NinaSession User Manual

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1. Welcome to NinaSession

NinaSession is your AI-powered professional session assistant. It records your conversations, transcribes them in real time, automatically protects sensitive information, and generates structured reports — saving you hours of documentation work after every session. Whether you are a therapist documenting a clinical session, a lawyer conducting a client intake, or a consultant running a strategy meeting, NinaSession adapts to your workflow and profession.

Who Is NinaSession For?

- **Healthcare professionals** — Therapists, psychologists, counselors, and physicians who need clinical notes, progress reports, and treatment documentation
- **Legal professionals** — Lawyers, mediators, and legal consultants who require client intake forms, case summaries, and deposition transcripts
- **Business consultants** — Management consultants, coaches, and advisors who produce meeting summaries, strategic plans, and recommendation reports
- **Insurance professionals** — Brokers and adjusters who document client interviews and claims assessments

What You Will Need

- A modern web browser (Chrome, Edge, or Safari recommended; Firefox supported with some limitations)
- A working microphone (built-in or USB) for voice sessions
- A stable internet connection
- An active Talari.ai account with NinaSession access

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2. Getting Started

Logging In

1. Open your browser and go to your organization's admin panel (typically `admin.talari.ai`)
2. Enter your username or email address and password
3. If two-factor authentication is enabled, enter your verification code
4. You will arrive at your dashboard

Navigating to NinaSession

1. In the top navigation bar, click **NinaSession**
2. You will see the NinaSession main screen with tabs for **Sessions**, **Presets**, **Prompt Templates**, and **Reports**

Your First AI Session — Step by Step

1. **Test your microphone:** Go to **Microphone Config** and click **Test Microphone**. Speak a few words and verify you see audio levels moving
2. **Run a health check:** Click **Create New Session**. The system will automatically verify that all services (transcription, AI model, knowledge base) are online
3. **Start recording:** Once the health check passes and the status shows "Ready," click **Start Recording**
4. **Speak naturally:** Talk as you normally would during a session. You will see the transcript appearing in real time on screen
5. **End the session:** When finished, click **End Session**
6. **Generate a report:** Choose your preferred report template and language, then click **Generate Report**
7. **Download:** Once processing completes, download your report as PDF, DOCX, or ODT

> **Tip:** Your first session is a great time to experiment. Try pausing and resuming, and test different voice volumes to find what works best with your microphone.

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3. Session Modes

NinaSession offers four distinct ways to create a session. Choose the one that best fits your situation.

Text Mode

Type your conversation or notes directly into the text input. The AI processes your written text and generates a report based on what you typed.

Best for: Situations where you cannot use a microphone, or when you want to paste an existing conversation transcript.

Voice Mode

Record your session using your microphone. NinaSession transcribes your speech in real time and displays the transcript as you speak.

Best for: Live face-to-face sessions, phone consultations, and any situation where you want hands-free documentation.

Audio Upload Mode

Upload a pre-recorded audio file (MP3, WAV, OGG, M4A, or FLAC, up to 50 MB). NinaSession transcribes the recording and generates a report.

Best for: Sessions that were already recorded on another device, dictation recordings, or when you want to process audio files in bulk.

Virtual Assistant (VA) Mode

The AI assistant conducts a structured interview, asking you questions one by one based on a template. You answer by voice or text, and the system fills in a structured form automatically.

Best for: Standardized intake interviews, clinical assessments, structured questionnaires, and any process that follows a fixed set of questions.

> **Tip:** For most professionals, Voice Mode is the default choice. Use VA Mode when you need to fill a specific form template, and Audio Upload when processing recordings made elsewhere.

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4. Working with Presets

What Are Presets?

Presets are saved configurations that define how a session behaves. Instead of configuring settings every time, you create a preset once and select it when starting a new session.

Creating a New Preset

1. Go to **NinaSession** and click the **Presets** tab
2. Click **Create New Preset**
3. Fill in the settings:
    - **Name:** A descriptive name (e.g., "CBT Session," "Client Intake")
    - **Professional Type:** Choose from Psychotherapist, Doctor, Lawyer, or General
    - **Recording Mode:** Voice Recording, Virtual Assistant, Audio Upload, or Transcript Upload
    - **Report Language:** English, German, or Polish
    - **Input Languages:** Select which languages will be spoken during the session
4. Configure optional settings:
    - **Professional Knowledge Base:** Enable shared professional knowledge (general guidelines, best practices)
    - **Collections:** Select which of your own document collections the AI should reference
    - **Templates:** Choose which report templates to use
    - **VAD Settings:** Adjust voice activity detection (noise threshold, silence duration)
5. Click **Save**

Configuring Voice Settings

In the preset configuration, you can select: - **Voice language:** The language of the AI's voice responses (English, German, or Polish) - **Voice selection:** Choose from available male and female voices - **Speed:** Adjust the speaking rate

Example Presets

Therapist — "First Session Assessment" - Professional Type: Psychotherapist - Mode: Voice Recording - Report Language: English - Knowledge Base: Enabled (with CBT guidelines collection) - Template: Clinical Summary

Lawyer — "Client Intake Interview" - Professional Type: Lawyer - Mode: Virtual Assistant - Report Language: English - Knowledge Base: Enabled (with contract templates collection) - Template: Case Summary

Business Consultant — "Strategic Planning Session" - Professional Type: General - Mode: Voice Recording - Report Language: English - Collections: Industry reports, company analysis - Template: Consultation Report

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5. Collections and Knowledge Base

What Are Collections?

Collections are organized sets of documents that the AI uses as reference material during your sessions. When you ask the AI a question or generate a report, it searches your collections for relevant information and incorporates it into its responses.

Think of collections as the AI's specialized library for your profession.

Creating a Collection

1. Navigate to **Collections** in the main menu
2. Click **Create Collection**
3. Enter a name and description
4. Set the access level:
    - **Public** — Available to all users in your organization
    - **Internal** — Available to authenticated users in your tenant
    - **Owner** — Only you can access (ideal for sensitive documents)
5. Click **Create**

Adding Documents to a Collection

1. Open the collection you want to add documents to
2. Click **Upload Document**
3. Select one or more files (supported formats: PDF, DOCX, TXT, MD, XLSX, PPTX, ODT)
4. Wait for processing to complete. The system will:
    - Extract text from your document
    - Split it into meaningful chunks
    - Create AI embeddings for intelligent search
    - Store everything securely in your collection
5. A progress bar shows the processing status

How the AI Uses Your Documents

When you start a session with a collection linked to your preset, the AI performs a process called Retrieval-Augmented Generation (RAG):

1. **You speak or ask a question** during your session
2. **The system searches** your collections for relevant passages
3. **Relevant information is provided** to the AI as context
4. **The AI generates** its response using both its general knowledge and your specific documents

This means the AI's answers are grounded in your professional materials, not just generic knowledge.

Professional Knowledge Base vs. Collections

These are two independent knowledge sources that can be enabled separately:

- **Collections** are personal or shared document libraries that you create and manage. They contain your own specialized documents (e.g., service descriptions, protocols, client templates).
- **Professional Knowledge Base (PKB)** is a shared knowledge base managed by your organization's administrator. It contains general professional knowledge such as standard guidelines, best practices, and reference materials that all professionals in your organization can use.

You can enable either, both, or neither for any widget or session preset:

PKB	Collections	What the AI Uses
OFF	None	General AI knowledge only (no documents)
ON	None	Platform knowledge base only
OFF	Selected	Your collections only
ON	Selected	Both sources combined (most comprehensive)

> **Example:** A therapist uploads CBT worksheets and intervention guides to their collection. During a session, when discussing anxiety management techniques, the AI references the specific CBT protocols from those documents to provide evidence-based suggestions for the report.

> **Example:** A law firm's administrator uploads standard contract templates to the Professional Knowledge Base. When any lawyer in the firm generates a report, the AI can reference these templates to help draft consistent documentation.

Tips for Organizing Your Knowledge Base

- Create separate collections by topic (e.g., "Clinical Protocols," "Client Templates," "Industry Standards")
- Keep documents up to date — outdated information leads to outdated AI responses
- Use descriptive file names so you can easily identify documents later
- For sensitive client materials, use **Owner** access level to ensure only you can access them

6. During a Session

Starting a Session

1. Click **Create New Session** in NinaSession
2. Select your preset (or use default settings)
3. The system runs an automatic health check to verify all services are online
4. Once the status shows **Ready**, click **Start Recording** (for voice mode) or begin typing (for text mode)

The Session Interface

When a session is active, you will see:

- **Status indicator** — Shows the current session state (Recording, Paused, Saved)
- **Timer** — Displays elapsed recording time
- **Transcript panel** — Shows your transcribed speech in real time, with automatic PII anonymization (names, phone numbers, and other sensitive data are replaced with placeholders like `[PERSON_1]`, `[PHONE_2]`)
- **Controls** — Buttons for Pause, Resume, Save, and End Session
- **Health panel** — Shows the status of connected services

Using Voice Commands

During voice recording, simply speak naturally. The system: - Detects when you start and stop speaking (Voice Activity Detection) - Sends audio for transcription in real time - Displays the transcript with a short delay

Pausing and Resuming

- Click **Pause** to temporarily stop recording without ending the session
- Click **Resume** to continue recording where you left off
- All transcript from before the pause is preserved

Saving a Session

Click **Save** to store your session progress. You can close your browser and return later to resume the session. Saved sessions appear in your session history.

Ending a Session

Click **End Session** to finalize the recording. This triggers the report generation process. Once ended, you cannot add more content to the session.

> **Note:** During recording, sensitive information is automatically anonymized. Names become `[PERSON_1]`, email addresses become `[EMAIL_1]`, phone numbers become `[PHONE_1]`, and so on. The original data is stored securely and only used within your session — it is never sent to external AI providers.

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7. After a Session — Reports and Templates

Automatic Session Reports

After you end a session, NinaSession generates a structured report based on your transcript and any context from your knowledge base. The report typically includes:

- Session summary
- Key topics discussed
- Action items or recommendations
- Relevant references from your knowledge base
- Timestamps and session metadata

Report Quality

The quality of your report depends on several factors:

- **Clear speech** — Speak clearly and avoid background noise
- **Session length** — Longer sessions with more content produce more detailed reports
- **Knowledge base** — Having relevant documents in your collections improves context-awareness
- **Template choice** — Use a template that matches your profession for the best structure

Template System

NinaSession includes a powerful template system for creating structured documents:

- **5 pre-configured templates** are provided for each organization:
  - Clinical Summary (healthcare)
  - Case Summary (legal)
  - Session Notes (general)
  - Therapy Progress (mental health)

- Consultation Report (business)

Using the Template Filler

The Template Filler automatically populates form templates from your session data:

1. After a session, go to **Template Filler**
2. Select the template you want to fill
3. Click **Auto Pre-fill** — the system analyzes your session and fills in fields automatically
4. Review each field. Confidence indicators show how sure the AI is about each value:
   - **Green badge** (>80% confidence) — The AI is very confident this is correct
   - **Yellow badge** (50-80% confidence) — Review recommended
   - **No badge** (<50% confidence) — Manual verification needed
5. Edit any fields that need correction
6. Click **Export** to download as PDF or HTML

Exporting Reports

Reports can be exported in three formats:

- **PDF** — Print-ready, professional formatting. Can be password-protected with AES-256 encryption
- **DOCX** — Editable Microsoft Word format for further editing
- **ODT** — Open Document Format compatible with LibreOffice

> **Example:** After a therapy session, you end the recording. NinaSession automatically generates a clinical progress note using your clinic's template format. The note includes session highlights, therapeutic interventions used (referenced from your CBT guidelines collection), and recommended next steps.

> **Example:** After a legal consultation, NinaSession auto-fills your firm's client intake form with the client's information, case details, and initial assessment — all extracted from the session transcript.

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8. Remote Sessions (Beta)

What Are Remote Sessions?

Remote sessions allow your client or patient to join a session from their own device via a secure invite link. You and your guest communicate in real time through voice, and NinaSession records and transcribes both sides of the conversation with separate speaker labels.

Setting Up a Remote Session

1. Create a new session and select your preset
2. Enable **Remote Session** in the session settings
3. The system generates a unique invite link (valid for 24 hours)
4. Share the invite link with your client via email, messaging, or any secure channel

The Client Experience

When your client opens the invite link:

1. They see a simple, clean interface (no login required)
2. They are asked to grant microphone access
3. They must provide consent for recording (GDPR compliance)
4. They can see a status indicator and mute/unmute button
5. Once connected, both parties can speak in real time

During the Remote Session

- **Real-time voice** is streamed between both parties via WebRTC (low latency, high quality)
- **Speaker labeling** — The transcript clearly marks who said what (PROFESSIONAL / GUEST)
- **Text chat** is available for exchanging notes or links during the session
- **You remain in control** — Only you can pause, resume, save, or end the session

Privacy and Security

- All audio is encrypted in transit (WebRTC/DTLS)
- Guest data is processed only during the session
- The guest’s name is optional and sanitized if provided
- Invite links expire after 24 hours
- Explicit recording consent is required before the session begins

> **Note:** Remote sessions are supported in Voice Recording and Virtual Assistant modes. Audio Upload and Transcript Upload modes do not use remote

connections.

9. Widgets — Embedding AI on Your Website

What Are Chat Widgets?

Chat widgets are embeddable AI assistants that you can add to your website. When visitors interact with the widget, the AI answers their questions using your knowledge base — providing accurate, contextual responses based on your professional documents.

Setting Up Your Widget

1. Navigate to **Widget Settings** in the admin panel
2. Click **Create Widget**
3. Configure the basics:
   - **Name:** Internal name for identification
   - **Welcome Message:** The greeting visitors see when they open the widget
   - **Language:** Primary language (English, German, or Polish)
   - **AI Model:** Select which AI model powers the widget
4. Connect a collection to give the widget access to your knowledge base
5. Customize the appearance:
   - **Colors:** Primary, secondary, and background colors
   - **Position:** Bottom-right, bottom-left, or custom
   - **Size:** Width and height settings
   - **Avatar:** Select from available assistant avatars (Nina, Nina-Doctor, Nina-Lawyer, Nina-Psychotherapist)

Knowledge Sources

Your widget can draw from two independent knowledge sources (see Section 5 for details):

- **Professional Knowledge Base (PKB)** — shared professional knowledge managed by your organization
- **Collections** — your own specialized documents

Both are configured independently in the widget's **Basic** tab. If neither is enabled, the widget uses only the AI's general knowledge.

Welcome Message, Quick Actions, and AI-Generated Buttons

- **Welcome message**: Configure in the **Prompt** tab. Shown when the widget opens.
- **Quick action buttons**: Configure up to 6 buttons in the **Prompt** tab. They appear below the welcome message and disappear after the first user interaction.
- **AI quick reply buttons**: The AI automatically suggests 2-4 follow-up options after each response. These are contextual and require no configuration.

Chat Ratings and Email Transcript

- Visitors can rate each AI response with **thumbs up/down** buttons.
- Visitors can email a copy of the conversation to themselves via the **envelope icon** in the widget header (sent from `widget@talari.ai`).

Confidence Transparency

When the AI answers using your knowledge base, a confidence indicator (green/yellow/orange dot) appears below the response. This shows visitors how well the answer is supported by your documents — building trust in professional service contexts.

Return Visitor Recognition

The widget remembers returning visitors via browser localStorage. On return visits, the greeting is personalized: “Welcome back! Last time we talked about [topic].” No server-side tracking — data stays in the visitor’s browser.

Page-Aware Proactive Messages

The widget can show notifications above the chat bubble based on the visitor’s current page (e.g., “Have questions about our pricing?” on the `/pricing` page). Configure URL triggers with custom messages and delays in the widget’s **Prompt** tab. The embed script must be placed on every page where you want the widget to appear.

Business Hours Awareness

Configure your business hours and timezone in the widget’s **Schedule** tab. When visitors arrive outside hours, an informational banner appears: “We’re currently closed. We open again [day] at [time]. I can still answer your questions!” The AI still responds normally.

Appointment Booking

Configure an external booking URL (Calendly, Cal.com, etc.) in the widget’s **Prompt** tab. Two things happen automatically:

- A persistent **"Book an appointment"** button appears above the message input in the widget, styled with your theme color and localized to the visitor's language (EN/DE/PL). Clicking it opens the booking URL in a new tab.
- The AI also mentions the booking link naturally when visitors ask about scheduling or appointments.

This provides two conversion paths — a visible CTA for visitors who are ready to book, and conversational guidance for those who need more information first.

Conversation Analytics

Access the analytics dashboard via **Widgets > Analytics** tab. View conversation volume, satisfaction rates, confidence scores, hourly activity, and per-widget comparisons. All data is GDPR-safe — no message content is stored.

Embedding on Your Website

1. In Widget Settings, click the **Embed** icon for your widget
2. Copy the provided script tag
3. Paste it into your website's HTML, just before the closing `</body>` tag:

```
<script src="https://talari.ai/widget/embed.js"
  data-slug="your-widget-slug"
  data-token="your-embed-token">
</script>
```

The widget appears as a **"Chat with AI"** bubble in the bottom-right corner (default size: 420 x 620 pixels). The bubble label automatically translates based on the visitor's browser language (English, German, or Polish). Clicking the bubble opens the full chat interface. You can customize the size via `data-width` and `data-height` attributes on the script tag.

Built-in Language Switcher

Every widget includes flag buttons (🇬🇧 🇩🇪 🇵🇱) in the header. Visitors can switch between English, German, and Polish at any time. The AI responds in the selected language, and voice input/output adapts automatically. You do not need separate widgets per language.

> **Example:** A therapy practice in Vienna embeds a single widget that serves clients in German, English, and Polish — visitors choose their preferred language with one click.

> **Example:** A law firm embeds a widget powered by their legal FAQ collection. Visitors can ask about legal procedures in any of the three supported languages.

Demo Widget vs. Production Widget

- **Demo widget** is available on the Talari.ai landing page for prospects to try without an account
- **Production widget** is connected to your specific knowledge base
- Demo widgets have limited functionality (no persistent history, no custom collections)

Testing Your Widget

Use the **Test Widget** button in Widget Settings to preview your widget before deploying it. This lets you verify: - The welcome message appears correctly - Responses are relevant (based on your connected collection) - The language switcher works - The visual style matches your brand

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10. Tips and Best Practices

Getting Better AI Responses

- **Provide context:** The more relevant documents in your knowledge base, the better the AI's responses
- **Use presets:** Presets ensure consistent settings across all your sessions
- **Speak clearly:** Clear speech produces better transcripts, which lead to better reports
- **Choose the right template:** Match your report template to your profession and use case

Organizing Collections

- **One collection per topic** keeps things manageable (e.g., "Anxiety Protocols," "Contract Templates")
- **Update regularly** — Remove outdated documents and add new ones
- **Use descriptive names** for both collections and documents
- **Set appropriate access levels** — Use Owner for sensitive materials, Internal for team resources

When to Use Voice vs. Text Mode

Situation	Recommended Mode
Live session with a client	Voice Mode
Processing a pre-recorded interview	Audio Upload
Filling a structured form	Virtual Assistant
Pasting an existing transcript	Text Mode
Remote client session	Voice Mode + Remote Session

Privacy Considerations

- **PII anonymization** is automatic — sensitive information is replaced with placeholders before being sent to AI providers
- **Finalization** permanently deletes source data while keeping the report (GDPR-compliant)
- **Owner-level collections** ensure your documents are accessible only to you, not even to tenant administrators
- **Password-protected reports** add an extra layer of security for sensitive documentation

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11. Troubleshooting

Microphone Not Working

1. Check that your browser has permission to access the microphone: **Browser Settings > Privacy > Microphone**
2. Try the microphone test in **NinaSession > Microphone Config**
3. If using an external microphone, ensure it is plugged in and selected as the default input device
4. Try a different browser (Chrome is recommended for the best experience)
5. Restart your browser and try again

Voice Not Playing Back

1. Check your device volume and ensure it is not muted
2. For browser TTS, verify that your browser supports speech synthesis (Chrome and Edge offer the best support)
3. In Firefox, TTS may require the Whisper server-side fallback — ensure the health check shows TTS as “Online”

4. Try selecting a different voice in your preset configuration

Session Disconnected

1. Check your internet connection
2. Refresh the page — if your session was saved or paused, you can resume it
3. Look for the session in **Session History** and click **Resume**
4. If the session shows as "Failed," create a new session and try again

Documents Not Appearing in Knowledge Base

1. Check the document processing status in your collection — it may still be processing
2. Large documents (>10 MB) may take several minutes to process
3. Verify the document format is supported (PDF, DOCX, TXT, MD, XLSX, PPTX, ODT)
4. If the status shows "Failed," try uploading the document again
5. Legacy `.doc` files may have issues — convert to `.docx` before uploading

Widget Not Loading on Website

1. Verify the embed code is placed correctly in your HTML (before `</body>`)
2. Check for CORS errors in your browser's developer console
3. Ensure the widget is marked as **Active** in Widget Settings
4. Verify that your domain is allowed in the CORS configuration
5. Test the widget using the built-in **Test Widget** button first

Report Not Generating

1. Run the health check to verify all services are online
2. Ensure your organization's LLM provider is configured correctly (contact your administrator)
3. For very long sessions, report generation may take 1-2 minutes
4. If the session is stuck in "Processing" for more than 15 minutes, contact your administrator

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12. Glossary

Term	Definition
Collection	An organized set of documents that the AI uses as reference material

Term	Definition
Preset	A saved set of session configuration options (mode, language, collections, etc.)
RAG	Retrieval-Augmented Generation — the process of searching your documents to provide context for AI responses
Template	A structured report format that defines how session data is organized in the output document
Widget	An embeddable AI chat assistant that can be added to any website
Transcript	The text version of recorded speech, generated by the speech-to-text system
Knowledge Base	The complete set of documents available to the AI, organized into collections
TTS	Text-to-Speech — the system that converts AI text responses into spoken audio
STT	Speech-to-Text — the system that converts your spoken words into written text
PII	Personally Identifiable Information — data that can identify an individual (names, phone numbers, emails, etc.)
Anonymization	The automatic process of replacing PII with generic placeholders before AI processing
Finalization	The irreversible process of deleting session source data while keeping only the generated report
Virtual Assistant (VA)	An AI mode that conducts structured interviews by asking questions one at a time
Remote Session	A session where a guest connects from a separate device via an invite link
PKB	Professional Knowledge Base — a tenant-wide document collection managed by administrators
Health Check	An automatic verification that all required services (transcription, AI, knowledge base) are operational

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