



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., `#abc123`) 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 ("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.
- **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).
- **Update Sources in current project ↗:** Upload an XLSX to update sources in-place ("round-tripping").
- **Tabs:** Must contain a `sources` tab (lowercase). Other tabs are ignored.
- **Long source text:** If the XLSX contains a `source_content_chunks` tab (exported by this app), updates will rehydrate `content` from it.
- **Required (case-insensitive headers):** Must include an `id` column. IDs must exist in the current project. (You can include just a subset of IDs — only those rows are updated.)
- **Columns:** You can include only the columns you want to change (for speed). Any missing columns are left unchanged in the database.
- **Updates:** `title`, `filename`, `content` (if those columns exist). Any other columns are merged into `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

- 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.