

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

#### **Quick start**

- 1. Choose a data source: Links, Factors (Work in progress!), or Sources.
- 2. Choose the stage: **After Analysis Pipeline** (matches your filters elsewhere) or **Before Analysis Pipeline** (raw data).
- 3. Pick a display: Table, Heatmap, or a Plotly chart.

## Arrange fields (drag and drop)

- Drag field chips from the left list into the drop zones:
- **Rows**: categories listed down the left.
- **Columns**: categories across the top.
- Values / Measure: the numeric field used for calculations (when needed).
- Reorder by dragging within a zone; remove by dragging out or clicking x.

# Choose the calculation ("Summarize by")

- Use the aggregator dropdown to select how numbers are calculated:
- **Count** (default) how many rows fall into each cell.
- Sum of / Average of / Min / Max pick a numeric field (e.g. ai\_confidence, text length, counts).
- **Unique Count** how many distinct values of a field occur.
- Example: to average AI confidence by region and sentiment 1) Put custom\_-Region in Rows and sentiment in Columns 2) Set aggregator to **Average of** and choose ai\_confidence as the field

#### Filter or exclude values

- Every field chip has a filter menu. Click it to include/exclude values.
- Use the search box, then tick/untick items. "Select All" toggles everything.
- Filters apply immediately and are remembered in the URL so you can share the view.

#### **Sort and tidy**

- Click any row/column header to sort by label or by totals.
- Subtotals and grand totals are included automatically in table views.
- Remove empty columns quickly by excluding the blank value in that field's filter.

#### Heatmaps and charts

- Switch the renderer to **Heatmap**, **Row Heatmap**, or **Col Heatmap** for quick intensity views (colors match the app palette).
- Choose Plotly renderers for interactive Bar, Line, Scatter, Stacked Bar, Area, or Multiple Pie charts.

## **Export and sharing**

- Use the toolbar to Copy to Clipboard or Download XLSX of the current table.
- The current configuration is saved in the URL automatically; bookmark or share it with collaborators.

#### Notes on the datasets

- **Links**: every causal link plus metadata; includes AI fields (e.g. confidence) and reserved columns like original\_cause, original\_effect.
- **Factors**: unique factors with frequency, source count, citations, and original\_label (ALL underlying original labels for the displayed factor, concatenated with line breaks, derived from the current stage's links like original\_cause/effect).
- **Sources**: document metadata and flattened custom fields (custom\_\*).