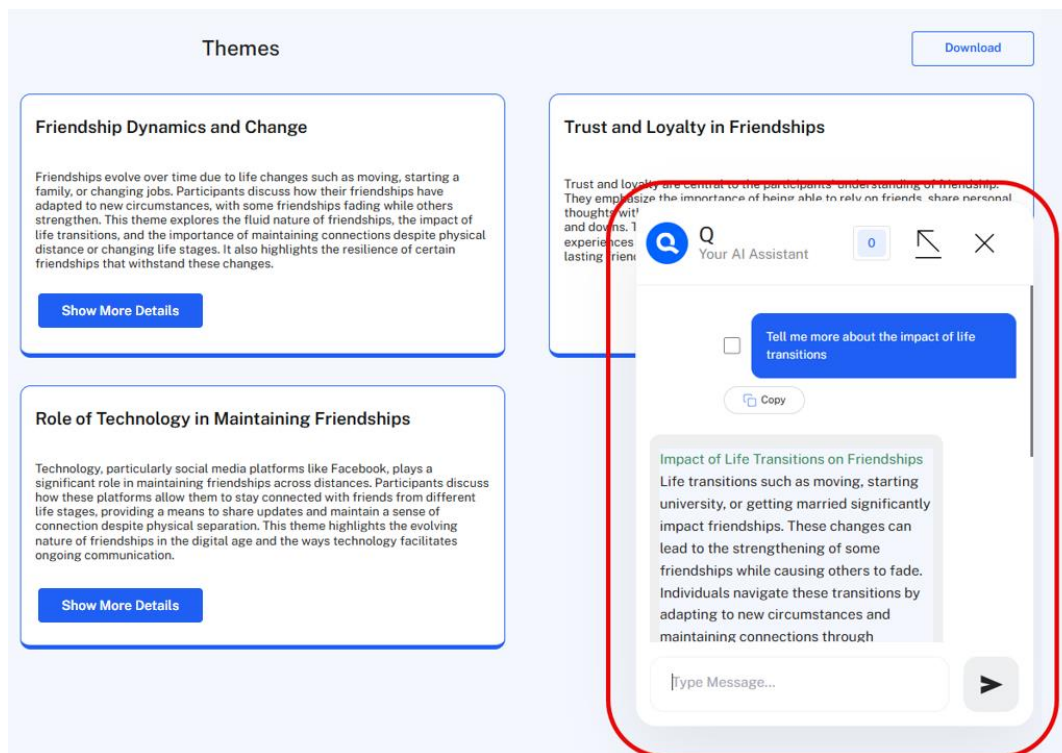


Figure 40: Asking follow-up questions

### Changing the Chat Display

Click the **arrow icon** to open the chat in full-screen view. Click it again to return to the split view and display both the chat and the theme analysis.

## Output

You can export your Theme Analysis results as a PDF.

The first part of the document displays an overview of your themes including how prevalent a theme is (occurs or does not occur in X% of the documents).

**Note:** For Excel files the count currently is not correct, it will show 0%. This will be fixed in the future.

Download Results as PDF

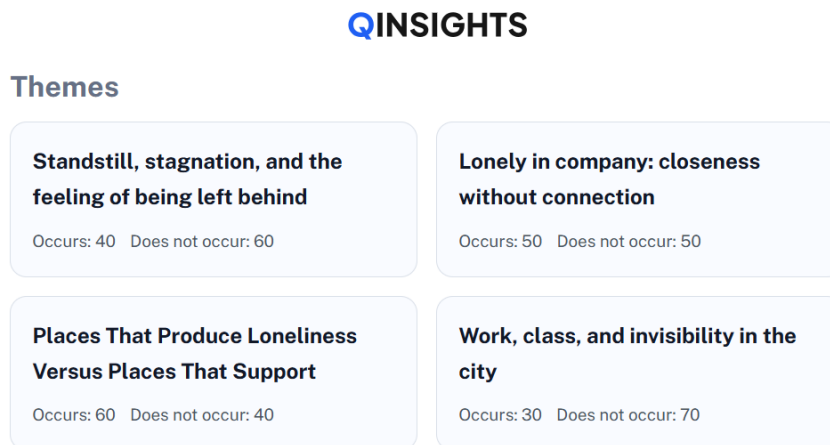


Figure 41: Themes export - first part

The second part of the output provides the theme description and the reference found for each theme per document:

## Theme Descriptions and References

---

### Standstill, stagnation, and the feeling of being left behind

Many respondents describe an experience of 'standstill': the feeling that their life is not progressing while their peers are moving forward. This is associated with unemployment, physically demanding or routine work, dropping out of school, or being stuck in the same neighborhood. Standstill is often depicted through metaphors of buffering, rust, empty spaces, or broken objects. It is not only about economic stagnation but also existential: a lack of direction, future prospects, and social recognition. This standstill is experienced as loneliness because people see themselves as redundant or replaceable within the city and society.

#### Bas (24\_IJsselmonde)\_G.docx

I have no ritme. I'm just \"buffering\" while the rest of Rotterdam is \"streaming\" at 4K  
You just sit there and watch the circle go round and round. That's my life in IJsselmonde.  
I'm 24, but I'm \"stilstaand\" (standing still

#### Malik (20\_Feijenoord)\_G.docx

Hef... it's rusty. It's beautiful but it's stuck. I feel like my life is stuck on this side of the water

*Figure 42: Theme export - second part*

If you want the output as Word file, do the following:

- Click on **Download**. You will see a preview. Highlight everything and copy / paste it into a Word document.

# Grid Analysis: Organizing Responses for Deeper Insights

Grid Analysis in QInsights is a structured way to organize and explore responses from interviews and focus groups. This feature is useful when you want to examine specific topics in a way that is closely aligned with your research questions or interview guide. By displaying responses in a clear grid format, it provides an accessible overview while still allowing you to explore the data in more depth.

Grid Analysis can be used with **Word** and **PDF** files.

## How Grid Analysis Works

### 1. Ask a Question

Begin by entering a specific question into QInsights. You can also include keywords if you want to direct the AI assistant toward particular terms, phrases, or aspects of the data. QInsights then locates and summarizes the relevant responses for each respondent.

### 2. Explore Summaries and References

For each respondent, QInsights provides a summary of the answer to your question. You can also open the reference field to see the original source passages on which the summary is based.

### 3. Ask Follow-Up Questions

You can refine the analysis by asking follow-up questions within the grid. This is useful when you want to explore one aspect in more detail or clarify a pattern you have noticed. In the archive, the follow-up conversation remains linked to the corresponding Grid Analysis.

### 4. Build Your Grid Step by Step

Responses are displayed in a grid format, with one row per respondent and one column per question. Each new question creates a separate tab, allowing you to build the grid gradually. Tabs can be renamed to keep the grid organized and aligned with your analytic focus.

## Creating a Grid Analysis

When you start a Grid Analysis, QInsights asks you whether you want to continue an existing grid or create a new one.

### To start a Grid Analysis

1. Select the documents you want to include in the analysis.
2. Click **Analyse** and choose **Grid Analysis**.
3. In the dialog window, decide whether you want to:
  - **select an existing Grid Analysis** and continue working in it, or
  - **create a new Grid Analysis** by entering a new name.
4. Click **Continue**.

### Creating a new grid or continuing an existing one

When you use Grid Analysis for the first time in a project, there will be no existing grid to select. In that case, enter a name for the new grid and continue.

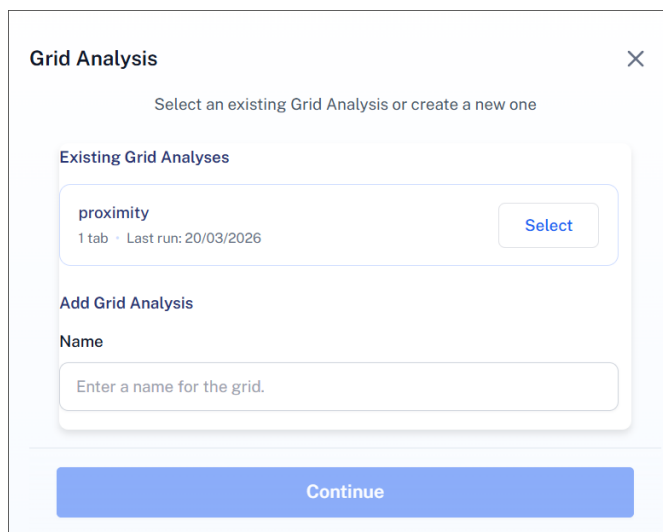


Figure 43: Creating a Grid Analysis

If one or more grids already exist, you can either continue working in one of them or create a separate new grid.

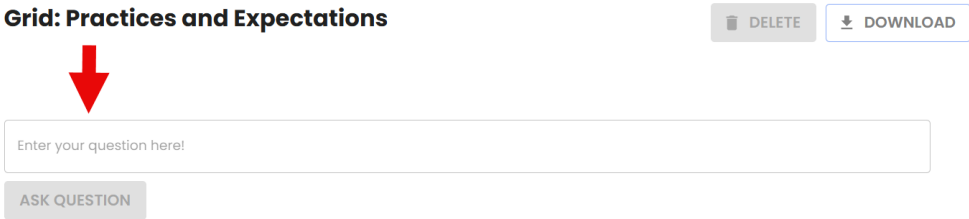
Creating different grids can be useful when you want to organise your work by analytic focus. For example, you might create:

- one grid for each research question
- separate grids for different themes or topic areas
- separate grids for different manually selected document sets

This makes it easier to keep larger analyses organised and prevents unrelated questions from being mixed together in one grid.

### Starting Analysis

- Enter your first analytic question.
- Click on Ask Question.



This is a possible result of a Grid Analysis:

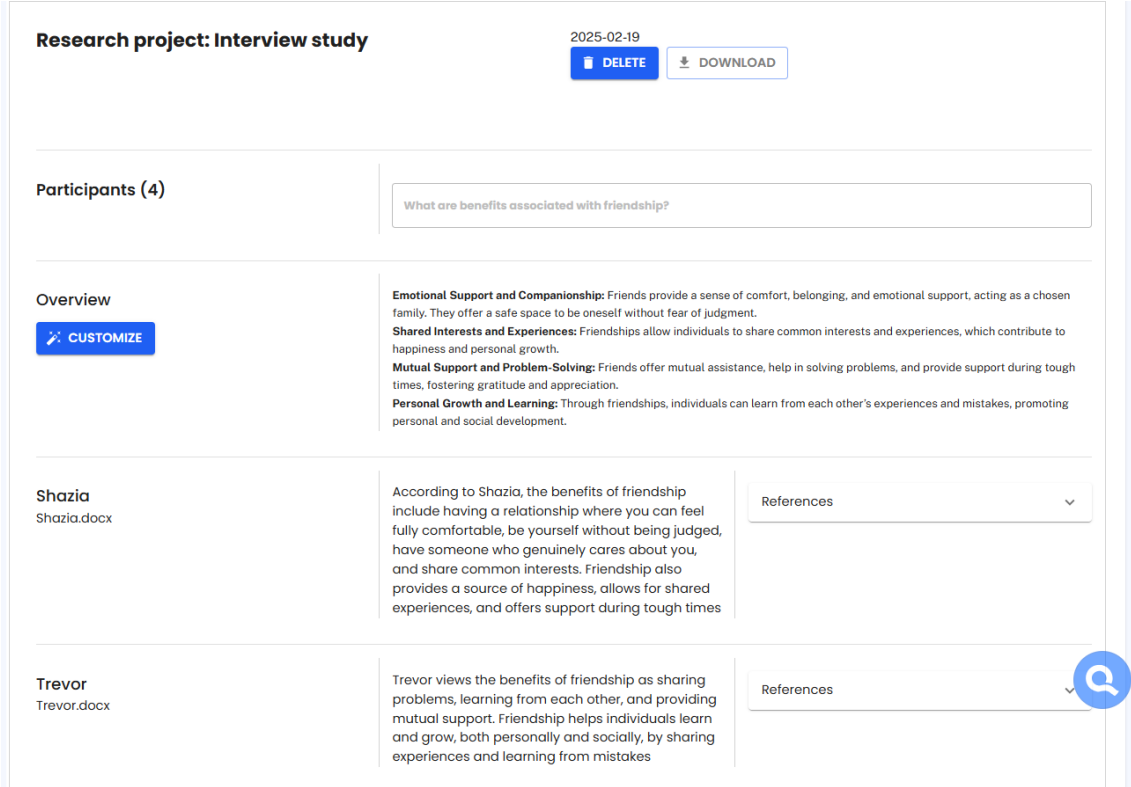


Figure 44: Results of a Grid Analysis

### Overview

Above the individual respondent answers, QInsights provides an **Overview** that summarises the responses across all respondents.

If you want the overview in a different format or more / less detail, click **Customize** and enter instructions for how the output should be presented. For example, you can ask for a summary organised by respondent, a descriptive summary in continuous text, or a table.

- Click on **Customize** and a window opens where you can add your instructions.
- Provide instructions in what way Q, your AI assistant should regenerate the summary and click on **Modify**.

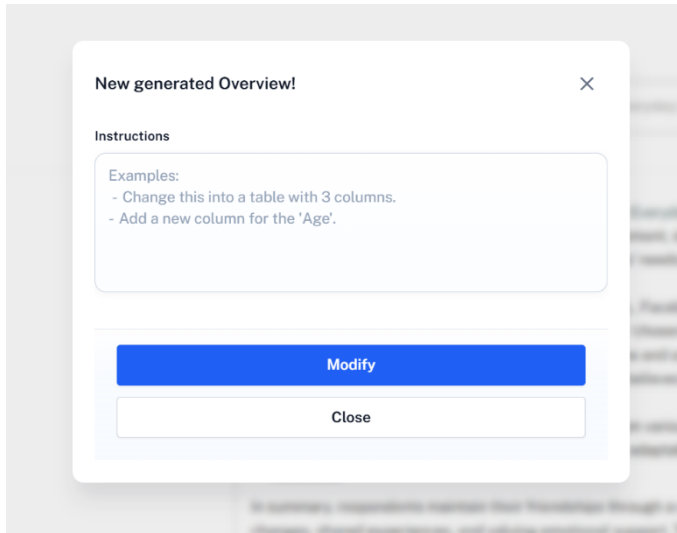


Figure 45: Customize the summary

## Summary answer for each respondent

For each individual respondent, QInsights provides a summary answer.

Click **References** to display the original text segments from the source file used to generate the summary.

<p>Shazia Shazia.docx</p>	<p>Shazia maintains her friendships by actively engaging with her friends and finding ways to connect, even when life circumstances change. During the early stages of her friendships, she mentions spending time together daily due to shared classes and interests. This regular interaction helped her develop a strong bond with her friend. Additionally, she highlights the importance of shared experiences and empathy in solidifying friendships. Even though her friend's life circumstances have changed (being married), she still values the friendship. They make plans to meet when possible, such as during travel, and she expresses gratitude for the support her friend provided during challenging times. For instance, she plans to visit her friend at university, avoiding the busy Freshers' Week to let her friend settle in and make new friends, showing her thoughtfulness and understanding of her friend's needs.</p>	<p><b>References</b></p> <p>we started talking more and found out we had a lot more in common because then we were together every day for the whole year, just, I don't know it just grew really strong and stuff, and even in the holidays we'd like meet up and she'd come to my house and stay over, I'd stay over at her house, and a lot can happen in a year.</p> <p>even when I do go home and we do, I do see her, I mean we don't make like a conscious effort to meet up and stuff because it's not like, our schedules are so, well hers is So, busy being a married woman and all that, but I do not, I still, I still feel like grateful to her that she was there for me when I needed her.</p> <p>she's going to ((UNIVERSITY NAME)) and when I drive up I pass ((UNIVERSITY NAME)) on the way So, we've already made plans that we're gonna go up and down all the time.</p>
-------------------------------	--	--

Figure 46: Summary answer for a respondent plus references

## Follow-up Chat

If you want more detail and see reference in the context of the documents, you can start a **follow-up chat** by clicking on the button to **call on Q, your AI assistant**:

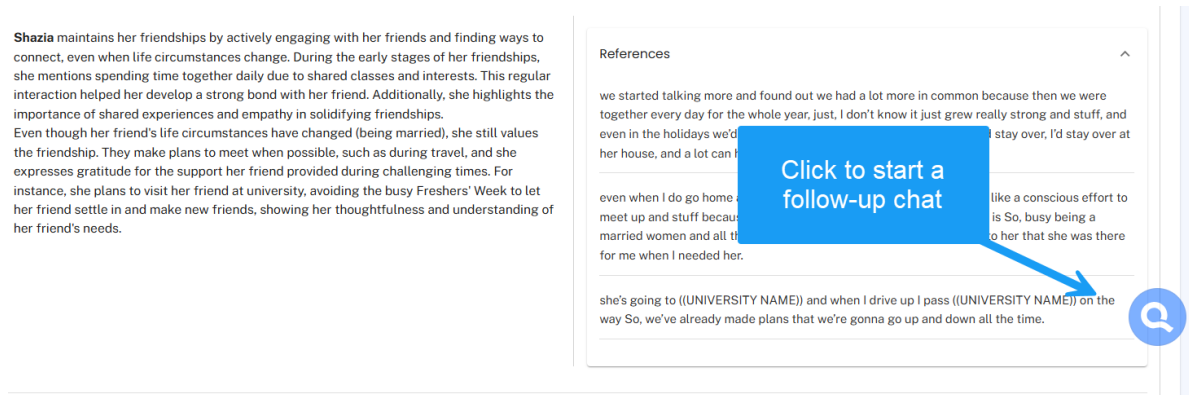


Figure 47: Starting a follow up chat.

## Adjusting the Chat View

When working with a follow-up chat in Grid Analysis, you can switch between two display modes.

**Click the arrow icon to expand the chat to full-screen view.** This is useful when you want more space for reading or writing in the chat.

**Click the icon again to return to the split view,** where both the chat and the grid remain visible on the screen at the same time.

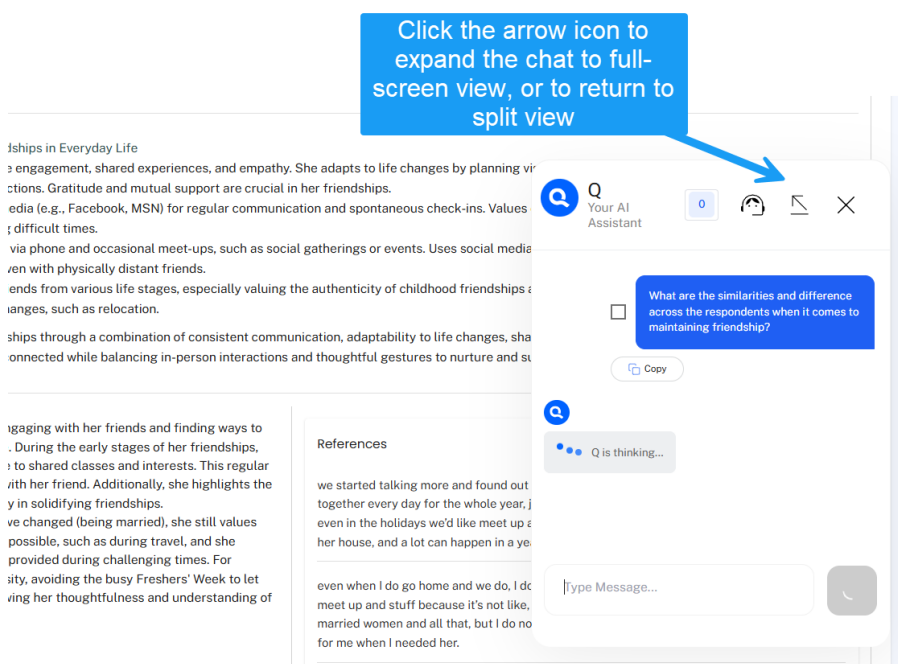


Figure 48: Expanding to full-screen view

## Building a Grid Analysis

- To build the grid step by step, click on the **plus button** and a new tab opens.
- **Enter a new question.**

Each question you ask creates a new tab. This allows you to build a multi-question grid over time. You can rename tabs so that they reflect the topic or purpose of each question more clearly.

When exporting the **Full Session** to Excel, each tab becomes a separate worksheet. Clear tab names therefore make the exported file easier to read and navigate.

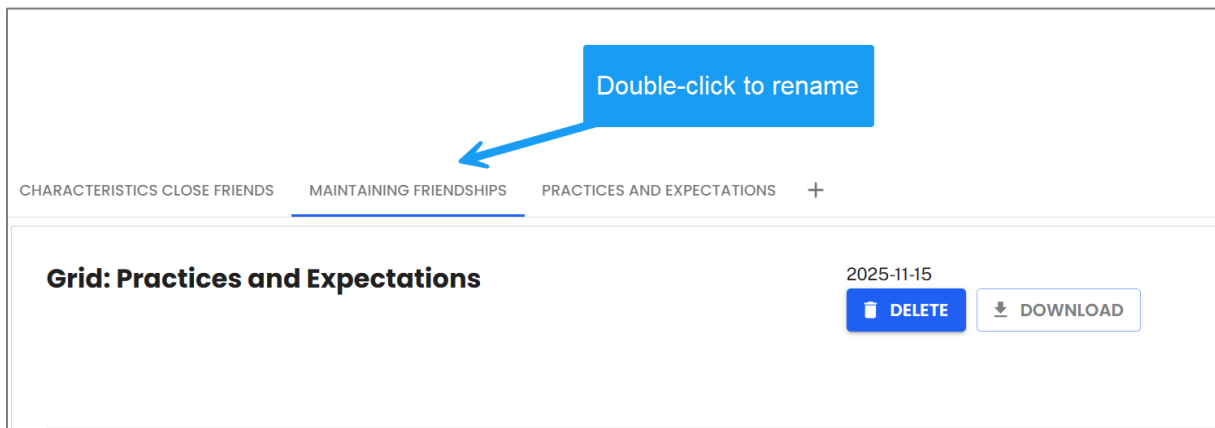


Figure 49: Renaming tabs in a Grid

**Note:** At present, project filters do not apply to Grid Analysis. If you want to run a grid for a specific subset of data, select the relevant documents manually before starting the analysis.

## Exporting a Grid Analysis

You can export a Grid Analysis in either **Word** or **Excel** format.

To export the grid, click **Download** in the Grid Analysis view. QInights then opens a dialog where you can choose your preferred export format.

### Word Document (.docx)

Choose this option if you want to export the analysis as a Word file for reading, editing, or further reporting.

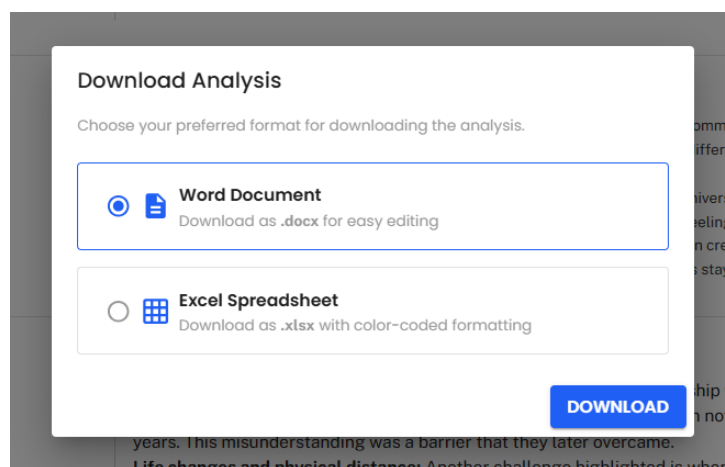


Figure 50: Download option for Grid Analysis

## Excel Spreadsheet (.xlsx)

Choose this option if you want to export the grid in spreadsheet format. The Excel export includes colour-coded formatting to help distinguish the different sections.

If you choose **Excel**, a second dialog appears with two export options:

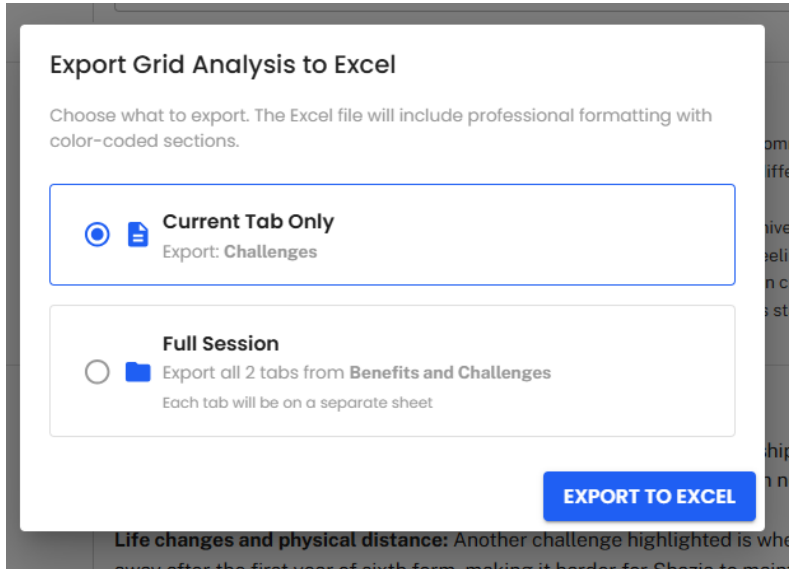


Figure 51: Export a Grid Analysis as Excel file

### Current Tab Only

Exports only the tab that is currently open.

### Full Session

Exports all tabs from the Grid Analysis. Each tab is placed on a separate sheet within the Excel file.

## Best Practices for Grid Analysis

**Start with Descriptive Questions:** Grid Analysis is best suited for content-oriented questions rather than interpretive ones. Examples include:

- What types of attitudes toward topic X are expressed by each respondent?
- What did respondents say about [specific topic]?

These types of questions help you gather an overview of the data before moving to more complex interpretations. A great starting point is to use your interview guide questions to populate the grid.

Once the grid provides a descriptive overview, you can add follow-up questions to explore similarities, differences, or nuances among responses.

**Avoid asking relational or comparative questions:** Questions like "What are the relationships between participant attitudes and their stated values?" or "What are the differences in respondents' attitudes toward X?" are better suited for Conversational Analysis or follow-up exploration. Answers to those questions cannot be attributed to just one respondent and thus are difficult to display in the grid format.

## When to Use Grid Analysis?

Grid Analysis offers a clear and structured way to get an **overview of participant responses to key topics**. It is particularly valuable for:

- Tracking responses by participant for comparison and analysis.
- Quickly identifying the content of responses without needing to read through entire transcripts.
- Preparing for deeper, interpretive analyses by organizing data in an easily digestible format.

This tool is a starting point to build an understanding and lay the groundwork for richer exploration. For more interpretive insights, combine Grid Analysis with follow-up questions, or Conversational Analysis, to maximize the value of your qualitative data.

# Conversational Analysis

Conversational Analysis in QInsights is a dynamic, researcher-guided tool designed for deep data exploration. It accommodates structured methods like inductive and deductive analysis but also serves as an accessible entry point for beginners. If you're unsure where to start, the QInsights AI assistant can help by suggesting preliminary questions to probe your data, making it easier to dive into analysis without needing extensive background knowledge in specific research methodologies.

## How Conversational Analysis Works

### 1. Choose Your Starting Point

- **Novice:** Start by asking the QInsights AI Assistant: "I am new to qualitative analysis can you suggest some initial questions to explore my data?" This method is perfect for easing into qualitative research and effectively engaging with your data without prior experience.
- **Inductive Approach:** Dive into your data and let the emerging patterns guide your analysis.
- **Deductive Approach:** Use established theories or hypotheses as a framework to examine and interpret your data.
- **Advanced – Abductive Reasoning:** Delve into this approach in the section below for deeper insights.

### 2. Engage in Dialogue with Q, your AI-assistant

- Ask specific, focused questions based on your objectives or areas of interest.
- Q will analyze your data and provide nuanced responses, offering insights or summarizing relevant portions of the dataset.

To validate the AI answer, click on a document name below the response:

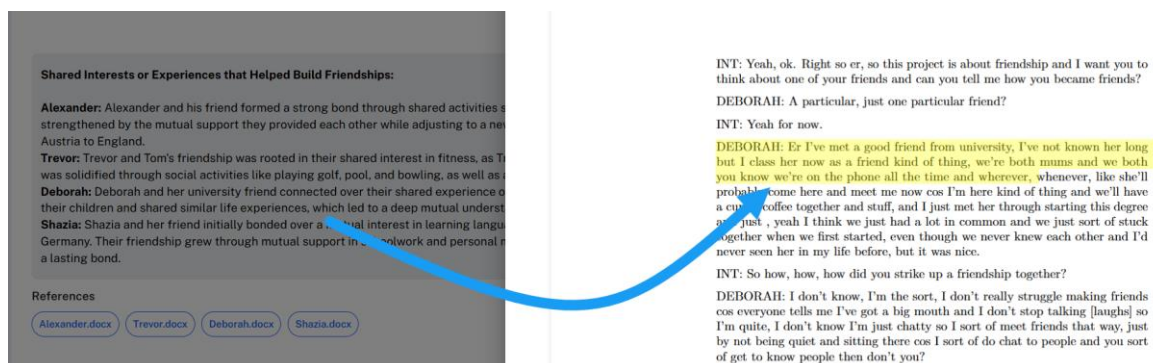


Figure 52: Validating AI answers

As already explained under Theme Analysis, the highlights show the parts of the transcript that were most relevant to the answer. They are not like “coded segments” and should not be

treated as such. Sometimes you will see only half a sentence or a small fragment highlighted. Think of the highlights as pointers to the right region of the document, not as precise markings. Their purpose is to help you validate the AI's answer against your data.

### **3. Iterate and Refine**

- Build on Q's responses by asking follow-up questions to clarify or deepen your understanding.
- Uncover patterns, relationships, or exceptions by steering the conversation in the direction most relevant to your analysis.

## Novice Researcher

If you're new to qualitative analysis, you can ask Q, your AI assistant, to guide you. Start by asking something like:

*"I am new to qualitative analysis. Can you suggest some initial questions to help me explore my data?"*

If you didn't add your research questions to the project summary during setup, you can include them directly in your prompt to get tailored suggestions that align with your study's goals.

Depending on the amount of data you have, you may want to start with a meaningful subset of your data (4 – 6 interviews) as suggested below for an inductive approach. When you ask a question across a large dataset, such as 30 interviews, the AI is likely to generate an answer that is broad or generalized. This is explained in more detail [here](#).

As you engage with your AI assistant, you'll probably start to develop a feel for how to ask questions that yield meaningful insights. Over time, you may find yourself becoming more confident and intuitive in framing your own queries, empowering you to explore your data in ways you hadn't considered before.

**Recommendation:** As a novice researcher, we recommend using [Guided Analysis](#).

## Inductive Approach: From the Descriptive to the Conceptual

When starting inductively, the researcher begins with specific questions aimed at understanding what has been said in the data. This approach is rooted in the data itself, gradually moving from descriptions to identifying more abstract concepts and relationships.

### Recommended Steps

1. **Start Small:** Select a subset of your data to begin. This allows you to focus and learn what each respondent (let's say you selected five) has said about your topic of interest.
2. **Ask Descriptive Questions:** Begin with questions like, "What benefits and challenges have been mentioned?" or "What types of childhood experiences have been described?"

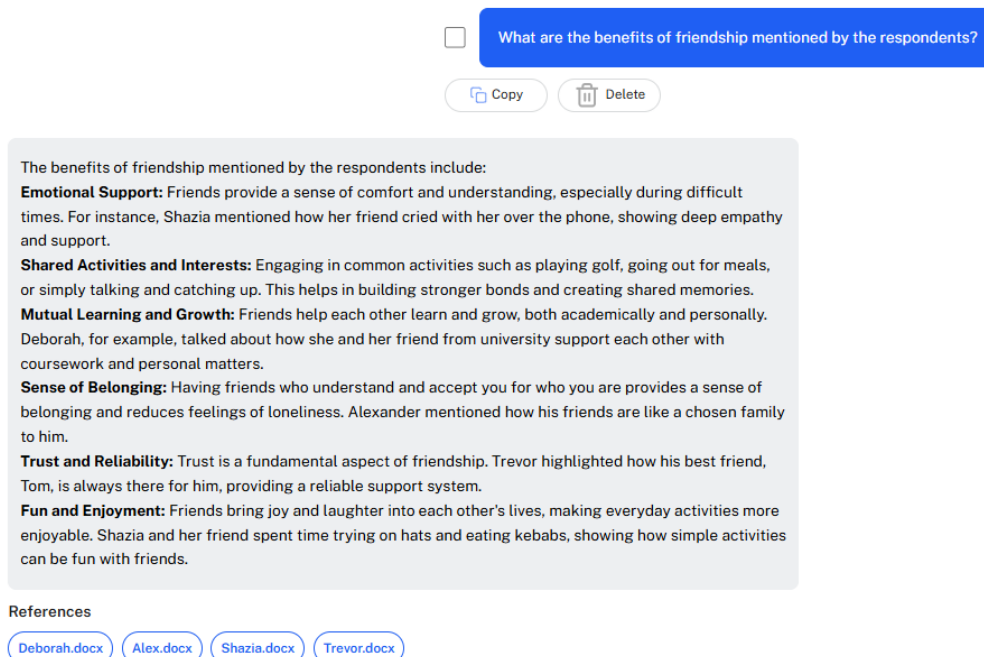


Figure 53: Asking a descriptive question

As the question indicates, it's not necessary to specify "as mentioned by the respondents" when using Q, Q Insights' AI-assistant. The responses you receive from Q are directly derived from the data you've uploaded, ensuring accuracy without the risk of fabricating data, often referred to as 'hallucination.' If your query is unrelated to your dataset, Q will rely on its general knowledge from training data. For now, just remember that Q is designed to provide reliable and data-true answers without hallucinating. For more details on asking questions that is not about your data, see below.

- 3. Identify Similarities and Differences:** Compare responses across participants to uncover patterns, trends, and variations. You can also make use of the variables entered during project setup (e.g., gender, age, educational level) to compare and contrast respondent groups. See below for a prompt on how to generate *Comparison Tables*.

For Word or PDF files, activate these variables under filter settings, allowing your AI-assistant to differentiate respondents based on selected criteria like gender or educational level. Ask questions like, "Are there gender differences regarding the benefits mentioned?" For Excel files, input variables directly in your prompt without needing activation in the settings.

- 4. Group and Label:** Use the AI assistant to group similar responses and provide higher-order labels to describe them. For instance:

- a. A list of benefits might be grouped into "Professional Development" or "Emotional Well-Being."
  - b. Childhood experiences could be classified as "Positive Reinforcements" or "Adverse Events."
5. **Relate and Contextualize:** Once certain concepts and sub-concepts are identified, explore their relationships. For example:
- a. How does attitude X influence user behaviour?
  - b. What influence did experience X, Y and Z have on the development of a certain leadership style? The example below shows that such questions can also be asked across different documents.

How does management style relate to upbringing?

Copy
Delete

Management style can be significantly influenced by one's upbringing. For instance, Beatrix's leadership approach is shaped by her early life experiences and the support she received from her family. She mentions how her mother and husband played crucial roles in her development, encouraging her to pursue her career and helping her manage her responsibilities. This support system allowed her to develop a balanced leadership style that combines assertiveness with empathy and collaboration. Beatrix also highlights how her upbringing in a family with academic background and the influence of her father, who was a powerful academic figure, impacted her confidence and leadership style. She learned to navigate institutional challenges and developed a strong sense of self, which is reflected in her management approach.

References

Beatrix\_MGMT.docx
Beatrix\_BIO.docx

Figure 54: Asking for relationships

Inductive analysis allows you to discover new patterns, concepts, and relationships through an exploratory process, which can later inform a broader, more structured deductive analysis.

## Deductive Approach: From the Conceptual to the Descriptive

When starting deductively, the researcher begins with **existing concepts or hypotheses** and examines whether and how they appear in the data. This approach moves from abstract ideas to detailed, contextual descriptions.

### Recommended Steps:

1. **Define Starting Concepts or Hypotheses:** Begin with a clear framework of what you want to explore. Ask questions and validate:
  - Do all respondents mention this specific concept?

- Does a hypothesized relationship between variables (e.g., gender and leadership style) exist in the data?
- Here are six leadership styles (define them). Which of them are described / have been mentioned by the respondents?

### Example

*Below there is a list of 7 different leadership styles. Which of them can you identify in the interviews?*

- **Autocratic Leadership:** A style where the leader makes decisions unilaterally, without much input from team members.
- **Democratic Leadership:** Involves team members in the decision-making process, promoting collaboration and participation.
- **Transformational Leadership:** Focuses on inspiring and motivating followers to achieve their full potential and embrace change.
- **Transactional Leadership:** Based on a system of rewards and punishments, where compliance is expected in exchange for rewards.
- **Servant Leadership:** Prioritizes the needs of the team and helps members develop and perform as highly as possible.
- **Laissez-Faire Leadership:** A hands-off approach where leaders provide minimal direction and allow team members to make decisions.
- **Situational Leadership:** Adapts leadership style based on the maturity and capability of team members and the specific situation.

#### **In the interviews, several leadership styles can be identified:**

**Democratic Leadership:** This style is evident in Dorothy's approach, where she emphasizes consensus and team decision-making. She states, "I usually think about the issues and formulate a perspective on things try to listen to everybody's views on the matter and in the end try to fathom out what's the best way forward."

**Transformational Leadership:** Lucie demonstrates transformational leadership by focusing on inspiring change and development in higher education. She mentions, "I always wanted to be in a place where I can influence the bigger picture."

**Situational Leadership:** Beatrix shows situational leadership by adapting her approach based on the context, as she mentions balancing "bottom-up" and "top-down" approaches.

#### References

[Dorothy\\_MGMT.docx](#)

[Lucie\\_EDU.docx](#)

[Beatrix\\_MGMT.docx](#)

Figure 55: An example of deductive prompting

2. **Drill Down:** Explore specific examples and details to better understand and explain your findings.
3. **Group-Level Analysis:** Use variables entered during project setup (e.g., gender, age, educational level) as filters to investigate patterns. Or asked questions based on information you entered in a header: Is leadership style related to different age groups?

Deductive analysis allows you to **test predefined ideas or theories** within your data while retaining the flexibility to refine or expand them based on evidence.

## Abductive Analysis – If you find the unexpected

Abductive analysis is a methodological approach that blends elements of both inductive and deductive reasoning. It focuses on generating the most plausible explanations for observed patterns or phenomena in data. The term originates from the work of Charles Sanders Peirce, who described abduction as a form of logical inference aimed at forming hypotheses to explain surprising or puzzling observations.

Abductive analysis is particularly useful in qualitative research when:

- Unexpected findings arise during the study.
- The researcher aims to bridge empirical data and theoretical insights.
- There is a need for a flexible, iterative approach to understanding complex phenomena.

**Abductive analysis starts when you encounter something unexpected**, unexplained, or puzzling in the data. You can then think of plausible hypotheses or explanations for shedding light on these anomalies – these then become your theories to be further explored and tested. In the process of abductive reasoning, you oscillate between data and theory, using the data to inspire new ideas and theories to refine your understanding.

### How Abductive Analysis Mirrors Detective Work

Abductive reasoning is often compared to the work of a detective because both processes involve piecing together incomplete information to arrive at the most plausible explanation. Here's how they align:

Abduction starts with an observation or a surprising fact and seeks the best explanation for it. Example: "Why is this window broken?" → Possible hypothesis: "It was a burglary."

Unlike deductive reasoning (which guarantees conclusions) or inductive reasoning (which generalizes), abduction selects the likeliest explanation, given the evidence. As new evidence is uncovered, hypotheses are revised or replaced to better fit the facts.

**Father Brown**, the television series based on G.K. Chesterton's stories, is an excellent example of abductive reasoning in action. Father Brown's method of solving mysteries

beautifully illustrates how this type of reasoning works, as he consistently relies on observation, intuition, and a deep understanding of human nature to form plausible explanations for crimes.

Father Brown starts by noticing details others might overlook. His keen attention to small, seemingly unrelated clues is the foundation of his reasoning: a misplaced object, an unusual tone of voice, or a reaction from a suspect might catch his attention as something worth investigating. He doesn't jump to conclusions but instead considers various possible explanations for the observed facts. His hypotheses are often guided by his profound understanding of people's motivations, emotions, and moral struggles. For instance, he might hypothesize that a murder wasn't motivated by greed but by a deeper personal conflict or guilt. By weighing the evidence, Father Brown identifies the most likely explanation. As new evidence comes to light, Father Brown adjusts his hypotheses. He frequently engages the suspects or witnesses in conversation, using their reactions to refine his understanding of the crime.

**Father Brown exemplifies abductive reasoning**, because he doesn't focus solely on physical evidence; he considers psychological, emotional, and moral factors to create a complete picture. He remains open to changing his theories as new insights emerge, a key aspect of abductive reasoning. Rather than seeking certainty, he seeks the most plausible explanation for the evidence at hand. His ability to think outside conventional logic mirrors the creative aspect of abduction.

*PS: Click on the above link to watch a Father Brown episode on YouTube.*



*Figure 56: Abductive reasoning is like detective work (created with DALL.E)*

### Example of an Abductive Analysis

Imagine you are analyzing interviews about workplace satisfaction, and you find that many employees express satisfaction despite working under highly stressful conditions. This unexpected finding prompts abductive reasoning. You might hypothesize that employees' satisfaction stems from a strong sense of team support or meaningfulness in their work, even under stress. To refine this hypothesis, you revisit the data to look for supporting evidence and consult existing theories about workplace dynamics to shape your understanding further. When using QInsights, you engage in a dialogue with Q to explore ideas, test assumptions, and refine your understanding.

At this stage, it's the perfect moment to tap into the creative strengths of AI. Use Q to brainstorm a range of possible explanations, even those you may not have considered

yourself. The AI can help you explore diverse angles—cultural factors, leadership styles, or even less obvious workplace dynamics—that might explain the surprising satisfaction under stress. By combining its capacity to generate ideas with your critical thinking, you can refine hypotheses and uncover insights that might otherwise remain hidden. This collaborative process highlights how AI can amplify your creativity while keeping you firmly in control of the analysis.

## How Abductive Analysis Works in QInsights

You might start looking for unexpected patterns, contradictions, or outliers purposefully; or you stumble across them when exploring your data. In both cases, the findings become the foundation for abductive reasoning. The next steps are:

### **1. Ask Exploratory Questions:**

Use Q to probe these observations further. Questions like:

- Why might respondents with similar experiences express contrasting emotions?
- What factors could explain this unexpected behaviour or response?

### **2. Generate Hypotheses**

Based on the responses, let Q help you generate plausible explanations for your observations. These hypotheses are grounded in the data but informed by your own expertise and existing theoretical knowledge.

### 3. Iterate and Refine

Abductive Analysis is an iterative process. Move between the data and emerging hypotheses, asking follow-up questions to clarify, refine, or challenge your initial ideas.

### 4. Validate with Data

Test your hypotheses by exploring whether they apply consistently across other subsets of your data or groups of respondents.

In practice, abductive analysis is often used in grounded theory, ethnography, and interpretive research, where the goal is not just to describe but to explain and make sense of social or cultural phenomena. It enables you to move beyond description and into the realm of meaning-making, fostering deep insights and rich theoretical contributions to your research.

## Tips for Communicating with Q, Your AI Assistant

### Querying All Data vs. Subsets: Striking the right balance in analysis

When you ask a question across a large dataset, such as 30 interviews, the AI is likely to generate an answer that is broad or generalized. This happens because:

1. **Summarization Bias:** LLMs are optimized to distil vast amounts of information into concise responses, often blending multiple points together. This can make it harder to discern specific patterns or themes.
2. **Complexity Dilution:** When dealing with large datasets, the AI assistant tends to prioritize comprehensiveness over depth. As a result, nuances or unique perspectives might be overshadowed by dominant or recurring themes.
3. **Pattern Obfuscation:** The sheer volume of data can lead to overly synthesized responses, which may mask the diversity and richness of individual data points, making it harder to see distinct patterns.

### Asking a question to a meaningful subset

When you narrow your query to a targeted subset of interviews that reflect specific sample criteria, the AI can provide more focused and contextually relevant insights. These are the benefits:

**Relevance:** The AI can tailor its response to the subset, aligning with the specific characteristics or themes relevant to your criteria.

**Depth:** With a smaller dataset, the AI can explore nuances and provide more detailed observations rather than broad generalizations.

**Pattern Recognition:** By focusing on a subset, patterns and themes become more apparent, as the diversity within the subset is less overwhelming compared to the entire dataset.

## Selecting a meaningful subset in QInsights

1. **Make use of variables** in QInsights and use them as filters (e.g., demographics, contexts, or topics) to create subsets that align with your research questions. See: **Error! Reference source not found.**
2. **Engage in a dialogic process**—ask broad questions to get a sense of the data and then follow up with more specific, targeted questions to uncover deeper insights.

This approach aligns with the strength of LLMs while preserving the integrity and richness of your qualitative data analysis.

## Conversing with your AI Assistant Through Questions

Below you will find a list of questions for various purposes. Choose the approach that best suits your project's needs. The examples below are designed to inspire and guide you in crafting your own tailored questions for deeper and more effective analysis.

### Follow-Up Questions

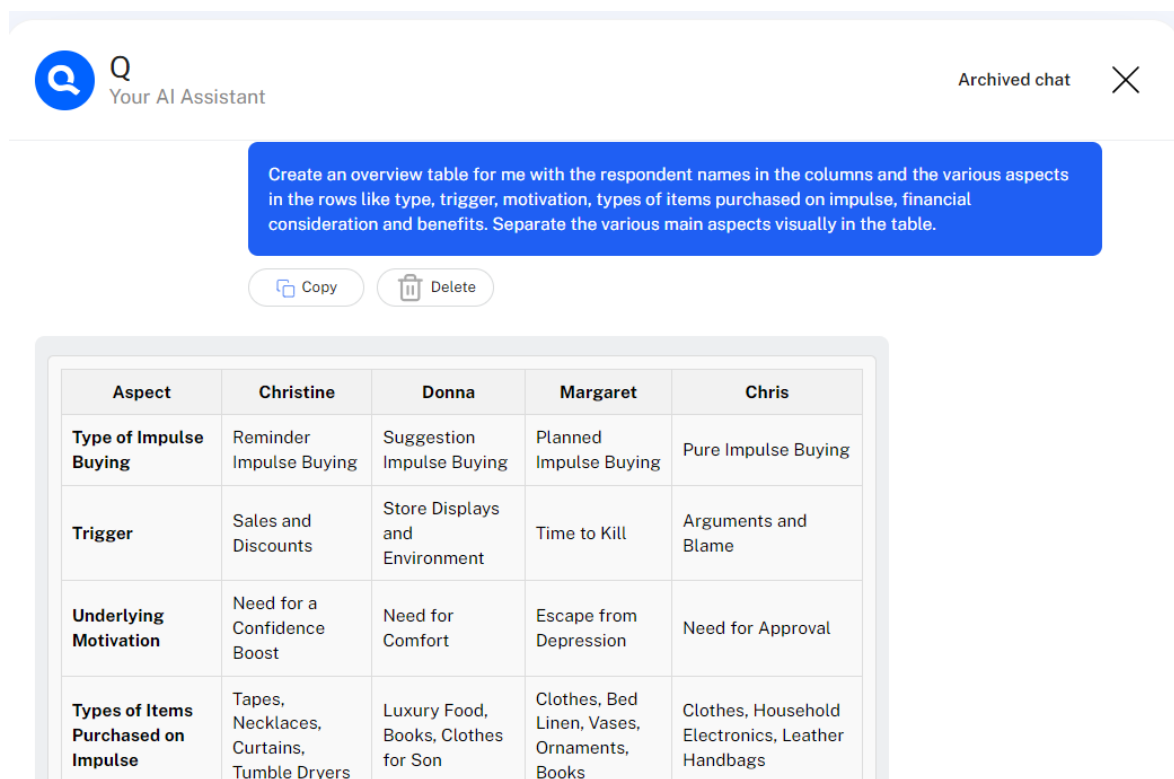
Follow-up questions allow you to deepen your understanding of specific topics or explore nuances in the data. Here are examples to inspire your tailored questions:

- I would like to explore more about [Topic X]. Please provide more detailed insights on the following: [Specific question or area].
- Extract a quote that supports [Topic X].
- Give me an example quote from [Respondent Name(s)] that supports [Topic X].
- What are the differences between the respondents?
- Let's focus on the similarities now. Which respondents expressed similar perspectives or had similar experiences regarding [Topic X]?
- How do respondents' views on [Topic X] evolve over the course of the interview? Please summarize any changes in perspective.
- Can you identify underlying motivations or reasons behind respondents' views on [Topic X]?
- What additional nuances did respondents share about [Topic X] that might not have been fully explored?
- How do respondents' emotions or tone change when discussing [Topic X], and what does this suggest about their perspectives?
- Are there any contradictions or tensions between different responses?

## Creating Overview Tables

When comparing multiple responses, requesting an overview table is helpful for visualizing variations and commonalities in the data. You can customize the table to suit your analysis:

- Create a table with respondent names in the columns across the top, and the [various perspectives/experiences/opinions on Topic X] in the rows.
- In the cells of the table, indicate with an X if [Topic X] was mentioned.
- In the cells of the table, include a supporting quote if [Topic X] is applicable to the respondent.
- In the cells of the table, [specify what you want to see, e.g., themes, keywords, or sentiment].



The screenshot shows a chat window with a blue header bar containing a search icon, the text "Q Your AI Assistant", and "Archived chat" with a close icon. A blue message bubble contains the request: "Create an overview table for me with the respondent names in the columns and the various aspects in the rows like type, trigger, motivation, types of items purchased on impulse, financial consideration and benefits. Separate the various main aspects visually in the table." Below the bubble are "Copy" and "Delete" buttons. The resulting table is as follows:

Aspect	Christine	Donna	Margaret	Chris
<b>Type of Impulse Buying</b>	Reminder Impulse Buying	Suggestion Impulse Buying	Planned Impulse Buying	Pure Impulse Buying
<b>Trigger</b>	Sales and Discounts	Store Displays and Environment	Time to Kill	Arguments and Blame
<b>Underlying Motivation</b>	Need for a Confidence Boost	Need for Comfort	Escape from Depression	Need for Approval
<b>Types of Items Purchased on Impulse</b>	Tapes, Necklaces, Curtains, Tumble Dryers	Luxury Food, Books, Clothes for Son	Clothes, Bed Linen, Vases, Ornaments, Books	Clothes, Household Electronics, Leather Handbags

Figure 57: Example Table

## Analytic Questions

Analytic questions help move from description to interpretation, exploring relationships, patterns, and dependencies in the data. Below are different types of analytic questions and examples:

**Relational Questions:** Highlight connections between elements

- What are the relationships between participant attitudes and their stated values?
- How does trust influence decision-making across respondents?

**Comparative Questions:** Focus on similarities and differences

- How do participants from different groups perceive Topic X?
- What are the similarities and differences in participants' approaches to Challenge Y?

**Correlative Questions:** Explore associations

- How does the frequency of emotional language relate to levels of satisfaction?
- Is there a link between years of experience and leadership style?

**Pattern-Seeking Questions:** Examines causes and effects or influencing factors

- What patterns emerge in respondents' views on Topic X across demographics?
- Do respondents consistently mention certain benefits when discussing [specific topic]?

**Causal Questions:** Examine causes and effects or influencing factors

- What factors seem to influence respondents' attitudes toward Z?
- What drives participants to adopt Strategy Y?

**Conceptual Linkage Questions:** Identifies conceptual or thematic relationships

- What links exist between the concepts of collaboration and innovation?
- I've noticed a relationship between [Aspect A] and [Aspect B]. Verify if this exists across the dataset and describe how it is expressed.

**Dependency Questions:** Focus on hierarchies or dependencies

- How do participants' experiences depend on external factors such as resource availability?
- Which respondents' perspectives shift based on specific variables (e.g., age, gender, or education)?

## Validating Your Synthesis

You can also validate the synthesis that you have written. Open a new chat and paste your write-up into the entry field, using the following prompt:

- Here is my synthesis on [Topic]. Please check the accuracy of the data, review the flow of reasoning, and ensure that nothing important is missing. Correct any spelling errors, improve sentence structure, and include a quote from each respondent if not already provided

The result can serve as a building block for your report, so be sure to save it with an appropriate name in the project archive.

## Relating Findings to Theory

Another option is to relate your findings to existing theories. If the theory you're working with is well-established, Q is likely familiar with it. However, it's a good idea to verify this first by asking:

- Are you familiar with [Theory X]? If so, provide a detailed description, including its key concepts.

If Q is unfamiliar, provide context:

- Here is a brief description of [Theory X] and its important concepts: [Insert Description]. Based on this theory, how can it help explain [specific findings or relationships]?

## Identifying relationships

You can allow Q to take more initiative by asking it to identify relationships in the data. While it's important to be aware that the results may reflect patterns from its training data, this approach can often reveal new insights or highlight connections you might not have noticed. It can be an inspiring way to explore your data with fresh perspectives; just be sure to reflect critically on the findings as you incorporate them.

To maintain context, start by summarizing the themes and patterns you and Q have already identified in previous chats. This way, Q continues from the established discussion instead of starting a completely new analysis. Once you've provided the summary, you can ask:

- What relationships or connections can you identify between the different themes or patterns in the data? How do these relate to the overall research question [define research question]?

## Guided Conversational Analysis

Guided Analysis supports a focused, step-by-step exploration of one selected topic within your project. It is designed to help you move from an initial area of interest to a deeper understanding through a structured sequence of analytic questions.

A good starting point is to run a **Theme Analysis first**. The themes can help you identify a topic that is worth exploring further. Once you have chosen a topic, you can open Guided Analysis and continue with a more focused investigation.

### How Guided Analysis works

When Guided Analysis starts, Q greets you and asks for your name and the language in which you would like to communicate.

Q then checks whether a **project description** is available. If no project description has been entered yet, Q asks you to provide one. If a project description already exists, you can simply confirm that Q should use it, so there is no need to enter it again.

Next, Q asks which **topic** you want to explore. At this stage, it is helpful to describe the topic as clearly as possible. The more specific the topic, the more focused Q's guidance will be in the following steps.

Based on the topic you provide, Q proposes **four analytic questions** that can help you explore the topic in more depth. You can click on any suggested question to place it into the query field and continue directly. You are not limited to the suggested questions. At any point, you can:

- ask your own questions
- modify a suggested question
- follow your own analytic direction within the topic

### Synthesis at the end of the guided process

After you begin working through the guided questions, synthesis options become available. These are designed to help you bring the results of the chat together in a more integrated form.

The available synthesis options include:

- Case-based summaries
- Synthesis of key insights
- Similarities and differences (unique perspectives)
- Create an overview table

You can use one or several of these options, depending on how you want to conclude the analysis. Some users will want to review all synthesis options, while others may select only one and then end the chat.

### Starting a Guided Analysis

1. **Select the documents** you want to analyse.
2. Click on **Analyse** and choose the **Guided Conversational Analysis** option.

You will then see the following screen:

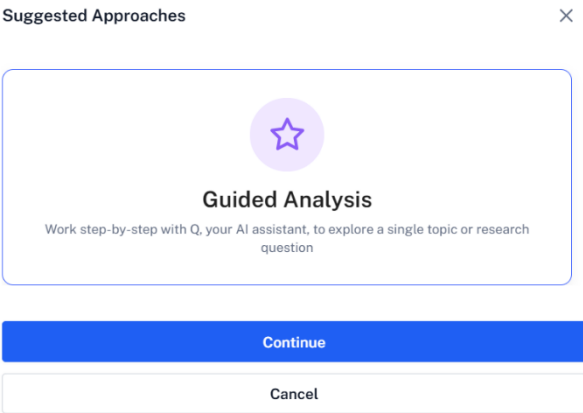
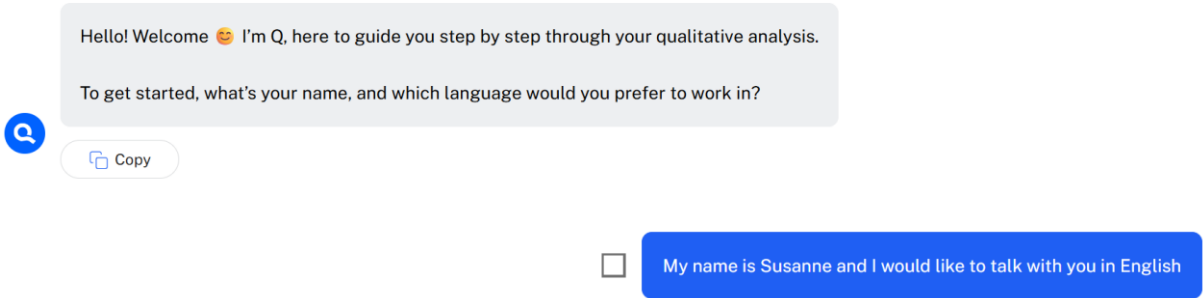


Figure 58: Starting a Guided Analysis

3. Click **Continue**.

Wait for a bit. After a few seconds, Q will greet you with:



Then it will ask you for a project description. If you already provided information about your project in the project description, you could say so:

Lovely to meet you, Susanne 😊 We'll continue in English.

Thanks! Could you briefly tell me about the project you'd like to analyze? For example, what is your main research objective, and is there any context that might help me support your analysis?



Copy



I think you already have a project description.

It will then ask you which topic you want to explore:

Great, thank you for confirming 😊

Let's move on to the next step.

**What specific topic would you like to explore within this project?**

Please describe it in a few sentences. For example, you might focus on how friendships begin, how they are maintained over time, experiences of conflict or distance, or how life transitions affect friendships. The more detail you share, the more targeted and insightful the analysis can be.



Copy

You might answer:

I would like to explore the topic of friendship formation.

Q is then proposing 4 questions that you can use to explore this topic in more depth:

Great choice, Susanne 😊

Focusing on **friendship formation** will allow us to explore how these relationships first emerge and what makes certain connections turn into friendships while others do not.

Based on your topic, here are a few questions we could explore using your interview material. You can pick one to start with, adjust one, or suggest a new one if something else feels more relevant.

Copy

How did participants describe meeting their friends, and what initial circumstances or contexts enabled these friendships to form?

What role did shared activities, environments, or interests play in the early stages of friendship formation?

How did participants recognize that an acquaintance was becoming a friend?

What personal qualities or behaviors did participants identify as important in forming friendships?



If you click one of the suggested questions, it will be entered in the query field and you can click **run**.

When Q responds, you will find three of the four questions below the response, and an option to ask a follow-up question or to synthesize the chat:

**Interpretive insight**  
Taken together, these accounts suggest that friendship formation is a relational process shaped by context, vulnerability, and initiative. Rather than being purely individual choice, friendships emerged where environments encouraged repeated contact and where at least one person actively nurtured the connection.

[Copy](#)

[What role did shared activities, environments, or interests play in the early stages of friendship formation?](#)

[How did participants recognize that an acquaintance was becoming a friend?](#)

[What personal qualities or behaviors did participants identify as important in forming friendships?](#) [Ask a new follow-up question](#)

[Move to synthesis](#)

**References**

[Alexander.docx](#) [Deborah.docx](#) [Trevor.docx](#) [Shazia.docx](#)

Read the answer carefully and then decide what you want to do.

If you select, ask a new follow-up question, Q suggests some questions. However, it is better at this point to stick with what you wanted to ask based on reading the answer.

The questions suggested by Q might be very interesting, but they also might lead you in a different direction and you will lose analysis focus. Thus, if you find them interesting, take a note – and maybe make use of the suggestion in another chat.

If you worked through all questions or have the feeling that the analysis of your topic is saturated, move to synthesising the findings.

Here are your options:

We can now bring together the findings from the analysis of friendship formation in a more integrative way. Below are several synthesis options you can choose from, depending on what would be most useful for your project or writing stage:

- 1. Case-based summary**  
This option presents each participant as a separate case. For each respondent, you'll see a short paragraph summarizing how their friendships began, what enabled them, and what stood out in their experiences, supported by examples from their accounts.
- 2. Synthesis of key insights**  
This option integrates findings across all participants and questions. It highlights recurring themes, central patterns, and major takeaways about friendship formation, focusing on what matters most across the dataset rather than individual cases.
- 3. Similarities & differences**  
This option compares participants' experiences. It identifies where their accounts converge (shared patterns), where they diverge (different pathways or meanings), and any unique or standout perspectives that do not fit the general pattern.
- 4. Overview table**  
This option creates a structured table showing, for each question explored, what each respondent contributed. It's especially useful for comparison, transparency, and supporting methodological rigor in reports or theses.

Please choose one of these synthesis options to continue.

[Case-based summary](#) [Synthesis of key insights](#) [Similarities & differences](#) [Overview table](#)

## When to use which synthesis option

The choice depends on the size of your dataset and what you want to do next.

For **smaller numbers of documents**, especially about **1 to 6**, the **Case-based summary** and **Overview table** can be very useful. They allow you to stay close to individual cases and compare respondents in a more explicit way.

For **larger numbers of documents**, these two options become less useful. Case-based summaries may become shorter and flatter, with less detail for each case, and overview tables may become too large to display clearly on the screen.

With larger datasets, **Synthesis of key insights** or **Similarities and differences** are usually the better choice, because they bring together the most important patterns across the data without overloading the output.

The Similarities and differences option will also analyse unique cases or perspectives.

### Recommended use

As a general guideline:

- use **Case-based summary** when working with a small number of respondents and you want to preserve the case perspective
- use **Overview table** when working with a small number of respondents and you want a structured comparison
- use **Synthesis of key insights** when you want an integrated summary across the dataset
- use **Similarities and differences** when you want to compare convergences, contrasts, and standout cases across participants

After selecting one or more synthesis options, you will find an option to **Wrap Up** the chat.

Q will suggest a name for the chat and reminds you to save it:

**We've reached the end of this analysis.**

Please save this chat and give it a meaningful name. It will be stored in your project archive and may later support your thesis or report, so a clear title will make it easier to find and reference.

Based on what we explored, a suitable name for this chat could be:

**"Friendship Formation Among University Students"**

Thank you for working through this analysis with me, Susanne. It was a pleasure exploring these insights together. If you'd like to analyze another topic (for example, friendship maintenance, conflict, or fading friendships), feel free to start a new guided chat anytime 😊

**Enjoy the process and have fun exploring this new way of working with your data!**

**Note:**

If Q doesn't offer a clear next step, you can always ask: *"What is the next step?"*

# Sentiment Analysis

QInsights currently offers sentiment analysis for **semi-structured data in Excel format**, making it ideal for open-ended survey responses, customer feedback, or social media comments. If you want to conduct a sentiment analysis for text or PDF documents, you can still do this by using a prompt in Conversational Analysis. See [below](#) for an example prompt you can use.

Traditional sentiment analysis often categorizes feedback as **positive, neutral, or negative**, but with the power of **generative AI**, it becomes much more dynamic. QInsights allows you to define **custom dimensions** that align with your data, such as **"satisfied" vs. "dissatisfied"** or **"rational" vs. "emotional"**. Additionally, you can refine your analysis by focusing on **specific topics** and engaging interactively through **follow-up questions**, also making sentiment analysis a collaborative process between human researcher and AI-assistant.

## How It Works

### 1. Select Your Data

- Select an Excel file for Analysis.
- Next, choose the column you want to analyse. Sentiment analysis evaluates data case by case (= row by row).

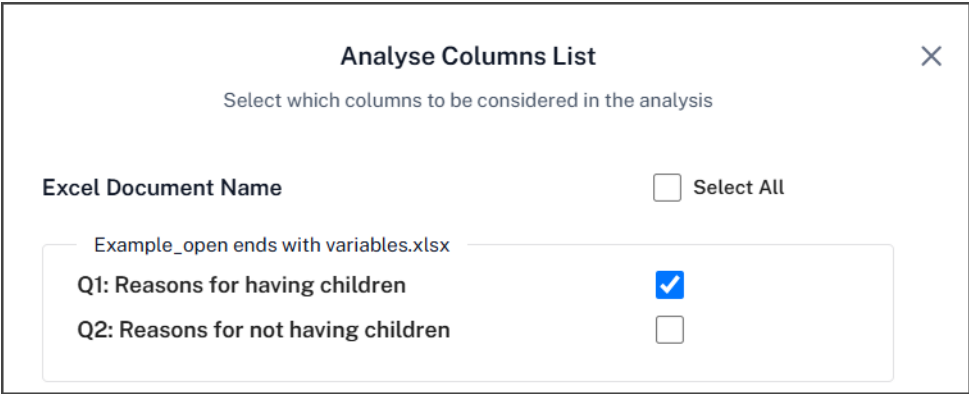
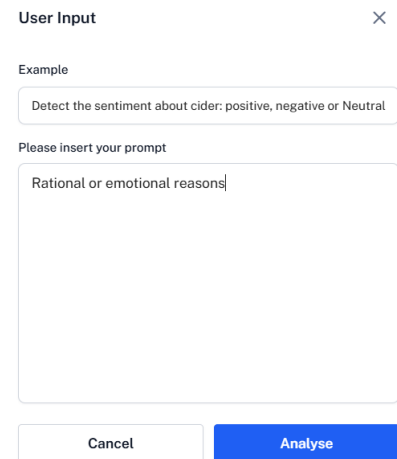


Figure 59: Select the question (column) in your Excel table you want to analyse

## 2. Define Dimensions

- Use standard sentiment categories, such as positive, neutral, and negative, or customize dimensions based on your needs. Examples include:

- Satisfied, neutral, dissatisfied
- Rational, emotional
- Planned, impulsive
- Supportive, critical, neutral



User Input

Example

Detect the sentiment about cider: positive, negative or Neutral

Please insert your prompt

Rational or emotional reasons

Cancel Analyse

Figure 60: Add the dimensions you are interested in

## 3. Focus the Analysis

- Narrow the scope to a specific topic, especially useful for datasets like social media comments or product feedback. Examples include:
  - Social media: "Classify responses that directly refer to the post's content as like, neutral or dislike."
  - Customer feedback: "Disappointment or satisfaction with regard to usability"

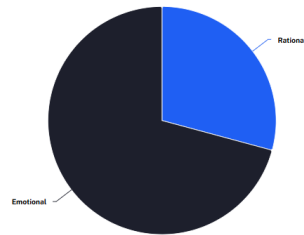
## 4. Review Results

- QInsights produces a pie chart showing the distribution of your defined dimensions.
- Hover over the chart to see the percentage distribution, or prompt Q for a detailed list of dimensions and their corresponding distributions.
  - Example Prompt: "List all dimensions with their percentage distribution."

### Question

rational or emotional reasons

### Pie Chart



### Summary

Edit

#### Insights:

The analysis of the reasons for having children reveals a predominant inclination towards emotional motivations. Many respondents express sentiments of love, fulfillment, and personal growth, highlighting the emotional bonds and transformative experiences associated with parenthood. However, there are also instances where rational considerations, such as timing, personal development, and societal roles, play a significant role in the decision to have children. This blend of emotional and rational reasoning underscores the complex and multifaceted nature of the decision-making process regarding parenthood.

#### Emotional Reasons:

- Emotional connections and love for children.
- Personal fulfillment and joy derived from parenting.
- The transformative experience of becoming a parent.

#### Rational Reasons:

- Considerations of timing and biological factors.
- Societal roles and personal development.
- The desire to create a family unit.

### Sentiment Analysis

Back

Export

Case ID	Name	Gender	Number of children	Marital status	Education	Q1: Reasons for having children	results	change result
case 1	Paul	male	1	divorced	highschool	Children whittle away your time in ways that are ultimately beneficial: they have an uncanny knack for getting rid of the meaningless hobbies that used to consume you.	rational	
case 2	Anne	female	0	single	some college	To Fulfill my devotion to children: so far I am a favorite aunt and my heart breaks a little bit every time my nieces and nephews walk out your door and into their parent's car. It's time for me to be the favorite mom instead.	emotional	
case 3	Toni	female	2	divorced	university degree	We are both past age 35 and are concerned that if we put off having children any longer, I might have trouble getting pregnullt or have complications in pregnullt or delivery.	rational	

Figure 61: Result of a sentiment analysis

A summary of the analysis is displayed below the pie chart, written by Q, your AI assistant. This may provide sufficient insights for your needs, but you can always ask follow-up questions to delve deeper.

You can export the detailed evaluation of each case as an Excel file for further review or reporting.

## Best Practices for Effective Sentiment Analysis

- Focus on One Column at a Time
- If your dataset includes separate questions for "benefits" and "challenges," analyze these columns individually to avoid conflicting results.
- Keep Prompts Simple

Instead of overly complex or multi-layered queries, focus on straightforward questions:

- rational vs. emotional regarding product design
- Positive, neutral, or negative with regard to pricing

Avoid stacking too many conditions in one prompt, like:

- ❌ Group responses first by similarity, then analyse for rational vs. emotional reasons.

Results like the following might be interesting for smaller data sets, but become quickly difficult to read:

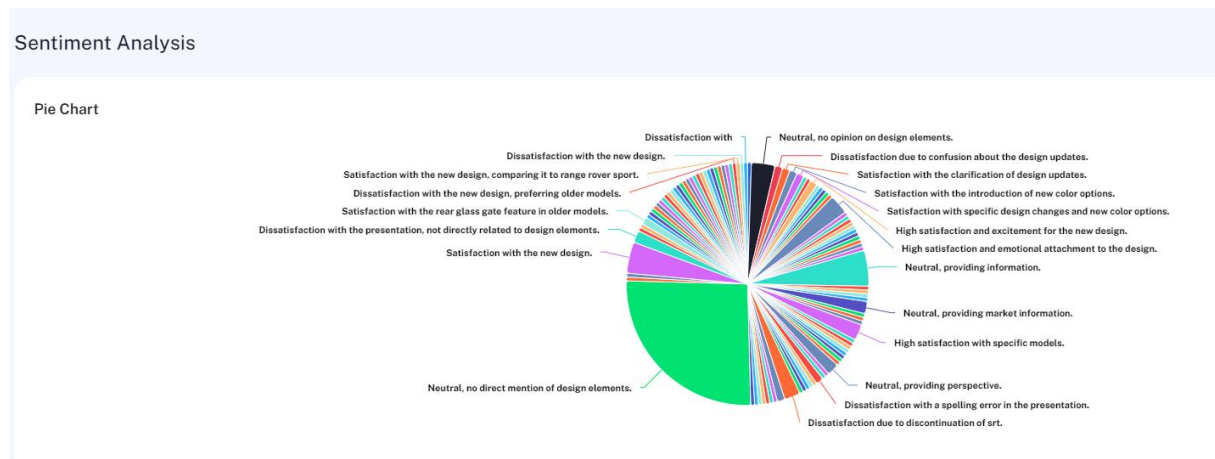


Figure 62: Result with a lot of detail

➔ If a pie chart like this was generated, simplify your prompt.

### Tailor Dimensions to Your Needs: Examples

- Happy, frustrated (e.g. for customer feedback)
- Supportive, critical, neutral (e.g. for evaluating user responses to a policy.)
- Disappointed, neutral, excited

## Prompt for Sentiment Analysis for Word / PDF documents

You can use the following prompt in Conversational Analysis if you want to conduct a sentiment analysis for Word or PDF files, e.g. for an interview, a focus group or a document.

### **Refine prompt to fit your specific needs:**

For each document, classify sentiments at a reasonably granular level (e.g., by paragraph, speaker turn, or thematic section) into positive, negative, or neutral categories (or define other dimensions that better suit your analysis purpose).

### **Document-Level Summary**

- Describe the overall balance of positive, negative, and neutral sentiments (e.g., “mostly positive with some negative remarks”).
- Cite short quotes or examples that illustrate each sentiment.

### **Cross-Document Analysis**

- Summarize common themes or patterns in sentiment across all documents.
- Identify any significant outliers, contradictions, or unexpected expressions of sentiment.

### **Relative Weighting (instead of counts)**

- Indicate for each document whether positive, negative, or neutral sentiments are *dominant*, *secondary*, or *minor*.
- For the full set, summarize the relative distribution of sentiments (e.g., “positive sentiments dominate, but negative remarks are frequent in relation to [theme]”).

### **Output Format**

#### *Per-Document Analysis*

- Document title or identifier
- Sentiment balance (dominant / secondary / minor)
- Representative quotes or excerpts
- Brief summary of key sentiment findings

#### *Cross-Document Summary*

- Overall sentiment balance across all documents
- Overarching themes or patterns
- Conflicting, unusual, or surprising findings

## Asking Q anything – from the Dashboard

On the dashboard, you will find an icon to open Q, your AI assistant.

When you chat with Q from the dashboard, the conversation is **not connected to your project data**. This means you can use Q for general support outside your current project, for example to brainstorm follow-up questions, improve the wording of a prompt, draft text, or ask other general questions.

Because Q is not linked to your project, it cannot access your uploaded files, project context, or analysis results from this dashboard chat.

At present, Q should also not be used for questions about specific QInsights features or how the software works. The dashboard chat does not yet have access to the user manual or product documentation. We will implement this shortly.

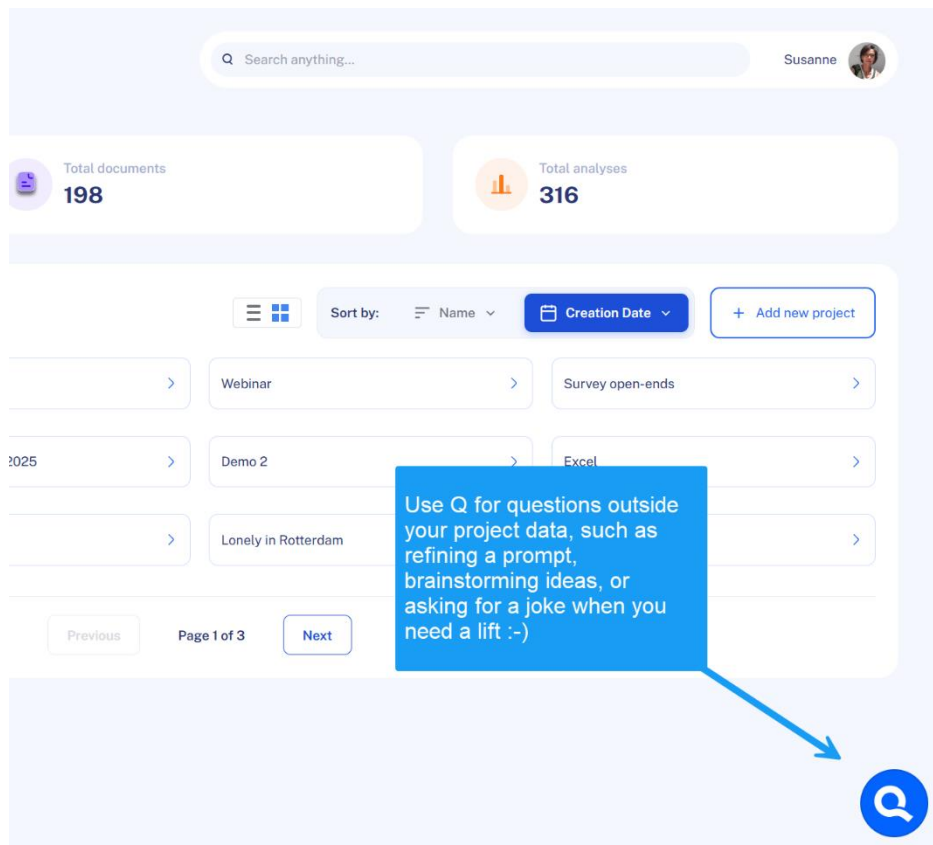


Figure 63: Open Q from the dashboard

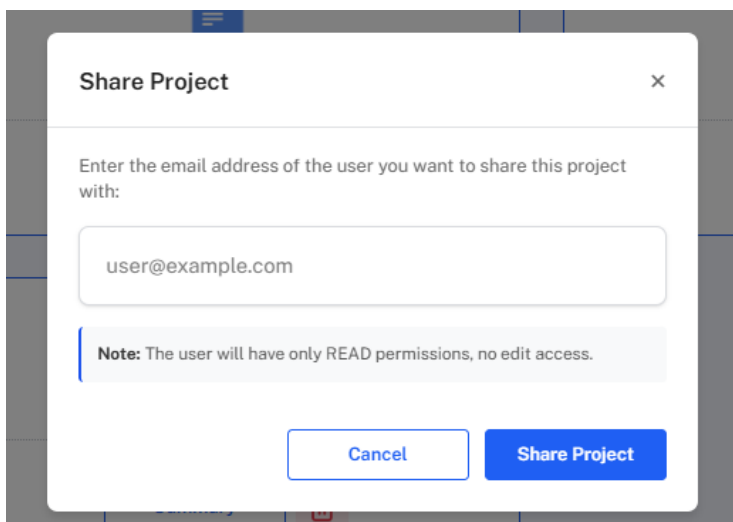
## Teamwork: Share your projects with other QInsights user (beta)

QInsights now allows you to **collaborate on projects** by sharing them with colleagues. This is especially useful when you're working in a research team or want to get a second opinion on your analysis.

To share a project, click on the "**Share**" button at the top left of your project space.



Enter the email address your team member uses for their QInsights account and confirm by clicking "**Share Project**". The person will receive an email notification with access details.



Once shared, your team member can:

- **See all analyses** saved in the archive
- **Run new analyses and add results to the project**
- **Interact with the data just like you would**

However, to protect the integrity of your dataset, they **cannot delete any documents** from the project.

This feature enables **transparent collaboration**, makes it easier to divide work, and helps ensure consistency across team-based research projects.

# Settings

## Settings

The **Settings** area allows you to manage your user account, security options, subscription details, and, if applicable, team administration settings.

Use the menu on the left side of the screen to move between the available sections:

- **Profile**
- **Security**
- **Billing**
- **Admin Settings**

## Profile

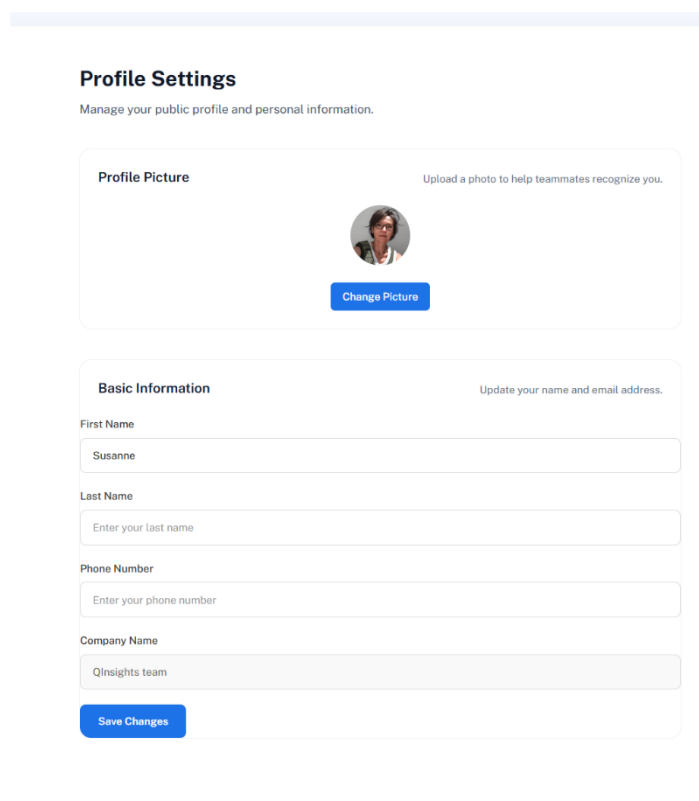
In **Profile Settings**, you can manage your personal profile information.

This section allows you to:

- upload or change your **profile picture**
- edit your **first name**
- edit your **last name**
- add or update your **phone number**
- add or update your **company name**

After making changes, click **Save Changes** to update your profile.

Your profile picture is displayed in the QInsights interface, for example on the dashboard, and can help team members recognise you more easily.



The screenshot shows the 'Profile Settings' interface. At the top, it says 'Profile Settings' and 'Manage your public profile and personal information.' Below this, there are two main sections: 'Profile Picture' and 'Basic Information'. The 'Profile Picture' section has a placeholder for a photo and a 'Change Picture' button. The 'Basic Information' section has fields for 'First Name' (filled with 'Susanne'), 'Last Name' (with a placeholder 'Enter your last name'), 'Phone Number' (with a placeholder 'Enter your phone number'), and 'Company Name' (filled with 'Qinsights team'). A 'Save Changes' button is at the bottom of the form.

## Security

The **Security** section contains settings related to account protection.

Here you can:

- view your **account email**
- check whether your email address is **verified**
- enable or disable **multi-factor authentication (MFA)** if available
- change your **password**

We recommend using a strong, unique password and enabling multi-factor authentication when available.

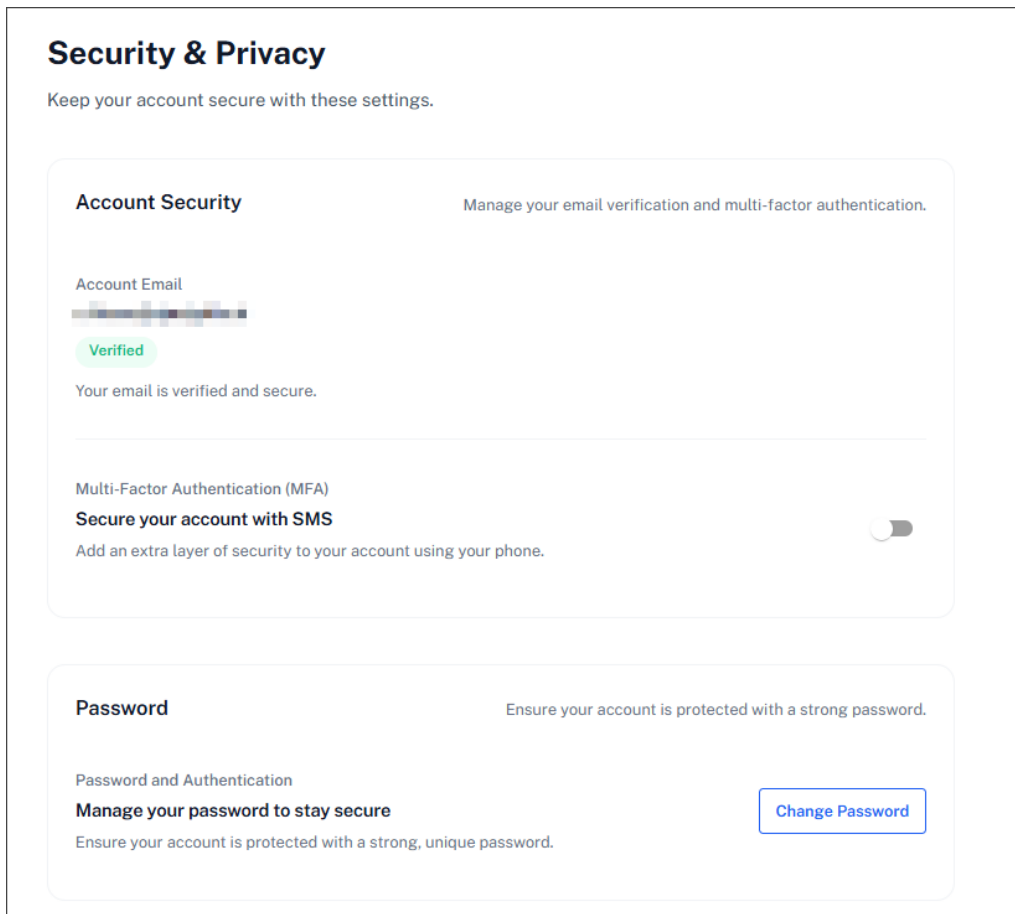


Figure 64: Security and Privacy Settings

## Billing

The **Billing** section provides an overview of your subscription and token usage.

Here you can view:

- your **current plan**
- the number of **tokens consumed**
- your total **token allowance**
- your subscription **status**
- the **next billing date**, where applicable

If you are using a trial version and want to continue with QInsights afterwards, you can purchase a licence directly from this section. To do so, select one of the available pricing options and click on it. This starts the purchase process. Once completed, the tokens for your subscription and the renewal date are allocated automatically.

The screenshot displays the 'Billing & Subscription' section. At the top, it says 'Manage your plan, tokens, and billing information.' Below this is a summary table with four columns: 'Current Plan', 'Tokens Consumed', 'Next Billing Date', and 'Status'. The current plan is '12-month subscription (regular, team)', with 5,690,570 tokens consumed out of a 125,000,000 allowance. The status is 'Active'. Below the summary, there is a 'Change your plan' section with two tabs: 'Educational' and 'Business'. Two upgrade options are shown: a '6-month business subscription' for €799 / 6 months and a '12-month business subscription' for €1,399 / year. Both include 37,000,000 or 75,000,000 tokens, 1 user seat, and all AI analysis features.

Current Plan	Tokens Consumed	Next Billing Date	Status
12-month subscription (regular, team)	5,690,570 / 125,000,000		Active

**Change your plan**

Educational **Business**

**6-month business subscription**  
6-month, business  
**€799** / 6 months

WHAT'S INCLUDED:

- ✓ 37,000,000 tokens
- ✓ 1 user seat
- ✓ All AI analysis features

Upgrade now

**12-month business subscription**  
12-month, business  
**€1,399** / year

WHAT'S INCLUDED:

- ✓ 75,000,000 tokens
- ✓ 1 user seat
- ✓ All AI analysis features

Upgrade now

Figure 65: Billing and Subscription

## Educational pricing

The Educational pricing option is only displayed for users who registered with a recognised educational email address. This is checked automatically by QInsights.

If you believe you are eligible for educational pricing but do not see the educational option in the Billing section, please contact [partnership@qinsights.ai](mailto:partnership@qinsights.ai).

## Team subscriptions

For team subscriptions, please contact [partnership@qinsights.ai](mailto:partnership@qinsights.ai).

## Admin Settings and Team Licences

The **Admin Settings** section is only relevant for the administration of a **team licence**. It is used to manage licence sharing, token allocation at team level, and team membership.

This is separate from **project collaboration**. Sharing a project and working together on a project is not limited to team licences. Individual users with their own single-user licence can also collaborate on projects with other QInsights users.

A **team licence** works differently from individual licences in two important ways:

- team licences can be purchased at a discounted rate
- all invited team members share one common **token pool**

This means that users who are part of a team licence do not use tokens from a personal allocation.

If a user is removed from the team, access to the shared team token pool also ends. In that case, the user's personal account will show **0 tokens**, unless a separate individual licence has been purchased.

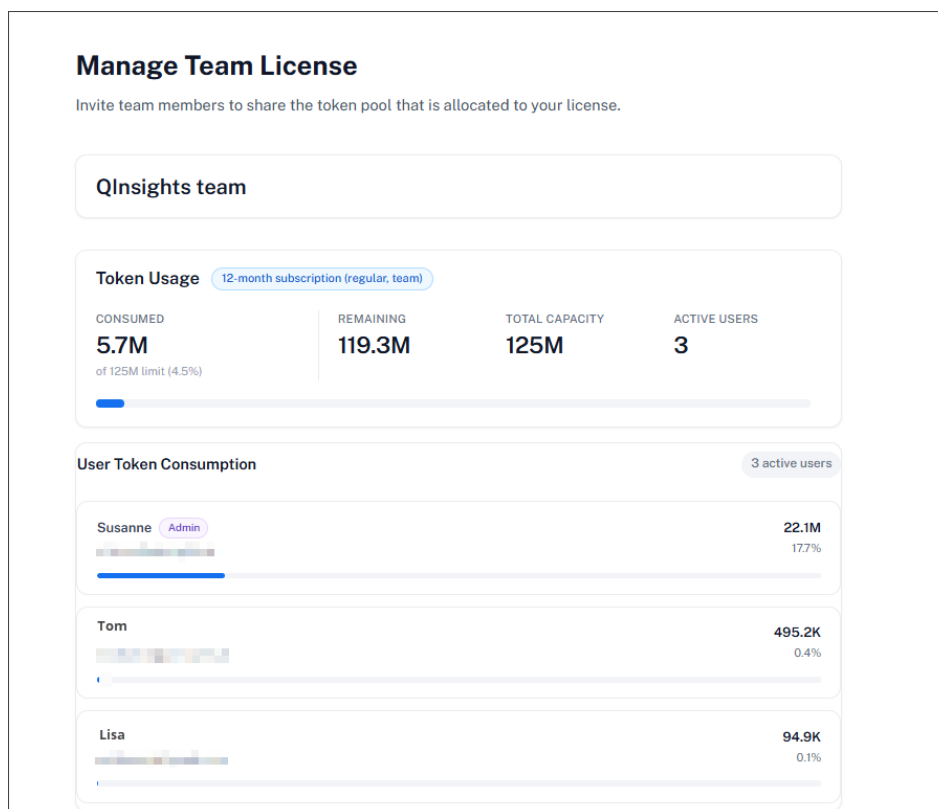


Figure 66: Overview of team members and token use

# Instructions for Team Licence Administrators

In the team management area, you can:

- invite a new user by clicking **Invite User**
- view current **team members**
- see each user's **role**
- review when a user **joined**
- remove users from the team
- view **pending invitations**
- cancel pending invitations if needed

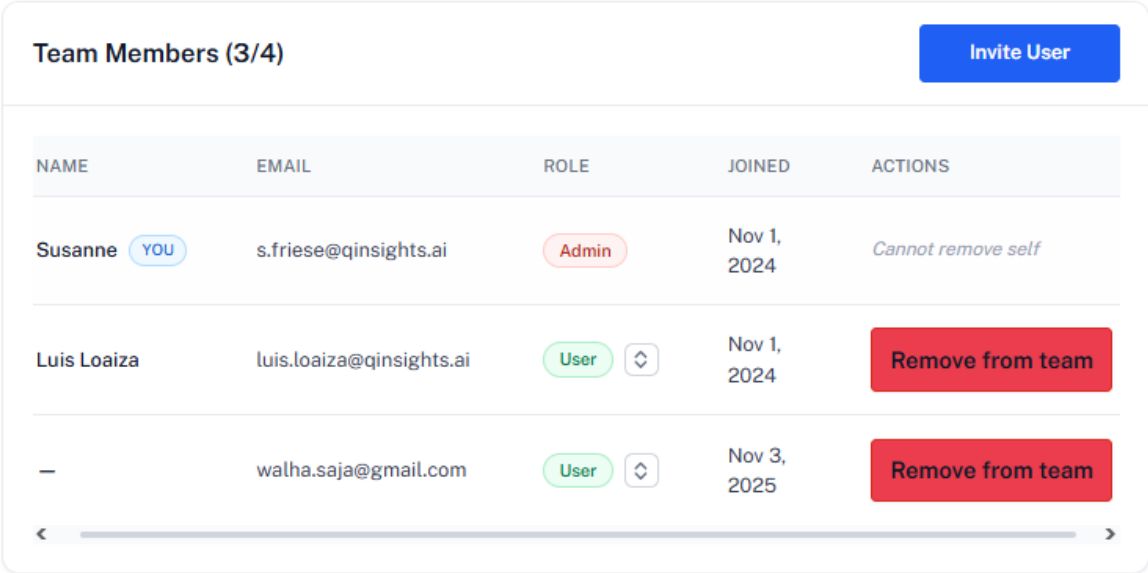


Figure 67: Team member administration

You can also see how many team members are included in your licence. New users can only be invited until this limit is reached.

## Changing User Role

Click the **role selector** next to **User** to change the user's role.

For example, if the amin leaves the team, he or she can turn over the admin role to another team member.

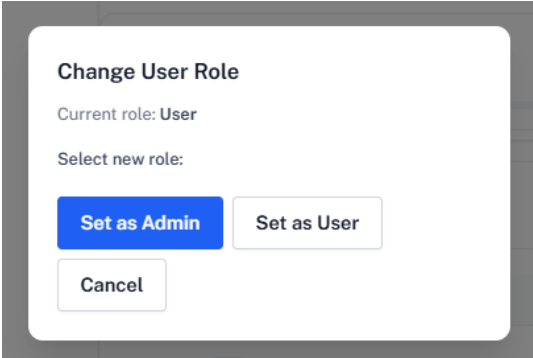


Figure 68: Changing user roles

## Changing Team Members During the Licence Period

Team members can be exchanged during the licence period. For example, if a team purchases a **5-user licence**, two users may work on one project during the first half of the year, and later two different users may work on another project during the second half of the year. This is possible.

The licence does not require that the same people remain assigned for the entire subscription period. What matters is the number of users who have access to the **shared licence pool at the same time**.

In other words, a 5-user licence allows up to five active team members to use the team licence concurrently. Team members can be removed and replaced as project needs change.

## Trouble Shooting and Common Issues

### **Analysis or import remains stuck at 0%**

Refresh the page by clicking the reload button next to the browser's address bar.

### **Error message during analysis or import**

This is often caused by a brief interruption in the internet connection rather than by the app itself. Wait a few seconds and try again. If the error continues, it may indicate a bug. Please let us know so we can investigate and fix it.

### **No preview after uploading a document**

The upload may have failed because the connection to the server was interrupted. Delete the document and upload it again. Do not continue working with documents that have no summary preview, as this may lead to errors later.

### **AI assistant refuses to answer**

This usually means that your question triggered a language model guardrail. This is outside the control of QInsights. In many cases, the issue can be resolved by rephrasing the question.

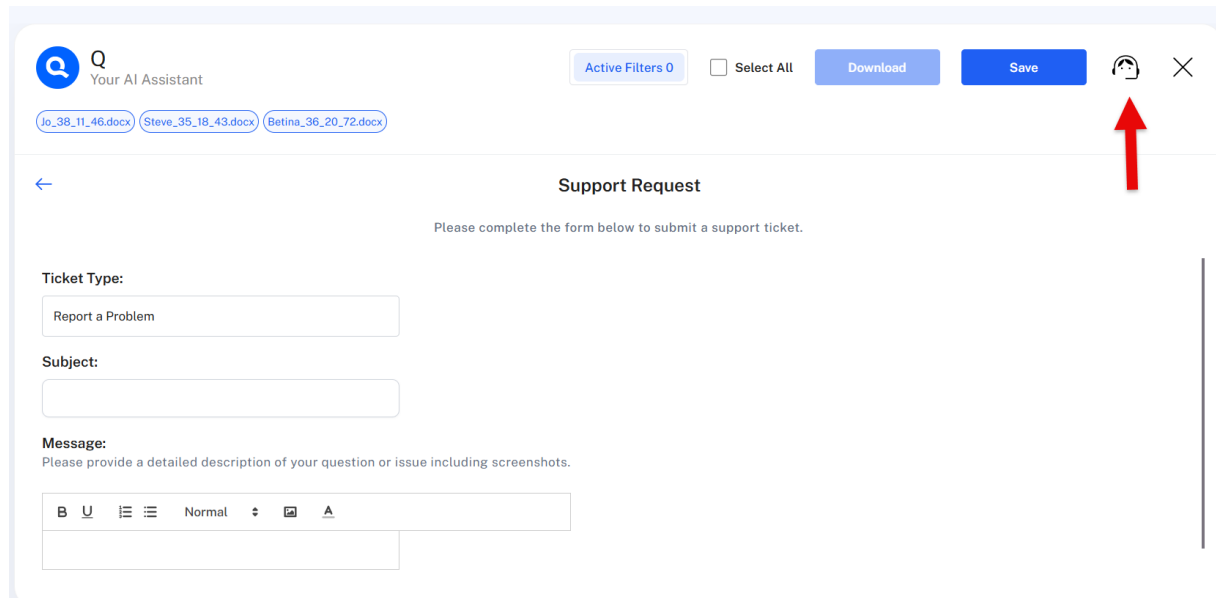
### **Repeated or persistent error messages**

If you encounter repeated error messages across several actions, the system may no longer be responding properly. In this case, log out and log in again.

## Support

You can contact us via email: [support@qinsights.ai](mailto:support@qinsights.ai).

Another option is to click on the Support icon within a Conversational Analysis:



## Resources

YouTube Videos: [QInsights Playlist](#)

Podcast: [AI in Qualitative Research](#)

Blogs: [Qeludra Blog](#) / [QInsights Blog](#)

Qeludra: [AI Resources for qualitative researchers](#)

Articles:

Friese, S. (2026). From Coding to Conversation: A New Methodological Framework for AI-Assisted Qualitative Analysis. *Qualitative Inquiry*, 0(0). <https://doi.org/10.1177/10778004251412871>

Hayes, A. S. (2025). “Conversing” With Qualitative Data: Enhancing Qualitative Research Through Large Language Models (LLMs). *International Journal of Qualitative Methods*, 24. <https://doi.org/10.1177/16094069251322346>

Morgan, D. L. (2025). *Query-based analysis: A strategy for analyzing qualitative data using ChatGPT*. *Qualitative Health Research*, Advance online publication. <https://doi.org/10.1177/10497323251321712>

Nguyen-Trung, K., & Nguyen, N. L. (2026). Narrative-Integrated Thematic Analysis (NITA): How can LLMs support theme generation without coding? *Qualitative Research in Psychology*, 1–37. <https://doi.org/10.1080/14780887.2026.2638348>