



# 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).



## File menu

Quick access to common actions:



### Manage the Current Project

- **Edit** : Modify settings and sharing
- **Upload sources** : Add documents to the current Project
- **Clone** : Create a complete copy of the Project under a new name
- **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
- **Manage projects** : Opens the [Projects](#) tab as a shortcut



### Link to the Current Project

- **Copy link** : Get short bookmark URL (e.g., `?bookmark=abc123`) to current app state
- **Copy formatted link** : Get HTML link with bookmark ID as text (e.g., `<a href="...?bookmark=abc123">#abc123</a>`) for documents and emails

### Manage projects

- **New Project** : Create an empty Project which you can then import sources into
- **Import XLSX** : Import a complete new Project from Excel (e.g. another Causal Map 4 project which has been exported as XLSX). You can use this for "round-tripping":

downloading, conducting some bulk operations or other tweaks within Excel and then uploading it again.

- **Update Sources in current project** : Upload Excel sheet with just a sources tab in standard format with updated sources data e.g. additional or corrected custom columns. You can use this for "round-tripping": downloading, conducting some bulk operations or other tweaks within Excel and then uploading it again.
- **Import cm3** : Import a complete new Project downloaded from CausalMap3

## Project Dropdown


- Lists all the Projects you have created or been invited to, from which you open just one
- After changing the project, the rest of the app **resets to defaults**: sources filter, all links filter pipeline filters, and deck filter (shows all bookmarks)
- 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.