



FOCUS OR EXCLUDE FACTORS

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Summary

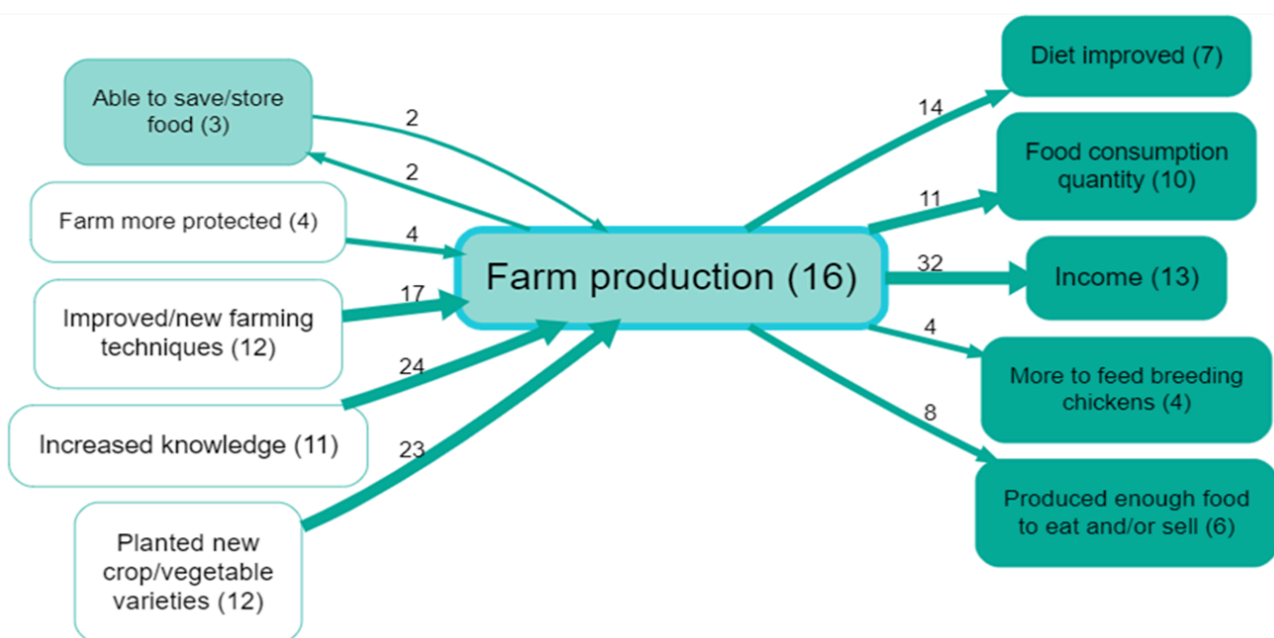
This extension is about using **factor labels** to carve out a useful subgraph of your causal map:

- **Focus:** keep the causal neighbourhood around one or more “target” factors (their upstream causes and/or downstream consequences).
- **Exclude:** remove unwanted factors (and therefore remove any links that touch them).

Unlike label-rewrite transforms (collapse synonyms, remove bracket text, zoom hierarchies, combine opposites), focusing/excluding does **not** rename factors. It decides which parts of the existing graph you want to *see and analyse*.

Focusing as neighbourhood extraction (not “just filtering factors”)

Focusing helps you understand a factor as both an **outcome** (what leads to it?) and an **influence** (what follows from it?), without having to interpret the entire map at once.



Step limits define which links are kept

Let F be the set of focused factor labels.

- **Upstream steps** U : how far “back” you look for causes.
- **Downstream steps** D : how far “forward” you look for consequences.

The intended definition is **link-based** (not factor-based):

- Keep a link $x \rightarrow y$ if it lies on **any path of length $\leq U$** that **ends** at some focused factor in F , **or** on **any path of length $\leq D$** that **starts** at some focused factor in F .
- Do **not** then add extra “cross-links” between the factors that happen to survive. (The output should contain only links that are actually part of the selected upstream/downstream paths.)

In interview-style data, causal chains longer than ~ 4 steps are uncommon; choosing U, D is therefore a modelling assumption about how far a “story” typically extends.

Matching is label-based

Focusing operates on **factor labels**, not on an ontology:

- You can match labels exactly, or match them as substrings (depending on your matching rule).
- Matching is case-insensitive in the current app.
- Multiple focus terms are treated as **OR**: anything matching *any* focus term is a target.

“Source tracing” as a conservative interpretation

Sometimes you want paths that reflect *single-source narratives* rather than a composite chain stitched together across sources.

In source tracing mode, a factor/link is only kept if there exists **at least one path** satisfying the upstream/downstream rule where **every link segment comes from the same source**.

Order matters

If you apply label-rewrite transforms earlier in your pipeline (collapse, zoom, remove brackets, combine opposites), then focus targets are interpreted in terms of the **rewritten labels** produced by those transforms. Conceptually: you are focusing on the map *after* those normalisations.

Excluding factors (the complementary operation)

Excluding is subtractive: you specify factor-label patterns, and **any factor that matches is removed**, along with any links incident to it (as cause or effect).

In the current app, exclusion terms within a single exclude-filter are combined with **AND**; if you want to exclude two different terms independently, you use two exclude filters.

Relationship to “collapse” (different goal)

- Use **collapse/label-rewrite** when you want to treat several labels as *the same concept* while keeping the surrounding structure visible.
- Use **focus** when you want to keep the original labels but restrict attention to the local causal neighbourhood of a concept.