🌻 Focus or exclude factors

22 Sep 2025

Summary

This extension is about using **factor labels** to carve out a useful subgraph of your causal map.

Like most extensions, it is best thought of as:

1. **A filter** (a rule that takes one links table and returns another), plus
2. **An interpretation rule** (what it means to say we are "focusing on" or "excluding" factors).

There are two closely related operations:

- **Focus**: keep the causal neighbourhood around one or more "target" factors (their upstream causes and/or downstream consequences).
- **Exclude**: remove unwanted factors (and therefore remove any links that touch them).

Unlike label-rewrite transforms (collapse synonyms, remove bracket text, zoom hierarchies, combine opposites), focusing/excluding does **not** rename factors. It decides which parts of the existing graph you want to *see and analyse*.

How to think about it

Focus = "show me the neighbourhood around this factor"

You choose one or more target factors (by label search), then choose:

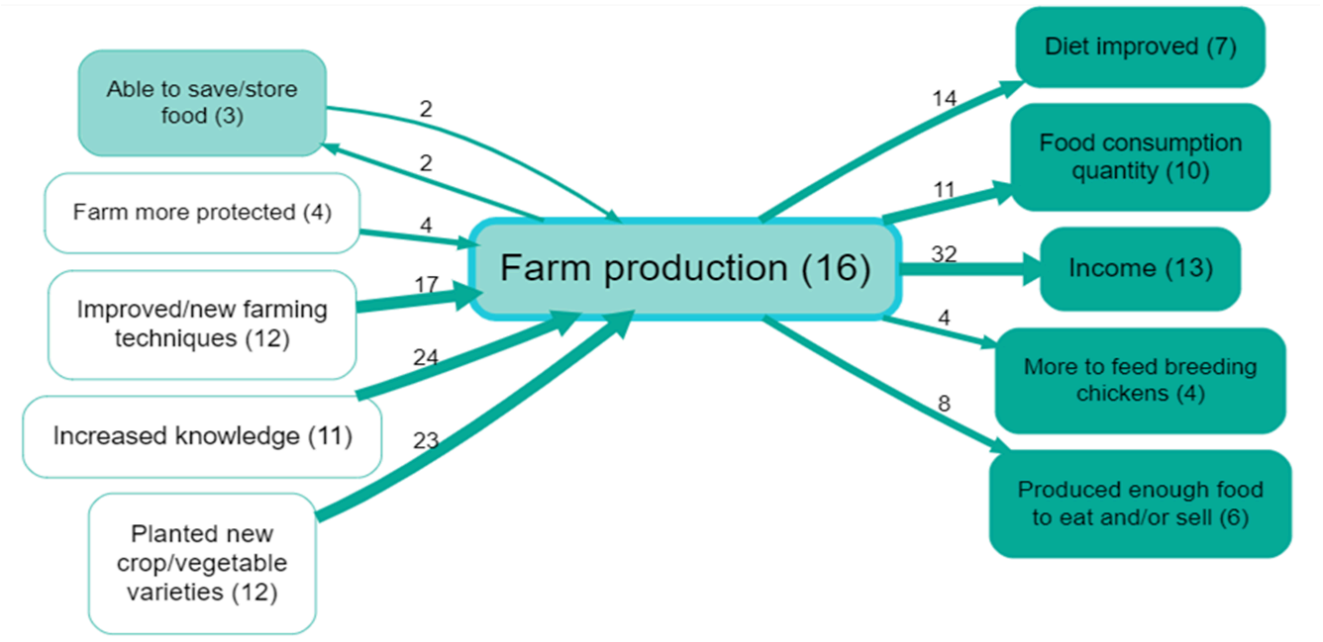
- how far to look **upstream** (causes), and
- how far to look **downstream** (consequences).

The result is a sub-map containing only the links that sit on those upstream/downstream chains.

Focusing is a good way to understand a factor as both:

- an **outcome** (what leads to it?), and
- an **influence** (what follows from it?),

without having to interpret the entire map at once.



Tip: In interview-style data, chains longer than ~4 steps are uncommon. Large step counts can create hard-to-interpret "hairballs".

Source tracing = "only keep paths that appear within a single source"

Sometimes you want coherent within-source narratives rather than a pathway stitched together across respondents.

With **source tracing** on, the focus result becomes more conservative: it keeps only links that lie on at least one upstream/downstream path that can be realised within a single source.

Exclude = "remove these factors (and anything touching them)"

Exclude is subtractive: you specify one or more unwanted factor patterns, and the app removes:

- the matching factors, and
- any links that touch them (as cause or effect).

Interpretation cautions

Order matters

If you apply label-rewrite transforms earlier (collapse, zoom, remove brackets, combine opposites), then focusing/excluding targets are interpreted in terms of the rewritten labels.

Focus is a reading strategy (not a claim about reality)

Focusing is a way to make a large map interpretable. It does not claim “only this neighbourhood is relevant”; it claims “within N steps, what do sources connect to this factor?”

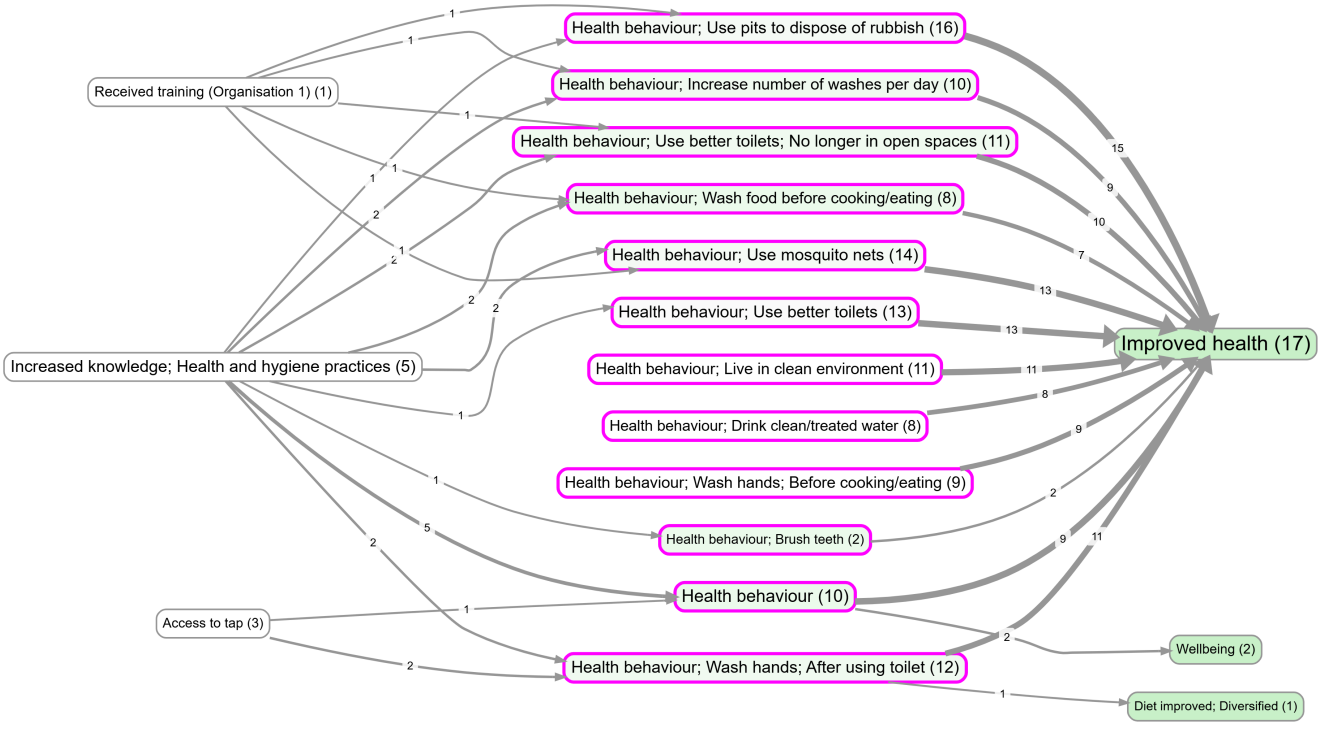
Relationship to “collapse” (different goal)

- Use **collapse/label-rewrite** when you want to treat several labels as *the same concept* while keeping the surrounding structure visible.
- Use **focus** when you want to keep the original labels but restrict attention to the local causal neighbourhood of a concept.

Examples (contrasts) from the app

A single-theme focus (one-step neighbourhood)

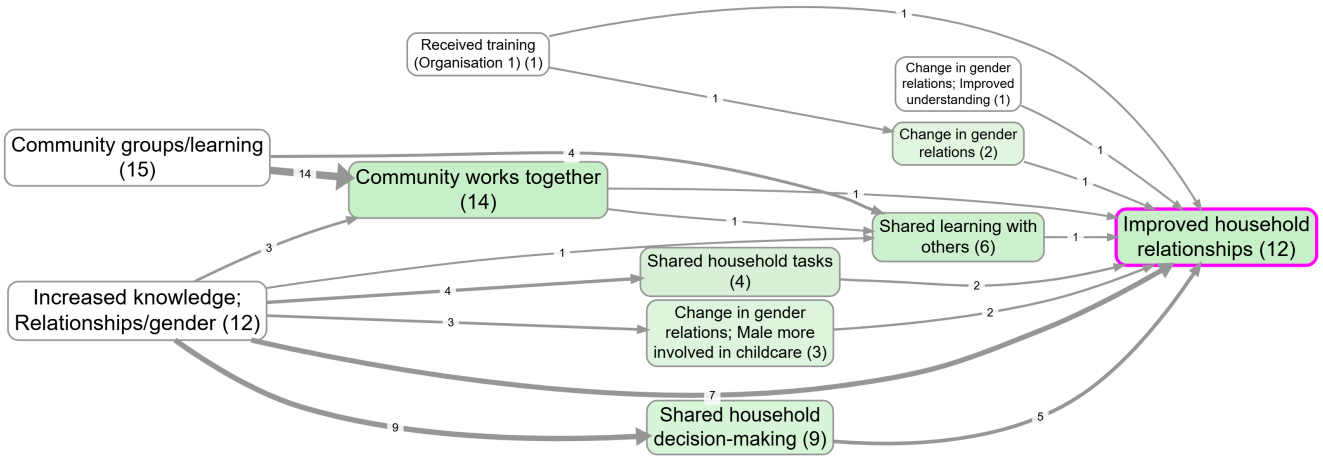
Bookmark #982 is a simple example of focusing on one theme and looking at its immediate neighbourhood.



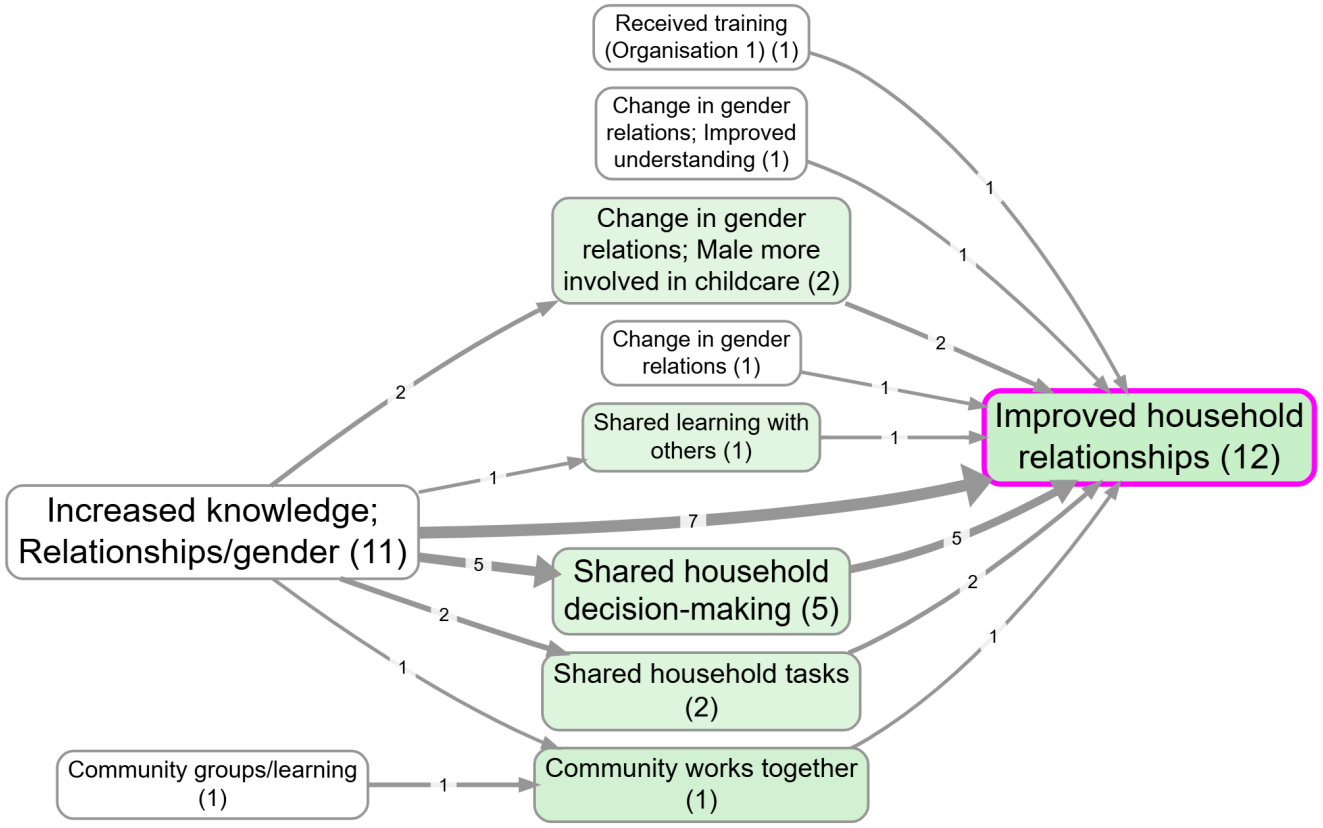
Upstream focus with a single-source constraint (“source tracing”)

These two bookmarks are both “upstream influences on wellbeing” views, but one requires within-source narrative coherence:

- Without source tracing: bookmark #270



- With source tracing: bookmark #534. Notice how it is more conservative.



Formal notes (optional)

If you want the precise (link-based) rule, here is the intended definition.

Let F be the set of focused factor labels, and let U and D be the upstream/downstream step limits.

- Keep a link $x \to y$ if it lies on any directed path of length $\leq U$ that ends at a factor in F, or any directed path of length $\leq D$ that starts at a factor in F.
- Do not add extra "cross-links" between surviving factors; keep only links that are actually part of the selected paths.

For exclude, let E be the excluded factor set; remove all links $x \to y$ where $x \in E$ or $y \in E$.

Transformation and interpretation rules

Transformation rule

- **Input:** a links table plus either (a) focus targets with upstream/downstream step limits, or (b) exclude patterns for factors.
- **Transformation:** keep links on selected focus paths (optionally with source tracing), or remove links that touch excluded factors.
- **Output:** a links table/map showing a focused neighbourhood or a reduced graph without excluded factors.

Interpretation rule

- Focus is a reading strategy for mechanism exploration, not a claim that non-focused parts are unimportant.
- Exclude is an analytical scoping choice; excluded links are omitted for the current view, not invalidated.