



GETTING STARTED

CHAPTER CONTENTS.



Welcome to CausalMap!!

 If you like learning through video, there are some short Causal Map videos to get you started: [here](#). Or keep reading this Guide!

Try this: code the short example project:

- We've created a practice project for you called `example-short-[your-username]`. This gives you your own copy of our tutorial project to experiment with freely. (If you selected the AI option during onboarding, you will receive an uncoded version of this project so you can try running the AI yourself). **You should see it** in the [Project Dropdown Menu](#) at top left of the app.
- **Select source 1** in the source selector. This will display the text from this source. (If you have the standard example project, this source is already partially coded for you).
- **Practice highlighting causal claims** in the [Source Text Viewer](#) to **create links** in the [Create Links tab](#).
- **View, edit or delete existing links** in the [Source Text Viewer](#) in the [Create Links tab](#) by clicking on the highlighted sections of text or on the corresponding links in the Map.
- **Watch** the causal relationships grow in the [Map panel](#)

Try this: view some examples of what you can do.

These examples are views of a real-life, anonymised [QuIP](#) project in the field of international development.

- Main factors [map](#).
- Main factors [table](#).
- Consequences of increased knowledge [map](#).

- Comparing groups (pivot heatmap) [table](#).

You can find them in the [Project Dropdown Menu](#).

Get help / read the documentation

The documentation you are reading now is embedded in the app via the [Help System](#) and is also available as a standalone [Guide](#).

Each section corresponds to a different part of the interface.

Within the app, you can:

- click the blue help buttons to find out more about the different parts of the app
- use the top bar buttons described in [Navbar](#) (Help, Guide, Bookmark, and Support chat).

But what even is causal mapping?

This Guide is all about how to use the app. For example it tells you how to use the different [filters](#). If you want to find out more about the ideas behind those filters, we have a new "[Ideas Garden](#)" with a more discursive look at the theory and everything that surrounds causal mapping. It's a work in progress but we are adding material every day, please bear with us.

Someone shared their work with you?

If they have to a particular map (or table), click the link and you will be automatically taken to view the corresponding map (or table), providing they have given you the correct permissions.

Alternatively if they have just asked you to log in at the app to explore a file name, say "project-x", log in and click on the dropdown list on the left-hand side and click on [project-x](#) to load it. If you can't find that file name, it means they haven't correctly shared it with the email address you logged in with.

PAGES IN THIS CHAPTER

How CausalMap Works

New features

The previous version of Causal Map, version 3, was already, as far as we know, the only software dedicated to causally coding causal claims within texts. Version 4 improves over Causal Map 3 in the following ways:

Simple AI coding

The **Simple Mode** provides a streamlined AI coding workflow inside the normal left pane. It keeps the app structure familiar while reducing clutter.

Navbar

 **What you can do here:** Use the buttons at the top of the app to open Help and the Guide, bookmark views, contact support, and manage your account.

The left and right panels

The app uses a two-pane layout with a draggable border between them (default split 30:70).

Tips for using the app

There are many dropdown menus throughout the app.

Projects Bar

 **What you can do here:** Choose which Project (project) you want to work on. Use the File menu for quick actions like creating new Projects, uploading documents, or sharing your work with others.

Sources Bar

 **What you can do here:** Choose which source documents (e.g. interviews or reports) from your current project you want to focus on. You can select one or more sources. Use this to narrow your analysis to specific interviews, reports, or other source materials. - The text of the selected source is shown below in the Create Links panel. - Selecting these sources also fetches only their links and no others, starting off the [Links Pipeline](../links-pipeline/): only the links from the currently selected sources are available for further filtering, and are finally shown in the output tabs.

Create Links tab

Qualitative causal mapping involves taking passages of text, e.g. from interviews or documents, and identifying sections which make causal claims. We highlight each of these sections and specify a causal factor at each end of each link (for example Lost job or Went hungry). This means creating a new factor or reusing an existing one. Usually we create these factors inductively as we code, and revise and review and consolidate them as part of the process, as with any other kind of qualitative content analysis.

Filter Links tab

Do qualitative causal analyses on the selected links by filtering or manipulating them.

Projects Panel

 **What you can do here:** Organize and manage all your research projects in one place. Create new projects, share them with collaborators, add descriptive tags, and control who can view or edit your work. You can also merge multiple projects together or archive old ones to keep your workspace tidy. See also the [File menu](../file-menu/) for more project management options.

Sources Panel

 **What you can do here:** Upload your research documents (PDFs, Word docs, RTF, TXT) or XLSX with a statements tab, and organize them with custom metadata like participant demographics or interview dates by adding and editing ****custom columns****. This is your document library and metadata manager.

Map Panel

 **What you can do here:** See your causal relationships as an interactive network map. Drag nodes around, click on links to edit them, and use the controls to customize how the map looks. You can even drag one factor onto another to quickly create new links. This is where your data comes to life visually.

Factors Panel

Ideas Garden: [Factors Panel](#)

Links Panel

Ideas Garden: [Links Panel](#)

Statistics panel

Use this panel to build pivot tables and charts from your project data with a simple drag-and-drop interface. Three subtabs: **Pivot table**, **Summary** (one-dimensional heatmaps for categorical vars with <10 categories, mean/median for continuous), and **All-by-all checks** (pairwise significance tests).

Logs panel

The Logs tab shows a concise history of what has happened in your projects – for example, when links or sources were edited or deleted, when projects were created, or when AI processing ran.

Bookmarks and Reports

The [yellow button in the navbar](#) is the fastest way to save useful views of your current project: maps or tables. From that one entry point you can quickly save views, update existing bookmarks, and copy links, images, legends, or a combined HTML block (link + image + legend) for reporting.

AI answers panel

Requires an AI subscription

Settings Panel

 **What you can do here:** Enable live collaboration. Other settings coming soon.

Account Panel

 **What you can do here:** View and manage your personal account settings. Change your password, update your project information, and control your privacy and security settings. This is also where you can export your data or delete your account if needed.

Responses Panel

Requires an AI subscription

Help System

 **What you can do here:** Get instant help and guidance while using CausalMap. Search for specific topics, browse documentation by section, or click the question mark icons throughout the app for context-sensitive help. The help system adapts to what you're currently doing. Also view the entire help contents as a separate Guide.

MapCat

MapCat is the small chat helper at the bottom-right. **MapCat is available to all users**, even if you do not have an AI subscription or if AI is disabled in your account settings. It is the only AI feature that does not require a subscription or for AI to be enabled, because it does not see your project data.

Hints system

Hints are small popovers that appear occasionally to help you discover features.

Mobile view

FAQ - frequently asked questions

First of all, there's nothing to worry about, it's fun!