CAUSAL MAP GARDEN

How to – in the Causal Map app

Contents

🌻 How to – in the Causal Map app. Introduction

Chapter contents.

9 Apr 2025

> In this chapter we look at some examples of specific workflows in causal mapping, mostly illustrated with the Causal Map app. It's work in progress, we only have a couple of pages at this point.

If you want to know about how to answer specific questions with causal mapping, look here:

Individual questions — introduction

Loop on

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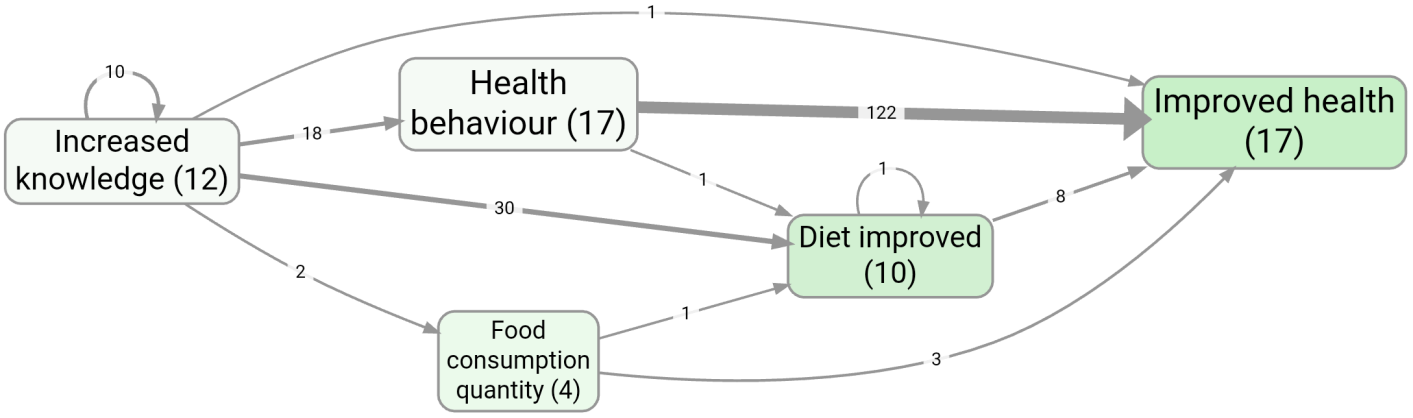
Example views (example-original)

28 Apr 2026

The public `example-original` project in the Causal Map app is a real, anonymised QuIP-style dataset. It is useful when you want to see what a **busy** map looks like after serious coding, and how filters change the picture. Screenshots below are exported from **saved bookmarks** (stable image files in this vault; open the matching bookmark in the app to reproduce the exact filter state).

Getting oriented: main factors



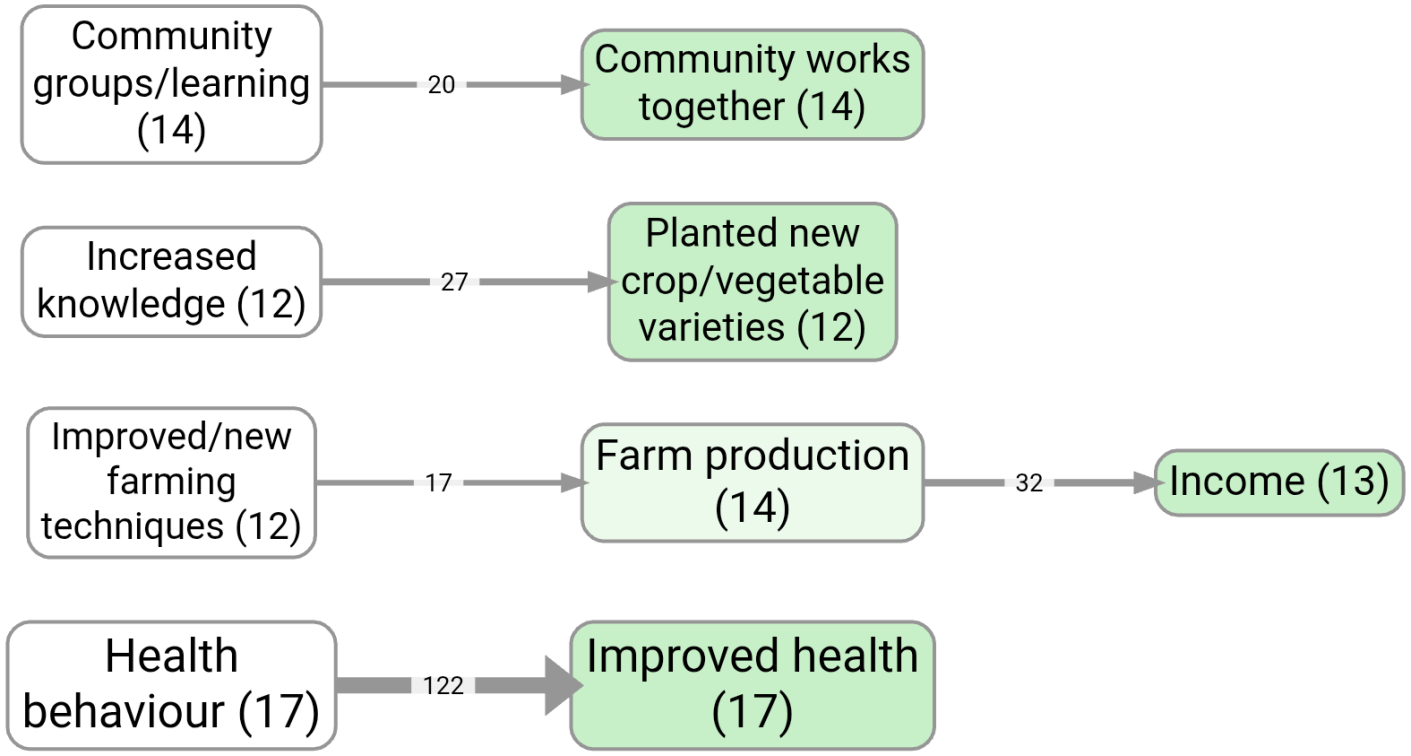
Bookmark #266 — factor-frequency style view: main factors map. Open in app

A focused consequence story

Bookmark #262 — consequences of increased knowledge. Open in app

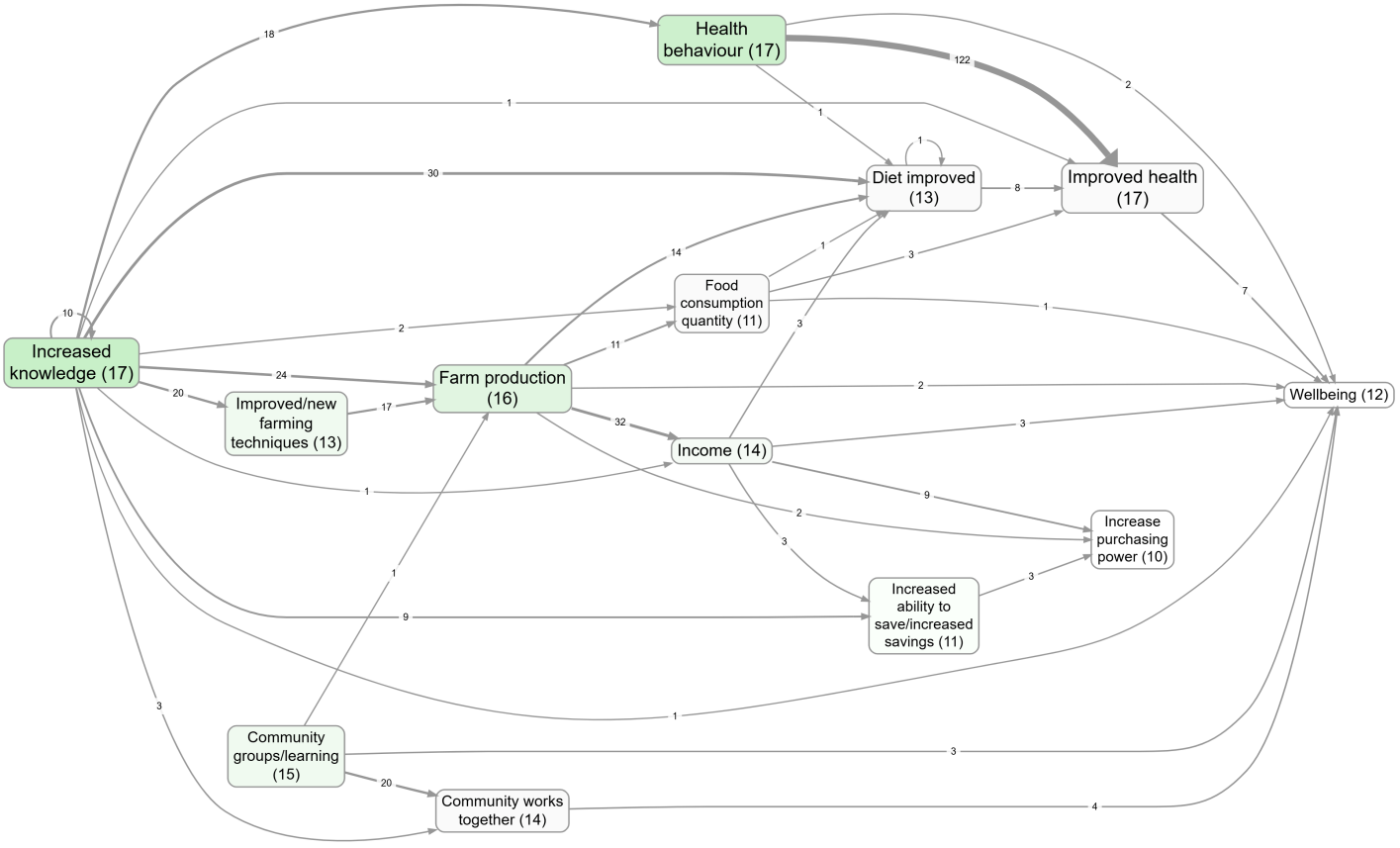
Bookmark #272 — immediate consequences of Increased Knowledge in the interactive map. Open in app

Frequency filters (links vs factors)



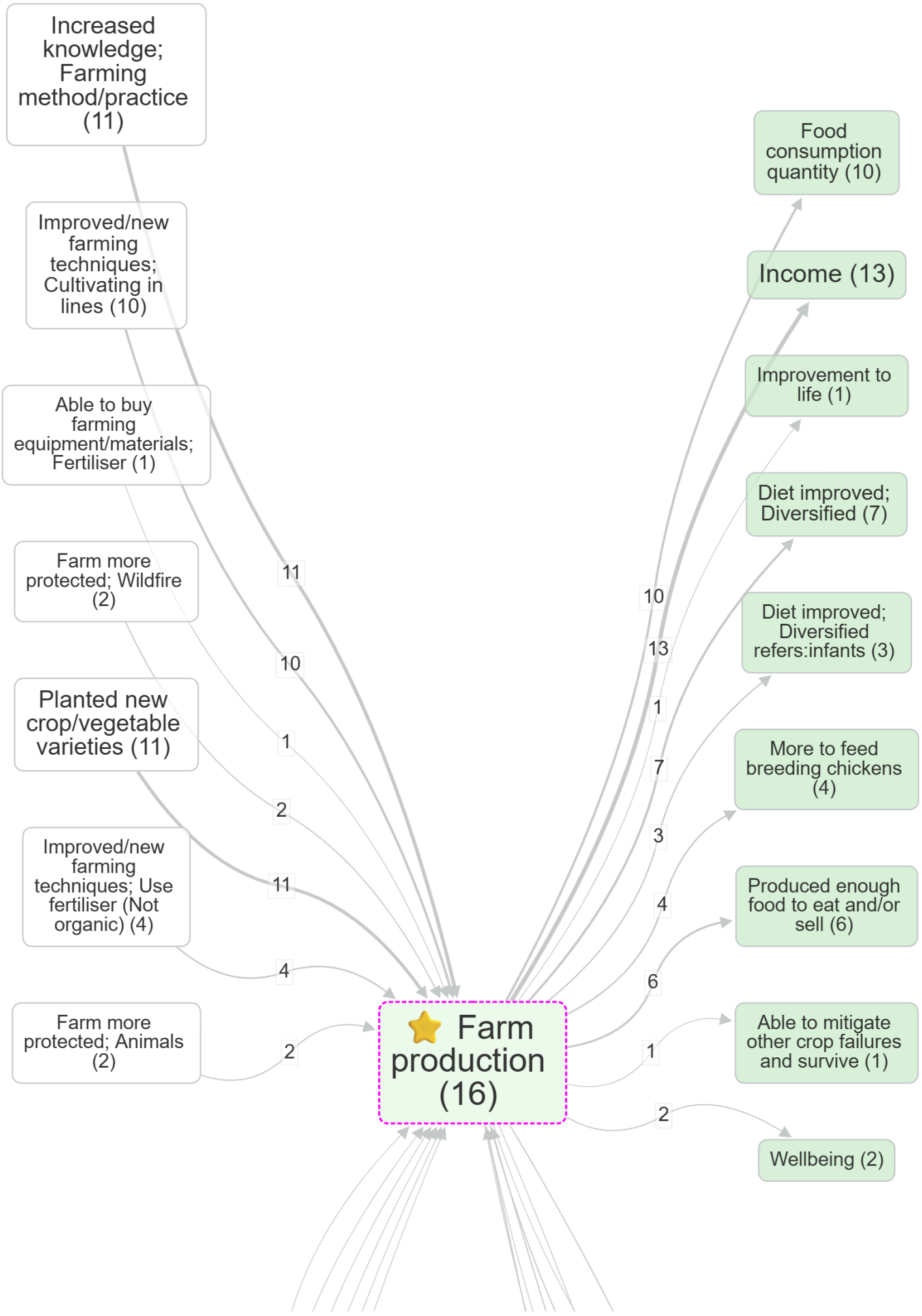
Bookmark #1124 — link frequency style example. Open in app

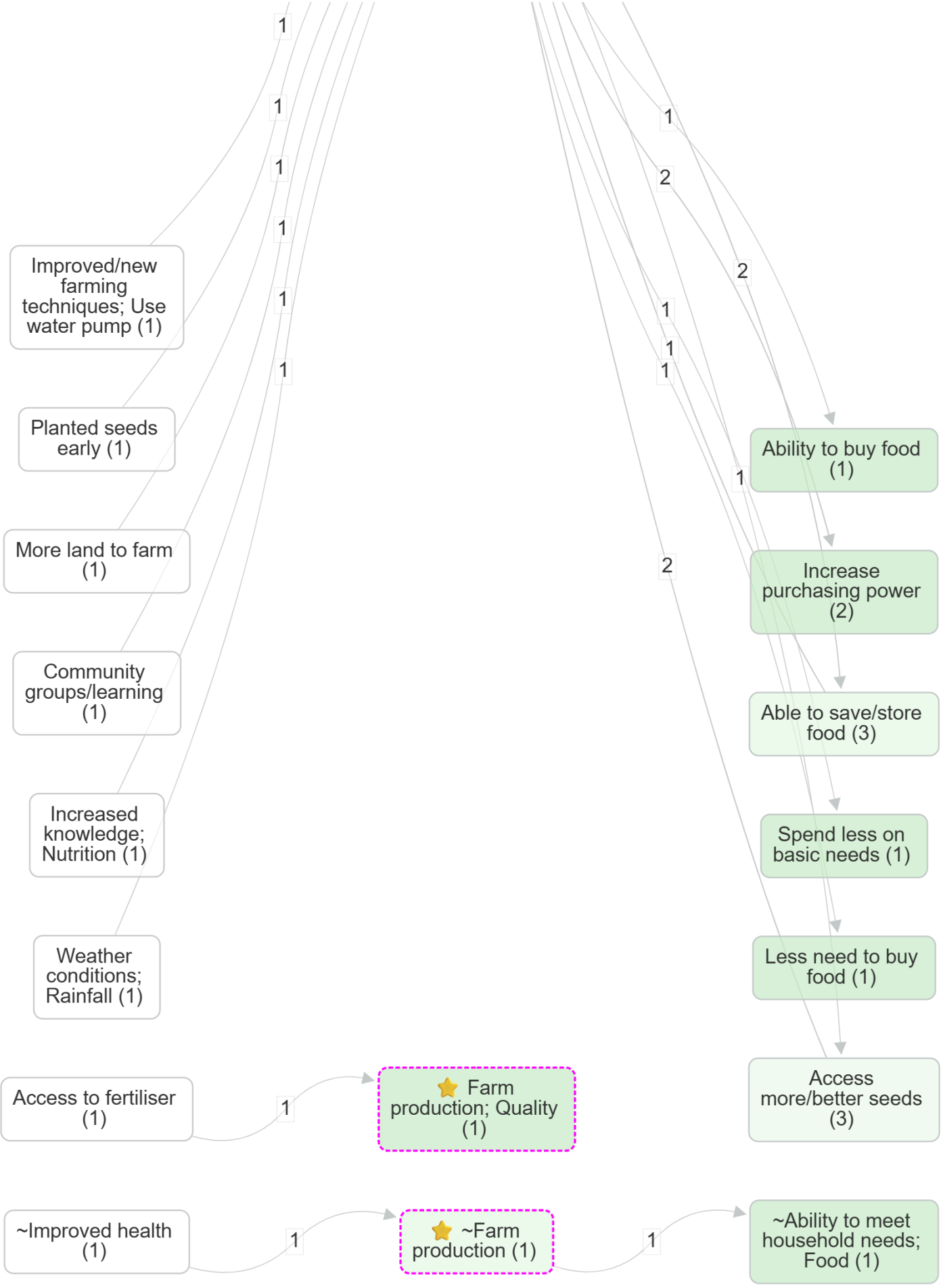
Factor emphasis and zoom



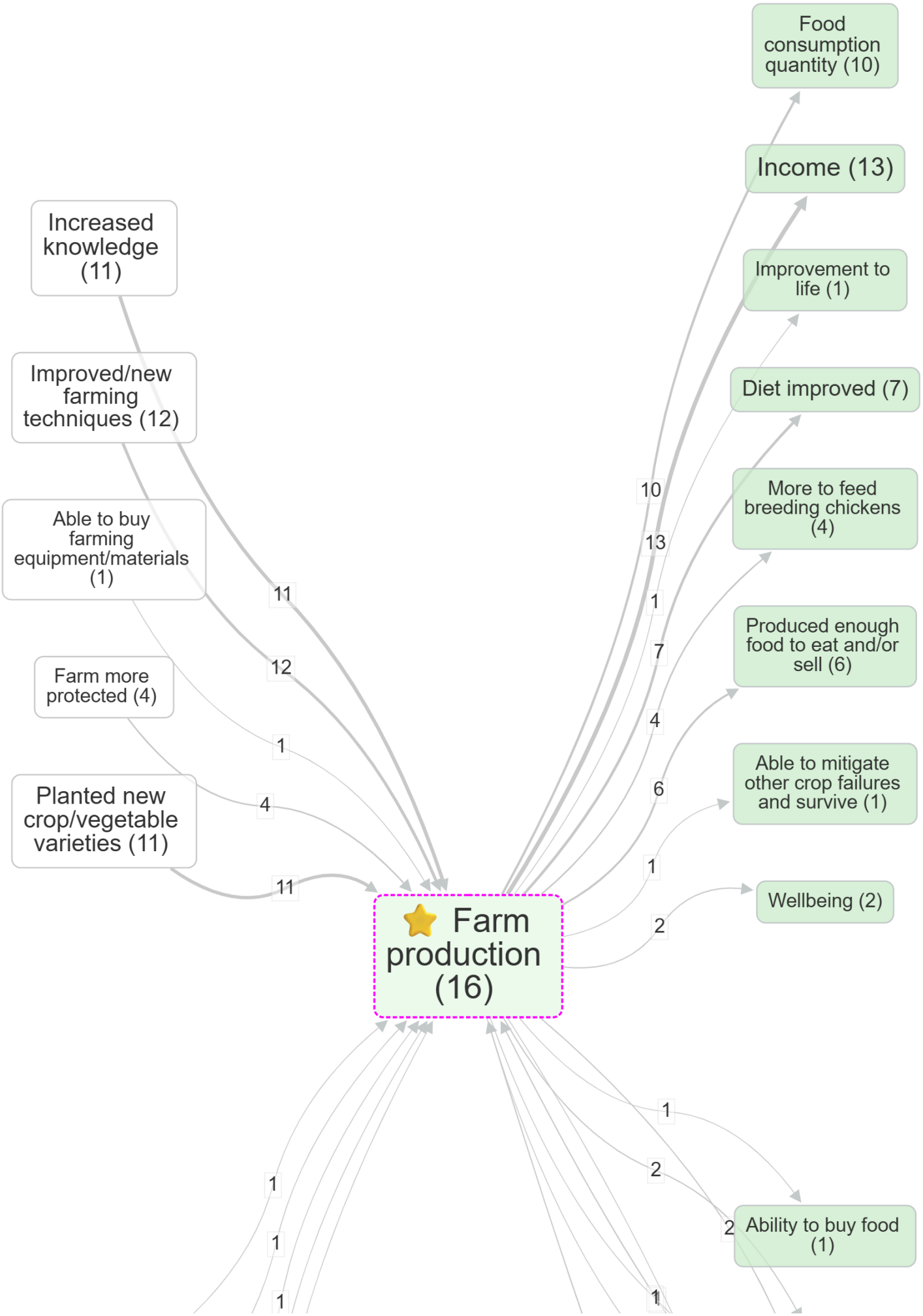
Bookmark #1063 — factor importance colouring. *Open in app*

Factor Label filter and zoom contrast


Increased knowledge; Farming method/practice (11)
Improved/new farming techniques; Cultivating in lines (10)
Able to buy farming equipment/materials; Fertiliser (1)
Farm more protected; Wildfire (2)
Planted new crop/vegetable varieties (11)
Improved/new farming techniques; Use fertiliser (Not organic) (4)
Farm more protected; Animals (2)
11
10
1
2
11
4
2
⭐ Farm production (16)
10
13
1
7
3
4
6
1
2
Food consumption quantity (10)
Income (13)
Improvement to life (1)
Diet improved; Diversified (7)
Diet improved; Diversified refers:infants (3)
More to feed breeding chickens (4)
Produced enough food to eat and/or sell (6)
Able to mitigate other crop failures and survive (1)
Wellbeing (2)



Bookmark #805 — factor label focus, no zoom. Open in app


Food consumption quantity (10)
Income (13)
Improvement to life (1)
Diet improved (7)
More to feed breeding chickens (4)
Produced enough food to eat and/or sell (6)
Able to mitigate other crop failures and survive (1)
Wellbeing (2)
Ability to buy food (1)
Increased knowledge (11)
Improved/new farming techniques (12)
Able to buy farming equipment/materials (1)
Farm more protected (4)
Planted new crop/vegetable varieties (11)
⭐ Farm production (16)
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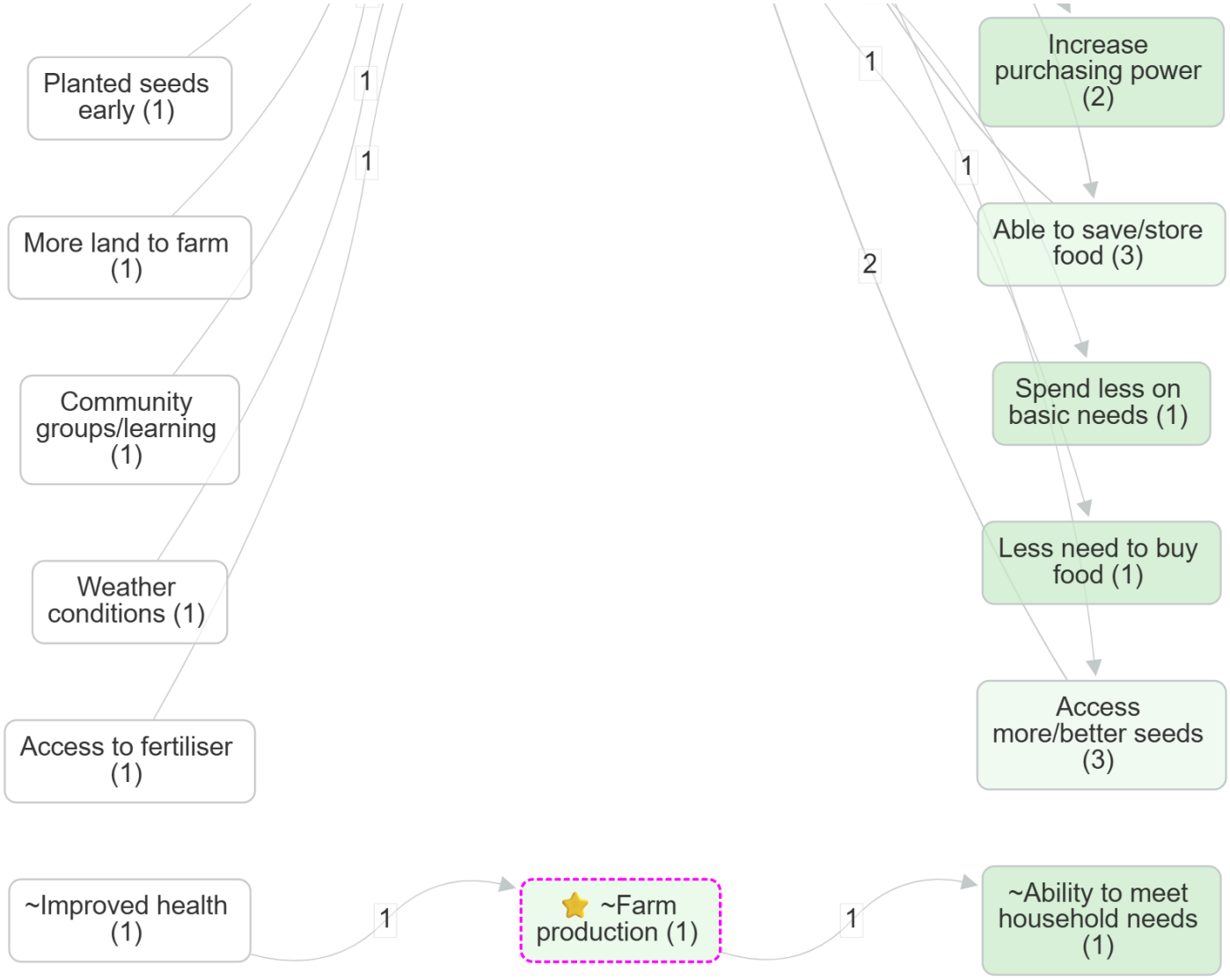
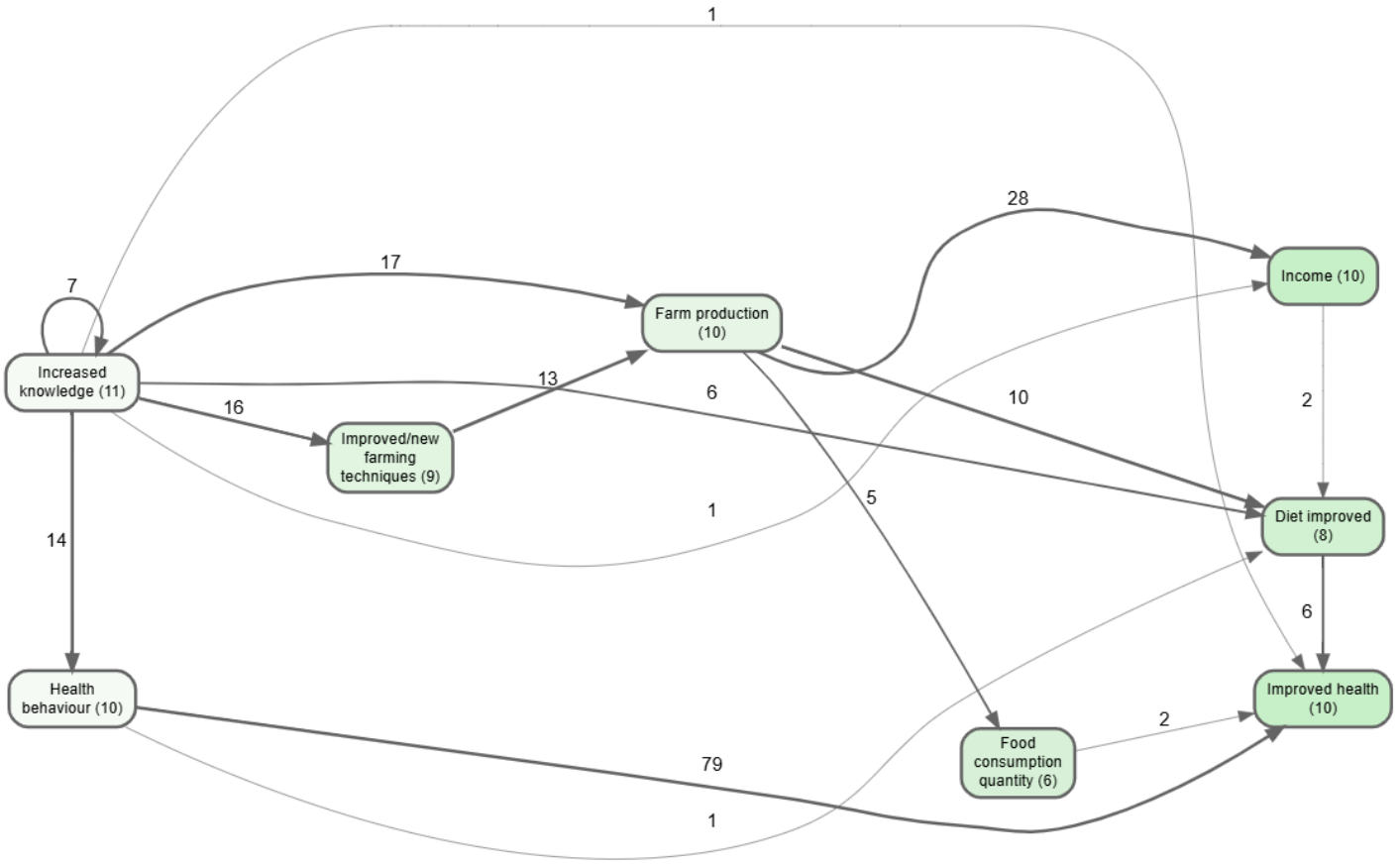
4
11

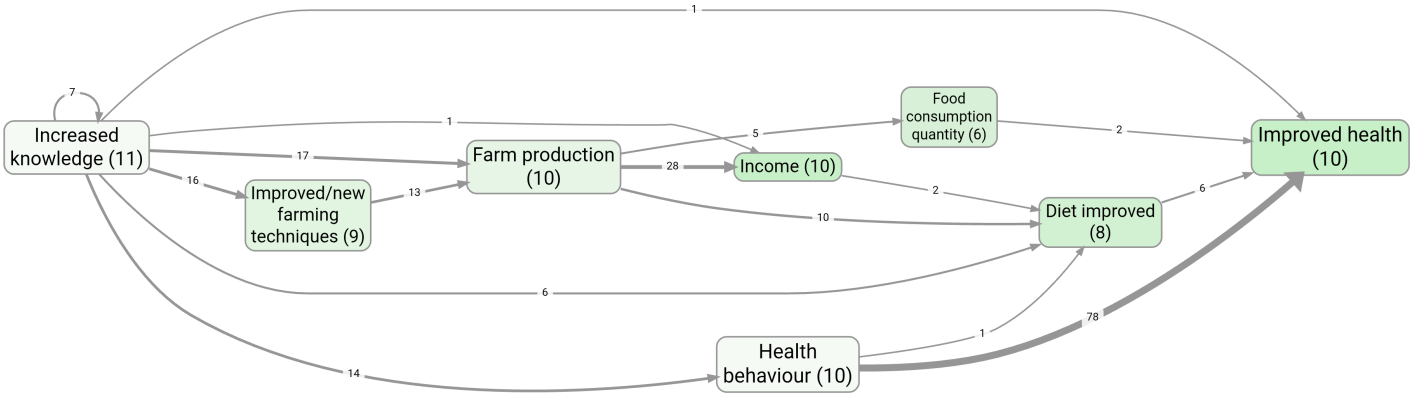


Bookmark #806 — same focus with zoom. *Open in app*

Group comparisons



Bookmark #259 — splitting by group: are different groups impacted in different ways? Open in app



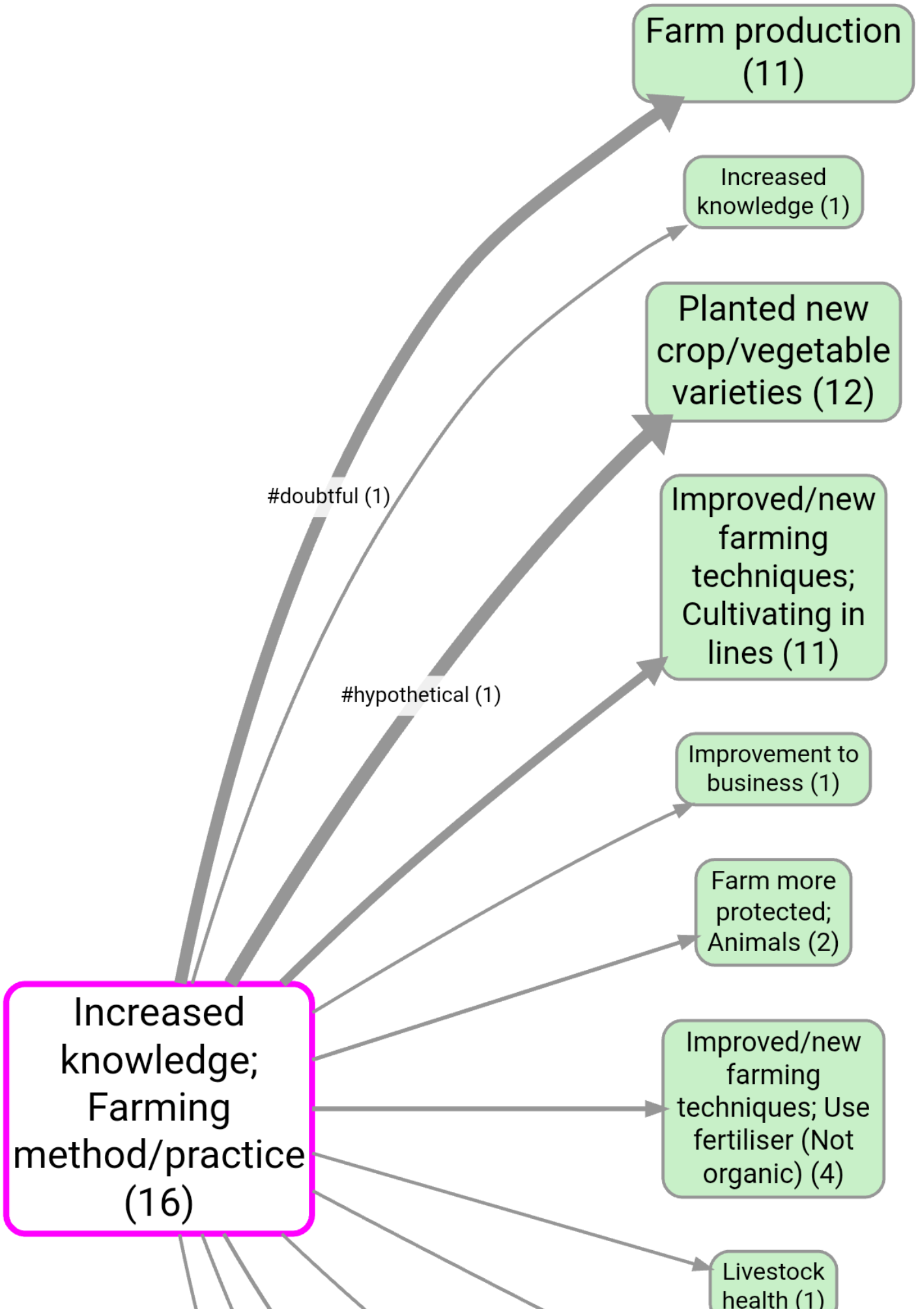
Bookmark #260 — the same question, filtered to one village. Open in app

source_id	custom_ #Sex of the respondent	Female	Male	Totals
MNX-1		18		18
MNX-2		26		26
MNX-3		48		48
MNX-4		51		51
MNX-5		36		36
MNX-6		37		37
MNY-1			42	42
MNY-2			47	47
MNY-3			56	56
MNY-5			56	56
MSX-1		46		46
MSX-2		33		33
MSX-4		41		41
MSY-1			40	40
MSY-2			34	34

MSY-3		34	34
TWX-1	95		95
TWX-2	71		71
TWX-3	22		22
Totals	524	309	833

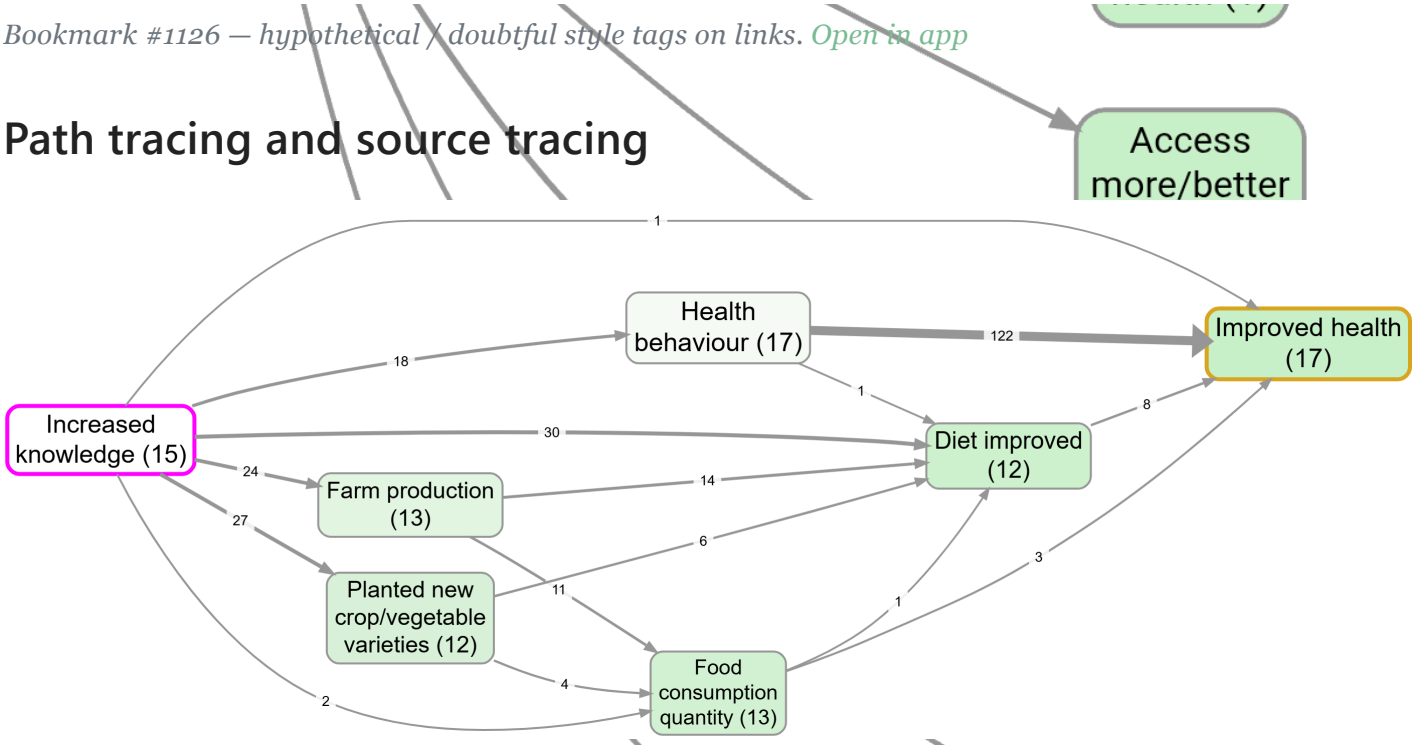
Bookmark #267 — comparing groups with a heatmap rather than a map. Open in app

Tags on the map

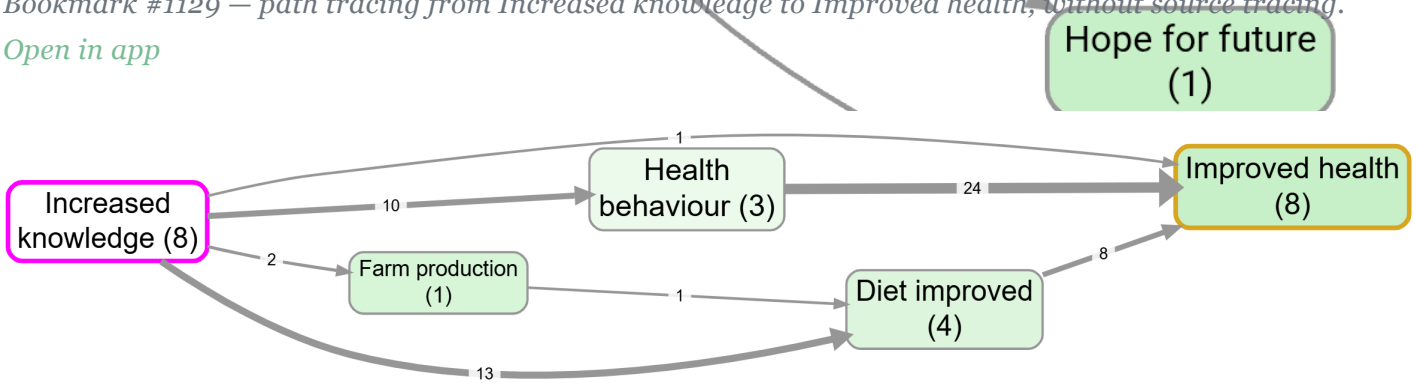

Farm production (11)
Increased knowledge (1)
Planted new crop/vegetable varieties (12)
Improved/new farming techniques; Cultivating in lines (11)
Improvement to business (1)
Farm more protected; Animals (2)
Improved/new farming techniques; Use fertiliser (Not organic) (4)
Livestock health (1)
#doubtful (1)
#hypothetical (1)
Increased knowledge; Farming method/practice (16)

Bookmark #1126 — hypothetical / doubtful style tags on links. Open in app

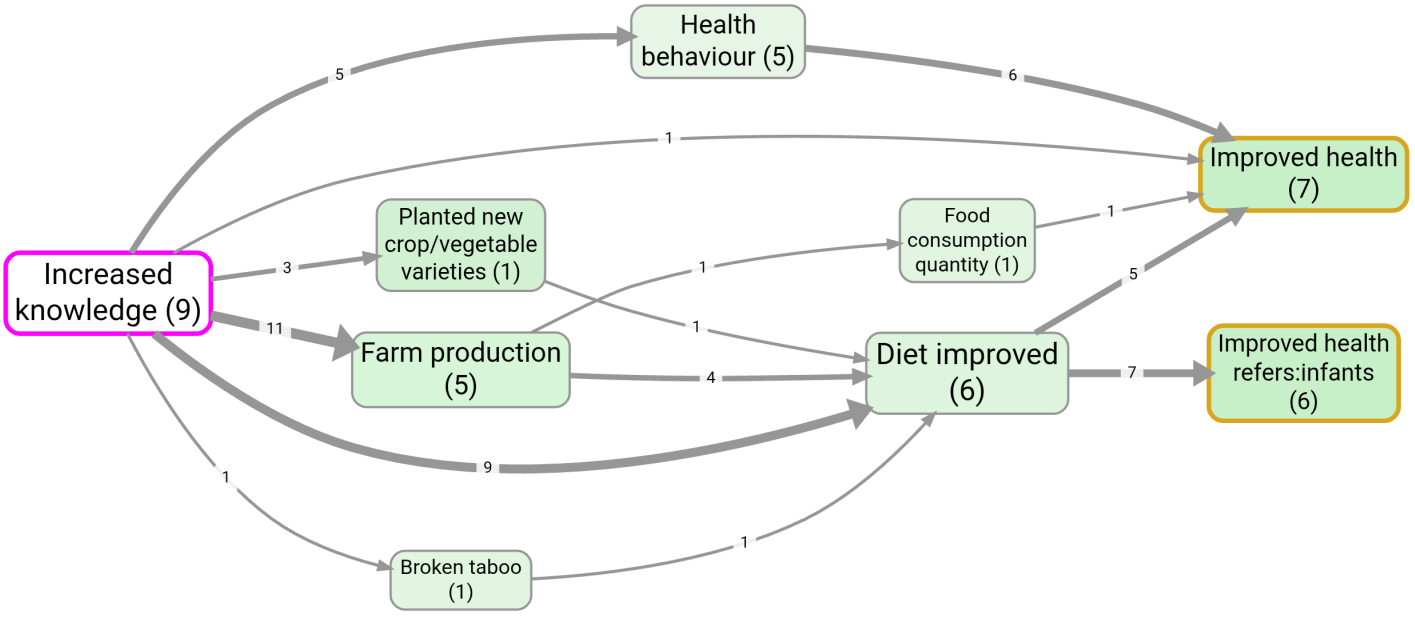
Path tracing and source tracing



Bookmark #1129 — path tracing from Increased knowledge to Improved health, without source tracing. Open in app



Bookmark #981 — path tracing with source tracing. Open in app



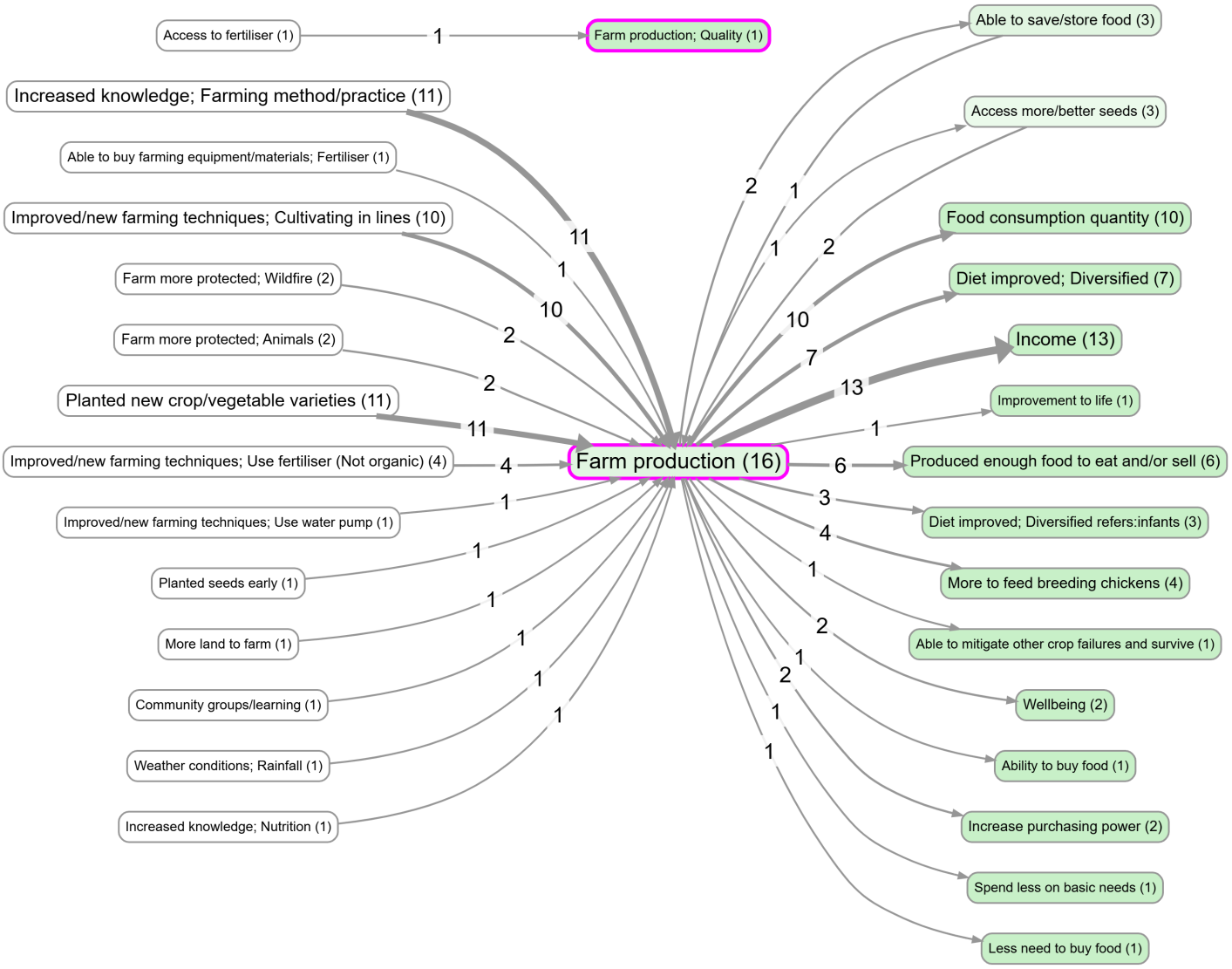
Bookmark #1125 — pipeline order (tracing then zoom). Open in app

Links, bundles, and evidence

Showing 1-10 of 157 rows **Page Size** 10 First Prev 1 2 3 4 5 Next Last

Actions	Cause	Effect	Bundle	Source Count	Citation Count
	Able to buy farming equipme	Farm production	Able to buy farming equipment/materials; Fertiliser >> F	1	1
	Able to save/store food	Farm production	Able to save/store food >> Farm production	1	2
	Able to save/store food	Farm production	Able to save/store food >> Farm production	1	2
	Access more/better seeds	Farm production	Access more/better seeds >> Farm production	2	2
	Access more/better seeds	Farm production	Access more/better seeds >> Farm production	2	2
	Access to fertiliser	Farm production; Quality	Access to fertiliser >> Farm production; Quality	1	1
	Community groups/learning	Farm production	Community groups/learning >> Farm production	1	1
	Farm more protected; Animal	Farm production	Farm more protected; Animals >> Farm production	2	2
	Farm more protected; Animal	Farm production	Farm more protected; Animals >> Farm production	2	2
	Farm more protected; Wildfire	Farm production	Farm more protected; Wildfire >> Farm production	2	2

Bookmark #1143 — links table sorted by bundle, showing that one visible map edge can contain several links.
Open in app



Bookmark #1144 — the map corresponding to #1143. *Open in app*

Showing 1-10 of 70 Page size 10 First Prev Page 1 / 7 Next Last

Bundle: Community groups/learning >> Farm production

Source: MSX-1

AFTER THESE CHANGES IN GENERAL I FEEL THAT WE SHOULD BE MORE UNITED AND CONFIDENT, THAT'S WHY BECAME A GOOD RELATIONSHIP TO THE FAMILY OVERALL, THAT'S MUCH CHANGES THAT WE DID NOT FEEL OVER LAST YEAR. CLOSE THAT YES THEY HAVE MISSED MANY AND MANY CHANGES AND WITH DECISIONS TAKEN INSIDE THE HOUSE , SO WE CAN HAVE A GOOD PHOTURE IN THE FAMILY. I LIKE THE FATHER AND MY OBLIGATION TO TAKE MORE CARE WITH THE FAMILY, THAT'S WHY I WANT THE FAMILY WELL, THROUGH THE LAST YEAR I WOULD NOT FEEL IT BUT WITH THE PASSING OF TIME OF THE DAYS TODAY THESE CHANGES ARE GOOD.

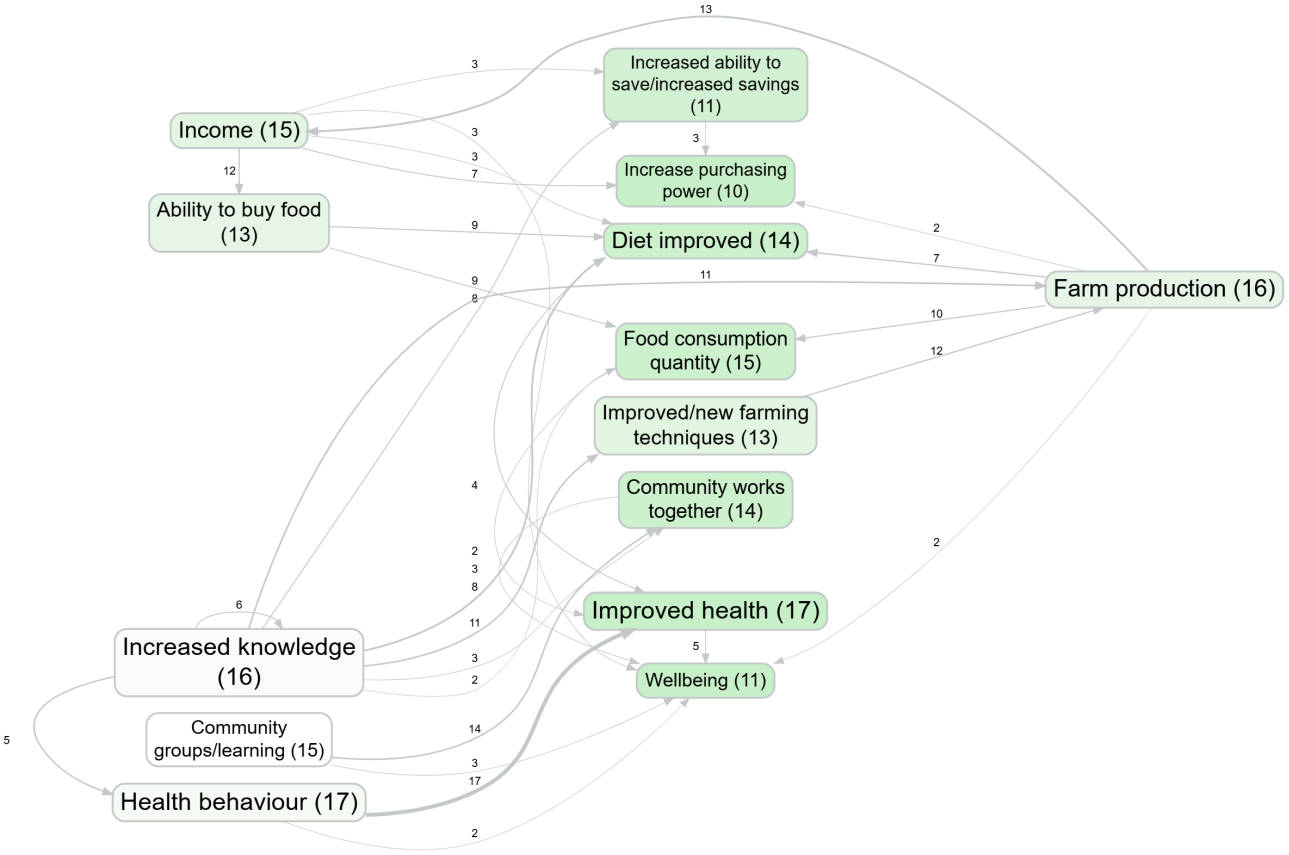
Improved

GOOD RELATIONSHIP, GOOD COMMUNICATION AND UNDERSTANDING IN THE HOUSEHOLD FAMILY

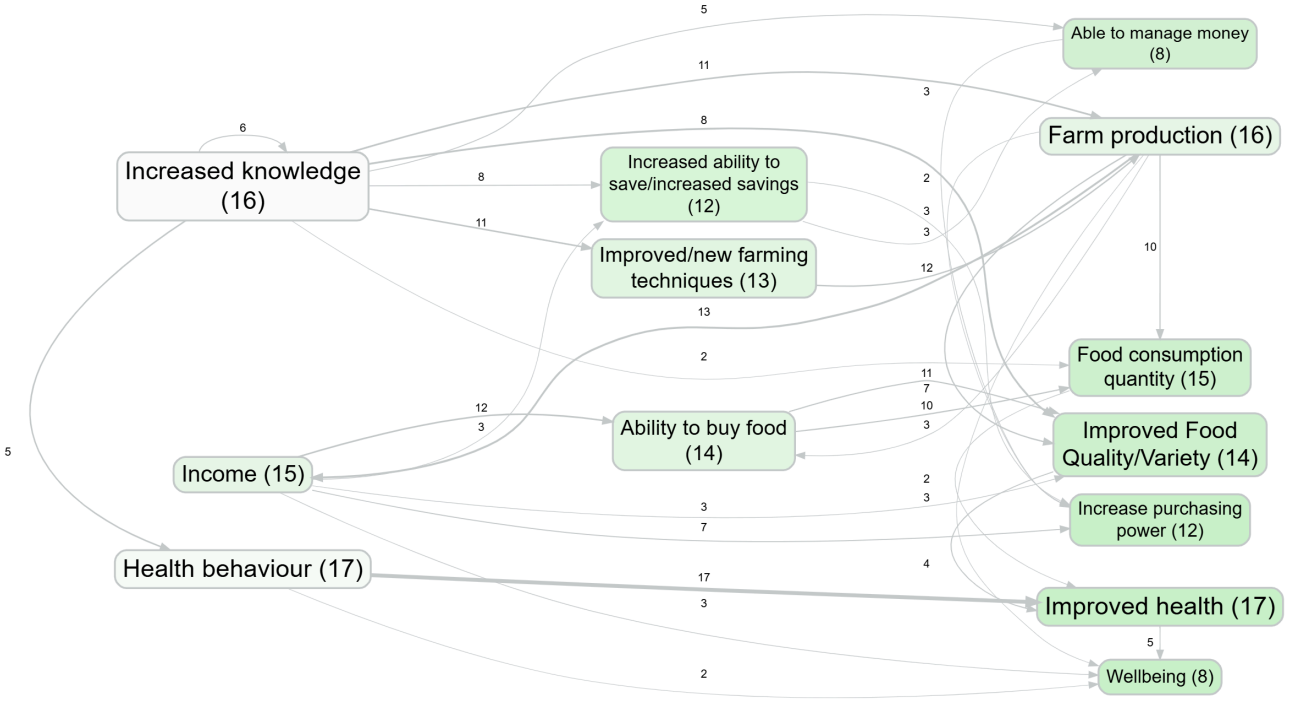
I AND MY FAMILY DO NOT HAVE PROBLEMS IN RELATING TO THE COMMUNITY (COMMUNITY LEADER, CHIEF OF THE LOCALITY). THERE WERE SOME CHANGES AND WITH THESE CHANGES THERE WAS A NEED TO CREATE A GROUP OF FARMERS WHERE EACH ONE CONTRIBUTES WITH HIS EXPERIENCES IN THEORY AND IN THE PRACTICE OF AGRICULTURE. THROUGH THIS GROUP OF FARMERS, BENEFITS CERTAIN FAMILY ADDED IN EDUCATION, IN HEALTH AND ALSO IN THE GENERAL WELL-BEING OF EACH HOUSEHOLD WHERE THROUGH THE PRODUCTION OR THE HARVEST ARE SOLD THE PRODUCTS FOR PURCHASE OF SOME THINGS

Bookmark #1185 — print view of links with context, useful for narrative evidence. *Open in app*

Soft recode examples



Bookmark #493 — soft recode using top-level labels from the human-coded file. Open in app



Bookmark #494 — same soft recode setup, with weak matches recycled. Open in app

🌻 Manually code your first project

28 Apr 2026

This page walks you through manually coding the practice project that every new user gets, called `example-short-uncoded`. The aim is to take you from "I just signed up" to "I have a small map I made myself", in around twenty minutes. If you'd rather have the AI code it for you, see the AI coding walk-through (separate page); if you want to know why we code the way we do, see Task 2 introduction.

Watch first

A short video tour is often quicker than reading. The video above ("Manual coding in cm4: first steps") covers the same workflow as the rest of this page. The full playlist of Causal Map 4 tutorial videos covers everything else. The written walk-through below uses the first interview in `example-short-uncoded`, where Mark talks about his day-to-day feelings.

Open the example project

When you sign up, the app creates a personal copy of a practice project for you.

1. In the **Project Dropdown** at top left, choose `example-short-uncoded-[your-username]`.

2. The Sources bar will fill with two short interview extracts.
3. In the Sources bar, click source `1`.

The text of source 1 (Mark's interview) appears in the **Source Text Viewer**. The right-hand side shows an empty Map panel. That's your starting point.

Read before you code

Read the whole of source 1 once, without coding anything. You're looking for places where Mark says or implies that one thing influences another, even loosely. Notice how often a single sentence contains a chain (A made B happen, which then led to C). That's normal in real speech, and it's why a single quote often becomes two or three separate links.

While you read, ignore everything that isn't a causal claim, including descriptions of facts, opinions about whether something is good or bad, and questions from the interviewer. Causal mapping codes only **bare causation**: someone saying or implying X influences Y. The reasons for this minimalist stance are in why we code only bare causation.

Code your first link

A clear causal claim from Mark, about what calms him down at the end of a long day:

> a bit of quiet time. After they're in bed. Just to like, mess around with something. My old soldering iron. Or trying to fix that radio. Something hands-on... That calms me down.

The quiet hands-on time causes him to feel calm. Code it like this:

1. With your mouse, **highlight** the passage in the Source Text Viewer, from "a bit of quiet time" to "That calms me down". Stay within one statement; don't drag across paragraph breaks.
2. The **Link Editor** opens. Your highlight appears in the Quote box at the bottom; you don't normally need to touch it.
3. In the **Cause** box, type a short label, `quiet hands-on time`. Press Enter to commit.
4. In the **Effect** box, type `feels calm`. Press Enter.
5. Press **Save**.

A new link appears in the Map panel on the right. The phrase you highlighted is now coloured in the source text. Click it again at any time to reopen the link for editing.

That's the whole loop: highlight, name cause, name effect, save. Everything else is variation on this.

For the full reference on the editor (chain mode, plain coding, multi-cause and multi-effect, custom fields), see Create Links tab.

Naming factors well

Factor labels do most of the work in causal mapping. A few principles:

- **Reuse existing labels** when you can. After you've coded a few links, the dropdowns will start suggesting labels you've already used; pick from the list rather than re-typing, so the same idea ends up under one name.
- **Be specific, not abstract.** `Increased household income` works better than `Economic improvement`. See don't over-generalise.
- **Make the direction implicit.** Labels like `Lost job`, `Sold cow`, `More food` already point in a direction; the link itself just says "this caused that". This is what we mean by semi-quantitative labels.
- **Don't worry about consistency on the first pass.** You'll tidy labels up later, in bulk, using search/replace and bulk relabel; that's a separate page.

The wider craft of writing factor labels is covered in factor labels: a creative challenge.

Several causes, several effects

Often a single quote supports more than one link. The Link Editor handles this without forcing you to repeat yourself.

Type two or more causes into the Cause box (separated by Enter), and likewise for effects. When you press Save, the app creates one link for every cause-effect combination. Two causes and two effects means four links, sharing the same quote.

Mark gives a clear example when he describes coming home to chaos:

> Sarah's late back, I've had a long day on-site, and you walk in and it's like... toys everywhere. Half-eaten cereal. Laundry mountain. And the kids are immediately like, "Dad, I'm hungry!" or "Dad, my show!"... That's when I just get... so frustrated.

Several causes, one effect. Highlight the passage and:

- in **Cause**, type `house mess`, then `Sarah late home`, then `kids demanding attention` (Enter between each)
- in **Effect**, type `feels frustrated`
- press **Save**.

The app creates three links, one for each cause, all sharing the same quote and the same effect. Use this when the speaker names several drivers, or several outcomes, in one breath. Don't use it as a shortcut for unrelated claims; if two causal statements are really separate, code them separately.

A bit further on, Mark tells you what happens next:

> And then I snap. Just say something sharp. To the kids. Or to Sarah, if she's just walked in. And then, instantly, it's like, "Why did I say that?" That guilt.

That's a chain: frustrated leads to snapping, snapping leads to guilt. Code it as two links sharing the same quote: `feels frustrated` to `snaps at family`, then `snaps at family` to `feels guilty`. (If you turn on **Chain mode** in the Link Editor, the Effect of the link you just saved becomes the Cause of the next one, which saves a bit of typing.)

For more on chain mode, multi-cause/effect, and using the Links tab to review your work, see the next video in the playlist:

Adding metadata as you go

Most of the time you can ignore the rest of the editor and come back to it later. Three small things are worth knowing about now:

- **Tags.** Quick free-text labels, useful for "come back and review this", "respondent unsure", "future hypothesis", and similar. Tags starting with `?` mark caveats (`?hypothetical`, `?doubtful`); see the tag conventions in the Create Links tab reference.
- **Sentiment.** A simple `+1`, `0`, `-1` per link, used when a claim is about an increase, no change, or a decrease in the effect. Mark's `quiet hands-on time` to `feels calm` is positive; `house mess` to `feels`

`frustrated` is negative. Details in sentiment metadata.
- **Custom fields.** Project-specific structured fields, for example `mechanism` or `confidence`. You don't need these on day one; if you do, see adding custom columns.

You can also add metadata in bulk later, in the Links panel, so don't slow yourself down adding it as you code.

Hierarchy and tags inside labels

Two label conventions become useful as the project grows. They're worth noting now even if you don't use them on the first pass.

- A label containing a semicolon is treated as **hierarchical**: `Family life; Quiet time` is read as "Quiet time under Family life". This lets you zoom out to a coarser map without losing detail. See hierarchical coding.
- You can also embed metadata in the label itself, for example `feels calm #positive` or `feels guilty (Outcome)`. Useful when you don't yet want a full custom column. See tags inside factor labels.

If you're not sure, code flat first. You can convert flat labels to hierarchical ones in bulk later (see the bulk relabel page when it's written).

Move through the sources

When you've coded everything in source 1 that looks worth coding, click the right arrow in the Source Text header to move to source 2. The map will start to grow as the same labels appear across multiple sources. That's where causal mapping starts to pay off: the same factor named by several speakers gets a thicker presence on the map.

Look at your map

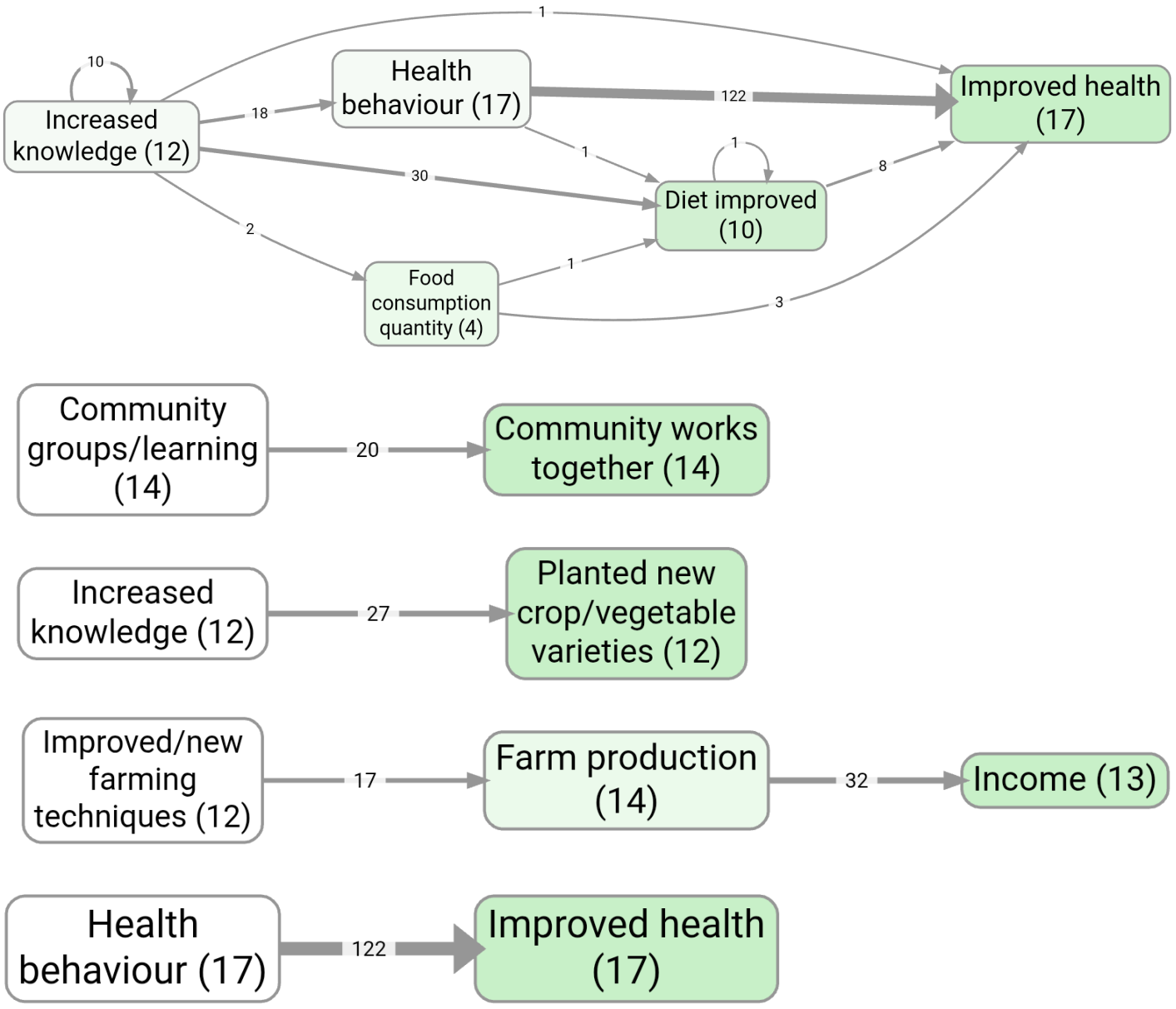
Switch your attention to the **Map panel** on the right.

- Click any edge to see the underlying quote.
- Click any factor to focus on links that touch it.
- The **Map Formatting** controls let you change colour, width, and labels (we have a separate how-to on map formatting).

If the map looks crowded after just a few sources, that's expected. The Filter Links panel exists exactly to manage that, starting with a top-N frequency filter. The full picture of which filters do most of the work is in the extensions chapter.

On a larger real project, **factor-frequency** and **link-frequency** filters are the usual first step. The anonymised `example-original` tutorial project shows the idea at scale — e.g. bookmark `#266` (map) and

#1124 (link-frequency style):



Tidy up afterwards, not during

Resist the urge to consolidate labels as you code. It slows you down and you'll often regret early decisions once you see the whole project. Code messy, tidy in bulk:

- Use search/replace in the Factors and Links tabs to rename labels project-wide.
- Use Bulk Relabel in the Factors panel to merge or split labels.
- Use the temporary cause/effect columns if you want to experiment without overwriting the originals: see recoding labels temporarily.

The full decision tree for cleaning up labels (and where AI-assisted recoding fits) is in different kinds of coding and recoding.

When you're done

Save a bookmark of your map (Bookmarks button, top right) so you can come back to this exact view. From there, the natural next steps are:

- explore the Filter Links panel to ask questions of your map
- read different kinds of coding and recoding to see what the AI can take off your hands
- and, when you outgrow the example project, read about gathering your own data.
- browse saved example views from the public `example-original` project for inspiration.

Bulk relabelling factors

28 Apr 2026

Sooner or later, every project ends up with a pile of slightly different factor labels for the same idea: `feels frustrated`, `feeling frustrated`, `frustration`, `gets frustrated`. This page covers the four ways to clean that up in bulk, when to reach for which, and how to use the same tools to convert flat labels into hierarchical ones.

The page assumes you've already coded something. If you haven't, start with manually code your first project.

Watch first

The two videos cover the two manual routes (search/replace and Bulk Edit). For the AI-assisted routes, see different kinds of coding and recoding and the soft recode page.

The four routes

Four ways to relabel factors, in rough order from "most precise" to "most aggressive":

- **Search/replace** in the Factors table. Find a substring, preview the change, tick the rows you actually want changed, hit Replace. Best for "fix one mistake everywhere".
- **Bulk Edit** in the Factors table. Switch the table body for a multi-cursor text editor and edit many labels at once. Best for "tidy up dozens of variants in one sitting".
- **AI-assisted Recode** (Links recoding or Factors recoding). Send labels to the AI with an instruction (e.g. "merge anything about anger or frustration into `feels frustrated`"), apply to all currently filtered rows. Best for "I've got hundreds of labels and I want a smaller, cleaner codebook".
- **Soft Recode** (magnetic labels). The cheapest option: define a small set of target labels and the app pulls similar labels towards them by embedding similarity, on the fly, without changing your underlying data. Best for "I want to see what a tidied version would look like, without committing".

The decision tree across all of these is in different kinds of coding and recoding. This page focuses on the first two (manual) routes; the AI ones get their own page.

Search/replace in the Factors table

This is the workhorse. Open the **Factors panel** and look near the top of the table for the search box. Type a substring; the table filters to matching rows and a Replace box appears next to it. Type the new text in the Replace box; the table updates to show a preview of what each label would become.

Tick the rows you actually want changed (or tick the header checkbox to select all visible matches), then press **Replace**. The Cause and Effect labels in those links are updated everywhere they appear.

A few things worth knowing:

- The search is **case sensitive**. `Calm` won't match `calm`. If you've coded inconsistently, search for each variant in turn.
- It only changes labels in **the currently selected links**. If you've filtered or restricted the source set, factors that only appear outside that selection won't be touched.
- If the matches don't fit on one page of the table, either treat each page separately or bump the **Page Size** selector at the bottom.
- An empty Replace box deletes the search text from each label, which is useful for stripping prefixes (`Improved health` → `health` by replacing `Improved` with empty).

The full reference is in the Factors panel page.

The same search/replace also exists on the **Links table** (see Links panel). Use the Links table when you want to find a substring in the **Quote** column or in custom link fields, not just in cause/effect labels.

Bulk Edit: edit dozens of labels at once

Search/replace handles "fix this one variant"; Bulk Edit handles "fix everything I can see in front of me". Toggle **Bulk Edit** at the top of the Factors table. The table body becomes a multi-cursor text editor (Ace), one factor label per line, in the same order as the table. The header stays put for sorting and filtering.

What this gets you:

- **Multi-cursor**: Alt+click to add cursors anywhere; Ctrl+Shift+L to select every occurrence of the currently selected text. Very fast for "add `Feelings;` to the start of these eight labels".
- **Find next**: Ctrl+Alt+Right adds the next occurrence of the selection to the cursor set; Ctrl+Alt+Left goes back.
- **Side info**: the right-hand column shows source and citation counts, plus the list of sources, for the label your cursor is on.

Two practical tricks:

- **Merge several factors into one**: just overwrite the rows you want to merge with the same target label. When you save, every link pointing at any of those old labels will point at the new one instead. There's no separate "merge" step.
- **Sort first, then edit**: sort by citation count to put the heavy hitters at the top, or sort alphabetically to bring near-duplicates next to each other. The bulk editor refreshes when you sort, so do all your sorting before you start typing.

Three things to watch for:

- **Pagination**: the editor shows the current page only (default 10 rows). For large clean-ups, increase the page size first.
- **Recoded labels are read-only** (shown with a yellow background). They've been generated by an AI recode and the app protects them from accidental edits. Edit the original cause/effect columns instead, or clear the recoded values first.
- **Label-transforming filters**: if you have Soft Recode, Zoom, Collapse, or Combine Opposites running in the filter pipeline, the Factors table is showing transformed labels, but Bulk Edit saves by exact label text match. Turn those filters off before bulk editing, or you'll be confused when nothing changes.

Soft Recode is a good example of a temporary label transform.

Worked example: tidy up Mark's project

Suppose you've coded both interviews in `example-short-uncoded` and your Factors table looks something like this (made-up, but realistic for a small manual coding session that crossed a few sittings):

- `quiet hands-on time`

- `Quiet hands-on time`
- `feels calm`
- `Feels Calm`
- `calmer`
- `feels frustrated`
- `feeling frustrated`
- `gets frustrated`
- `house mess`
- `mess at home`
- `kids demanding attention`
- `kids demanding`

Three small clean-ups:

Fix the capitalisation drift. Search for `Feels Calm`, replace with `feels calm`, hit Replace. Same for `Quiet hands-on time` → `quiet hands-on time`. Two presses, done.

Merge the `frustrated` family. Switch on Bulk Edit, sort by label so the three frustration variants are adjacent, overwrite all three rows with `feels frustrated`, Save. Three labels become one; all the links repoint automatically.

Decide what to do with `mess at home` vs `house mess`. This is a judgement call. Either pick one (search/replace), or recognise that they actually capture slightly different things (general clutter vs the specific moment) and leave them alone. Bulk relabelling is not a licence to flatten distinctions you wanted to keep.

After all that, the map gets noticeably simpler without losing any evidence: the same quotes are still attached to the same links, just with cleaner labels.

Converting flat labels into hierarchical ones

This is the same tooling, used differently. Suppose all of Mark's emotion labels are flat: `feels calm`, `feels frustrated`, `feels guilty`. You want them under one parent so you can zoom out to a single `Feelings` node.

Two ways:

- **Search/replace**: search for `feels`, replace with `Feelings;`. Tick all three rows, Replace. Now you have `Feelings; calm`, `Feelings; frustrated`, `Feelings; guilty`. Zoom to level 1 in the map shows them all as one node.
- **Bulk Edit**: switch on Bulk Edit, select the three rows, use multi-cursor (Ctrl+Shift+L on the word `feels`) to add the `Feelings;` prefix in one keystroke pattern. Slightly faster if you're already in the editor.

You can convert the other direction too (drop the prefix to flatten), and you can build deeper hierarchies the same way (`Feelings; negative; frustrated`). The semicolon convention and what it licenses is in hierarchical coding.

When to recode into temporary columns instead

Anything in this page is **destructive**: once you replace `feels frustrated` with `Feelings; frustrated`, the original is gone (the links table no longer has it). For most clean-ups that's fine; you wanted the change.

If you want to **try a relabelling without committing**, do it into a temporary cause/effect column instead. Set a Label set with a suffix (e.g. `_v2`), recode into that, and use the temporary labels in your maps and tables. You can throw the temporary set away if it doesn't work out. Details in recoding labels temporarily.

Other places you can do this

The Factors panel is the obvious place, but you can also:

- **Edit a single label in the Map**: click the factor, edit. Useful for a one-off rename.
- **Edit in the Link Editor**: open any link that uses the label, retype the cause or effect. The change applies to that link only unless you choose otherwise.
- **Edit in the Links table**: search/replace works in the Cause and Effect columns there too, and you can also search the Quote column, which the Factors table can't do.

When in doubt, do the rename in the Factors panel: it's the most predictable, and the preview shows you exactly what's about to change before you commit.

See also

- Example views for saved bookmarks illustrating filters and recoding.
- Different kinds of coding and recoding for the wider decision tree, including AI-assisted routes.
- Recoding labels temporarily when you'd rather experiment without overwriting.

<!— Internal reference only: tidied transcripts of the embedded videos. Hidden from the published page.

Transcript: video 15, "Factors table: Search and Replace"

0:03 Hi. In this little video we're going to look at the Factors table in the Causal Map app. The Factors table, like the Links table and the other tables, responds to whatever filters you've got set in your filter column. So in this case you can see that we're focused on `farm production` and links coming into and out of it. The Factors table will respond to that and show just those same factors as you could see on the map. If you switch that filter off, the display changes, and you see there are now 277 different factors in this list.

0:50 They're ordered in this table according to citation count, with the most often cited factors at the top. But you can change that. All of these tables you can sort and filter just the way you want. In fact, 15 sources mentioned all of these factors, 14 sources mentioned these, and so on. You can see the citation count and the source count aren't the same: quite often you'll get a factor mentioned by not so many sources, but those sources mentioned that factor a lot. That's why we have two different counts.

1:36 We also have what we call citation-count-in (also known as in-degree), which is the number of times this factor was mentioned as the effect of something (the arrows coming into it). And here it's the opposite, the out-degree: the number of times a link leaves this factor. So in this case you can see that `improved health` is mentioned very often as the effect and not so often as the cause. We also have a special metric called outcomeness: how much like an outcome is it? It's very high here because it's mostly mentioned as the effect.

2:22 There's other interesting columns here too. You can move the columns around, sort by them, and most importantly you can filter the factor labels. So you're saying I'm only interested in something to do with farming. Here are all the factors where the word `farm` is mentioned anywhere. And as usual you can choose how many factors to see at a time; if you've got only 10, you'll be clicking through to subsequent pages.

3:08 There's a few other special features. There's the breakdown box, which lets us break out the columns by different groups within the sources, for example young and old, or gender, or village. There's another little video about that.

3:24 There's also Search and Replace, which is quite important. Supposing I want to search for any factors which mention `xx`, because somebody somewhere has put an `xx` in here which shouldn't be there. I want to get rid of all the xxs and replace them with, for example, nothing. If I put the search text as `xx` and the replace text as nothing, you can see it gives a preview of what it's going to look like afterwards. This is a very simple example; you can imagine it's pretty powerful. Remembering of course that this is also conditional on any filters you might have, so you can apply filters to get just those factors that you want to apply a search and replace to.

4:23 Now, I'm going to do the beginner's mistake, which is to press Replace. That won't work because there's no rows selected; I need to select some rows with the checkboxes first. The reason for the checkboxes is you might say "I want to make this change for some of the labels but not all of them". In this case I want all of them, so I select all, press Replace, it asks me to confirm, and the xxs are removed from the labels for those three factors. If we try to search for `xx` again, there aren't any. It seems quite simple but it's quite powerful.

5:25 There's also an even more powerful thing called Bulk Edit, which we'll look at in a different video.

5:33 Finally, I forgot to mention: these checkboxes can be used for other things too. You can select multiple factors and then delete them, or merge them. Irrespective of the checkboxes, you can also

download an Excel sheet or take a screenshot of just what you can see. You can also press the Edit button to directly change the label, if you've got a typo or a different idea.

Transcript: video 16, "Factors table: Bulk edit"

0:02 Hi. If you've done a lot of causal coding, especially manually, you might find you've got a complicated list of different factor labels and maybe you're happy with some of them and not so happy with others. In this case, this is a copy of our favourite file `example original`, and you can see there's lots of different labels in it.

0:36 We need to do some kind of high-level restructuring, perhaps using hierarchical labels (semicolons to distinguish higher and lower-level concepts). Or maybe we just need to systematically clean up: perhaps we've done it collaboratively and one coder has used American spelling and another UK spelling. The problem is you need to do a kind of bulk refactoring of the factor labels.

1:08 There's another video that shows how you can use the search/replace box, which is pretty powerful. But sometimes you just want to see all of your labels and go through the whole lot and tidy them up, do a massive spring clean.

1:28 There's a very small button here on the Factors table which doesn't look like much, but what it does is it shows you a view of the same information as the Factors table: there's 10 factors here just the same as there were 10 factors before, but you just see the labels and you can edit them directly. Which is pretty amazing.

1:52 But you've got to remember that it responds just exactly to whatever table-like settings you've got. So if you're viewing 10 at a time you'll see the first 10, then the next 10, and so on. Or you can just change the page size. In this case there's about 300 factor labels, so if you switch it to 1000 you can see all of the labels at once. It's very important to understand that any changes you make only apply to the factors you can see in front of you on the screen. Otherwise these labels respond just the same way as the table does. So if I sort by factor label alphabetically, they're alphabetically organised.

2:49 And you might think, "Aha, this is useful because I might have a nice system going in my top-level labels here but I'm not sure about what's going on down here, and I might want to change some things, reorganise the levels of the hierarchy." That's what I can do with this editor.

3:11 Very simply, I could change `bank D` to `bank X`, for example. So I change using this text editor just what I want, I save changes, and that label will be changed. It says "you're about to rename one factor, two links mention this factor, changing `bank D` to `bank X`". I can say yes or cancel.

3:45 There's a lot more you can do because it's a sophisticated text editor. You can do things like multiple cursors. So if I press Ctrl and the down arrow, you see how I can select multiple things at once. I can say instead of `agricultural production`, I might change this to `farm production` by using these multiple

cursors. There's a blue box here giving you a lot of detail about the different shortcuts for using this powerful text editor.

4:22 A different thing you can do (let me press Ctrl+Z to undo): supposing I think "what else is there to do with agriculture around here?" I select a piece of text, then Ctrl+Alt+right-arrow, and you see it's selecting all the different instances where `agriculture` or `agricultural` have been mentioned. That's multiple cursors, so I can start to type. It's not going to quite work in this case because

🌻 Formatting your map for what you want to show

28 Apr 2026

A causal map is meant to make a point, not to be a faithful echo of the data. This page covers the controls that decide what shows up on the map and how each thing looks, organised by the question you're trying to answer rather than by which widget does what. The widget-by-widget reference lives in the Map Panel page and the Filter Links tab page.

Watch first

Two-step mental model: filter, then format

There are two distinct sets of controls in the app, and almost every problem with a map's appearance comes from confusing them.

The **Filter Links tab** decides what gets onto the map at all. It runs the links through a pipeline: frequency, focus, path tracing, opposites, zoom, and so on. Anything excluded by a filter is invisible to everything else.

The **Map Formatting card** (on the right of the Map panel) decides how the things that survived the filter pipeline are drawn: which encoding goes on factor size, colour, link width, link label, and so on. It changes nothing about the data; it just changes how the same data is presented.

Almost all the answers below say "use this filter" or "use this Map Formatting setting", and the two routes are not interchangeable. If you can't find the lever you want under one, try the other.

Decide what's on the map

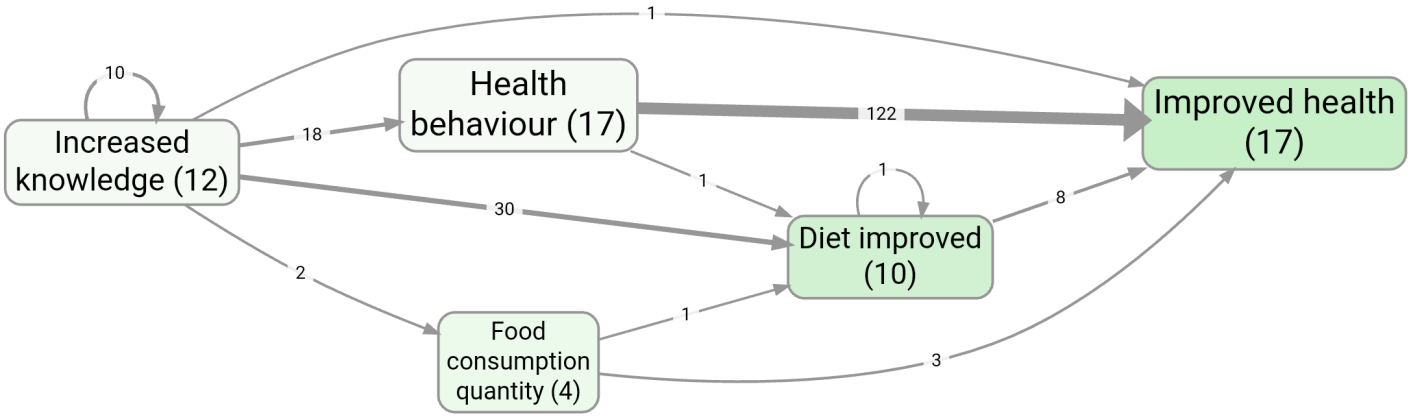
"My map is too crowded"

By far the most common problem. Five different cuts:

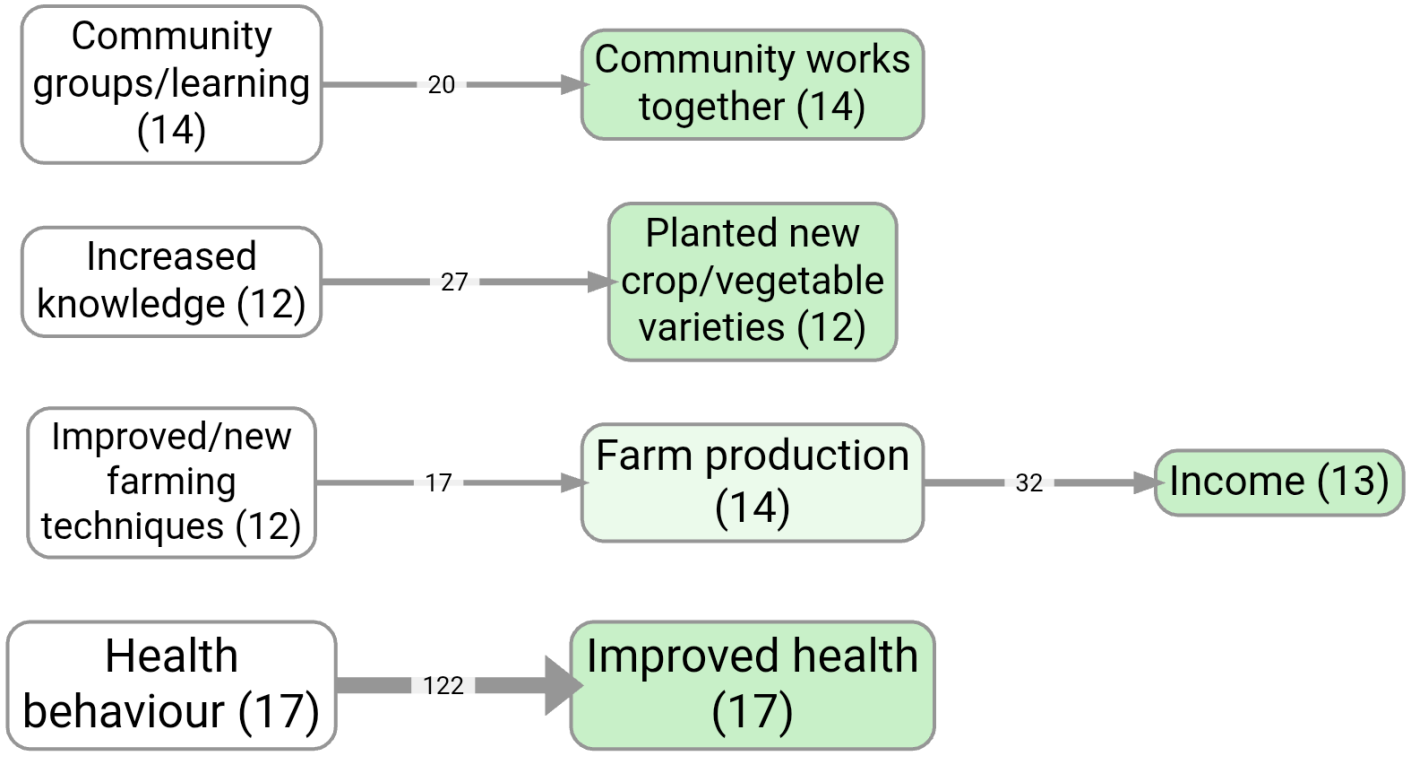
- **Top N most-cited.** The Link Frequency and Factor Frequency filters keep only the top N by citation count or source count. This is the first thing to try; "top 10 factors" usually halves your map. See frequency filtering.
- **Zoom out hierarchical labels.** If your labels use the `general; specific` convention, zooming to level 1 or 2 collapses the detail without losing the evidence. Best for projects that have grown deep. See hierarchical coding.
- **Focus on one factor.** Show only causes and effects within N steps of a chosen factor. Great when you want to talk about one thing in particular. See focus or exclude factors.
- **Trace paths between two factors.** If your question is "how does A lead to B", path tracing keeps only the links on a route between them, and ignores everything else. See path tracing.
- **Collapse synonyms or strip brackets.** If the clutter is really just the same thing under several near-duplicate labels, the Collapse filter merges them on the fly without altering your data. See collapsing labels. For a permanent tidy-up, use bulk relabelling instead.

If none of those is enough, you probably need to ask a narrower question, not show a busier map.

For example, these two saved views of `example-original` show two first-pass simplifications: top factors by factor frequency, and top factors by link frequency.



Bookmark #266 — main factors map, top 5 by factor frequency.



Bookmark #1124 — same map, top 5 by link frequency. Note how the surviving factors and links differ.

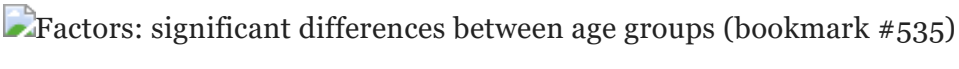
"I want to compare groups on the map"

Two related routes, and they answer different questions.

If the question is "do men and women paint different maps?", filter to one group at a time using the Source Groups filter, save each as a bookmark, and put them side by side. The Statistics panel does the equivalent in tabular form (see).

If the question is "on this single map, where do the groups disagree about a given link?", use **Label by Group** (the Custom Links Label filter). It writes per-group counts directly onto each map link: Tally mode shows raw counts, Percentage mode shows shares, Chi-square mode highlights links where the

difference is statistically significant. The chi-square arrows ⬆/⬇ pair nicely with the **Links highlight: Significant** option in Map Formatting, which thickens the significantly different links and dims the rest.



Bookmark #535 — chi-square breakdown for factors mentioned by different age groups.

You can also switch to a table or heatmap when the comparison is the point:

source_id	custom_ #Sex of the respondent	Female	Male	Totals
MNX-1		18		18
MNX-2		26		26
MNX-3		48		48
MNX-4		51		51
MNX-5		36		36
MNX-6		37		37
MNY-1			42	42
MNY-2			47	47
MNY-3			56	56
MNY-5			56	56
MSX-1		46		46
MSX-2		33		33
MSX-4		41		41
MSY-1			40	40
MSY-2			34	34

MSY-3		34	34
TWX-1	95		95
TWX-2	71		71
TWX-3	22		22
Totals	524	309	833

Bookmark #267 — gender comparison as a Statistics-panel heatmap, an alternative to a map for the same question.

"I want to follow one source's story"

Path tracing has a Source Tracing option that constrains the trace to chains within a single source. This stops you reading off transitive stories that nobody actually told. See path tracing.

Decide how each thing on the map looks

The Map Formatting card has roughly twenty dropdowns. Most of the time you want one of three encodings.

"Show me at a glance what's important"

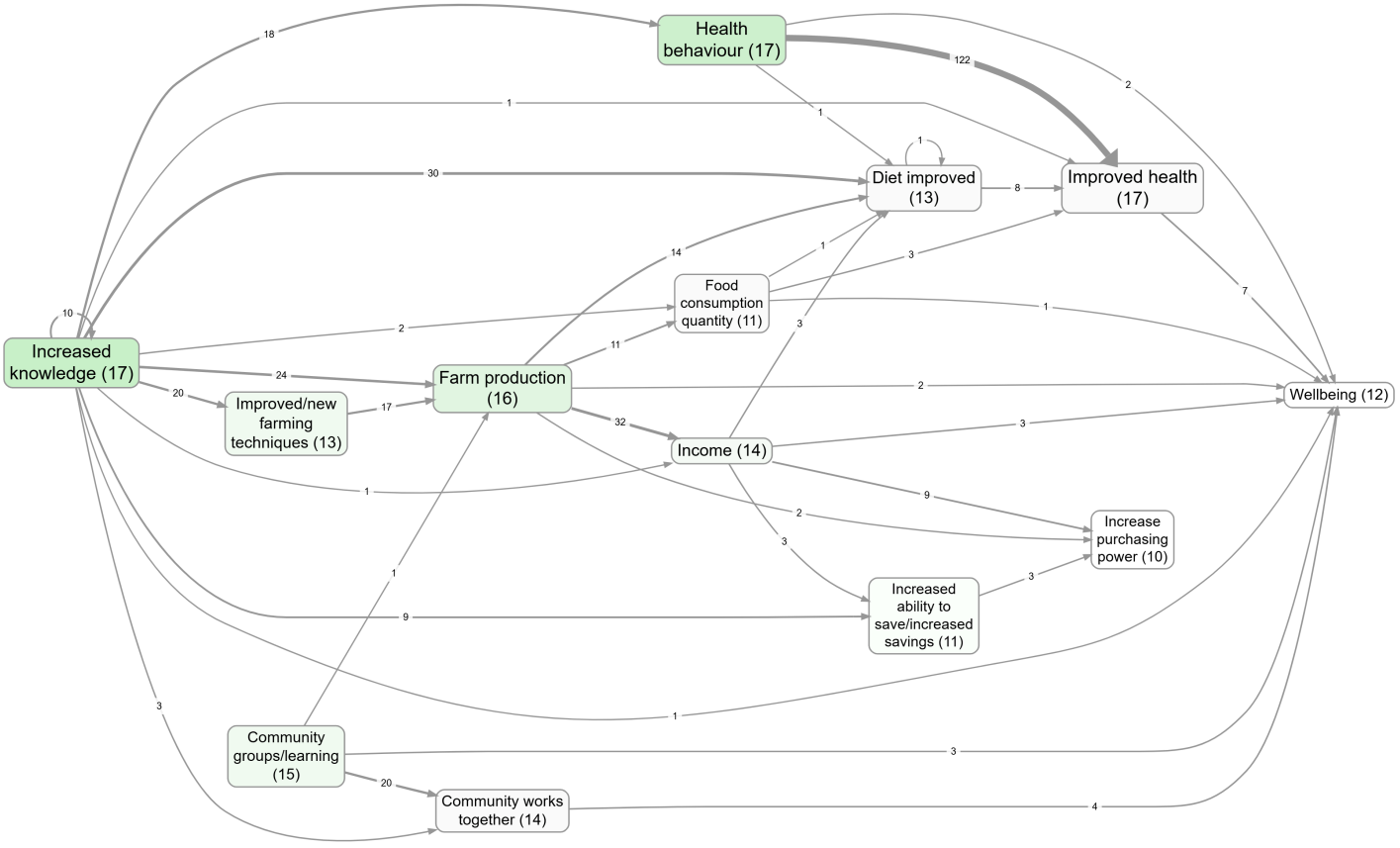
Factor sizes are already driven by citation count by default. The two other things worth turning on:

- Set **Factor colours** to **Source count** or **Citation count** if outcomeness (the default) isn't telling the story you want. Outcomeness is "how much like an outcome is it?", which is great for theory-of-change views and confusing for almost everything else.
- Set **Link widths** to **Source count** if you have a few prolific respondents, so width reflects breadth of agreement rather than just how often people repeated themselves.

For a stronger visual cue:

- **Links highlight: Significant** puts a "halo" on links that the chi-square test flagged as group-different (works only when Label by Group is set up).
- **Links highlight: Feedback loop** (2 / ≤3 / ≤4 factors) highlights links that participate in a cycle of that length. Useful when feedback is the point you want to make.

This example colours factor backgrounds by causal importance:



Bookmark #1063 — Factor colours set to Influence: factors that influence many onward-important factors are darker.

"I can't tell positive from negative"

Two layers, both already on by default.

Arrowhead colour reflects the mean **sentiment** of that link bundle: muted blue for `+1`, grey for `0`, muted red for `-1`. Factor border colour reflects the mean incoming sentiment, so factors that are mostly the result of bad things get red borders and mostly-good ones get blue.

If your project has lots of `~`-prefixed opposites (positive and negative versions of the same factor), turn on the Combine Opposites filter. It folds the two poles together into one node and uses arrowhead colour to show how often the link goes "as expected" versus "flipped". See also the broader writeup on opposites coding in chapter 007.

If you'd rather see the number than the colour, set **Link labels** to **Sentiment** and the mean appears on each edge.

"I want to display a metric I coded myself with a custom links column"

If you have a custom link column (e.g. `confidence`, `mechanism`, `time_horizon`), the **Map Custom Columns** filter feeds that column into one of three Map Formatting outputs: **Custom label**, **Custom**

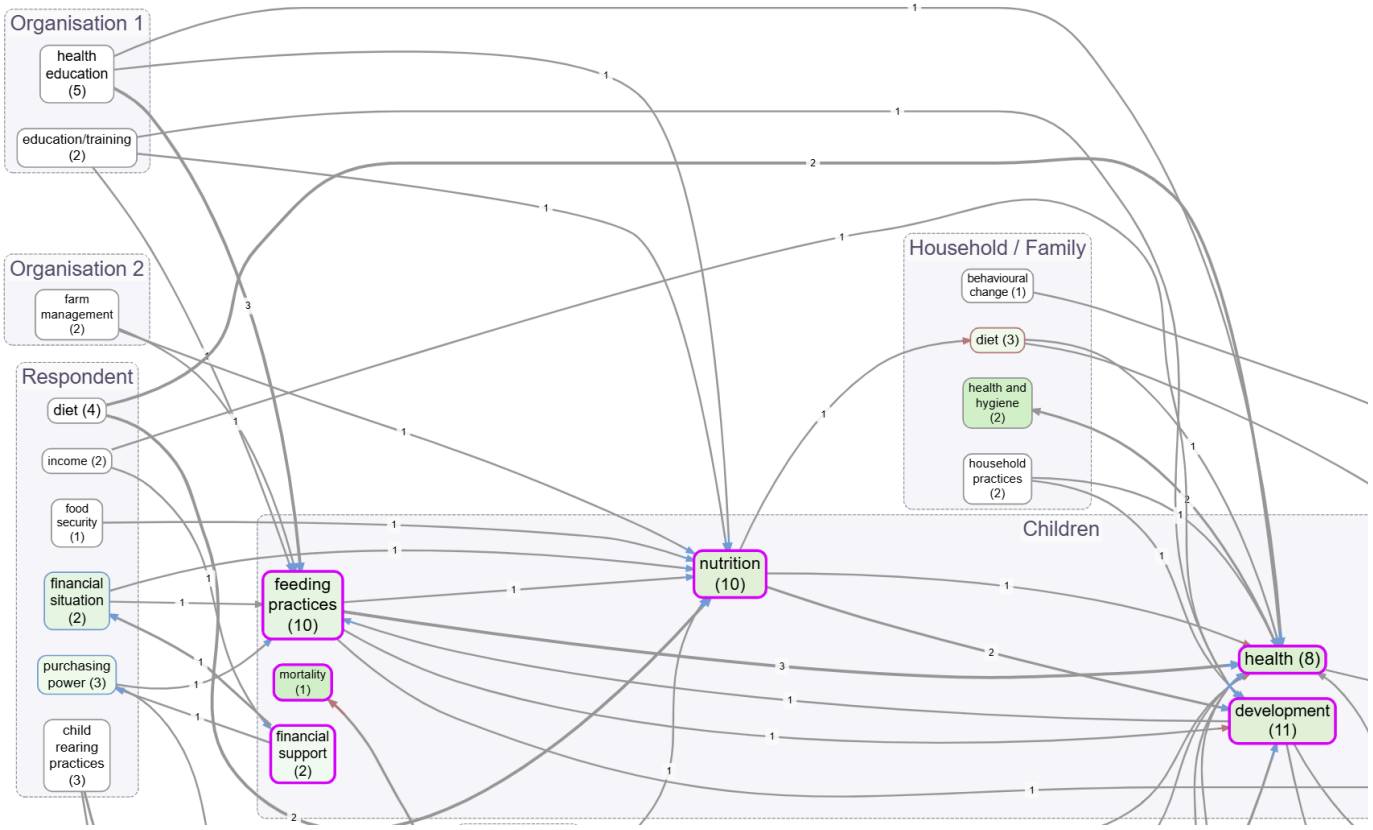
width, or **Custom colour**. You also pick how multiple links in a bundle get aggregated (Unique, Tally, All, Average, Sum, Mode). The full pattern is on the custom columns page.

This is also how you put source IDs, tag tallies, or per-bundle sentiment in the link label, by switching **Link labels** in Map Formatting.

"The labels make the map look fragmented or repetitive"

Three small switches, in order of effort:

- The **Groups** dropdown wraps top-level groupings in a box on the map. Choose how the group is identified: hierarchy level 1 (the part before the first `;`), the part before the first colon, what's in square brackets, or what's in round brackets. Quick way to show structure when zooming would lose too much detail.



Top-level groupings shown as boxes on the Interactive map via the Groups dropdown.


Top-level labels used as groups in Print view (bookmark #1178)

Bookmark #1178 — same grouping in Print/Graphviz layout for a report-ready figure.

- **Factor colours = Label segment** colours each factor by its group using the same patterns as Groups. Use it on its own for a softer visual hierarchy, or pair it with Groups for both shape and colour.

- For deeper tidying, bulk relabelling is the right tool. Don't fight the Map Formatting card if the underlying labels are the problem.

"I want a quick visual marker on certain factors"

In the Print/Graphviz layout, if a factor label starts with an emoji, the app pulls that emoji out of the inline text and renders it as a larger symbol at the top of the node. So labelling a factor `🌱 New farming method` puts a clear sapling icon on the node and `New farming method` underneath. The Interactive layout keeps the emoji inline. This costs nothing, looks good in reports, and is a fast way to mark up a few key factors (interventions, outcomes, ones to flag) without setting up a custom column.

"I want my factors to sit in a specific place on the map"

Add a tag of the form `(N,M)` (or `[N,M]`) anywhere in the factor label, where N is the rank position (along the main flow direction) and M is the perpendicular position. Both numbers are integers; the tags are stripped from the label when displayed.

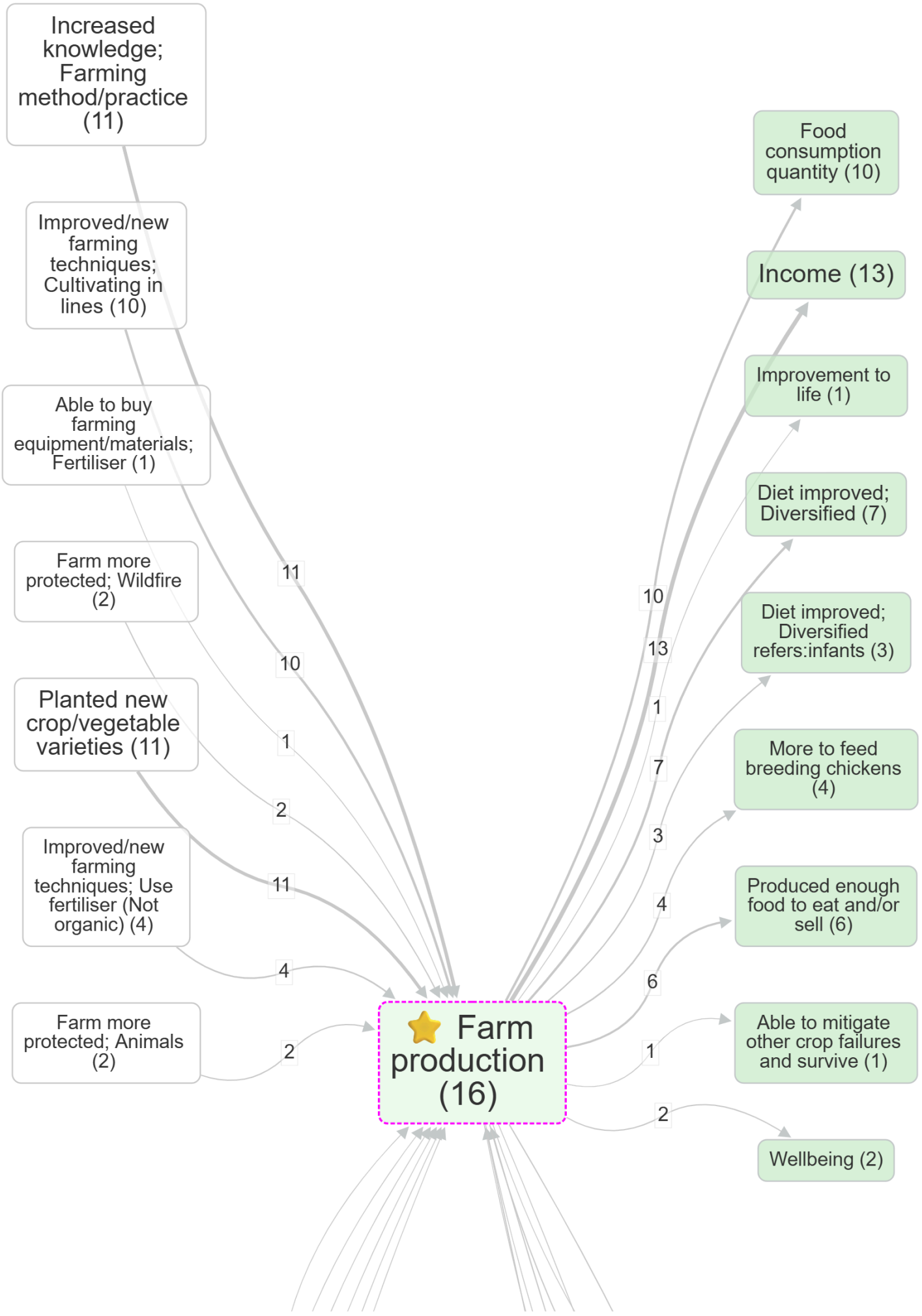
For an intervention-to-outcome map with **Direction = LR**, you might want activities at the far left (rank 0), intermediate steps in the middle (rank 1, 2), and outcomes at the right (rank 3). Tag those factors `(0,1)`, `(1,1)`, etc., and they're locked into those columns; everything else floats freely between them.

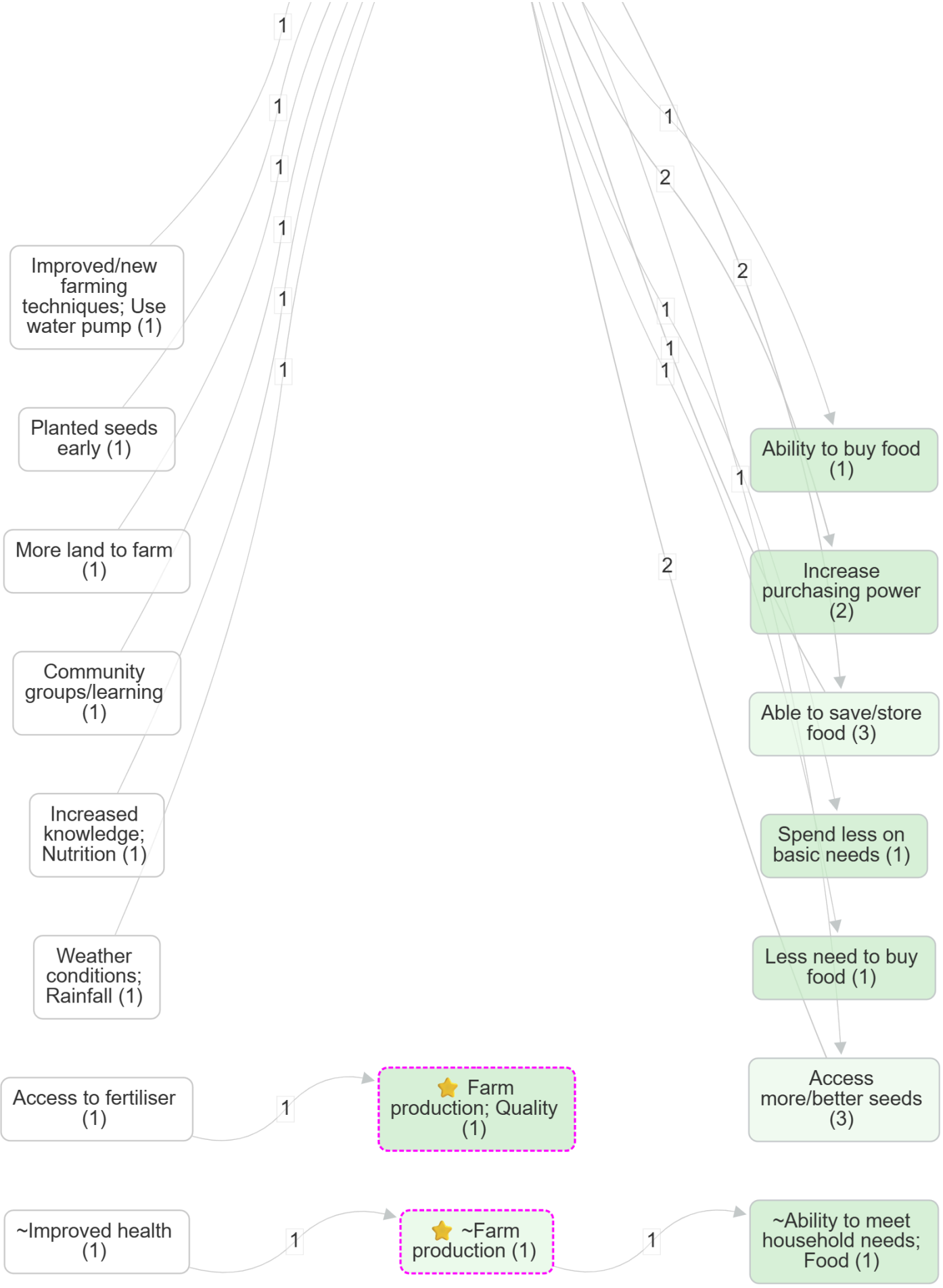
Partial tags work: `(N,)` sets only the rank, `(,M)` sets only the perpendicular (only meaningful in Interactive layout; in Print/Graphviz the perpendicular is a best-effort hint within a rank). The grid toggle in Map Formatting disables grid behaviour without removing the tags, useful when you want the structured view for one bookmark and a free layout for another.

Useful contrasts to save as bookmarks

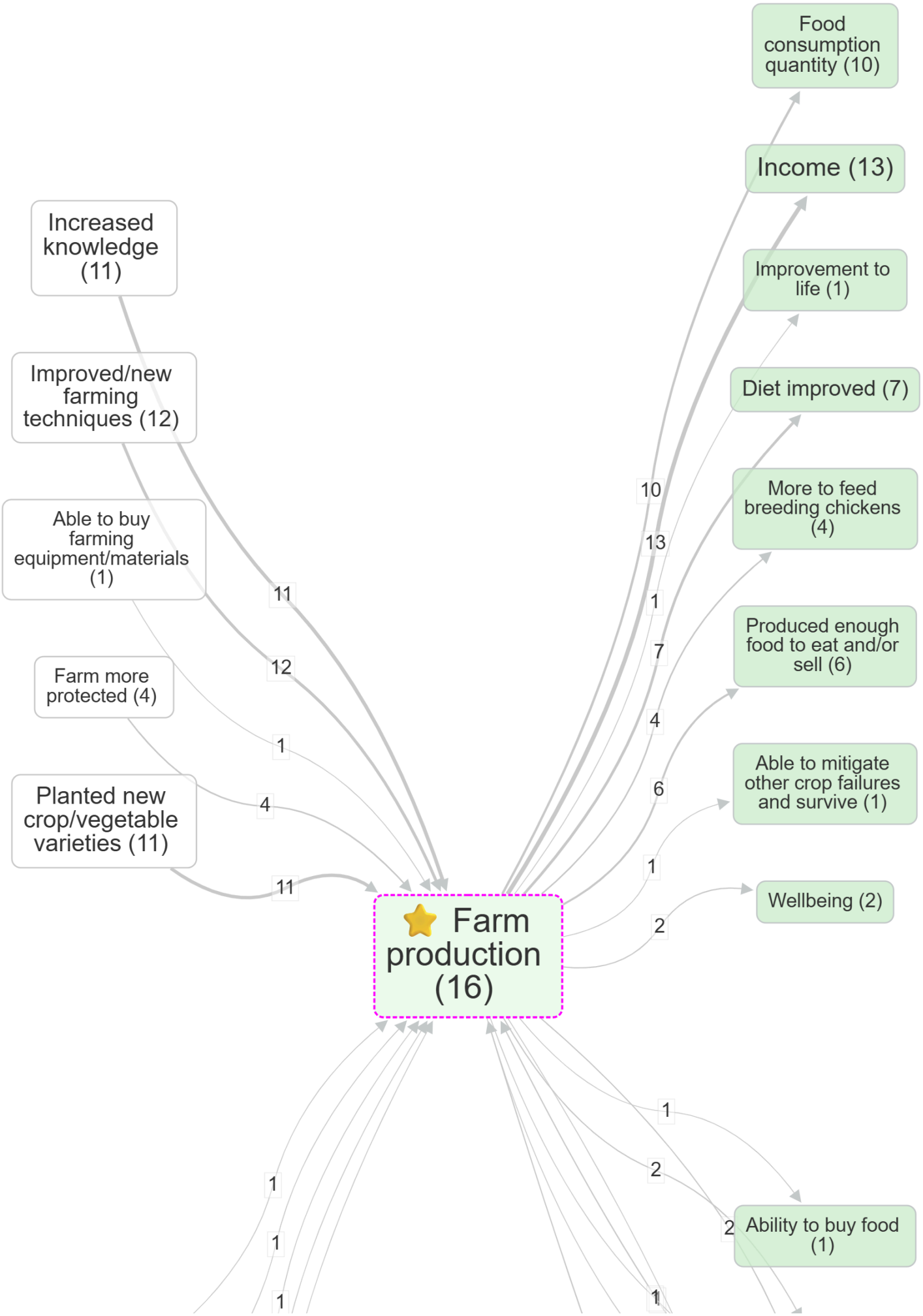
Some map-formatting choices are easiest to understand as a pair. Save both views as bookmarks so you can compare them later.

Focus with and without zoom


Increased knowledge; Farming method/practice (11)
Improved/new farming techniques; Cultivating in lines (10)
Able to buy farming equipment/materials; Fertiliser (1)
Farm more protected; Wildfire (2)
Planted new crop/vegetable varieties (11)
Improved/new farming techniques; Use fertiliser (Not organic) (4)
Farm more protected; Animals (2)
11
10
1
2
11
4
2
⭐ Farm production (16)
10
13
1
7
3
4
6
1
2
Food consumption quantity (10)
Income (13)
Improvement to life (1)
Diet improved; Diversified (7)
Diet improved; Diversified refers:infants (3)
More to feed breeding chickens (4)
Produced enough food to eat and/or sell (6)
Able to mitigate other crop failures and survive (1)
Wellbeing (2)

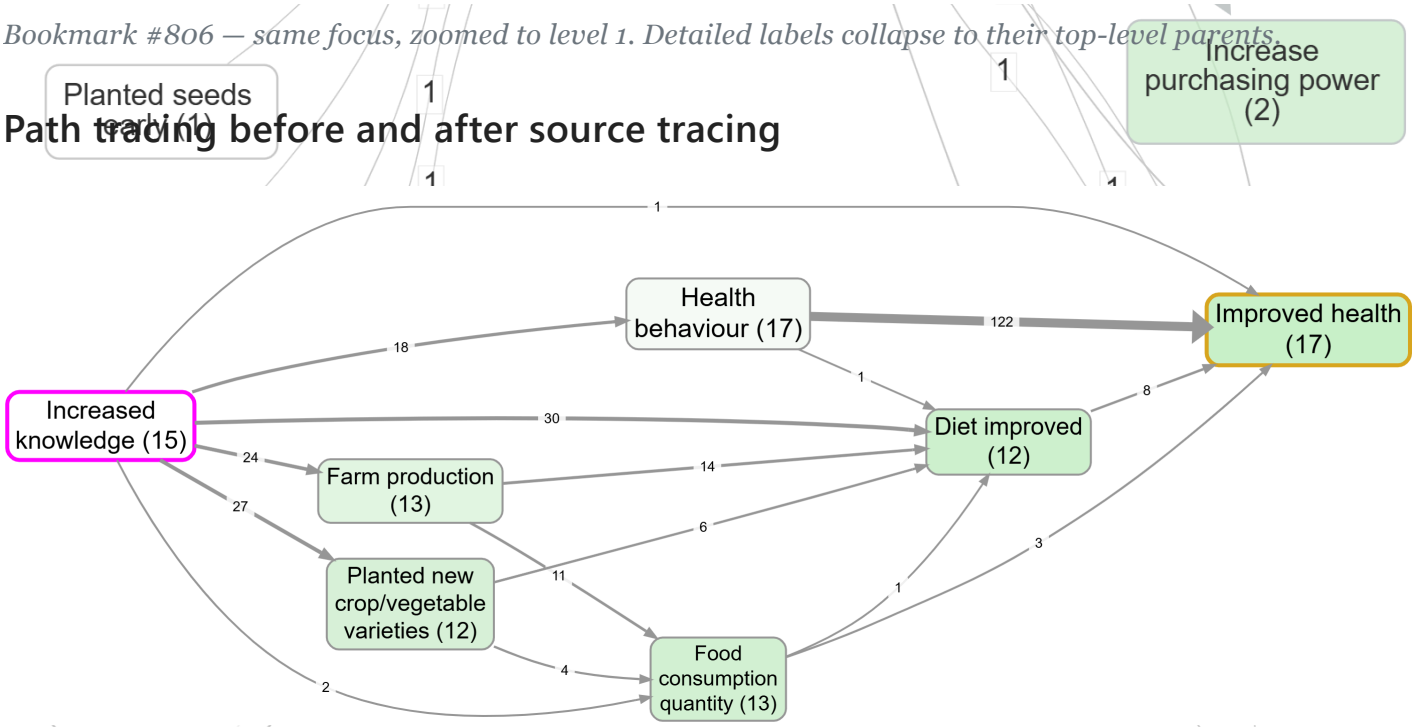


Bookmark #805 — Focus filter on `farm production`, no zoom. Detailed labels remain.

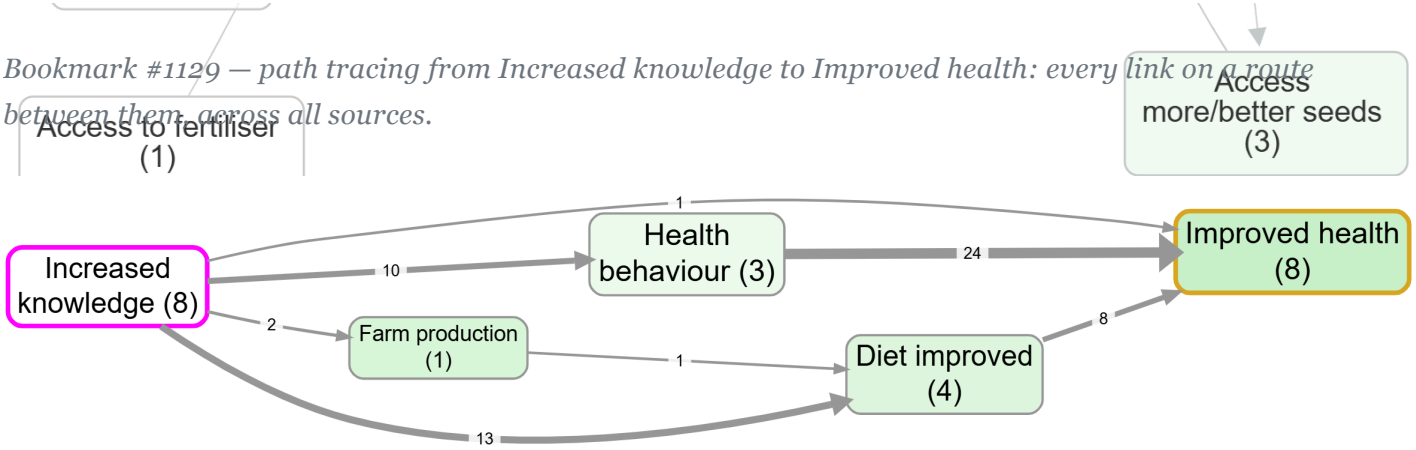

Food consumption quantity (10)
Income (13)
Improvement to life (1)
Diet improved (7)
More to feed breeding chickens (4)
Produced enough food to eat and/or sell (6)
Able to mitigate other crop failures and survive (1)
Wellbeing (2)
Ability to buy food (1)
Increased knowledge (11)
Improved/new farming techniques (12)
Able to buy farming equipment/materials (1)
Farm more protected (4)
Planted new crop/vegetable varieties (11)
⭐ Farm production (16)
10
13
1
7
4
6
1
2
1
2
2
1
1
1
1
11
12
1
4
11

Bookmark #806 — same focus, zoomed to level 1. Detailed labels collapse to their top-level parents.

Path tracing before and after source tracing



Bookmark #1129 — path tracing from Increased knowledge to Improved health: every link on a route between them, across all sources.



Bookmark #981 — same trace with Source tracing on: only paths actually told within a single source survive.

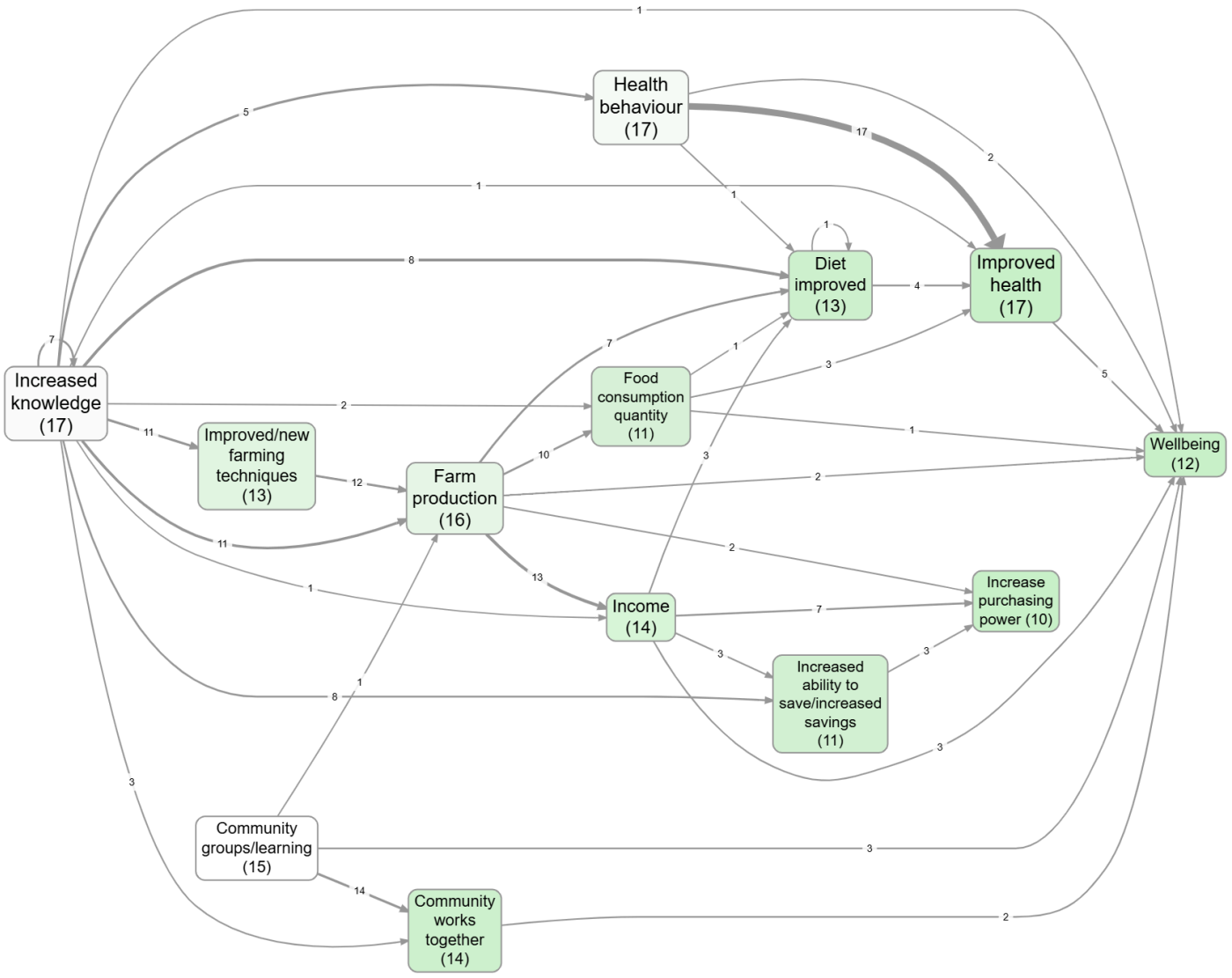
Make it report-ready

For a static image to drop into a deck or a paper:

- Switch **Layout** to **Print/Graphviz**. The interactive layouts are good while you're working but produce shapes that look improvised in print.
- Hit the **camera** button (top-right of the map controls) to copy a high-quality PNG to your clipboard. The resolution multiplier (1×, 2×, 3×) lives in the Account panel, not on the Map panel.
- The **Copy legend** button puts the legend text in your clipboard separately, which is what you usually want in a figure caption.

For a reproducible view to come back to, or to share with a colleague:

- **Save as a bookmark.** Bookmarks store the entire state of the view: filter pipeline, sources selected, every Map Formatting dropdown, custom column setup, layout, the lot. Send the bookmark URL and the recipient sees exactly what you saw. See Bookmarks and Reports.
- For multi-slide reports (e.g. one map per region), the Report Builder takes a bookmark plus a "variants" custom column and generates an HTML or PDF output with one slide per variant. Same page.



Bookmark #1361 — Report Builder variants in action.

A few caveats

The Filter Links pipeline runs in order, and each filter sees the output of the previous one. If you have Soft Recode or Combine Opposites running, the labels you see in the Factors panel are transformed labels

See also

- Example views for a saved-bookmarks gallery using `example-original`.

Print view of links

28 Apr 2026

The **Print view of links** is for evidence checking. A map

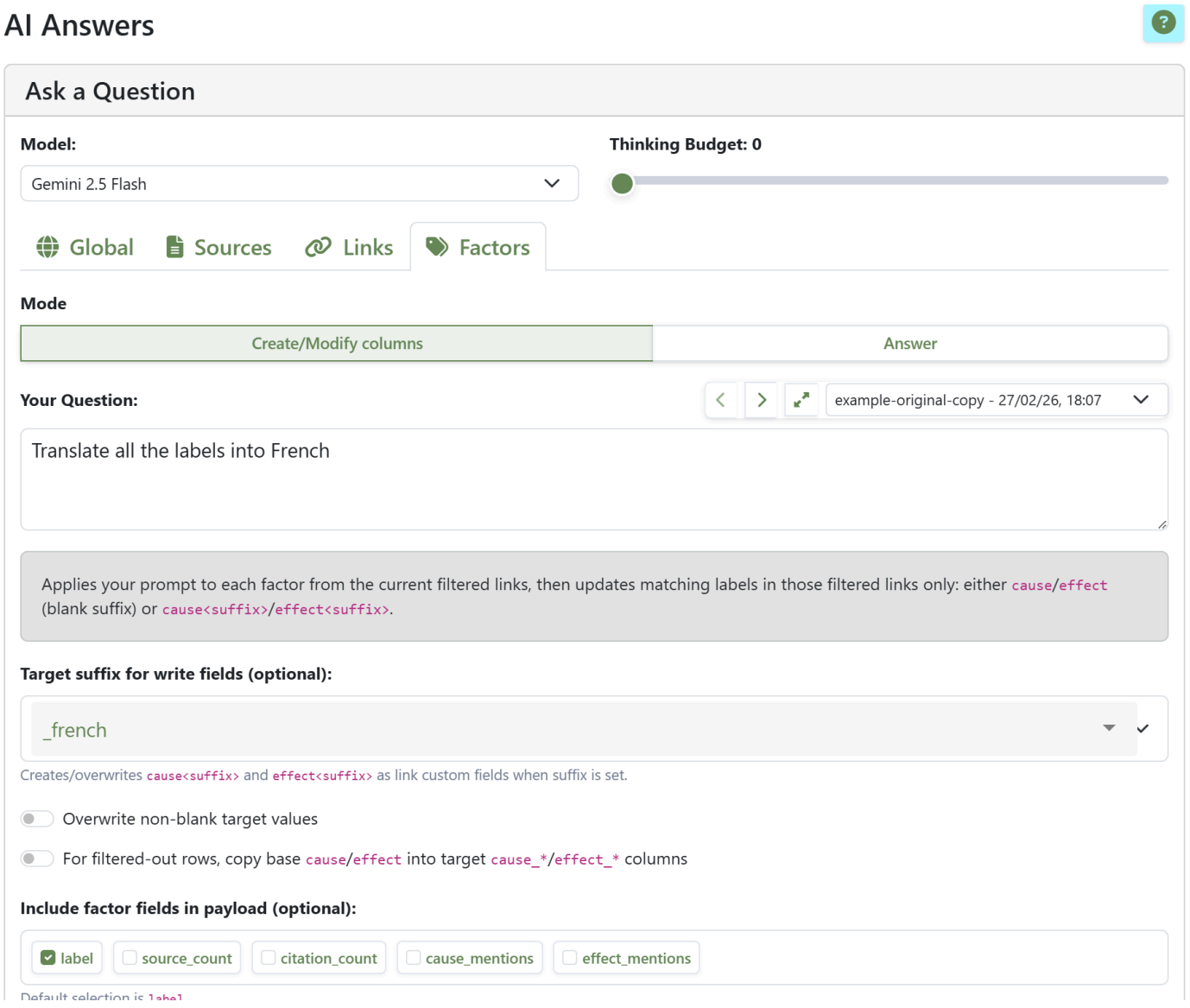
See also

- Links Panel reference for the underlying widget controls.
- Bookmarks and Reports for export workflows.
- Vignettes for an AI-generated prose alternative.
- Combining links into bundles for the conceptual basis.

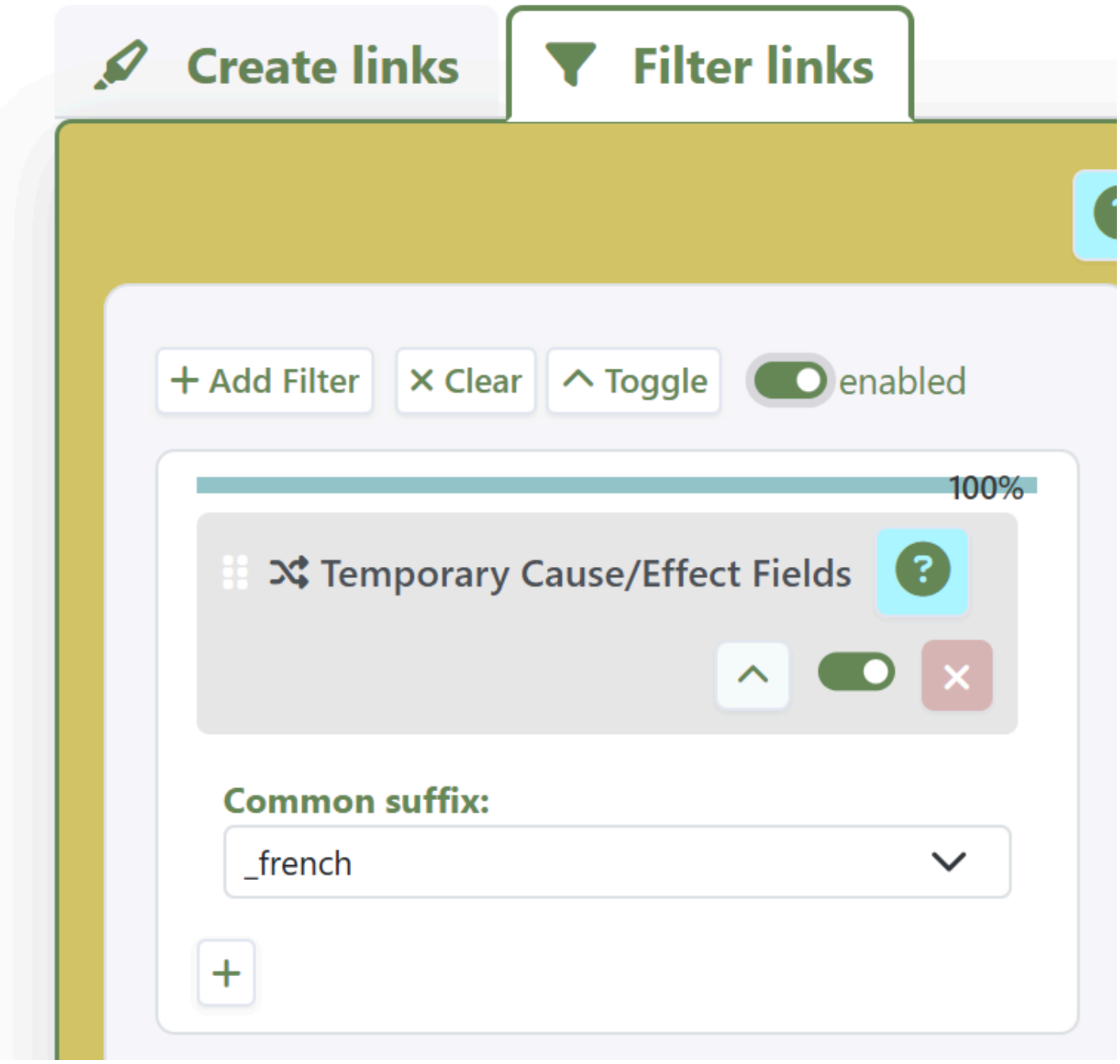
Translate factor labels

This is easy with AI Answers in Factors mode.

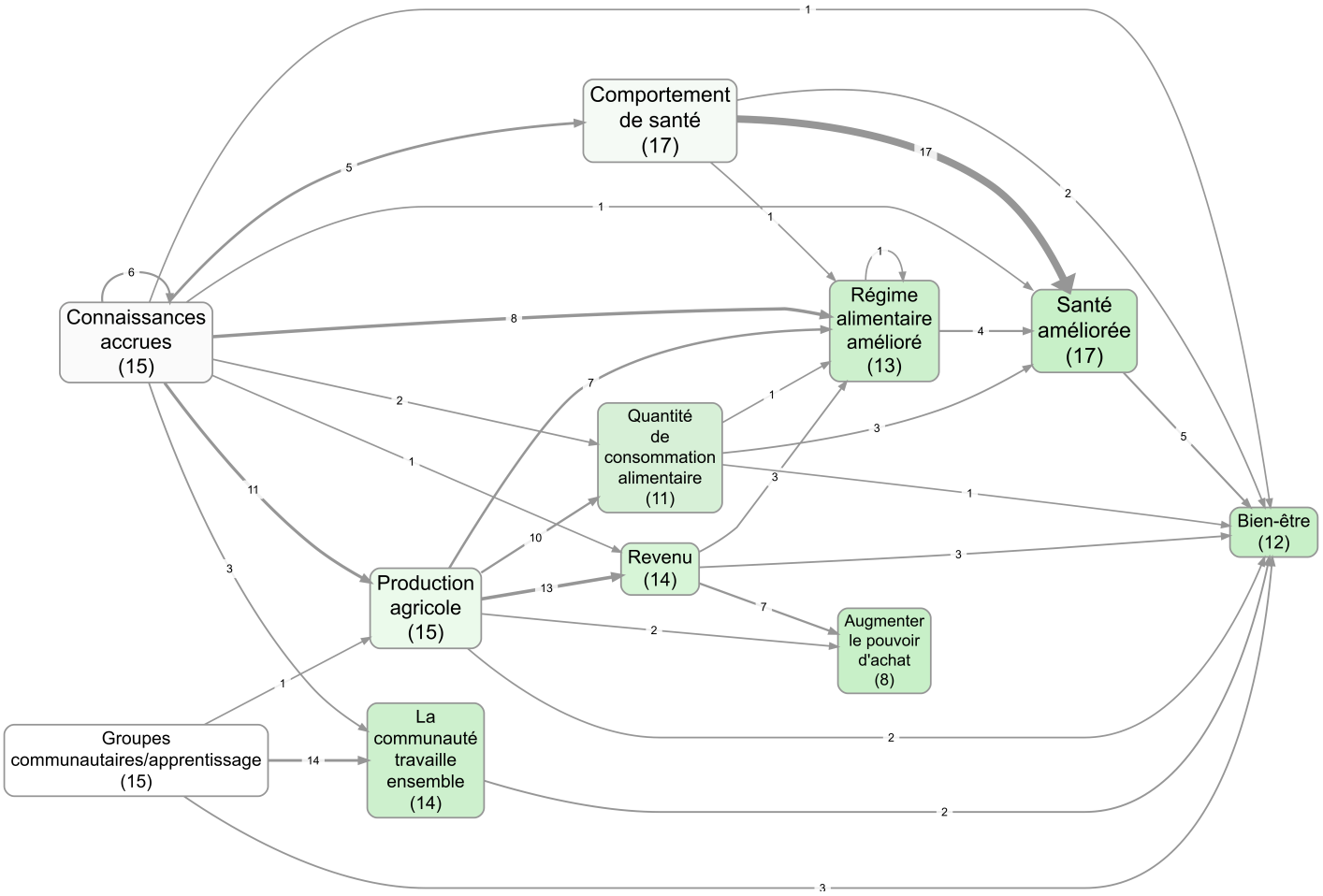
First, in the **Label Set widget** under the Sources bar, create a new named set such as `french`. The app sets up `cause_french` / `effect_french` columns and switches you into that set.



Run AI Answers (Factors) with a prompt like "translate each factor label into French". The translations write into the experimental set; your originals stay untouched.



Flip between languages in the same widget: pick `default` for the original, pick `french` for the translation. The map and tables refresh to match.


Comportement de santé (17)
Connaissances accrues (15)
Régime alimentaire amélioré (13)
Santé améliorée (17)
Quantité de consommation alimentaire (11)
Revenu (14)
Production agricole (15)
Augmenter le pouvoir d'achat (8)
Bien-être (12)
Groupes communautaires/apprentissage (15)
La communauté travaille ensemble (14)

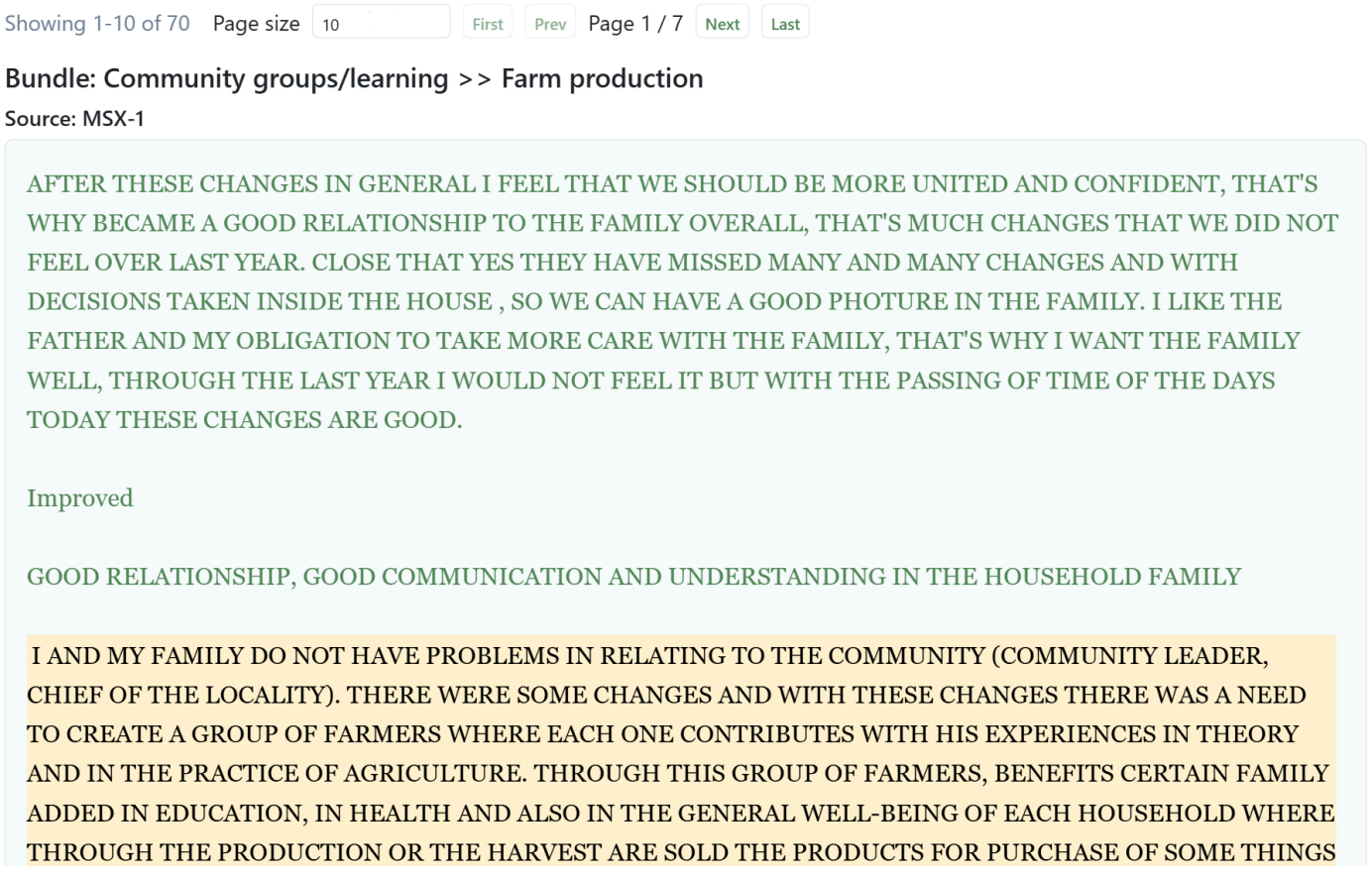
Vignettes

1) What are vignettes and why use them?

Some people love just staring at a map and clicking the links to view the quotes behind them. Other people are like "No, what does it say, tell me in actual words already!"

Vignettes turn your coded causal map into readable prose. The Causal Map AI can draft a narrative that names themes, tensions, and patterns in your material — or whatever else you want. You stay in control: you write the prompt (tone, audience, structure), and you can edit the text afterwards. You can choose which AI model to use. It's a good idea to include a "Checking" phase, where another AI instance checks the work of the first one. As usual, your Account Settings determine where the model is run, e.g. in the EU.

For a non-AI alternative, the **narrative print view** of links shows quotes with surrounding context, which can be enough on its own:



Bookmark #1185 — narrative print view; see Print view of links for the recipe.

2) Whole-map Vignettes

Use this when you want a bird's-eye story of everything that is currently in the map (respecting your current filters and source selection). The app sends a compact summary of factors and bundled links (with sentiment), evidence snippets (quotes and source IDs from highlighted bundles where available), and up to 30 "typical" sources scored by how much they represent common bundles, each with bundles, link-level quotes, and a small metadata preview (title, filename, and simple custom fields). If you want the narrative to emphasise particular edges, set Map Formatting → Links highlight to Significant or Feedback loop first; that snapshot is included so the model can focus there.

Typical-source

Use this when you want a single-respondent case study: the app picks the most "typical" source for the current map view (using link counts and coverage of bundles, with a correction to make sure very long documents do not always win). It sends that source's full text plus its links with quotes and sentiment, so the model can write as if telling one story. Do not ask it to generalise across the whole project in this mode: the prompt and data are scoped to that one source.

Example: Vignette for "Lonely in London"

See Causal mapping of loneliness interviews

The Gravity of Isolation
The data reveals a profound and interlocking narrative about modern isolation, where the ultimate destination for many pathways is the crushing sensation of **Feeling Like a Nobody**. This central experience acts as a gravitational pull, drawing in various social and internal struggles. It was observed by 38 sources that this profound emptiness becomes a self-fulfilling prophecy, feeding back into itself in a devastating loop that traps individuals in a state of profound disconnection.

> "with the experience of loneliness, the first thing that came to my head was darkness, and I just felt like, people feel lonely, usually find like a dark place" — PANT32
> "It makes me feel upset because I feel like I haven't changed like everyone around me is changing, moving away to better themselves and I feel like I'm still stuck in the same place that I haven't changed, and then maybe it's me that's like the problem" — PANT35

The Social Fracture
A major catalyst for this darkness is the **Breakdown of Friendships**. 41 sources noted that the fracturing of social bonds directly led to feeling like a nobody. This breakdown often spirals; 24 sources observed that losing friends triggers further social withdrawal, creating a feedback loop where the breakdown of friendships simply leads to more broken ties.

> "I think that, the feeling of the void that someone leaving leaves can make you feel lonelier than you probably are" — VIEW1M
> "And that's where you start to question yourself about oh I cannot be bothered to go to gym or I cannot to go work. Because you're lonely because the fact that you broke up with someone, um, yeah." — VIEW43

Compounding this social fracture is a **Total Lack of Support**, which 23 sources linked to feeling entirely invisible and alienated. When individuals feel they have no one to lean on, it breeds a deep sense of inadequacy and isolation.

> "the specific kind of loneliness that comes from being connected to people because of common factors, but feeling lonely because of there not being certain deeper things that you think are important. So... do you, are you in... are you just around each other, but not in actual support of each other? Or you might not truly believe in each other." — VIEW18

The Pressure to Fit In

The modern pressure cooker of the **Social Media Popularity Contest** was highlighted by 18 sources as a direct pathway to feeling like a nobody. The constant, curated comparison leaves individuals feeling inadequate and left behind.

> "nowadays people just do things because it's like, I need to look like I'm doing something on, on Instagram, otherwise I'm just a nobody, that's another form of loneliness, do you know what I mean?" — VIEW11

Similarly, the exhausting act of **Conforming to the Crowd** was cited by 24 sources as a driver of profound emptiness. Trying to fit into molds that don't match one's true self leads to a **Disassociation from Identity** (noted by 16 sources). Conversely, **Being Singled Out** for being different was reported by 35 sources to plunge individuals into feeling like a nobody, creating a painful paradox where both fitting in and standing out lead to the same dark place.

> "you pick out the worst in yourself but the best in everyone else and it makes you feel like you don’t want to be around anyone else- because you haven’t got the same quali-qualities as them." — VIEW37
> "others not understanding you, you, just being misunderstood, you know, leads to loneliness." — VIEW11

The Internal Prison

These external pressures inevitably seep inward, creating a landscape of **Internal Mental Blocking**. 21

sources described how this mental paralysis leads straight to feeling like a nobody, while 17 sources noted that this mental blocking feeds into itself, trapping the individual in their own head with their self-doubt.

> "if I ignore it and I focus on the feeling of loneliness and emptiness, and existence, that's when I could stay in the state of loneliness, when I ignore my longing for more" — VIEW3M
> "my way of thinking is not like, it's like I'm basically like kind of restricted myself from like, for reaching a high level" — VIEW11

This internal trap frequently transitions into **Built-up Frustration** (mentioned by 13 sources as stemming from mental blocks) and **Crippling Mental Anxiety**. 13 sources observed that feeling like a nobody generates severe anxiety, which in turn—according to 15 sources—reinforces the feeling of being a nobody, creating a suffocating cycle of panic and isolation.

> "And if you have more worries and that makes you feel... It makes you feel like you, you can't be heard, because it's like, even if you're screaming or shouting, it's like being in space" — VIEW11
> "if you fail and then like obviously you have a whole class of 50 people watching you crumble and burn and then just after that you just feel like you shouldn't even be there, you know, you'll, you're not worthy of being at that place anymore" — YPART1

The Search for Connection

In an attempt to escape the void, many turn to **Keeping Busy**. 20 sources described how staying occupied becomes a self-sustaining loop. However, the effectiveness of this strategy is highly mixed. While 19 sources found that keeping busy successfully led to **Finding Matching Human Energy**, 26 sources reported that merely filling time ultimately still resulted in feeling like a nobody, as the underlying void remained unaddressed.

> "I feel lonely if I stay in my house for too long ... if I stay at home then, and if I don't have anything to do, then I'll watch films and I'll feel like I'm really bored" — VIEW34
> "making stuff makes me feel like this is my role in this world" — VIEW11

Genuine **Face-to-face Interaction** was highlighted by 22 sources as a vital pathway to finding that matching human energy. Yet, even the pursuit of connection is fraught; 17 sources warned that finding matching human energy can sometimes paradoxically lead to a breakdown of friendships if old bonds are neglected, or if the energy turns out to be mismatched, plunging them back into the cycle of isolation.

> "when I read those quotes, you feel... not happy, what makes you happy. Like think positive, so think positive, and stay around positive people to make you feel better." — VIEW34
> "they kind of understand what I'm trying to do, so it's like, it's easier to be around people like that, yeah." — VIEW11

Model: gemini-3.1-pro-preview

Bookmark

#1410 — https://app.causalmap.app/?bookmark=1410

Autocoding with AI

There is a whole chapter on this:

Intro — auto-coding with AI

🌻 Adding and using custom columns for your links

Custom link columns let you store extra information on each causal claim, beyond the standard fields like **sentiment** and **tags**.

They are useful when you want to capture something more specific or more structured, for example:

- a confidence score
- a policy area
- a mechanism type
- whether the claim is based on lived experience, hearsay, or observation
- a time horizon such as short / medium / long term
- a project-specific code that only matters in this study

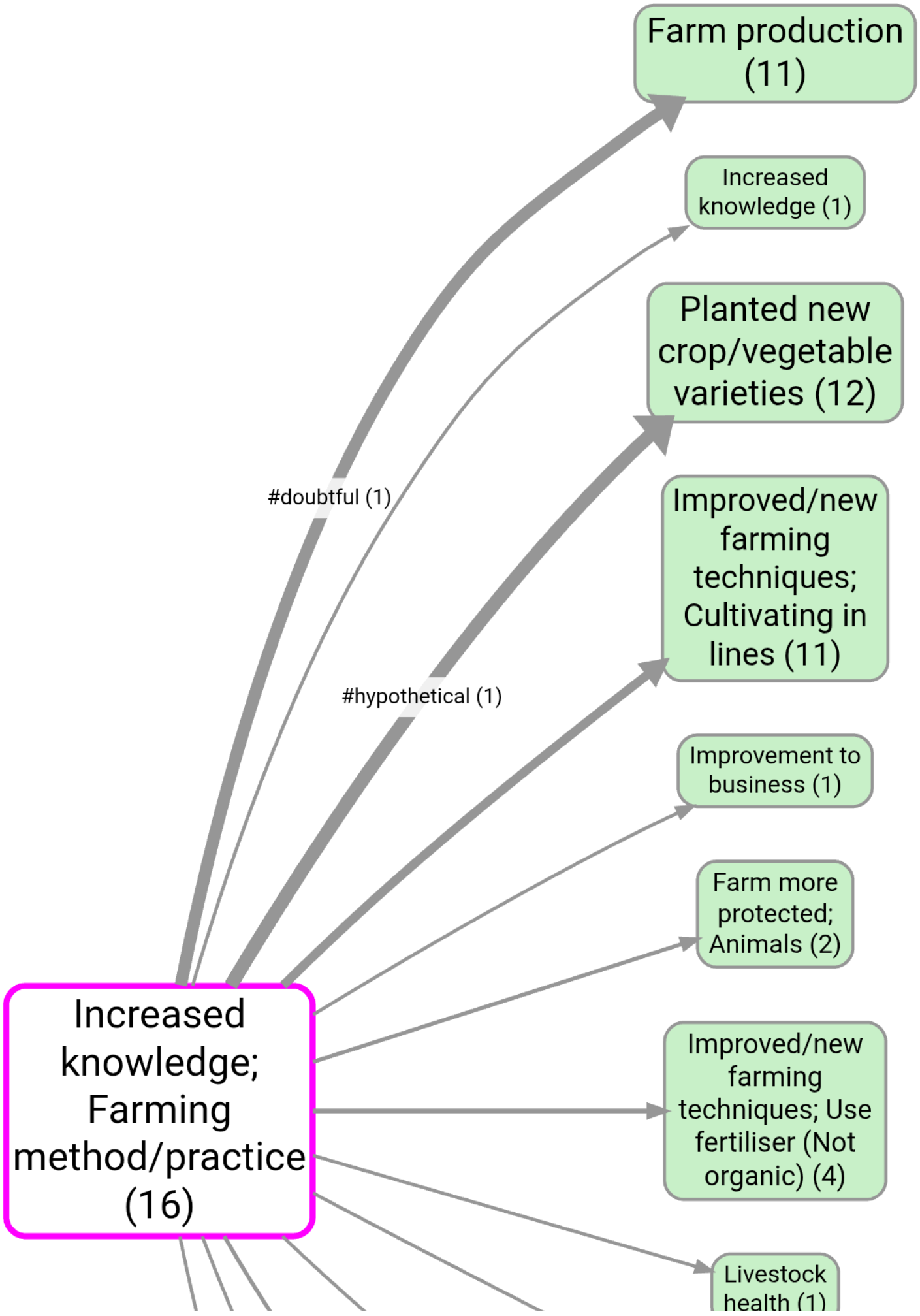
Why use custom columns?

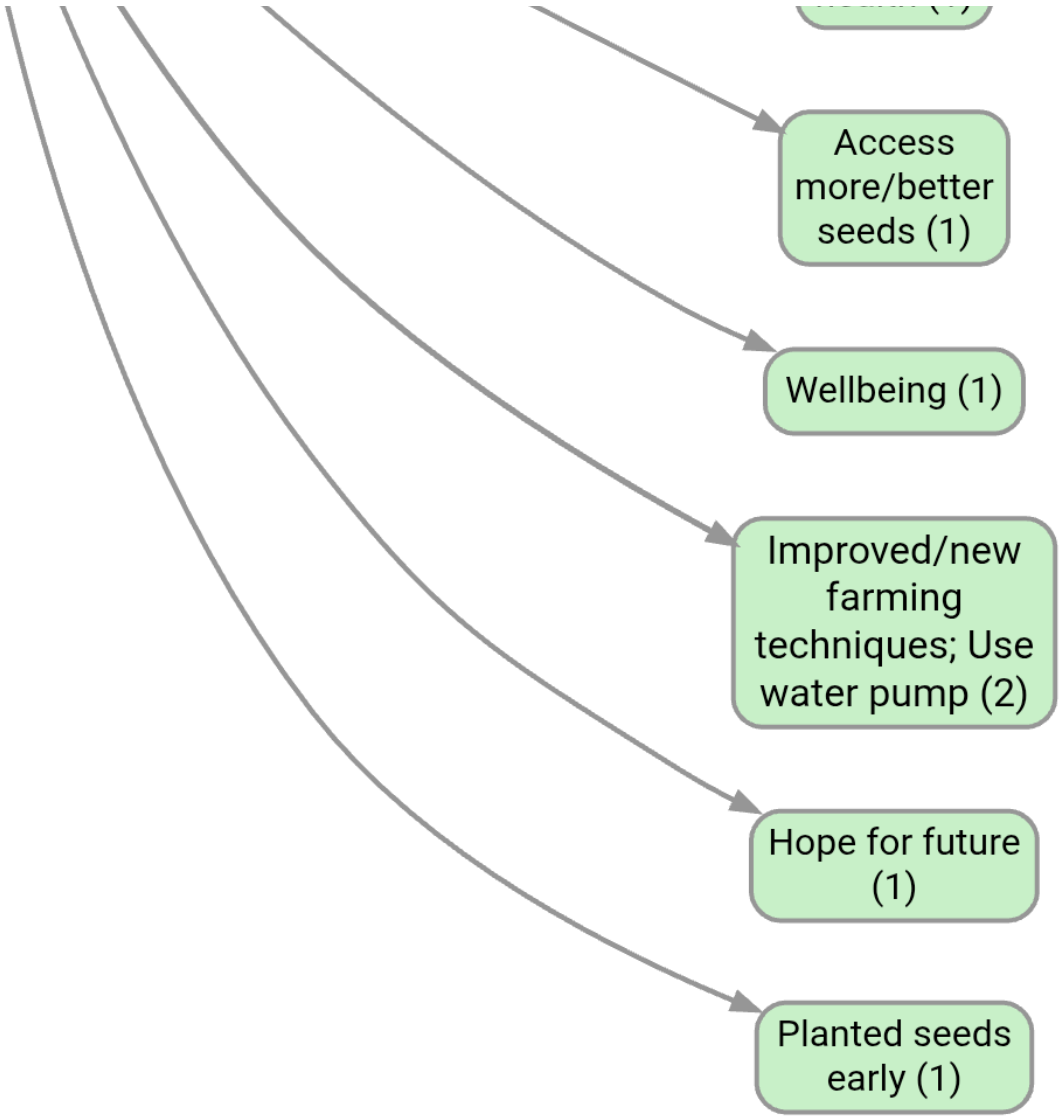
Tags are quick and flexible, and sentiment is built-in for direction of effect. But sometimes that is not enough.

Use **tags** when:

- you want a quick label like `#uncertain` or `#important`
- a link may need several labels at once
- you mainly want fast searching and filtering

For example, this saved map shows `#hypothetical` and `#doubtful` tags displayed directly on the links:


Farm production (11)
Increased knowledge (1)
Planted new crop/vegetable varieties (12)
Improved/new farming techniques; Cultivating in lines (11)
Improvement to business (1)
Farm more protected; Animals (2)
Improved/new farming techniques; Use fertiliser (Not organic) (4)
Livestock health (1)
#doubtful (1)
#hypothetical (1)
Increased knowledge; Farming method/practice (16)



Use a **custom column** when:

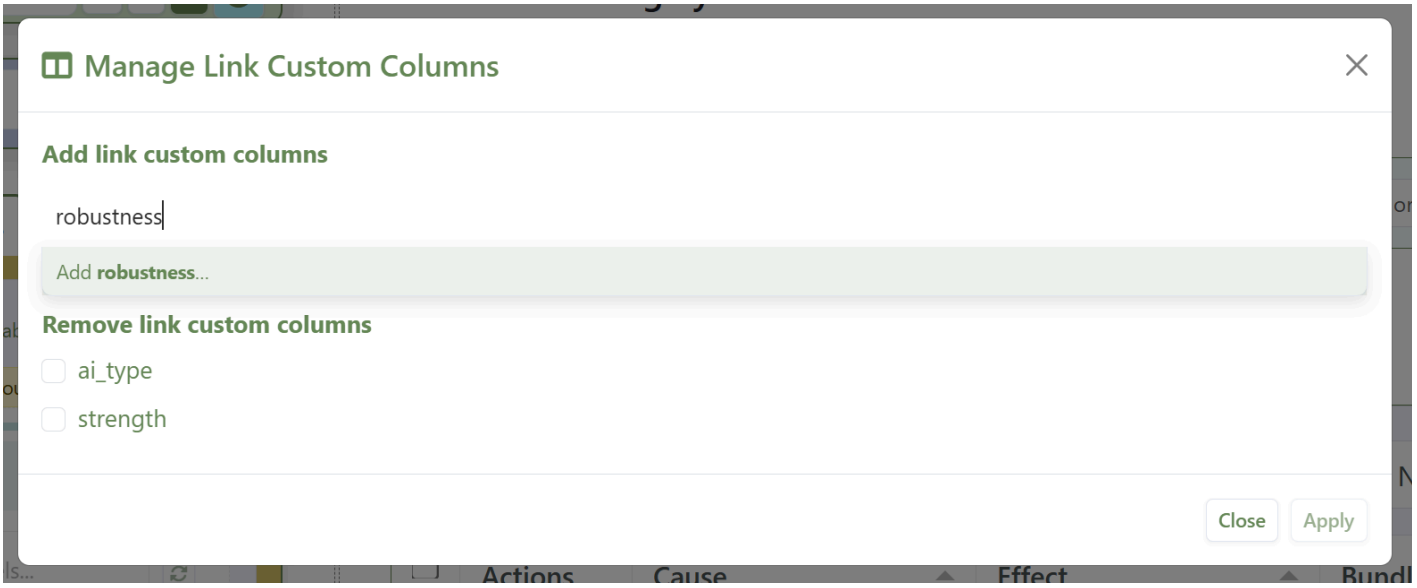
- you want a named field with a clear purpose, such as `confidence`
- you want one value per link for that field
- you want to sort, group, break down, or visualise links using that field
- you want a coding scheme that other people can understand and reuse consistently

So the short version is:

- **tags** are loose and many-per-link
- **custom columns** are structured and field-based

Two ways to create a link custom column

1. From Manage Link Custom Columns

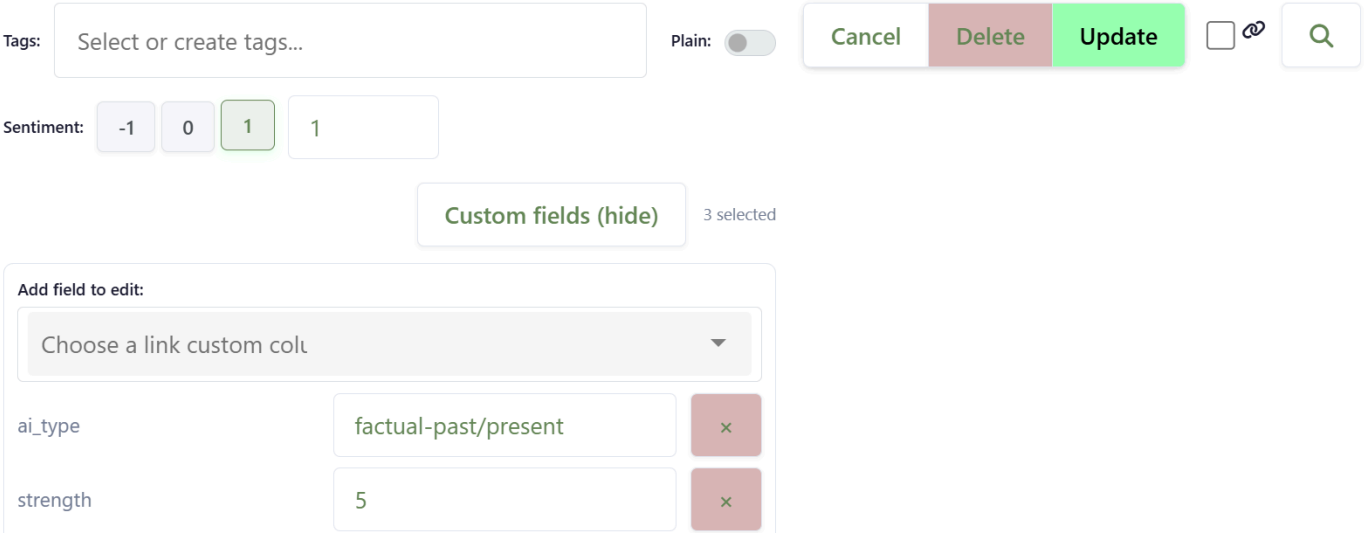


This is the best route when you already know the field name you want to add across the project. It works the same as for adding custom columns in the *sources* tab.

1. Open the **Links** tab.
2. Open **Manage Link Custom Columns**.
3. Type the new field name.
4. Apply the change.

That creates the field for the project, so it is available across your links.

2. Directly from the Link Editor



This is useful when you are coding and realise, in the moment, that you need a new field.

1. Open an existing link or create a new one.
2. Open the **Custom fields** panel in the Link Editor.
3. In the field picker, type a new field name.
4. Confirm that you want to create it for the project.

The editor stays open, and you can carry on coding.

How to fill in values

Once a link custom column exists, you can edit its values in two main places:

- in the **Link Editor**, by opening the **Custom fields** panel and choosing the fields you want to see
- in the **Links Table**, by showing the custom columns and editing cells there

This is useful because some people prefer to code while reading evidence in the editor, while others prefer to review many coded links side by side in the table.

How to use custom columns in the Links Table

Once you have filled in some values, custom columns become useful immediately in the table.

For example, you can:

- sort links by that column
- filter to one value
- group rows by that column
- use breakdowns based on that column

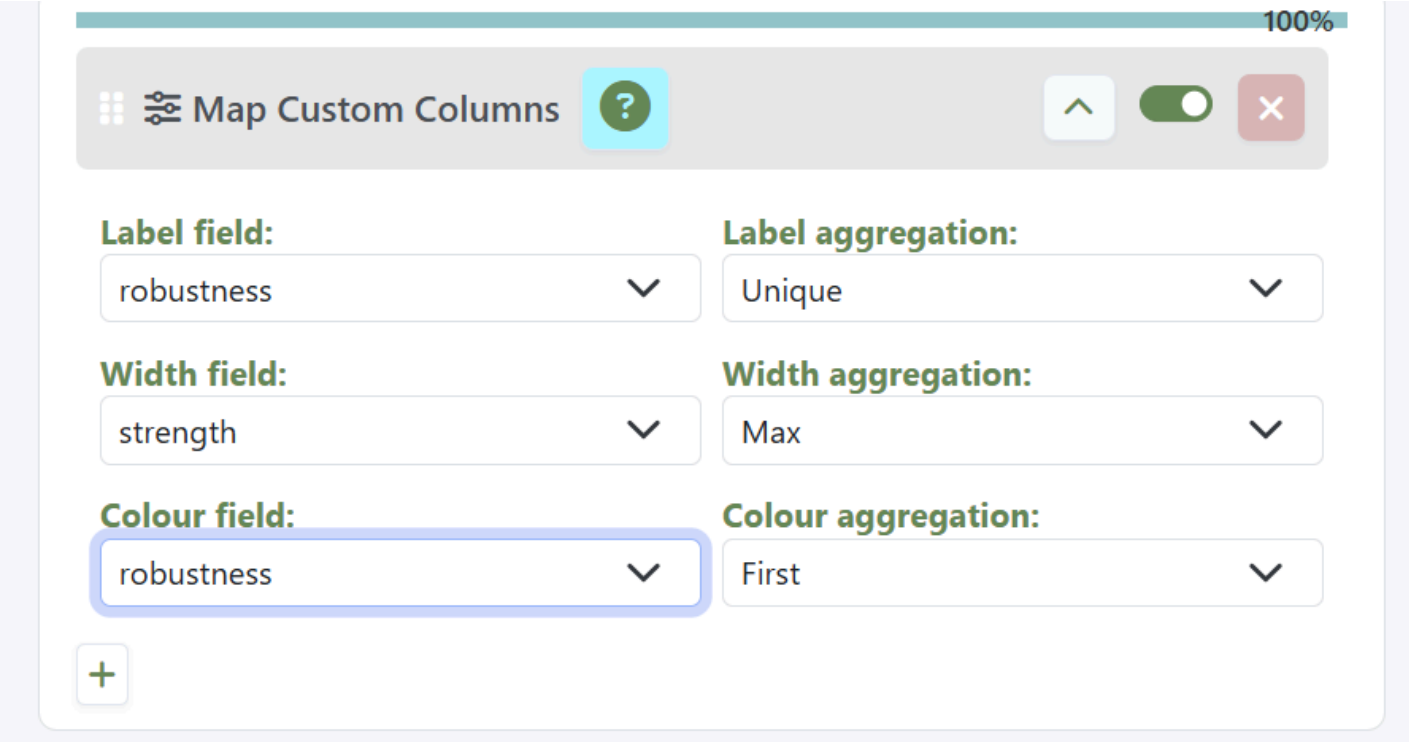
This is often the easiest way to answer questions like:

- Which mechanisms appear most often?
- Which claims were coded as high confidence?
- How do links differ by policy area?

In other words, custom columns make your links table more like an analysis table, not just a coding log.

How to use custom columns in map visualisation

Custom columns can also drive map display.



The basic idea is:

1. Use the **Map Custom Columns** filter to choose a link custom column.
2. Tell the filter whether that column should feed **Custom label**, **Custom width**, or **Custom colour**.
3. Choose how values should be aggregated when several links are bundled into one visible edge.
4. In **Map Formatting**, choose **Custom label**, and/or **Custom width**, and/or **Custom colour**. These should be selected automatically.

This matters because the map often shows one visible edge which actually represents several underlying links. So the app needs a rule for combining their values.

Typical label aggregation options are:

- **Unique**: show distinct values only
- **Tally**: show counts by value
- **All**: list all values
- **Average**: for numeric columns
- **Sum**: for numeric columns

Typical width aggregation options are numeric summaries such as:

- **Average**
- **Sum**
- **Max**

Typical colour aggregation options are:

- **Mode**: most common value
- **First**: first value encountered

Simple examples

Example 1: confidence

Create a custom column called `confidence` and fill it with values such as `1`, `2`, `3`.

You can then:

- sort the links table by confidence
- break the table down by confidence
- use average or max confidence to control map edge width

Example 2: mechanism

Create a custom column called `mechanism` and fill it with values such as `cost`, `motivation`, `trust`, `access`.

You can then:

- group the links table by mechanism
- filter to one mechanism
- show edge labels on the map using unique values or tallies

Example 3: policy area

Create a custom column called `policy_area` and fill it with values such as `health`, `education`, `agriculture`.

You can then:

- compare bundles in the links table by policy area
- use map labels to show which areas are contributing to each connection

A practical tip

Keep the field names simple and stable.

Good examples:

- `confidence`
- `mechanism`
- `policy_area`
- `time_horizon`

Less good examples:

- `misc`
- `other2`
- `new field`

If you choose a clear field name early, the rest of the coding and analysis is much easier later.

In short

Custom link columns are for structured coding that goes beyond sentiment and tags.

They help when you want to:

- create project-specific coding fields
- analyse links more systematically in the table
- drive map labels, widths, or colours from your own coding

That makes them especially useful once your project moves from simple coding into comparison and analysis.

Recoding labels temporarily

28 Apr 2026

Recoding labels temporarily

Sometimes you want to improve your factor labels (cause and effect text) without changing the original data. You might want to:

- experiment safely, trying different prompts or AI settings without overwriting what you coded
- iterate, running factor relabelling several times until you're happy
- compare the original and improved labels side by side
- review before committing, only merging into the main labels when you're satisfied

The app supports this with the **Label Set widget** in the toolbar below the Sources bar. Treat label sets like different versions of the same document: one **default** version, plus as many named experimental versions as you want.

How to use it

1. **Open the Label Set widget** under the Sources bar. Type a new name for your experimental set, for example `v1` or `cleanup`, and confirm. The app fills a new pair of columns (`cause_v1`, `effect_v1`) for every link from what you were just looking at, then switches you to that set.

2. **Edit or recode within the experimental set.** From now on, anything you do (manual edits in the Factors panel or Links table, AI Recode, Answers, search/replace, Bulk Edit) writes to the experimental columns. The default labels stay untouched.

3. **Flip between sets** with the same widget. Pick `default` to see the original labels; pick your experimental set to see the experimental labels. The map and tables refresh to match. Useful for quick before-and-after comparisons.

4. **When you're happy with one experimental set**, open the ⋯ menu in the widget (only visible when a non-default set is selected) and choose **Promote to default**. That copies the current experimental set into the default columns. Your other named versions stay in the project; nothing is lost.

Summary

Use the Label Set widget to spin up named experimental versions of your labels, work on them without touching the default, switch between versions with one click, and promote the winner to default when you're done.

See also

- Different kinds of coding and recoding for the broader picture.
- Bulk relabelling factors for permanent (non-temporary) clean-ups.
- Translate factor labels for a worked example using a `french` set.
- Sources Bar reference for the Label Set widget specification.

Comparing groups

30 Apr 2026

Comparing groups

Do men mention X more than women? Do project A respondents talk about different consequences than project B? This page sketches the methods you'll usually use in the Causal Map app, then goes into detail on the quickest one (the Factors table) and on what "significant" means when the app flags a difference.

The main routes

- **Factors table with breakdown.** Open the Factors panel, set Breakdown by to your grouping variable, optionally set Show differences to a significance level, and read off which factors are mentioned more by some groups than others. Covered below.
- **Links table with breakdown.** The same logic applied to whole links (cause-to-effect pairs) rather than individual factors. Use this when you care which connections, not which factors, are talked about more by which groups. Arithmetic and worked example in comparing groups in the Links table.
- **Separate maps per group.** Filter to one group, save a bookmark or take a screenshot; repeat for the others; compare side by side. Useful for showing common patterns alongside group-specific factors. See splitting by groups.
- **Show Differences on link labels.** Display the per-group counts (or percentages, or chi-squared significance flags) directly on the arrows of the map, so the comparison reads off the picture rather than a table. See showing group data on link labels.
- **Tribes.** Cluster sources by their causal stories and let the data tell you what the relevant groups are. Useful when you don't already have a grouping variable, or when you want to check whether your chosen one captures the relevant differences. See Tribes.

Comparing in the Factors table

Open the Factors panel. Near the top, set **Breakdown by** to the column that holds your grouping: gender, district, project, type of interview, baseline vs endline, anything in the Sources table. The count column splits into one column per group, so you can see at a glance how often each factor was mentioned by each.

If you also want the app to flag which differences look real, set **Show differences** to a significance level: `p < .1`, `.05`, or `.01`. The table then hides factors where no group differs by more than chance at that

threshold, and colours the cells by chi-squared residual: how far each count is from what you'd expect given the totals.

Source count or citation count. Source count is the number of distinct respondents who mentioned the factor; citation count is the total number of mentions. Source count is the more conservative choice: it isn't inflated by one talkative respondent making the same point repeatedly. Use citation count when emphasis matters, not just whether something was raised at all.

Numerical groupings. With a numerical grouping (age band, year, score), the app applies an ordinal correction so the chi-squared test isn't weakened by treating an ordered variable as nominal.

What "significant" means here

A `p < .1` result on a factor means: if there were no real difference between the groups, you would see a difference at least this large less than 10% of the time by chance alone. `.1` is a lenient threshold and flags more candidates, including borderline ones; `.05` and `.01` are stricter and flag fewer. Use the lenient one for exploration, the stricter ones for any claim you intend to publish.

Two things to keep in mind every time you read these tables.

Multiple comparisons. If you test 100 factors at `p < .05`, around 5 of them will come up significant by chance even when no real difference exists. The more factors (or links) you scan, the more sceptical you should be of any single significant result. Treat the table as a shortlist of candidates worth a closer look, not as a list of confirmed findings.

Sample, not population. A significant result tells you the difference within these specific respondents is unlikely to be chance noise. It does not say the same difference would hold for men and women in general, unless your respondents were sampled to represent some wider population, which they usually weren't. State the claim as "in this sample, women mentioned X more than men", not "women mention X more than men".

The arithmetic underneath, the chi-squared test on mentions vs non-mentions and the residual-based colouring, is the same for links and is described in full in comparing groups.

See also

- Splitting by groups for the visual route.
- Identifying groups when you don't already have a grouping variable.
- Tribes for clustering sources by their causal stories.
- Counting and comparing influences for comparing across pathways or time points rather than groups.
- Distinguishing factors that make claims about different groups when your factors themselves refer to groups.