🌻 Causal Map App.

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📄 Getting Started

> 🎉 Welcome to CausalMap!!

📄 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:

📄 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.

📄 Analysis Filters Filter links tab

Do qualitative causal analyseis 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) 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

🏷️ **What you can do here:** See all the factors (causes and effects) in your data, ranked by how often they appear. Select multiple factors to rename them, merge similar ones, or delete unwanted entries. If you've added demographic data to your sources, you can also see statistical breakdowns showing which groups mention certain factors more often.

📄 Links Panel

🔗 **What you can do here:** View and manage all your causal links in a spreadsheet-like table. You can sort, filter, and edit individual links, view the quotes like a printed page, or export your data to Excel. Each row shows one causal relationship with its source quote and any additional details you've added. Great for detailed review and bulk editing of your causal map data.

📄 Statistics panel

Use this panel to build pivot tables and charts from your project data with a simple drag-and-drop interface (powered by PivotTable.js).

📄 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 Report Builder lets you

- manage your bookmarks
- delete
- copy links
- search and load bookmarks
- create professional reports
  - combining multiple bookmarked views with custom descriptions and variant filtering.
  - with programmatic production of multiple variants e.g. maps with the same filters but for different countries

📄 Bookmarks and Slide Decks

If you want to save a specific view of the app for later, for example an interesting map or table, you can just copy the URL from your browser and paste it somewhere or send to a colleague.

📄 AI answers panel

Requires an AI subscription

📄 Source Interview with Participant 001

ID: ABC-123 custom_Country: Kenya | custom_Gender: Female | custom_Age: 34

📄 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

Work in Progress!

📄 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.

📄 Mobile view

Implemented: Mobile offcanvas for right pane

- A mobile-only two-button toggle (Left side / Right side) sits next to the brand.
- Tapping Right side opens the offcanvas that contains the right pane (tabs and content).
- Tapping Left side closes it. The active side shows a tick.
- The offcanvas shows a "Back to left side" button at the top to close it.
- On desktop (≥ lg), the right pane behaves exactly as before; offcanvas visuals are disabled via CSS.
- A mobile-only Menu consolidates: About, Guide, Help, Bookmark, and Account/Login/Logout.

📄 FAQ - frequently asked questions

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