CoreClarity

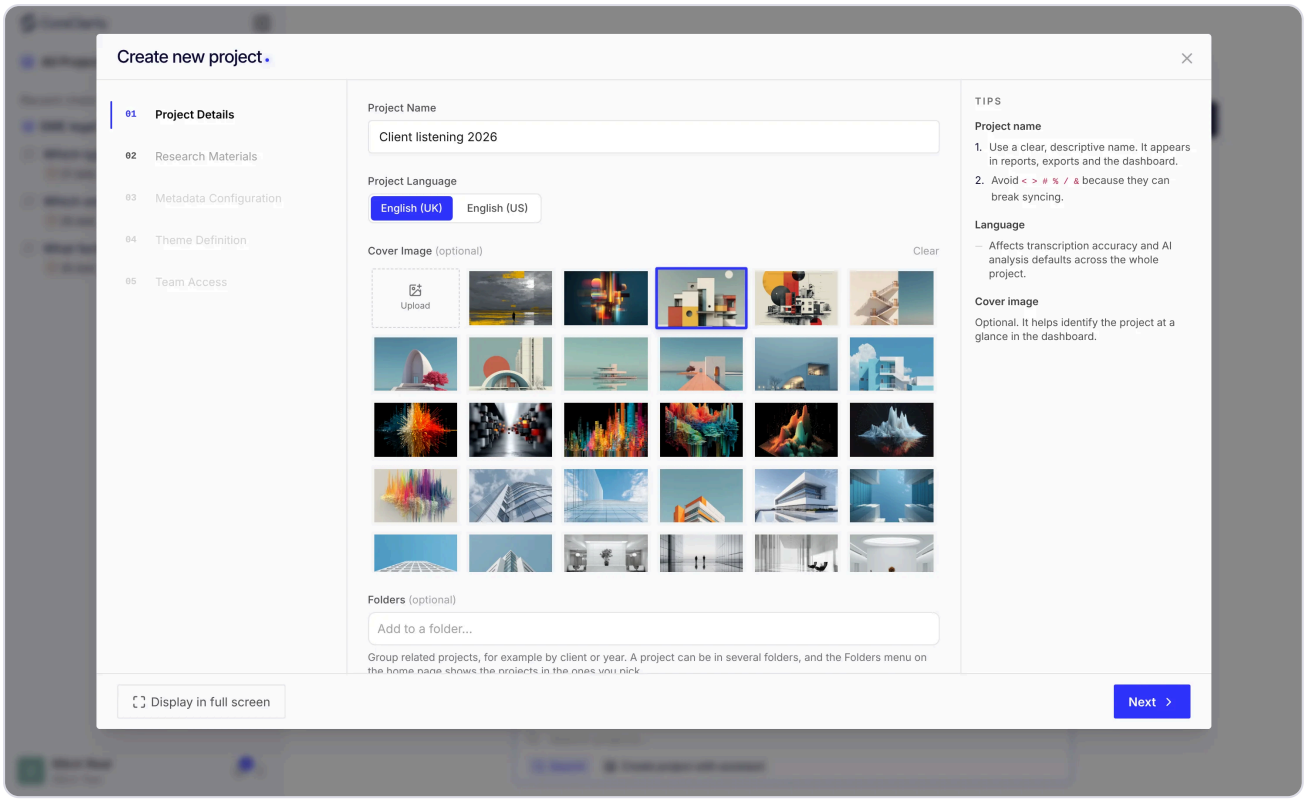
# User guide

Set up a project and add your sources. Then analyse them and share what you find.

01

# Getting started

Log in, find your way around and set up a project.




## Log in

Meridian West creates your account. Go to coreclarity.io and log in with your email address and the one-time password (OTP) we email you. If your firm uses Microsoft 365, you can sign in with your work Microsoft account instead (single sign-on). Some features are switched on per company: if you cannot see one described here, ask your Meridian West contact.

## Find your way around

The left-hand sidebar is your main navigation. From top to bottom:

- The project switcher.

- The project menu: *Overview*, *Ask Clarity*, *Insight Matrix* and *Library*.
- The *Sources* list, with *Find*, sort and *+* to add a source.
- At the foot, your notifications and the account menu: *Admin panel*, *Guides*, *Settings* and *Log out*.

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## Create a project

From the projects page, either fill in the *Create Project* form step by step, or open the setup assistant (*Display in full screen*) and describe your study or attach a brief. The assistant drafts the name, objectives, themes and metadata fields; you choose the cover image, folder and team access. Ask it for changes in the conversation or edit the form directly, and review every field it fills in.

**Tip.** The assistant suits quick or small projects. For larger studies, set up step by step so the objectives, metadata and themes are exactly what you need.

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## Step 1: Project details

Give the project a clear, descriptive name: it appears in reports, exports and the projects page. Avoid the symbols < > # % / &, which can break syncing. Choose the project language (English (UK) by default). Optionally, pick a preset cover image or upload your own, and choose or create a folder to group related projects.

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## Step 2: Research materials

**Background document.** Upload one Word (.docx) file that describes the study, such as a discussion guide, brief, proposal or statement of work. CoreClarity suggests several business objectives from it at once, for you to review, edit or add to, and uses it as context for themes and summaries throughout. Keep it focused: internal notes and unrelated content can steer the analysis the wrong way. You can open and download it later from the Overview. No document? Write your objectives in instead.

**Key Term Glossary.** Add client, brand and product names, people's names, abbreviations and jargon that will come up in this project. When you upload a recording they are offered as key terms, which you can select or deselect for each file, and they help the transcriber spell them correctly. Keep the list short and relevant: the transcriber replaces similar-sounding words with your terms, so a long company-wide list can introduce errors.

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## Step 3: Metadata

Metadata fields are the labels you tag sources with, such as client sector, region, practice area or interview type. You use them to filter *Ask Clarity*, build rows in the *Insight Matrix* and group the source table.

1. Add the ready-made fields (Quarter, Type, Client Sector, Client Region, Practice area, Office Location and Lead Partner) one by one or with *Add all*. Added fields show a tick.
2. Edit the common values that come with each field. Click *+ more* to see them all.
3. To create your own field, type a name, add values (paste a comma-separated list to add several) and click *Add field*.

Fields marked *multi* allow more than one value per source. *Open* fields, such as Lead Partner, start empty.

**Best practice.** Give every source a value for every field. Add a catch-all such as "Other" rather than leaving gaps, so filters work reliably. Fields can be changed after the project is created.

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## Step 4: Themes

Type themes in, or click *Generate Themes* to draft them from your background document or objectives. You need at least one, and you can change them later. CoreClarity splits each source into passages and matches each passage to your themes; the *Overview* then shows each theme's share of passages.

## Step 5: Team access

Select the colleagues who should have access to the project.

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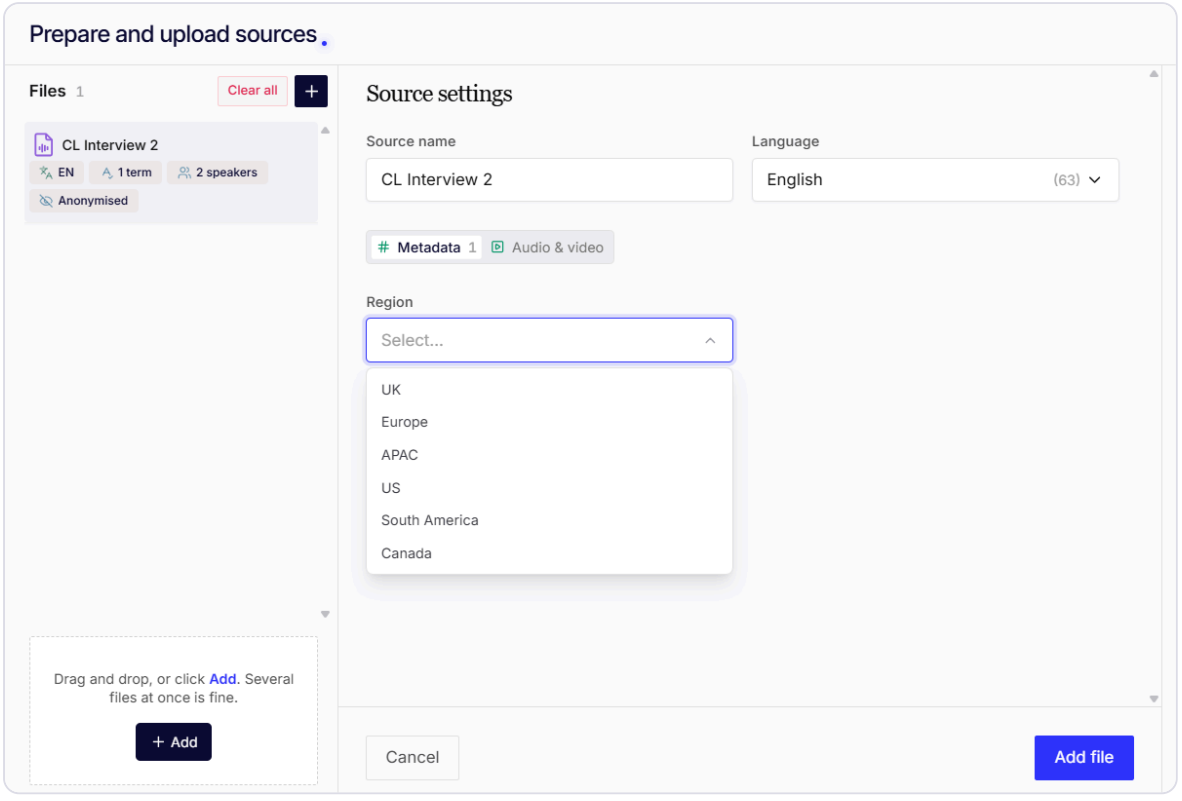
# Upload and tag sources

Add your files, check recordings once they are processed, and tag every source with metadata.




## What you can upload

| | |
|---|---|
| Documents | PDF, DOCX, PPT, PPTX, TXT, JSON, up to 100 MB each |

| | |
|---|---|
| Recordings | MP3, WAV, M4A, MP4, MOV, up to 2 GB each |
| Data files | CSV, XLS, XLSX, SAV, with one sheet, headers in row 1 and UTF-8 encoding preferred |
| Questionnaires | DOCX, up to 20 MB |

## Add sources

Drop files onto *Upload materials* at the top of the *Overview*, or use *+ Add* above the source table or *+* beside *Sources* in the sidebar. You can select several files at once. For each file, set the language and its metadata, and a name that is unique in the project (avoid the symbols < > # % / &).

**Recordings.** Check the key terms (pre-filled from the Key Term Glossary; select or deselect them for each file), set the number of expected speakers and choose whether to anonymise names and organisations.

**Survey data.** Attach the questionnaire (.docx) if you have one and choose the data type, so the tool reads the survey structure and variables correctly. Otherwise tick *I don't have a questionnaire for this file*.

## Processing

Recordings take roughly 3 to 8 minutes and documents around 10. You can keep working, and keep uploading, while files process; a notification tells you when each is ready. If an upload stalls for more than 10 minutes, open the three-dot menu on the file and choose *Remove file*, then *Report issue* if it happens again.

## Other languages

CoreClarity supports more than 50 languages. To get an English translation of a recording in another language, set *Language* to English when you upload it: CoreClarity transcribes the original and shows each line in English followed by the

original. If you choose the recording's own language, the transcript stays in that language only. The language cannot be changed after upload, so upload the file again if needed. You can export the overview in the original language or in English.

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## Check speaker names

Speakers are detected automatically, with interviewer and interviewee shown in different colours and real names used where they are mentioned. To correct them:

1. Open the transcript and click *Update speakers*.
2. Enter the right names and mark the moderator.
3. Click *Apply*.

- Auto-detect runs during processing. Run it again from *Update speakers* to suggest names from the context.
- To fix a single segment, hover over it, click the speaker icon beside the name and pick a speaker or type a new name.
- To rename a speaker throughout, click their name in the transcript.
- Occasionally one person is split into two profiles: merge them the same way.

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## Correct the transcript

### To fix one segment

1. Hover over the segment and click *Edit*.
2. Change the text and click *Save*.

### To fix the same mistake throughout

1. Open *Replace segments* in the right-hand panel.
2. Enter the wrong text and its correction.
3. Tick the segments to change. Expand a segment with several matches to review each one.
4. Click *Replace all*.

Check each match first, as “dated reach” also matches “updated reach”. Adding the term to the Key Term Glossary prevents the error in future uploads.

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## Tag sources with metadata

There are four ways to tag: while uploading; inline in the source table; from the source page with *Edit source*; or in bulk with the source metadata assistant.

**Metadata assistant.** Click the speech-bubble icon above the source table. Type an instruction, such as “Tag the first three sources as UK and the rest as US”, or attach a spreadsheet with source names in the first column and one column per field. The assistant will propose changes but will not apply them until you approve them.

**Before you start.** The assistant can only use fields and values that already exist, so add them in Project settings first. In your tagging spreadsheet, enter “N/A” where a field does not apply to a source, rather than leaving the cell empty. To tag an existing project with a new field, add the field in Project settings, then fill it in inline or with the assistant.

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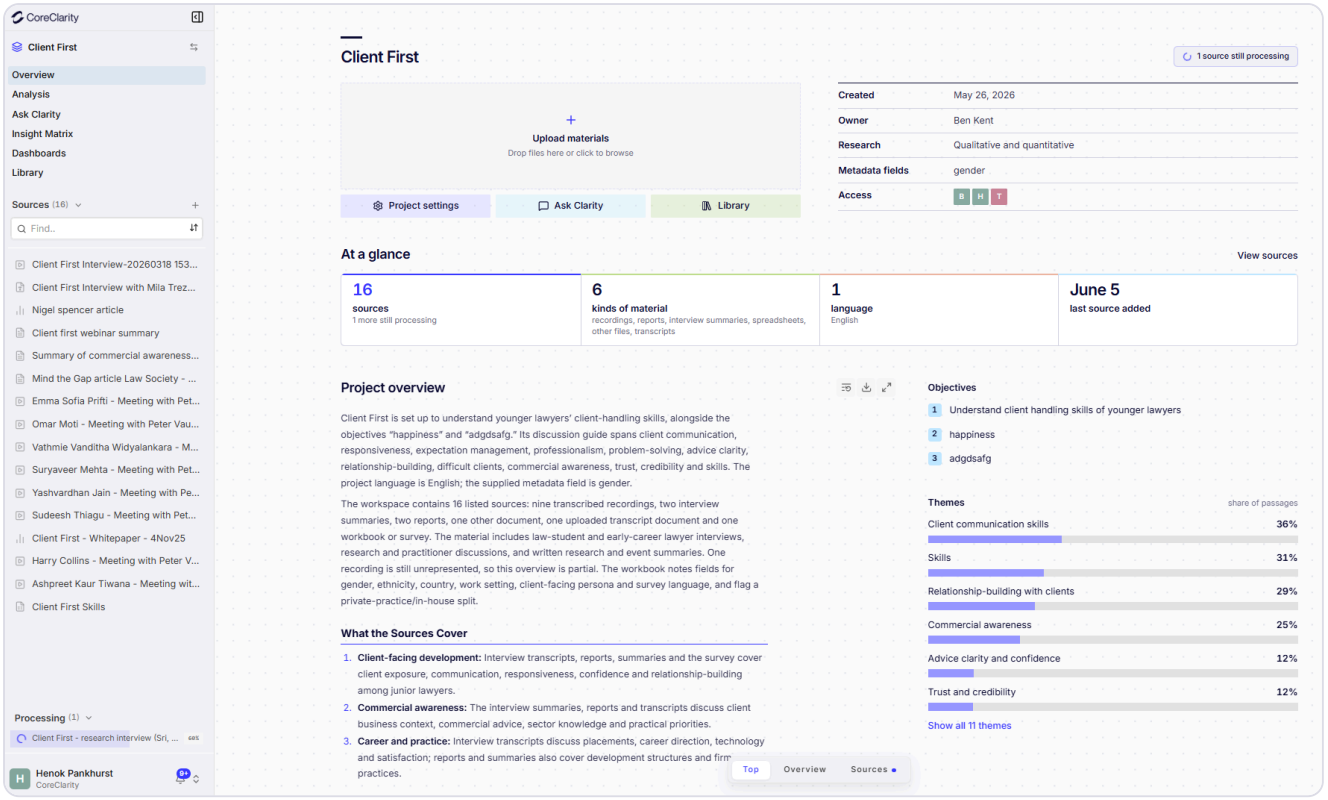
# Overview

See what a project contains, read its AI-written overview and find any source quickly.




## The Overview

Each project opens on its *Overview*: upload box and shortcuts at the top, then *At a glance*, an AI-written project overview, your objectives, themes and the source table. The *Project details* panel on the right shows when the project was created, its owner (which can be changed), the type of research, the metadata fields and who has access. *At a glance* counts the number of available sources, their types and languages, and when the last was added.

**Project overview** is built from the individual source summaries. Click *Regenerate* after adding sources; download it as a markdown file. *Themes* shows each theme's share of passages. It describes the material, not the percentage of respondents who hold a view.

**Source table.** Search, filter and group sources; click a metadata value to filter by it; click the icon beside a name to read its summary without opening it. Use *Open* to go to a source or *Edit* to change its name and metadata, and show 10, 20 or 50 rows per page. *Export to Excel* exports the current filtered view.

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## Change themes and settings

Project settings repeat the setup steps, so anything can be changed later. Changing themes recalculates the project, which takes extra processing time. Project settings also hold *Archive project*. Slide templates and tone of voice are company-wide: find them under *Settings* › *Brand guide* and *Settings* › *Tone of voice*.

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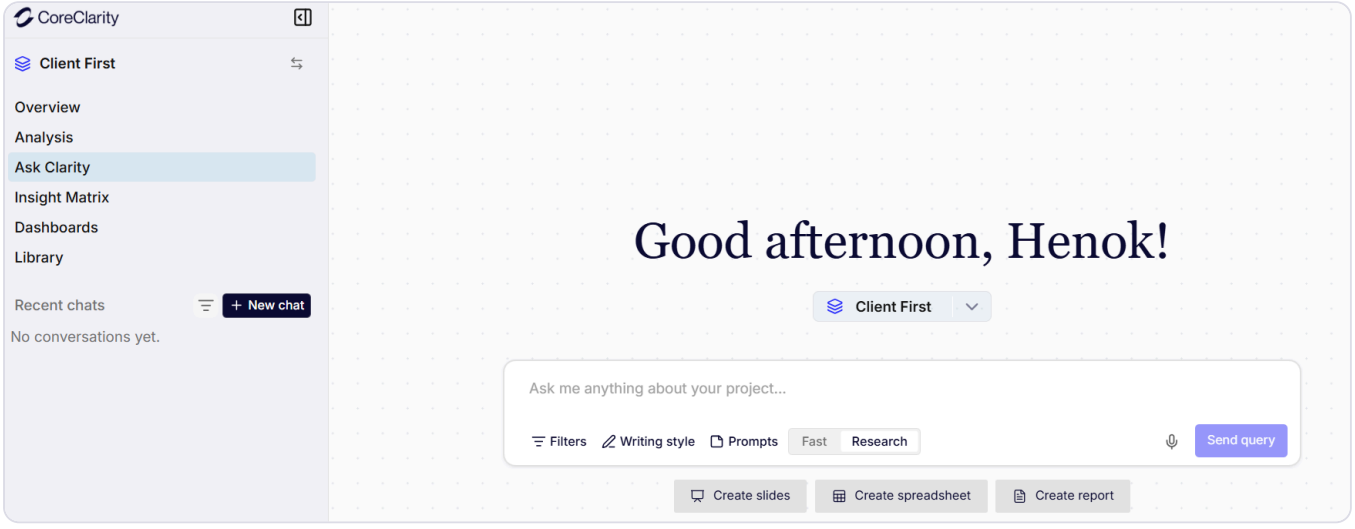
# Ask Clarity

Ask questions across your material and check the evidence behind every answer.



## Ask a question

*Ask Clarity* answers questions about your project's material, across interviews, documents and survey data.

**Fast** gives a quick answer in one pass, for simple questions. **Research** plans and runs several analysis tasks first, often taking several minutes, for complex or multi-part questions and those that combine qualitative and quantitative data.

Within the message box you can set *Filters*, a *Writing style* and saved *Prompts*, switch between *Fast* and *Research*, or dictate. You can also ask in plain language, such as "Compare the UK and US interviews", and *Ask Clarity* uses your metadata to pick the sources.

**On an older account?** Some accounts still have the earlier *Talk to Your Data* and *Analysis* pages. *Ask Clarity* and the *Insight Matrix* replace them; if you use them, change filters only after an answer has finished.

## Check the evidence

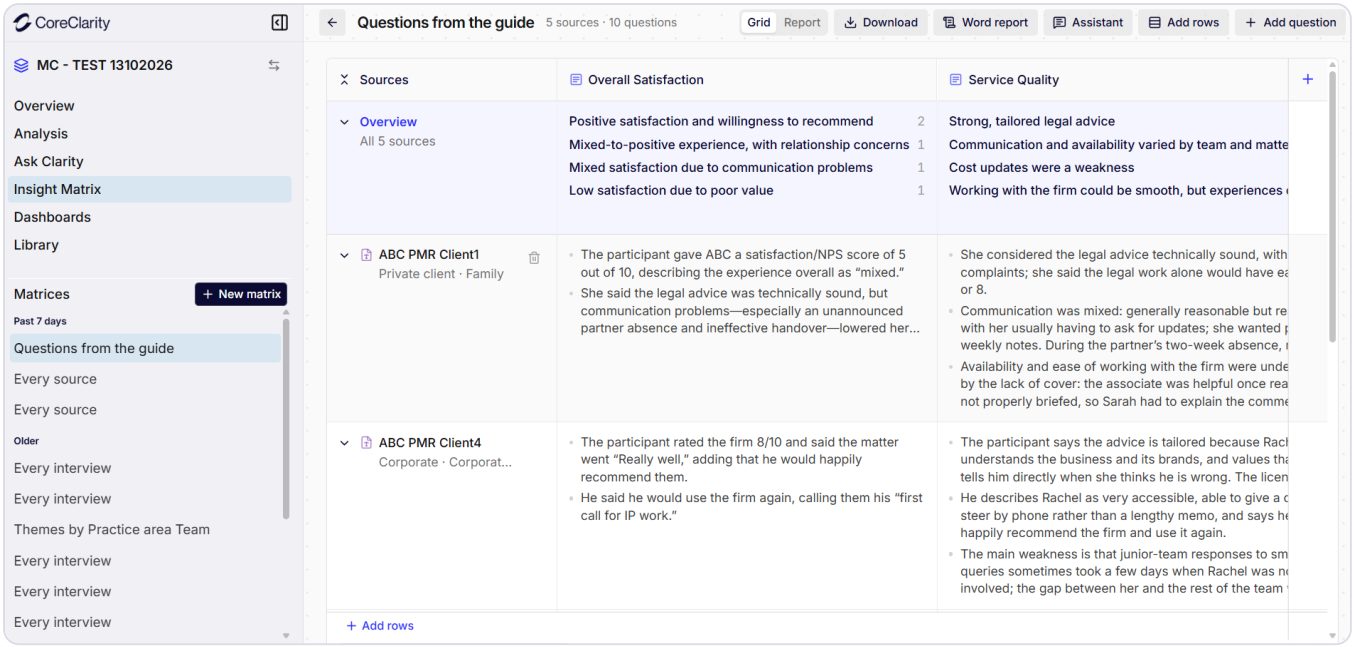
Qualitative findings cite excerpts: click a citation to see the original source with the passage highlighted. Numerical findings come with tables or charts, and *Analysis code* shows how each figure was calculated. The research trail records the work done for each answer.

Follow up, challenge a result or ask for a different comparison in the same chat. Conversations run in the background and are listed under *Recent chats*, where you can reopen and rename them. Bookmark an answer to save it to the *Library*.

05

# Insight Matrix

Ask every qualitative source the same questions and compare the answers in one grid.




## Build a matrix

The matrix asks every qualitative source the same questions and lays the answers out as a grid, with sources (or speakers, or groups) down the side and questions across the top. Every answer cites the passages it rests on. Matrices are saved, so you can return, add questions and compare groups.

1. Open *Insight Matrix*, click *New matrix* and choose how to start: *Every source*, *Questions from the guide*, or *Themes by metadata*.
2. Every source gets a row by default. Use *Add rows* for a single speaker, a metadata group (such as one row per country) or a saved filter.
3. Click *Add question*, type it and choose the answer type: Summary, Quotes, Yes / No, Number, Categories (labels from a list you define), Themes or Sentiment (per speaker for transcripts). You can rename the column, limit the question to particular

themes, choose whether it appears in the overview row, and pick from example questions or ones suggested by your background document.

4. Click *Get insights*. The button shows how many cells will be generated, and they fill in as they complete.

The overview row clusters the answers and counts the sources in each. *Not discussed* means a source never covers the topic: treat it as a finding. Switch to *Report view* to read question by question, or download a Word report.

**Tip.** Ask about one topic per question, and phrase Summary questions as what, how or why. For client feedback, try follow-up actions, service improvements or cross-selling, client by client.

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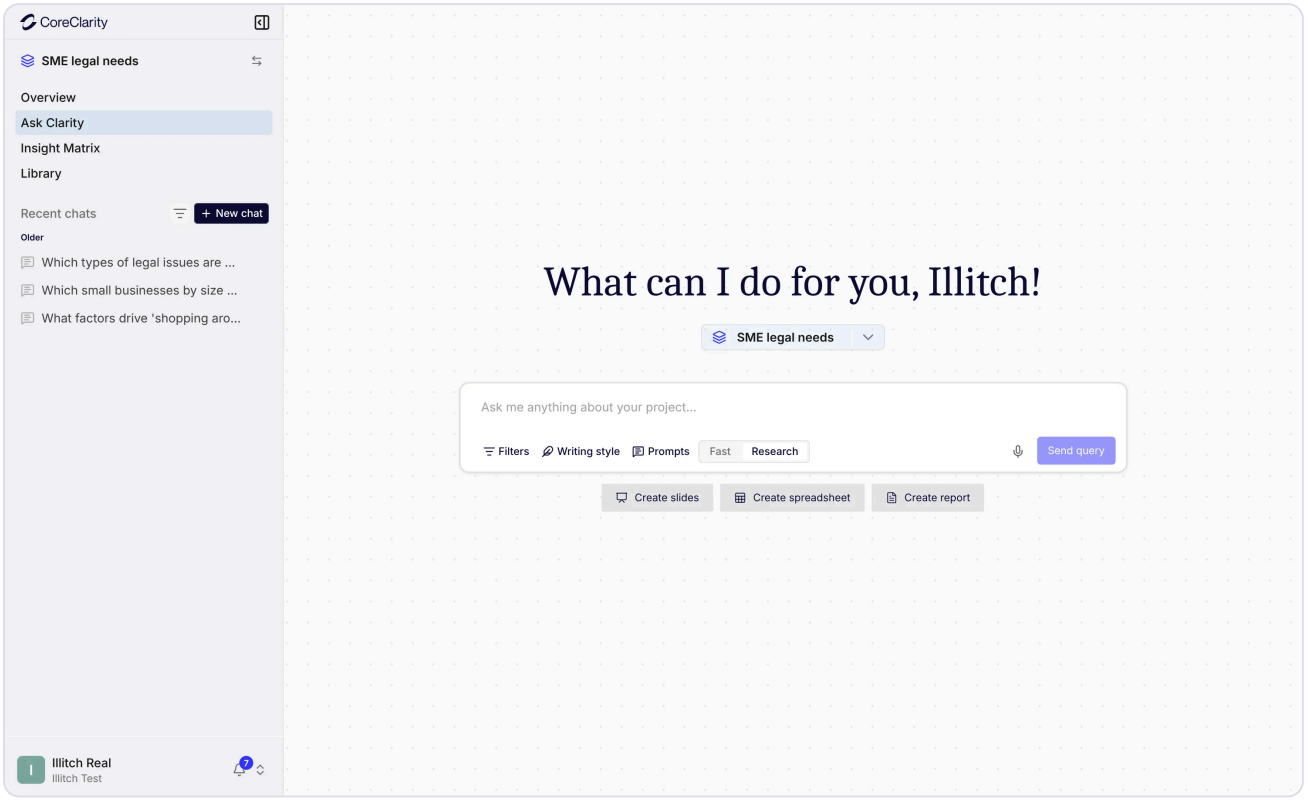
# Outputs

Turn your findings into reports, slide decks and spreadsheets.



## Create reports, slides and spreadsheets

Choose *Create report*, *Create slides* or *Create spreadsheet* below the message box, or ask in a conversation, for example “Turn this into a presentation”.

1. Explore the topic in the conversation until you are happy with the findings.
2. Ask for an outline, slide by slide or section by section, and say how long it should be.
3. Review the outline and ask for changes.
4. Create the output. A full report or deck takes a few minutes; long decks are quicker section by section. Download decks as PowerPoint and save a snapshot to the *Library*.

## Branded decks (Enterprise tier)

*Settings* › *Brand guide* holds your company’s PowerPoint templates, and *Settings* › *Tone of voice* sets how AI-written text should sound. When you choose *Create slides*, pick a template (yours first, then the built-in ones) or click *Use default*. The deck is built in that template and downloads as PowerPoint.

**Managers only.** Preparing a template: upload a .pptx under *Settings* › *Brand guide*. Remove placeholder text and unused slides so the right layouts are picked up. Check the layout previews, then click *Approve and activate*. Only managers can set the brand guide and tone of voice.

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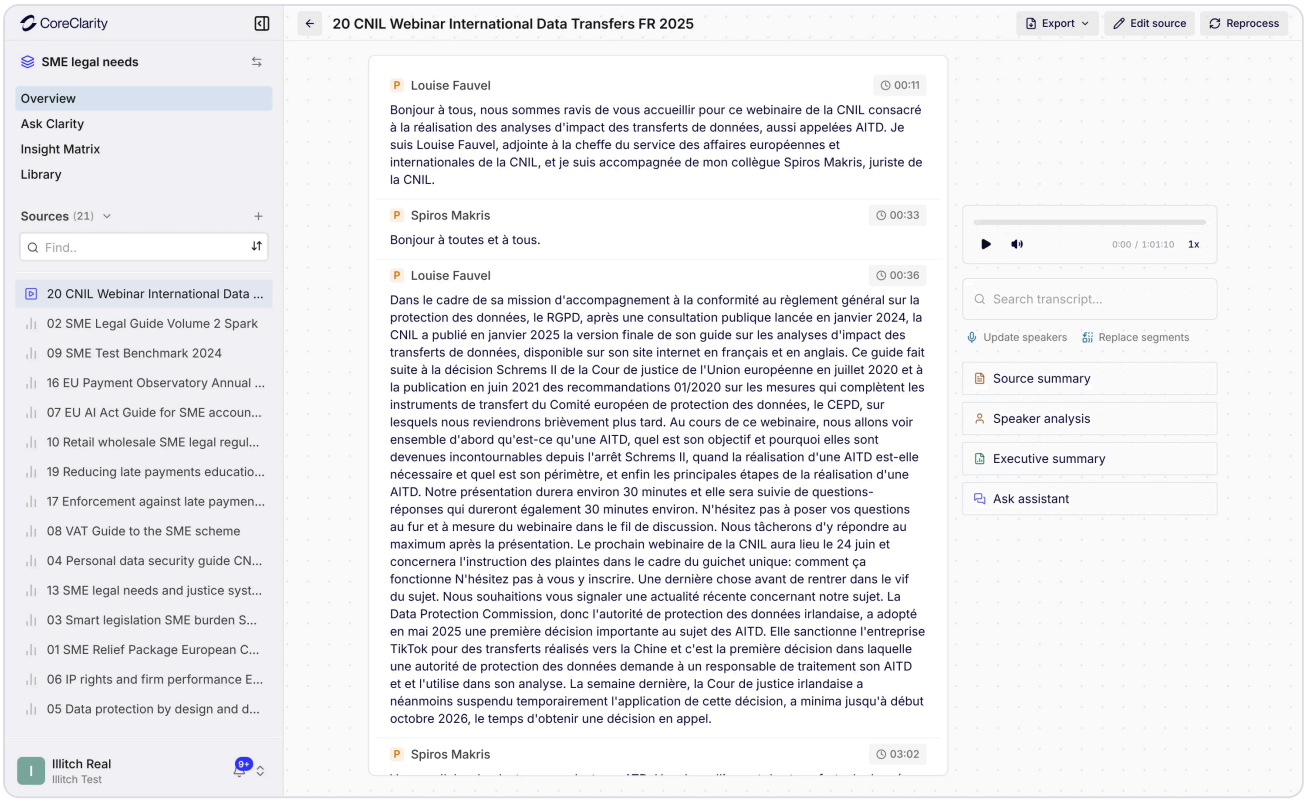
# Sources and clips

Open a single source to read it, summarise it, question it and cut clips.

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## The source page

Open any transcript, document or dataset from the source table or sidebar.

### Top bar

- *Export*, *Edit source* and *Reprocess*.

### Right-hand panel for recordings

- The player and transcript search.
- *Update speakers* and *Replace segments*.
- *Source summary*, *Speaker analysis* and *Executive summary*.
- *Ask assistant*.

**Right-hand panel for documents**

- Search.
- *Source summary* and *Executive summary*.
- *Ask assistant*.

Click a line of the transcript and press play to hear it. The player skips 10 seconds, changes speed and volume, and opens a larger player or picture-in-picture.

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## Summaries

**Source summary** is written automatically for every source: an introduction, highlights and notable points.

**Speaker analysis** (recordings only) summarises each speaker's views.

**Executive summary** is a structured, report-style summary that can include scores. Edit it with the formatting toolbar, select text to *Rewrite*, *Shorten*, *Expand* or *Simplify* it, and export it as a Word document.

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## Ask assistant

Use *Ask assistant*, the last button in the right-hand panel, to question the source you have open. Its references highlight the passages in the text; click a citation to check the evidence.

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## Clips

Highlight words in a transcript to preview a clip, with its speaker, length and text. Nudge the start with Alt + arrow and the end with Alt + Shift + arrow, use *Replay* to check it, then *Save to Library* or *Download*. To join clips into one video, build a showreel in the *Library* (see Library and exports).

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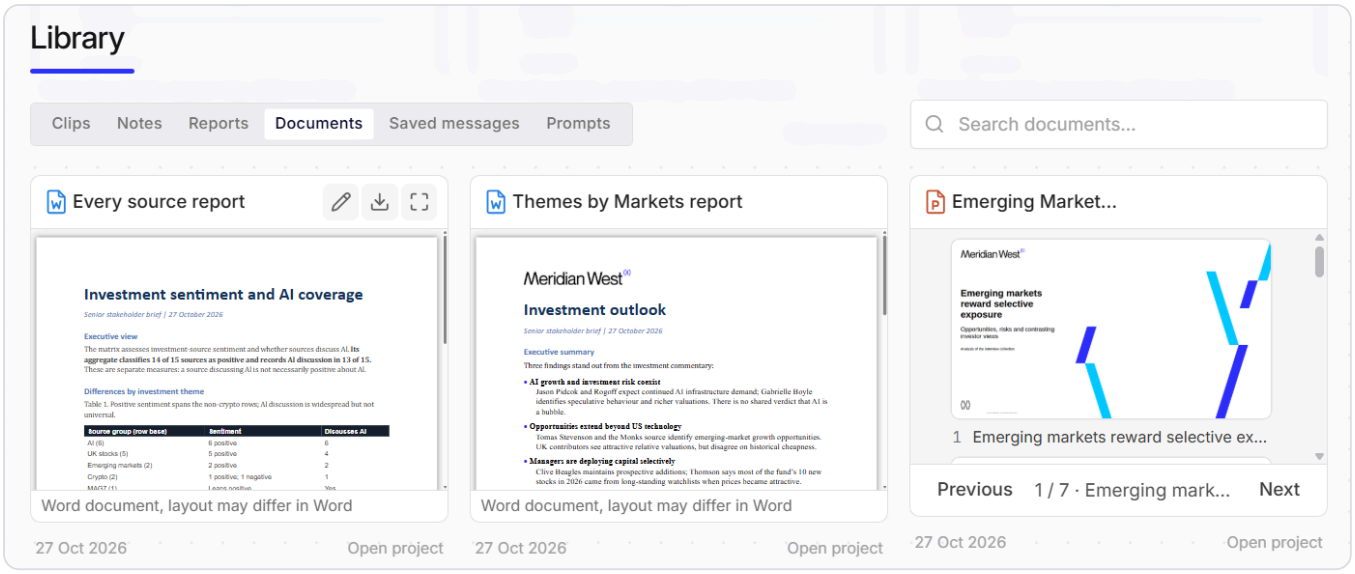
# Library and exports

Keep what you want to reuse, and take your work out of CoreClarity.




## The Library

Everything you want to reuse in a project, in six tabs: *Clips*, *Notes*, *Reports*, *Documents*, *Saved messages* (bookmarked answers and deck snapshots) and *Prompts*.

## Showreels

In the *Library*, *New showreel* joins saved clips into one video: give it a title, then add, order and trim clips on the timeline.

## What you can export

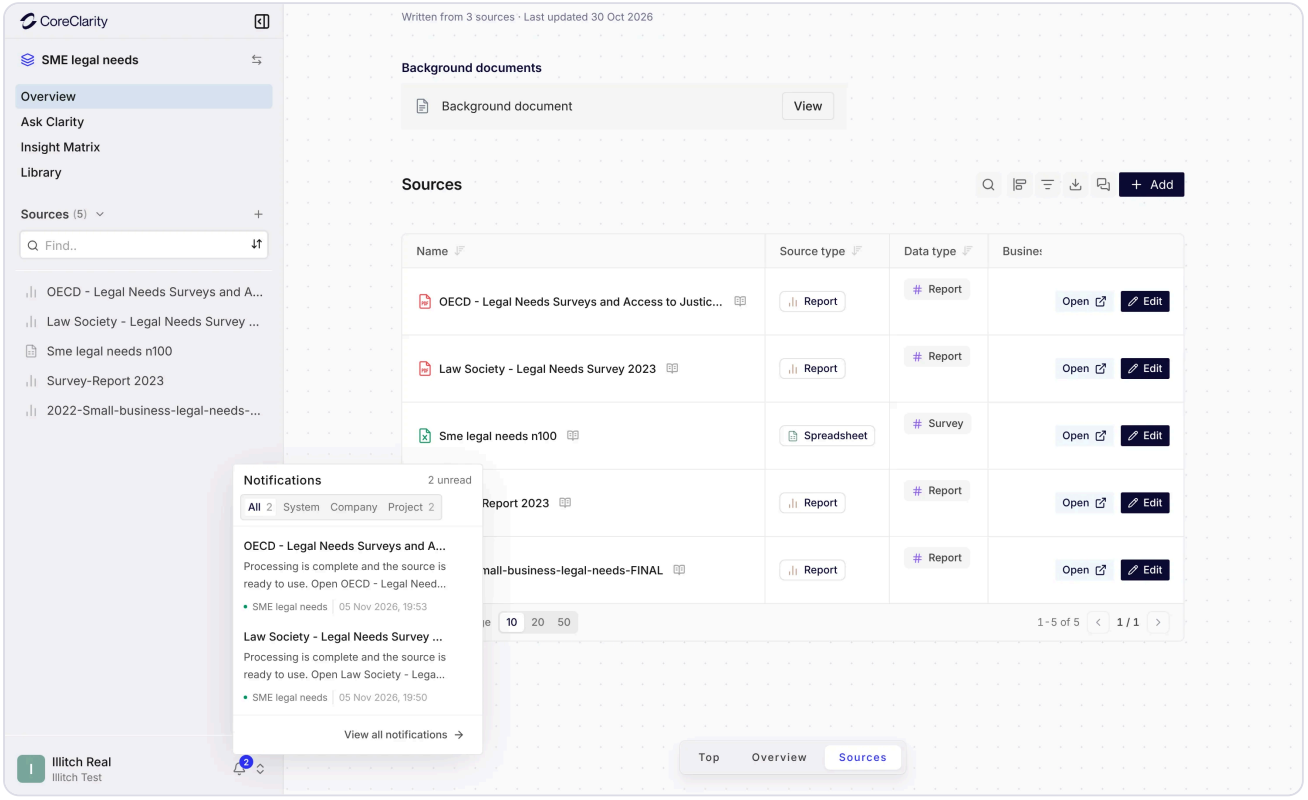
| | |
|---|---|
| Transcript | Word, full verbatim or summary only |

| | |
|---|---|
| **Source metadata** | Excel, current filtered view |
| **Project overview** | Markdown |
| **Executive summary** | Word |
| **Insight Matrix** | Word report |
| **Ask Clarity outputs** | Report, PowerPoint deck or spreadsheet: see Outputs |
| **Clips** | Audio or video, from the clip preview |

09

# Access and help

Stay up to date, manage who can open each project and get support.



## Notifications

The bell shows unseen updates, filtered by platform, company and project; open an item to read it in full. You are notified when a source finishes processing and when someone is added to a project. Anyone with access to a project can post an announcement to it, and save it as a draft first; authorised administrators can reach wider audiences.

## Manage access

**Managers only.** Open *Settings* from the account menu, then *Project access*, to see every project in your company and who can open it; use *Grant Access* or *Withdraw* to change it. The project owner is shown on the *Overview* and can be changed there.

## Using AI responsibly

Get consent for every recording, and create only the metadata fields you need so participants are not over-identified. The AI can misread complex or abstract ideas and can reflect bias in its training data, so verify key findings before important decisions.

## Getting help

Contact your Meridian West contact, or open *Settings* from the account menu and choose *Report a bug* under *Support*. We reply within 24 hours. For a demo or free trial, email info@meridianwest.co.uk.

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# Glossary

| | |
|---|---|
| **Answer mode** | The choice in Ask Clarity between Fast and Research. |
| **Ask assistant** | The source page tool that answers questions about that one source, with highlighted references. |
| **Ask Clarity** | CoreClarity's chat agent, which analyses your material and creates reports, slides and spreadsheets. |
| **Background document** | A Word file describing the study, used as context for the analysis. |
| **Brand guide** | Your company's PowerPoint templates for branded slides, set by a manager in Settings › Brand guide. |
| **Clip** | A short extract of a recording, saved to the Library or downloaded. |
| **Excerpt** | A short passage quoted in support of a finding. |
| **Folder** | A way to group related projects on the projects page. |
| **Inline editing** | Changing a source's metadata directly in the source table. |

| | |
|---|---|
| **Insight Matrix** | A grid that asks every qualitative source, speaker or group the same questions, with cited answers. |
| **Key Term Glossary** | A project's names and jargon, which help the transcriber spell them correctly. |
| **Library** | Where a project's clips, notes, reports, documents, saved messages and prompts are kept. |
| **Metadata field** | A label such as region or client type, given a value on each source. |
| **Not discussed** | An Insight Matrix result: the source never covers the topic. |
| **Overview row** | The top row of a matrix, clustering every answer to a question. |
| **Reprocess** | Running a source through processing again, from its page. |
| **Research filters** | Controls that restrict an Ask Clarity question to particular themes, sources or groups. |
| **Research trail** | The record of the work Ask Clarity did to produce an answer. |
| **Setup assistant** | Drafts a project's name, objectives, themes and metadata from a description or brief. |

| | |
|---|---|
| **Showreel** | A video made by joining saved clips in the Library. |
| **Source metadata assistant** | Proposes metadata changes across sources for your approval. |
| **Source summary** | The AI-written overview created automatically for every source. |
| **Source table** | The list of a project's sources, their metadata and processing status. |
| **Theme** | A recurring topic that passages across the project are matched to. |
| **Tone of voice** | How AI-written text should sound, set by a manager in Settings › Tone of voice. |
| **Writing style** | The Ask Clarity setting that controls the style of an answer. |