




# SOURCES PANEL

 **What you can do here:** Upload your research documents (PDFs, Word docs, RTF, TXT) or XLSX with a statements tab, 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

- **New Project or Upload Sources** (green + in the Projects bar): besides files, you can **paste plain text** into **Or paste text**; it is imported like a TXT file as `pasted-text.txt`. You can combine paste with file picks in one step.
- **Click to select** one or more PDFs, DOCX, RTF, TXT, or XLSX files
- **XLSX:** Requires a `statements` tab with `source_id` and `text` columns; other columns become custom columns. Optional `sources` tab for metadata. Adds sources to the current project (no new project created).
- **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)
- **Confirm Upload modal** (shown when "Show Advanced" is on in **New Project or Upload Sources**) lets you adjust filenames→ID mapping, add custom columns, and split sources. When Show Advanced is off (default), uploads use defaults (keep filenames as IDs, no custom columns, no split) and skip this screen.
- 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.

- Into the box, type one **regex pattern per line**. The pattern must match the *whole separator line* in your source text, so use `.*` to match the rest of the line. For example, if your text contains lines like `statement_id: 42` or `Question 7: ...`, enter `statement_id:.*` or `Question.*` respectively.
- Matching lines are styled as **headings** in the text viewer.
- Each link is assigned to the section it falls under. The matched text (e.g. `statement_id: 42`) becomes the section value, available as a column (e.g. `section_statement_id`) in:
- The [Everything Filter](#) — so you can show only links from specific sections
- The [Sections Filter](#)
- Pivot tables and statistics
- Links before the first separator in a source get the value `Initial Text`.

## 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: [Pivot Tables](#) 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
- **Column visibility control:**
- Click the small **:** in any header to hide that column (or hide selected columns) and quickly show hidden columns again.
- **Manage Columns**  is the main source-table column manager. It includes a checkbox list for Sources table columns, with **Select all** / **Select none** / **All source** / **No source**, and drag-to-reorder.
- **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.

- You can also use them for source-level memo columns; see [Link custom columns](#) for the same idea on individual causal links.
- **Manage Columns**  opens a modal to add/remove custom columns, choose which Sources table columns are visible, and reorder them
- After you add a custom column and reopen the modal, the new column appears as an existing project column; the add box starts empty again
- **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](#)
- Link custom columns work the same way in the [Links Table](#), but apply to individual causal links rather than sources.