🌻 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.

Upload & Setup ⬆️

Upload Source Texts ⬆️

- **Click to select** one or more PDFs or DOCX or RTF files
- **Optionally split large documents into multiple sources** using separator patterns
- **Optionally set custom columns on upload** (applies to all uploaded sources)
- Type an existing column name (or a new one) and optionally set a fixed value, e.g. `Country = Zambia`
- Leave the value blank to just add the column (no value set during upload)
- **Confirmation dialog** shows projectname→ID mapping
- On completion, the app automatically:
  - selects the sources via Sources Dropdown
  - switches to the Create Links sub-tab and loads the first source's text into it
  - on the right, switches to Sources panel with and the View & Edit subpanel

Splitting documents into multiple sources with source separators

This feature helps you split individual documents you upload into multiple sources. These separators are *hard*: you use them just once, on uploading one or more documents, to produce multiple sources.

- In the Confirm Upload screen, there is a Sources Separator text box
- Text lines matching special "regex" patterns separate into multiple sources. So if you have sections marked with "Source Number 12", "Source Number 13" etc, just put "Source Number.*" in the box.
- This will produce multiple sources with "Source Number 12" etc as source_id
- Live preview of new source IDs with count
- User can leave blank for normal upload

Section Separators

This feature helps you split existing source texts into sections. These separators are *soft*: they don't permanently change the file and you can add or remove one or more separators on the fly.

- **Two-line expandable textArea** for one or more (regex) patterns
- **Section header detection** within imported texts
- **Special styling** for matching rows in text viewer
- **Links created in the different sections can be filtered using the** Everything Filter. So you can do things like "Show me all the causal claims (links) only in answers to Question 7".

- Into the box, you type special "regex" patterns to create sections withing source texts. So if you have sections marked with "Section Number 12", "Section Number 13" etc, just put "Section Number.*" in the box.

- This will highlight the sections and create fields like "Section Number 12" etc as section ID.

Sample Check

You want a table showing your sample: gender * region?

Use this simple customisable table to check your sample according to any custom columns you have defined.

- See also: Statistics Panel and Analysis Filters.

Custom Column Analysis

- **Aggregate by** multi-select for cross-tabulation
- **1 column**: Simple count table

- **2 columns**: Cross-tabulation table

- **Maximum 10 values** per column for analysis
- **URL state preserved** for bookmarking

View & Edit Your Sources

- See also: Tips for all tables and Custom columns.

Sources Table ⊞

- NEW column **Source Prompt** - this new column shows the first few characters of any text in this field. It can be edited as usual with the existing pencil icon/ edit button in each row.
- **Checkbox selection** for analysis pipeline
- **Row editing** with keyboard navigation
- **Custom columns** for metadata
- **Uncoded column** - Shows true/false for sources with no links; filterable to find uncoded sources
- **Fullscreen mode** available

Table Editing Features

- **Range selection** - Click and drag
- **Copy/paste** - Ctrl+C, Ctrl+V
- **Arrow key navigation**
- **Delete/Backspace** to clear cells
- **Column/row selection** - Click headers
- **Double-click editing**

Custom Columns

Custom columns are where you store extra data about each of your sources, e.g. gender, location, type; whatever you want. You can create, edit and remove custom columns. Then you can use them to filter your data.

- **Manage Columns** ⊡ opens a modal to add and remove custom columns
- **Show/hide custom columns** ⊙
- **Double-click a cell in a custom column to edit it** or via source edit modal
- **Copy and paste** selections with ctrl-C, ctrl-V.
- **These columns are available elsewhere in the app, e.g.**
- In the Source Groups filter
- In the Everything filter
- In the Sample Check table