



R3mScore Documentation

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Introduction

Welcome to the thematization module documentation for the R3M Score platform. This toolkit introduces the new AI-assisted coding feature for open questions (OQ), designed to streamline and enhance the qualitative analysis of verbatim responses.

What is thematization?

Thematization is the process of coding open-ended responses (verbatims) into organized themes and ideas. By structuring qualitative data, you can extract actionable insights, quantify recurring topics, and make your research more robust and comparable.

AI-assisted coding

With the R3M Score platform, you can now leverage artificial intelligence to:

- **Automatically generate a code frame** from your verbatim files or import an existing code plan.
- **Efficiently code and thematize verbatims**, saving time and reducing manual effort.
- **Retrieve coded files** ready for further analysis and integration with quantitative data.

How it works

The thematization workflow consists of two main steps:

1. **Creation or integration of a code frame:** Build a new code frame from your verbatim data, or upload an existing coding plan to use as a reference.
2. **Codification of verbatims:** Apply the code frame to your open-ended responses. The platform will process, code, and return a structured file for analysis.



TIP

Each project is linked to a single code frame. If you want to code different types of responses (e.g., Likes and Dislikes), create a separate project for each.

Why use thematization?

- **Faster and more consistent coding** with AI assistance.
- **Easier extraction of actionable insights** from qualitative data.
- **Seamless integration** with quantitative analysis and reporting.

This documentation will guide you through every stage of the thematization process, from project setup and code frame management to coding, output interpretation, and best practices.

If you need support or have questions, please refer to the support resources at the end of this documentation.

Getting started

This section will help you begin using the thematization module on the R3M Score platform. Follow these steps to set up your first thematization project and prepare your data for AI-assisted coding.

Prerequisites

Before you start, make sure you have:

- Access to the R3M Score platform with the thematization module enabled.
- Your open-ended responses (verbatim) collected and saved in an Excel file.
- A clear idea of the language you will be working in (French or English).

Accessing the thematization module

1. **Log in** to the R3M Score platform.
2. Navigate to the thematization section from the main dashboard.



Project structure

- **One project = one code frame.** If you need to code different types of responses (e.g., Likes and Dislikes), create a separate project for each.

Supported languages

- The platform currently supports French, English and Spanish for AI-assisted coding.

Next steps

Once you have access and your data is ready, you can proceed to create your first thematization project. The following sections will guide you through project creation, code frame management, and the coding process.



TIP

For best results, ensure your verbatim file is well-organized and clearly labeled before uploading.

Code frame overview

A **code frame** is the backbone of the thematization process. It is a structured list of themes and ideas used to categorize and code open-ended responses (verbatims) in a consistent and meaningful way.

What is a code frame?

- A code frame organizes qualitative data by grouping similar responses under common themes and sub-themes.
- It enables you to quantify and analyze qualitative feedback, making it easier to identify trends, recurring topics, and actionable insights.

Codeframe - Test Thématization

Codeframe management

> ☐ 100 Sensations et effets

> ☐ 200 Efficacité et performance

> ☐ 300 Nature et composition

> ☐ 400 Problèmes et inconvénients

> ☐ 500 Innovation et tradition

> ☐ 600 Attractivité et apparence

> ☐ 700 Générosité et abondance

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Structure of a code frame

- **Themes (Main Categories):** Broad topics or areas (e.g., "Design," "Performance," "Usage").
- **Ideas/Sub-themes:** More specific aspects within each theme (e.g., "Color," "Ergonomics," "Battery Life").

Example

Code	Theme/Idea
100	Design
101	Likes the design
102	Modern look
200	Performance
201	Powerful
202	Good battery life

- Codes ending in "00" (e.g., 100, 200) are typically used for main themes.
- Codes ending in other numbers (e.g., 101, 102) represent ideas or sub-themes.

Why use a code frame?

- **Consistency:** Ensures all responses are coded using the same logic.
- **Efficiency:** Speeds up the coding process, especially with AI assistance.
- **Clarity:** Makes it easier to interpret and report on qualitative data.

How is a code frame used in the platform?

- You can **generate a code frame** automatically from your verbatim file or **import an existing code frame**.
- The platform uses the code frame to assign codes to each meaning unit in your responses, enabling structured analysis.



TIP

A well-structured code frame is essential for reliable and insightful thematization. Take time to review and adapt your code frame before starting the coding process.

Generate a code frame from verbatims

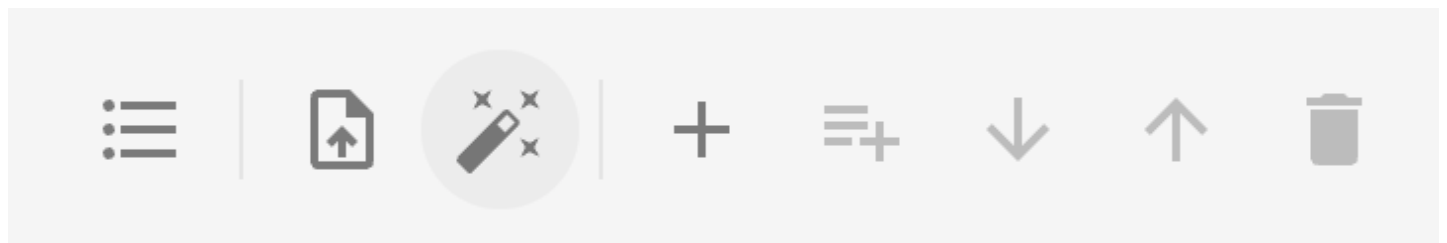
The R3M platform allows you to automatically generate a code frame from your open-ended responses (verbatim) using AI assistance. This feature streamlines the initial setup of your thematization project and ensures that your code frame reflects the real content of your data.

Step-by-step process

1. Start a new project

- Create a new thematization project and specify the working language (French or English).
- Remember: **One project = one code frame**. If you have different types of responses (e.g., Likes and Dislikes), create separate projects for each.

2. Upload your verbatim file



- Prepare your verbatim responses in an Excel file.
- Upload the file to the platform.
- Indicate where the data can be found:
 - **Tab name**
 - **Column** where verbatims are located
 - **Row** where the data starts

Generate a codeframe

Upload a verbatim file

Select a file

CHOOSE

Where the data begins:

Tab number

Column number

Line number

1

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UPLOAD

3. Automatic code frame generation

- The platform analyzes your verbatims and uses AI to identify ideas and group them into themes.
- A draft code frame is generated, reflecting the main topics and sub-themes present in your data.

4. Review and edit the code frame

- After generation, review the proposed code frame.
- You can:
 - **Rename** ideas and themes (using the pen icon)
 - **Delete** ideas or themes (using the trash icon)
 - **Add** new themes or ideas (plus icons)
- (Coming soon: Move ideas between themes using arrows)

Codeframe - Test Thématization

Codeframe management

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100 Sensations et effets

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200 Efficacité et performance

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300 Nature et composition

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600 Attractivité et apparence

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TIP

Take time to refine your code frame before starting codification. A well-adapted code frame leads to more accurate and meaningful results.

By generating your code frame from real verbatims, you ensure that your thematization process is grounded in the actual language and concerns of your respondents.

Import an existing code frame

If you already have a code frame (coding plan) from previous projects or external sources, the R3M platform allows you to import it directly. This saves time and ensures consistency across studies.

Step-by-step process

1. Prepare your code frame file

- Your code frame should be in Excel format.
- Clearly structure your file:
 - **Main themes** (e.g., 100, 200, 300) as titles or categories.
 - **Ideas/sub-themes** (e.g., 101, 102, 103) as specific codes under each theme.
- Avoid including subtotal or NET groupings in the file; these should be calculated during data processing.

Example structure

Code	Theme/Idea
100	Texture
101	Doesn't like the texture
102	Too runny/too liquid texture
103	Too light/too thin texture
104	Too oily texture
200	Scent
201	I do not like the smell
202	Chemical smell

B	PRODUCT QUALITIES
<u>C</u>	<u>Texture</u>
1	Pleasant / good texture
2	Thin / light texture
3	Not greasy / not oily texture
4	Not sticky texture
5	Soft / silky texture
6	Unctuous / creamy texture
7	Thick / dense texture
8	Liquid texture
10	Smooth texture
11	Wet texture / not dry
314	Not too thick or too runny
13	Other texture
<u>C</u>	<u>Scent</u>
14	Smells good / Pleasant scent
15	Light scent / Not too strong
20	No smell/ Fragrance free
21	Long-lasting scent
22	Other scent
<u>C</u>	<u>Usage/application</u>
23	Easy to apply / easy to spread
24	Easy to apply with a brush / a sponge
25	Penetrates well / absorbs-dries quickly
26	Quick to apply
27	Spreads evenly
28	Pleasant to apply
29	Does not make flakes / clumps
30	Easy to remove
31	Doesn't smear-smudge
32	Easy to blend
312	Glides on nicely, smooth to apply
33	Other usage/application

2. Upload the code frame

- In your thematization project, select the option to **Import a code frame**.
- Upload your Excel file.
- Indicate where the data is located:
 - **Tab name**
 - **Row** where the code frame starts

3. Platform integration

- The platform will read your file and generate the code frame accordingly.
- You can then review, edit, or adapt the imported code frame as needed (rename, delete, add themes/ideas).



TIP

Make sure your code frame is well-structured and clearly labeled before importing. This will ensure a smooth integration and accurate coding.

File format reminders

- Use clear, descriptive codes and labels.
- Do not include subtotal or NET groupings—these can be added during data processing after coding.
- If you need to group themes (e.g., "USAGE" combining Texture + Scent + Usage/Application), do this in your analysis, not in the code frame file.

Importing an existing code frame helps maintain consistency and speeds up the thematization process, especially for recurring studies or standardized research topics.

Edit & adapt code frame

After generating or importing a code frame, the R3M platform allows you to refine and customize it to best fit your project's needs. Editing and adapting your code frame ensures that your thematization is accurate, relevant, and tailored to your specific data.

Why edit the code frame?

- **Improve accuracy:** Fine-tune themes and ideas to better reflect the content of your verbatims.
- **Increase relevance:** Remove irrelevant or redundant codes and add new ones as needed.
- **Enhance clarity:** Use clear, descriptive names for themes and ideas to make coding and analysis easier.

Editing tools & actions

You can perform the following actions directly in the platform's code frame editor:

-- **Rename ideas and themes:** Click the pen icon to edit the name of any theme or idea for clarity or consistency.

-- **Delete ideas or themes:** Select the item and click the trash icon to remove it from your code frame.

-- **Add new themes or ideas:** Use the plus icon in the top menu to add a new theme, or the plus on the right to add a new idea or sub-theme under an existing theme.

-- **Move ideas between themes:** (Feature coming soon) Use arrows to reorganize ideas and place them under different themes as your analysis evolves.

Codeframe management

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100 Sensations et effets

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200 Efficacité et performance

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300 Nature et composition

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TIP

A well-adapted code frame is essential for meaningful thematization. Take time to review and adjust your code frame before starting the codification process.

Iterative improvement

- You can return to the code frame at any time to make further adjustments.
- If you add or change themes/ideas after initial coding, you may need to re-run the thematization process for updated results.

Editing and adapting your code frame ensures your qualitative analysis is robust, flexible, and truly reflective of your data.

Codification process

Once your code frame is finalized, you can launch the codification (thematization) process on the R3M platform. This step applies your code frame to the verbatim responses, automatically coding each meaning unit for structured analysis.

Step-by-step codification

1. Validate your code frame

- Ensure your code frame is complete and accurately reflects the themes and ideas relevant to your project.
- Make any final edits or adjustments before proceeding.

2. Upload the verbatim file

- Prepare your verbatim responses in an Excel file.
- Upload the file to the platform.
- Specify where the data is located:
 - **Tab name**
 - **Column** containing the verbatims
 - **Row** where the data starts

3. Launch codification

- Once the code frame is validated and the verbatim file is uploaded, start the codification/thematization process.
- The platform will process the data, assigning codes to each meaning unit found in the responses.

4. Processing and output

- The codification process may take several minutes, depending on the size of your dataset.
- You will receive an Excel file by email with several tabs containing the coded results.



TIP

Do not change the order of verbatims in your output file until you have recovered any additional information (such as IDs) that may not appear in the coded output.

What happens next?

- Review the coded file and check for accuracy.
- If you need to adjust the code frame (e.g., add new themes or ideas), you can update it and re-run the codification process for improved results.

The codification process transforms raw qualitative data into structured, actionable insights, ready for further analysis and reporting.

Output file structure

After the codification process, the R3M platform provides you with an Excel file containing several tabs. Each tab serves a specific purpose in helping you interpret, analyze, and further process your thematized data.

Overview of output tabs

Meaning Units	Thematization	CodeFrame	9099 unclassified ideas
---------------	---------------	-----------	-------------------------

1. Meaning units tab

- **Purpose:** Lists each verbatim alongside the meaning units (segments of text) that have been identified and coded.
- **Use:** Allows you to see exactly how each response was broken down and which codes were assigned.

2. Thematization tab

- **Purpose:** Shows the same verbatims, but with the codes associated with each meaning unit.
- **Use:** Provides a clear mapping between the original text and the assigned codes, making it easy to trace coding decisions.

3. Code frame tab

- **Purpose:** Contains the full code frame used for coding, including all themes and ideas.
- **Use:** Lets you quickly count the number of occurrences for each idea (using Excel formulas) and review the structure of your coding plan.

4. Unclassified ideas tab

- **Purpose:** Lists meaning units that could not be coded with the current code frame, along with their occurrences.
- **Use:** Helps you identify gaps in your code frame and decide if new themes or ideas should be added.



TIP

Each tab in the output file is designed to support a different aspect of your analysis, from reviewing individual coding decisions to refining your overall code frame.

Meaning units tab

The **Meaning units** tab in your output Excel file is the foundation of the thematization process. It shows how your verbatim responses have been segmented and prepared for coding.

What are meaning units?

- **Meaning units** are segments of text extracted from each verbatim response.
- Each unit represents a distinct idea, opinion, or theme expressed by the respondent.
- Segmenting responses into meaning units allows for more precise and granular coding.

[illegible]

Structure of the tab

- **Verbatim:** The original open-ended response from the participant.
- **Meaning units:** The individual segments identified within each verbatim.
- Each meaning unit is listed alongside its corresponding verbatim, making it easy to trace back to the original context.

Example

Verbatim	Meaning Unit
"I love the design and the color, but it's too heavy"	"love the design"
	"love the color"
	"too heavy"

Why are meaning units important?

- **Accuracy:** Ensures each idea is coded separately, improving the quality of your analysis.
- **Clarity:** Makes it easier to see how complex responses are broken down and interpreted.
- **Flexibility:** Allows for more nuanced coding, especially when responses contain multiple themes.

Best practices

- Review the meaning units to ensure they accurately reflect the content and intent of the original verbatims.
- If you notice recurring uncoded segments, consider updating your code frame and re-running the codification process.



Meaning units are the building blocks of qualitative analysis. Careful segmentation leads to more meaningful and actionable insights.

Thematization tab

The **Thematization** tab in your output Excel file displays how each meaning unit from your verbatim responses has been coded according to your code frame. This tab is essential for understanding the link between the original text and the assigned codes.

What does the thematization tab show?

- **Verbatims:** The original open-ended responses from participants.
- **Meaning units:** Segments of each response, as identified during codification.
- **Codes:** The specific codes (themes or ideas) assigned to each meaning unit.

1	Verbatim															
2	Ecrire, dess	101	102	202	203	201	302	105								
3	Avion de pa	202	102	201												
4	dessiner all	9099	301	202	9099	402	103	403								
5	Ecrire, pens	9099	503	501	201	404										
6	Pour écrire,	9099	103	9099												
7	Dessin Écrite	9099	101	103	405	406	407									
8	Ecrire, dess	9099	9099	9099												
9	Ecrire un co	101	101	102	104	105										
10	ORIGAMI, li	9099	408	102	502											
11	écrire, desig	9099	409	9099	202	9099	9099	104	303							
12	dessin, écri	9099	9099	9099												
13	écrire un tex	101	502	9099	9099	9099	410	9099	9099							
14	Ecrire, dess	9099	9099	103	202	304	304	304	304	410	9099	9099	9099	9099	9099	502
15	Créer des ca	9099	9099													
16	Écrire, dess	9099	9099	9099												
17	écrire, origa	9099	9099	9099	202	9099										
18	écrire, plier,	9099	9099	9099	9099											
19	Dessiner	9099														
20	Je ferai des c	204	202	9099	102											
21	Un couple	9099														
22	Ecrire, dess	9099	9099	9099	104	9099	9099	9099	9099	9099	9099	9099	304	9099	9099	9099
23	Origami lett	9099	501													
24	Ecrire, plier	9099	9099													
25	ECRIRE UN	101	9099	202	301	9099	9099									
26	Liste de cou	408	9099	101	9099											
27	lettre, origa	9099	9099	9099	9099	9099										
28	Dessin, imp	9099	9099	9099												
29	Ecrire, dessi	9099	9099	9099	410											
30	origami, déc	9099	9099													
31	Origami, de	9099	9099	104	9099	9099	9099	9099	9099							
32	Faire un avio	202	9099													
33	avion en pa	9099	9099	201	201	201	201	104								
34	Avion en pa	9099	9099	9099	9099	9099	9099	9099	9099	9099						
35	Sapin, avio	9099	9099													
36	Faire des sc	9099	9099	9099												
37	Froisser la f	9099	9099	9099												
38	Un avion	202														
39	Dessin, Orig	9099	9099	9099	9099	9099	9099									
40	Livre, cahier	9099	9099	9099	9099											
41	dessin ,lett	9099	9099													
42	Compte ren	9099	9099	9099	9099	9099	9099	9099	9099							
43	Dessin, lett	9099	9099	204	301											

Structure of the tab

Each row typically includes:

- The original verbatim.
- The meaning unit extracted from that verbatim.
- The code or codes assigned to that meaning unit.

Example

Verbatim	Meaning Unit	Code
"I love the design and the color, but it's too heavy"	love the design	202
	love the color	201
	too heavy	303

How to use the thematization tab

- **Traceability:** Easily trace which codes were assigned to which parts of each response.
- **Quality check:** Review the coding for accuracy and consistency.
- **Iteration:** If you find meaning units that are not well coded, consider refining your code frame and re-running the codification.



TIP

The thematization tab is your main reference for understanding how qualitative data has been structured and categorized for analysis.

Code frame tab

The **Code frame** tab in your output Excel file contains the complete list of themes and ideas (codes) used to categorize your verbatim responses. This tab is essential for reviewing your coding structure and for further quantitative analysis.

What does the code frame tab show?

- **All themes and ideas:** Every code used in the thematization process, organized by main themes and sub-themes.
- **Occurrences:** The number of times each idea or theme appears in your coded data.
- **Structure:** The hierarchical organization of your code frame, making it easy to see how ideas are grouped.

1	100	Activités créatives	
2	101	Écriture	
3	102	Dessin	
4	103	Origami	
5	104	Découpage	
6	105	Peinture	
7	200	Artisanat en papier	
8	201	Pliage	
9	202	Avion en papier	
10	203	Bateau en papier	
11	204	Cocottes papier	
12	300	Activités pratiques	
13	301	Allumer un feu	
14	302	Faire des trous	
15	303	Expérience de physique	
16	304	Caler	
17	400	Nouveaux thèmes	
18	401	Longue vue	
19	402	Pâte à papier	
20	403	Couronne de l'avent	
21	404	Administration	
22	405	Combustible	
23	406	Règle	
24	407	Éventail	
25	408	Liste de courses	
26	409	Designer	
27	410	Déchirer petits bouts	
28	500	Expression personnelle	
29	501	S'exprimer	
30	502	Poésie	
31	503	Penser	
32	9000	AUTRE	
33	9099	Idée non classée	

Structure of the tab

Each row typically includes:

- The code (e.g., 100, 101, 102)
- The label or description of the theme/idea
- The count of occurrences (can be calculated using Excel formulas)

Example

Code	Theme/Idea	Occurrences
100	Design	12
101	Likes the design	7
102	Modern look	5

Code	Theme/Idea	Occurrences
200	Performance	9
201	Powerful	6

How to use the code frame tab

- **Count occurrences:** Quickly count how many times each idea appears by using Excel formulas, such as: `=COUNTIF(Themmatization!C:C, CodeFrame!A2)`
- **Review structure:** Ensure your code frame is logical and comprehensive.
- **Adjust and iterate:** If you notice important ideas with low or zero occurrences, consider refining your code frame and re-running the codification.

Adding subtotals and NETS

- You can add your own subtotals or NET groupings in this tab for reporting purposes (e.g., combining several codes under a broader category).



TIP

The code frame tab is your reference for the structure and coverage of your qualitative analysis. Use it to validate your coding and to support further quantitative work.

Unclassified ideas tab

The **Unclassified ideas** tab in your output Excel file lists all meaning units that could not be assigned to any code in your current code frame. This tab is crucial for identifying gaps in your coding structure and for improving the comprehensiveness of your analysis.

What does the unclassified ideas tab show?

- **Uncoded meaning units:** Segments of verbatim responses that were not matched to any existing theme or idea.
- **Occurrences:** The number of times each unclassified idea appears in your data.

1	abri	1
2	absorber ur	1
3	accrocher s	1
4	activité	1
5	affichage m	1
6	affiche	3
7	affiche infor	1
8	affiche mur	1
9	affiches	1
10	agenda	1
11	aide-mémo	2
12	ajouter imag	1
13	algorithmes	1
14	allume-feu	3
15	allumer feu	1
16	allumer un	5
17	amplificateu	1
18	animation	1
19	antisèche	1
20	argent	1
21	arracher	1
22	art	3
23	article	2
24	avantages e	1

Structure of the tab

Each row typically includes:

- The unclassified meaning unit (text segment)
- The count of occurrences

Example

Unclassified Idea	Occurrences
"unique feature"	3
"unexpected result"	2
"not sure what to say"	1

How to use the unclassified ideas tab

- **Identify gaps:** Review unclassified ideas to spot recurring topics or concepts not covered by your current code frame.
- **Refine code frame:** Add new themes or ideas to your code frame based on these findings.
- **Iterate:** After updating your code frame, re-run the codification process to improve coverage and accuracy.



A low number of unclassified ideas indicates a well-adapted code frame. Use this tab to continuously improve your qualitative analysis.

Improve code frame

Iterative improvement is a key part of the thematization process on the R3M platform. By regularly reviewing your results and refining your code frame, you ensure that your qualitative analysis remains accurate, comprehensive, and relevant to your data.

Why improve your code frame?

- **Capture emerging themes:** New ideas or topics may appear in your data over time.
- **Reduce unclassified ideas:** Minimize the number of meaning units that remain uncoded.
- **Enhance analysis quality:** A well-adapted code frame leads to more meaningful and actionable insights.

How to improve your code frame

1. Review output tabs:

- Check the **Unclassified ideas** tab for recurring or important concepts not yet covered.
- Examine the **Code frame** and **Thematization** tabs for underused or redundant codes.

2. Refine themes and ideas:

- **Add new themes or ideas** to cover gaps identified in your data.
- **Merge or split codes** as needed to better reflect the nuances in responses.
- **Rename codes** for clarity and consistency.

3. Iterate the process:

- After making changes, re-run the codification process to apply the updated code frame to your data.
- Continue this cycle until the number of unclassified ideas is low and your code frame accurately represents your dataset.



TIP

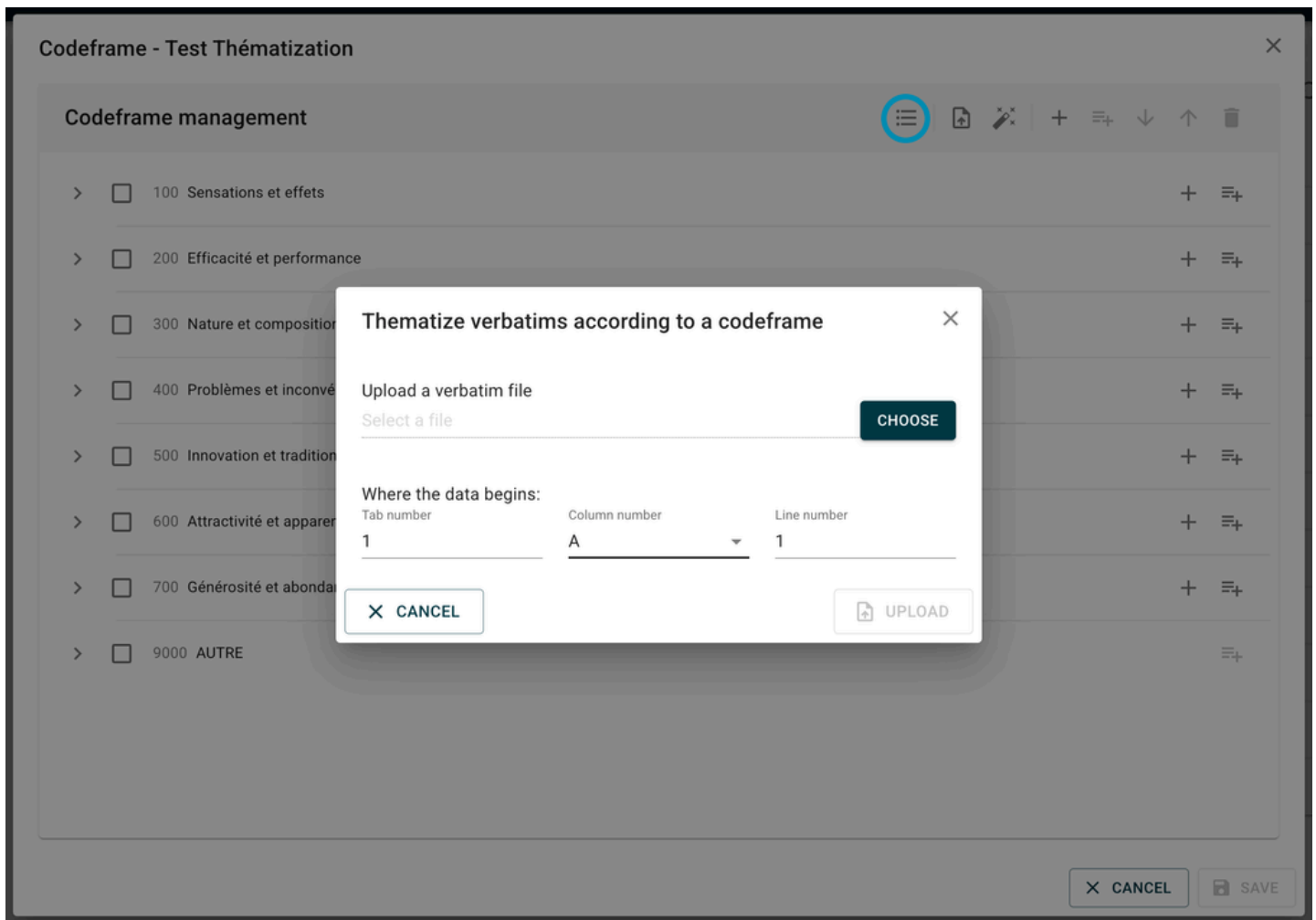
Continuous improvement of your code frame ensures your qualitative analysis evolves with your data, leading to richer and more reliable insights.

Export & integration

After thematization and codification, the R3M platform allows you to export your results for further analysis, reporting, or integration with other research tools and partners.

Exporting your results

- Once codification is complete, you will receive an Excel file by email containing all relevant tabs:
 - Meaning units
 - Thematization
 - Code frame
 - Unclassified ideas



- The exported file preserves the order of your original verbatims.



TIP

Do not change the order of verbatims in the output file until you have recovered any additional information (such as IDs) that may not appear in the coded output.

Integration with further processing

- The Excel file can be sent to data processing partners (e.g., Double Précision) for advanced analysis or cross-referencing with other survey questions.
- On the **Code frame** tab, you can add your own subtotals or NET groupings for reporting (e.g., combining several codes under a broader category like "USAGE").

Exporting and integrating your thematized data ensures that your qualitative insights can be fully leveraged alongside other research findings.