



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.

- A small locked indicator at the top-right of `#project-selector-header` shows only when a project is read-only.
- An archived icon appears only when the project is archived. Archived projects are automatically read-only and only visible to owners, collaborators, and admins (not visible to the public even if marked public).
- **New Project or Upload Sources +**: Opens a modal to create a new project or add sources to the current project. Choose files, then Continue. A **Show Advanced** switch (default off) skips the **Confirm Upload** screen and uses defaults (keep filenames as IDs, no custom columns, no split). When on, the Confirm Upload modal appears for adjusting filenames, adding custom columns, or splitting sources.

File menu

Quick access to common actions:

Manage the Current Project

- **Edit** : Modify settings and sharing
- **Upload sources +**: Add documents (PDF, DOCX, RTF, TXT) or XLSX with a `statements` tab to the current Project
- **Clone** : Create a complete copy of the Project under a new name
- **Merge** : Copy sources and links from selected projects into this one
- **Clone filtered** : Create a copy of the current Project but only containing the sources and links as currently filtered
- **Archive** : Hide from main list
- **Delete all links** : Remove every causal link in this Project (sources remain)
- **Download** : Export as XLSX
- **Versions** : Restore and create backups of this Project
- **Update sources (Excel)** : Upload an XLSX to update sources in-place ("round-tripping").
- **Tabs**: Must contain a `sources` tab (lowercase). Other tabs are ignored.
- **Required (case-insensitive headers)**: Must include an `id` column. IDs must exist in the current project.

- **Columns:** You can include only the columns you want to change. Any missing columns are left unchanged.
- **Updates:** `title`, `filename`, `content` (if those columns exist). Any other columns are merged into `metadata.custom_columns`.
- **Manage projects** : Opens the `Projects` tab as a shortcut

Create new project

- **Quick upload** : Create a new project or add sources to the current project (same as the green + button in the Files bar)
- **New Project** : Create an empty Project which you can then import sources into
- **Import XLSX** : Import a complete new Project from Excel ("round-tripping").
- **Tabs:** If the XLSX has 1 tab, it is treated as the sources tab (whatever its name). If it has multiple tabs, it must contain `sources` (lowercase); `links` (lowercase) is optional.
- **Long source text:** If the XLSX contains a `source_content_chunks` tab (exported by this app when source content exceeds spreadsheet per-cell limits), imports will rehydrate `sources.content` from it.
- **Format note:** CausalMap can import many document/file formats elsewhere in the app, but a BathSDR-style QuIP Excel workbook is not supported by this XLSX importer.
- **sources columns (case-insensitive headers):** source id comes from `id` (preferred) or `source_id`; source text comes from `content` (preferred) or `text`. Any other (non-empty) columns are imported as custom columns (into `metadata.custom_columns`).
- **links columns (optional):** uses `cause`, `effect`, `sentiment`, `tags`, `source_id`, `selected_text` (and remaps `source_id` based on the old ids from the sources sheet).
 - Any other non-empty `links` columns are imported into `links.metadata.custom_columns`.
 - For round-trip consistency, incoming `custom_<name>` headers are normalized to `<name>` before writing `links.metadata.custom_columns`.
- **Import cm3** : Import a complete new Project downloaded from CausalMap3.
- **Tabs:** Requires `links` and `statements` (lowercase). Optional: `sources`, `questions`.
- **statements columns (case-insensitive headers):** requires `source_id` and `text` (optional `statement_id/id`, optional `question_id`).
- **links columns used:** `from_label`, `to_label`, `quote`, `hashtags`, `sentiment`, `statement_id` (used to map links to sources via the statements sheet).

Project Dropdown

-  **Project** (dropdown): lists all the projects you have created or been invited to; selecting one opens it.
-  **On change:** the rest of the app resets to defaults (sources selection + analysis filters pipeline).

- On startup, the app auto-selects the most recent **viewable** project (owned by you, shared with you, or public).
- Admins can see all projects in the Projects table, but the dropdown never auto-selects or loads a non-viewable project; admins may open the Edit Project modal for non-viewable projects from the table only.

Project Details button

- A small pencil button sits to the right of the **Project Dropdown**.
- Clicking it opens the Project Details screen, the same as you get by clicking the first item in the **File menu**, which we describe next:

Project Details screen

Manage every aspect of the current project. You can reach this management pane by clicking Edit from the **File menu**. Manage other projects by clicking the edit button in the corresponding row of the **Projects Panel**.

 **What you can do here:** - **Open it:** File → Edit, or the edit icon in the Projects table. - **When it appears:** Also opens on project load/change unless you turn it off for this project. - **Save vs instant changes:** - Use the *Save* button to apply changes to **Name**, **Tags**, and **Description**. - **Archived**, **Locked**, **Public**, and **Collaborators** update instantly.

Details

- **Name:** Rename the project. Click *Rename* to save.
- **Tags:** Comma-separated tags for quick grouping/searching.
- **Description:** Free-text notes about the project.
- **Edit codebook:** Toggle to reveal a text area where you can list factor labels (one per line). These are added to the cause/effect dropdowns in the link editor; existing options are kept.
- **AI Processing Region:** Choose where AI processing occurs for GDPR/data residency compliance:
- **EU (Belgium - europe-west1)** - Default. Recommended for EU data residency requirements.
- **UK (London - europe-west2)** - UK has GDPR adequacy decision, suitable for EU/UK compliance.
- **US (Virginia - us-east5)** - US East region.
- Setting is saved per-project and auto-saves on change (with confirmation warning).
- All subsequent AI coding for this project uses the selected region.

- **Archived:** Hide the project from the main list and make it read-only. Archived projects are only visible to owners, collaborators, and admins (hidden from public view even if marked public). Applied immediately. Unarchiving restores normal visibility and editability.
- **Info line:** Created / Modified / Owner, plus counts for links/sources/words, and quick actions:
- *Versions:* Open the versions manager.
- *Delete embeddings:* Remove factor embeddings for this project (advanced).
- **Show on open:** Toggle "Show this screen when opening this project" at the top to auto-open or suppress this screen for this project.

Sharing

- **Locked:** Make the project read-only. Editing is disabled until unlocked. Applied immediately.
- **Public:** Allow all signed-in users to view the project (read-only). Applied immediately.
- **Collaborators:** See current collaborators, add by email, and choose permission:
- *Viewer:* Read-only
- *Editor:* Read & write

Bookmarks

- If available, view saved "bookmarked" views of your data and open the Bookmark Manager.

This screen also shows when a project loads or is changed, except:

- for new users (the help drawer is still being opened to welcome them),
- if you have already clicked "don't show" for this project.