

Creating Word Reports from Compendium 1.5.3-Alpha1 A Brief Tutorial

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Summary: Compendium is a powerful hypertext tool for mapping and analyzing knowledge in multiple dimensions, but it is often useful to create reports from those maps that project rich hypertext structure into the linear bounds of a traditional document, i.e. “meeting notes”. This is rarely a pushbutton process – there is considerable art and skill in creating a coherent narrative from the typical results of collaborative sensemaking. Nonetheless, this tutorial outlines the basic steps of printing out a map or series of maps as an outline in MS Word.

These instructions are specifically for the Alpha1 version, which is not an official Compendium release. It is available through the [CogNexus Alpha Version web page](#).

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Overview of the Process

The basic process is simple and fast¹:

Step 1: Do an Export – Web Outline, creating an HTML file

Step 2: Open the HTML file in Word and save it as a DOC file.

However, there is some one-time customization needed to clean up the outline output.

Note: This document was created using Word 2000 and tested in Word 2002. Anything you do with MS Word that is at all unusual must allow for bugs in Word and idiosyncrasies between versions of Word – some fiddling may be required to get the results you need.

¹ In previous versions of this paper I have described a 3-step process; the Alpha1 version eliminates the need for the middle step, and there is no longer a need for a Word template file (.dot) to specify the formatting for the various styles.

Nodes to Notes – The Default

Here is a short example of the transformation from a map to text. Suppose you had held a very short meeting in which the group had created the following simple map:

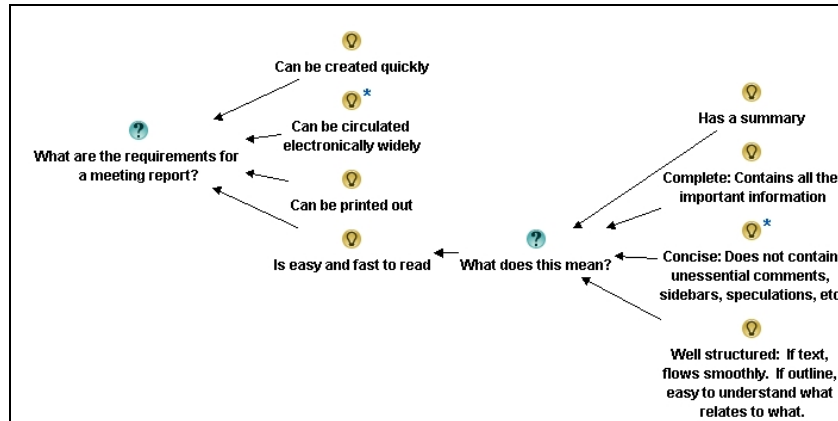


Figure 1: A simple meeting map

If from this map you did an Export Web Outline² using the default settings in Compendium Alpha1, the result would look something like **Figure 2**.

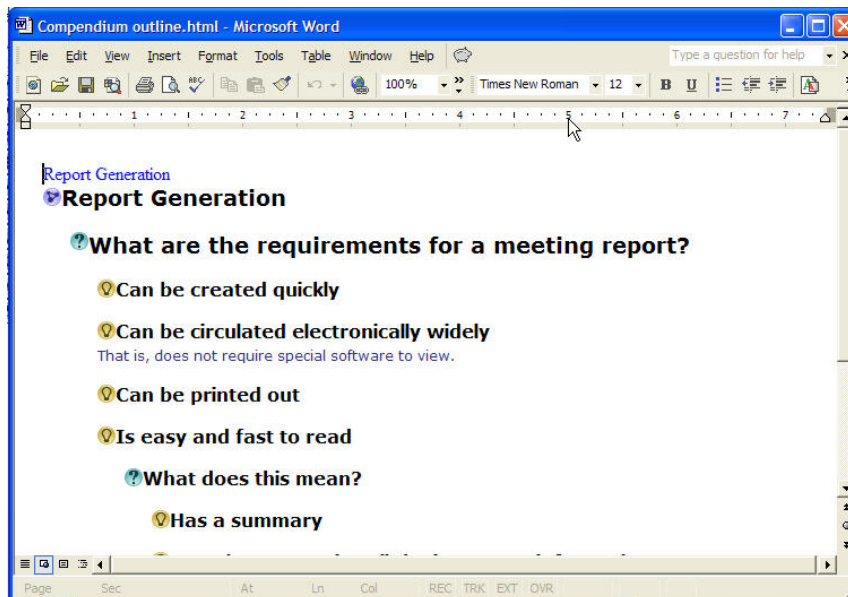


Figure 2: Portion of Outline Export, in Word, using Compendium export defaults

While you could certainly use this as the starting point for your report, there are several problems that you will probably want to correct:

² The Export creates a temporary HTML file, which, by default, is placed in the Compendium Exports folder.

- It includes an interactive “navigation menu” (the smaller “Report Generation” at the top) which is meant to be used from a browser.
- There is a lot of wasted vertical space between lines.
- The styles that Word has used for the paragraphs are very difficult to work with in making formatting changes (although you can’t see this in the figure).
- The node labels are in a large bold font that looks like headings (In Word, they ARE headings styles!)

In short, it doesn’t look much like a “meeting notes” document. The vertical spacing is especially problematic, because even a small map can run to several pages, and with a larger map it is sometimes difficult to keep track of outline indentation between pages. Instead, by choosing different settings in Compendium we can get a starting point in Word that looks like **Figure 3**. This more compact presentation of the map takes no longer to produce, is easier to read, and makes a better starting point for the editing which will produce your finished meeting report.

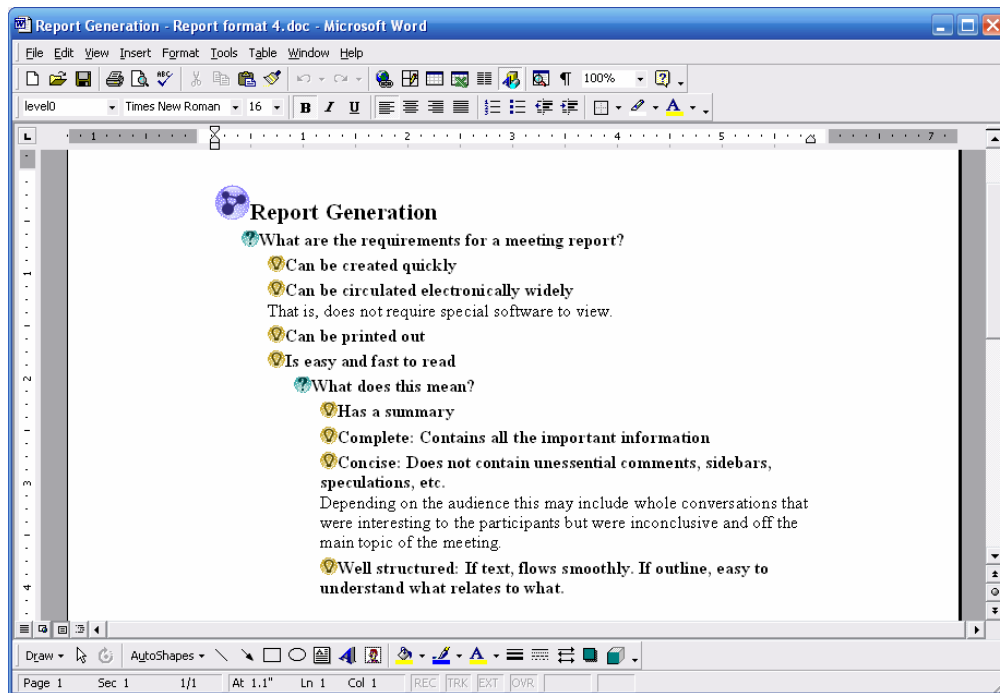


Figure 3: More compact outline output

Initial Set Up for Outline Exports

This section describes how to set the parameters for Web Outline exports from Compendium. You only need to do this once. Even if you have multiple projects, these settings are preserved in your copy of Compendium until you change them.

1. Start Compendium Alpha 1
2. Open the map that you want to create the report on (e.g. “Agenda”)
3. Navigate the menus for File, Export, Web Outline
4. Set up the “Node Selection” tab parameters to look like **Figure 4**.

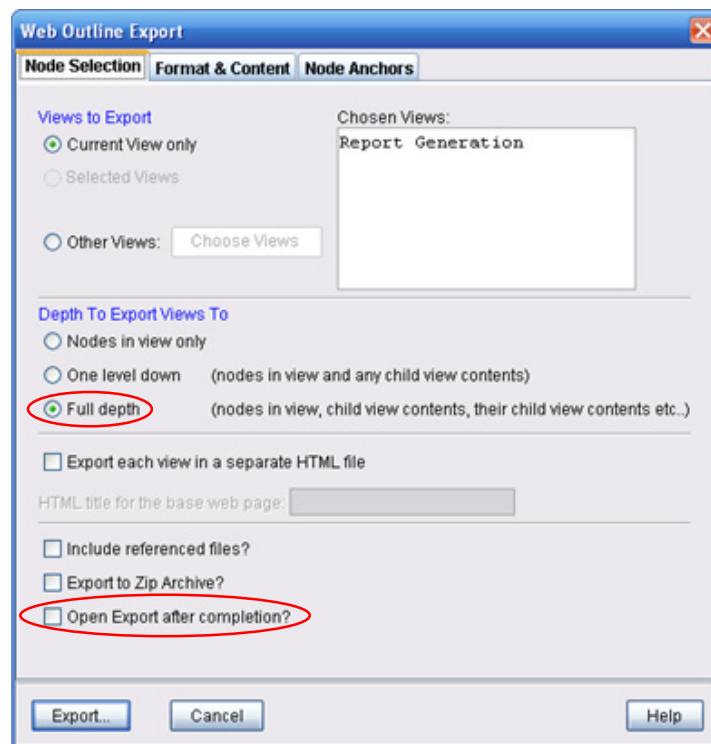


Figure 4: Outline Export settings -- Node Selection Tab

Notes on “Node Selection” tab:

- Usually you’ll want to include all submaps, thus the “Full depth” setting;
- While the default setting for Open Export after completion is “off”, some users have this option turned on, but it is no longer necessary.

- Set up the “Format and Content” tab parameters to look like **Figure 5**. First check all the settings except the first one, “Outline Format”, and then proceed to that one in Step 6.

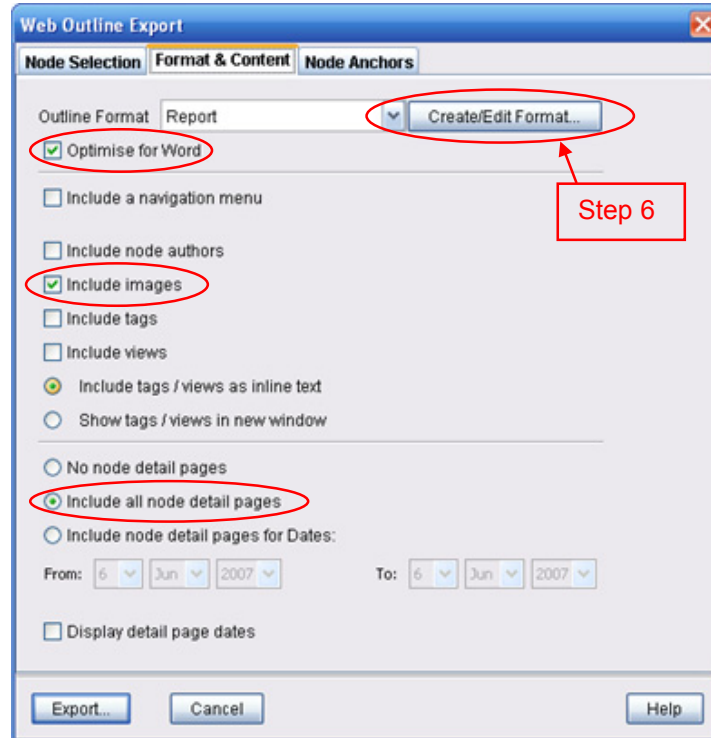


Figure 5: Outline Export settings – Format & Content Tab

Notes on “Format and Contents” tab:

- Although you may find the “Default” format acceptable, you will probably want to customize the Outline Format. (Figure 5 shows the “Report” format selected, which you’ll create in Step 6 below.)
 - Check “Optimise for Word” – this is the major new feature of Alpha1 (and that’s the British spelling for optimize, so it’s OK!);
 - If you are using “Small Icons” in your maps (which in any case I recommend for saving screen real estate), then you can also “Include Images”. Using the icon images from the map is a nice way of creating more continuity between the session and the notes.
 - Dialogue mappers will always want to “Include all node detail pages”!
- Customizing Outline Formatting. Almost all of the formatting that you’ll need to set up for Compendium reports can be on the “HTML Formatting Options” screen (see **Figure 6**).

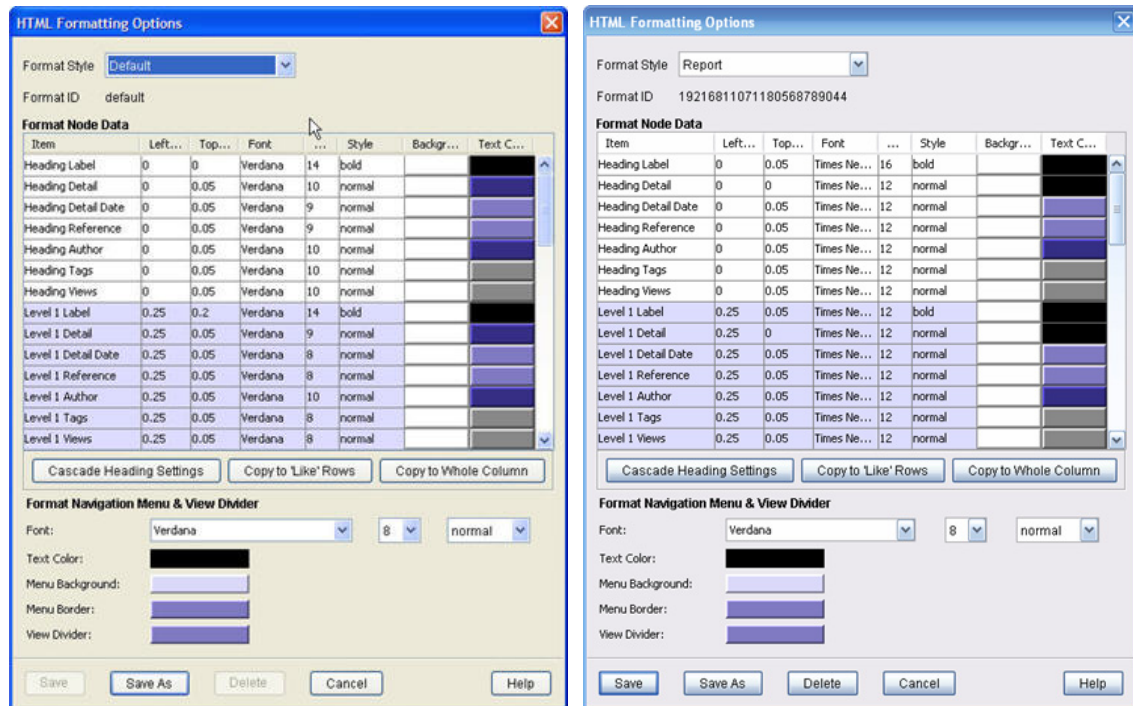


Figure 6: Outline Formatting Options, BEFORE and AFTER customizing

- The quickest way to get a customized format is to download the “Report” format that I have created and install it. You can get the file at <http://cognexus.org/Compendium/Report.zip> ; unzip the file “Report.properties” and extract it into the **System/resources/OutlineStyles³** folder in your Alpha 1 Compendium installation folder. The next time you click the drop down menu for “Outline Format” on the “Format & Content” tab, you will have the option to select the “Report” format. (In the future we will probably have other formats available on the Compendium page; for example, for denser and looser line spacing.)
- If you would rather have the flexibility to customize the styles manually, then you can try using these settings by entering them into Format Node Data section. The buttons at the bottom of the section are very handy for this process, and well explained in the Help. Here are the values I used in the “Report” format for seven levels of outline, Heading, Level 1, Level 2, Level 3, Level 4, Level 5, and Level 6:

³ Normally the full path will be C:\Program Files\Compendium\System/resources\OutlineStyles. Note: Compendium has many supporting files and folders that require frequent access, e.g. the Exports folder. A good practice is to put a shortcut to the Compendium folder on your desktop. The normal location for the Compendium folder is C:\Program Files. Make a shortcut for C:\Program Files\Compendium and cut/paste it to your Desktop.

Column Name	Value(s)
Left Margin	0 for Heading, increasing by .25 for each successive level
Top Margin	.05 ⁴
Font	Times New Roman
Size	12 (except for the Heading Label: 16)
Style	Bold for all Labels
Text Color	Black for Label and Detail

- When you are done, Save your settings as a new outline format which you can then use for future reports.

7. Make sure that your “Node Anchors” parameters to look like **Figure 7**.

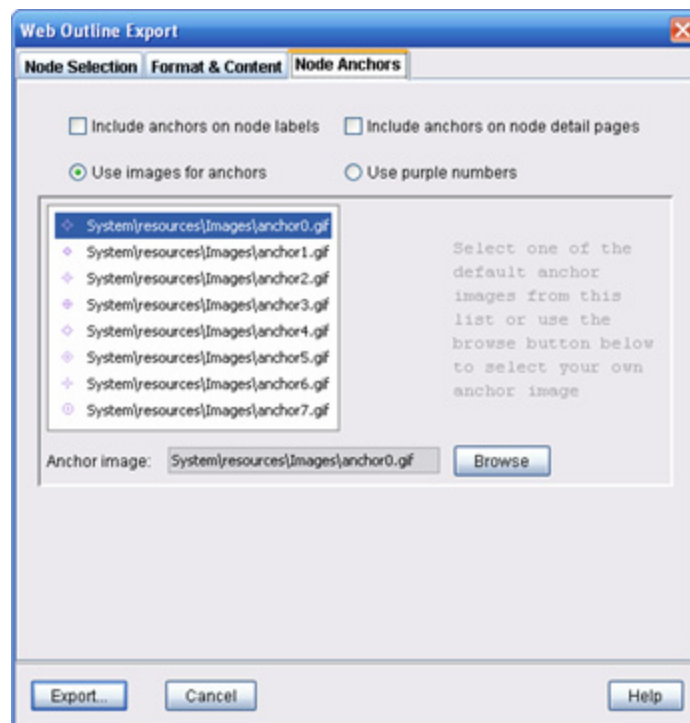


Figure 7: Outline Export settings – Node Anchors Tab

8. Click Export to create the HTML output file. Name the file “Compendium outline” and click Save.

⁴ .05 inches between lines gives enough space that the Small Icons are not overcrowded. If you don’t include Small Icons, or if close packing is OK, then you can get even more text density with a setting of .0 for the top margin.



9. Create a Shortcut to this file in Windows Explorer and place the shortcut on your Desktop. What you're doing here is setting it up so that you can export to HTML and read that (temporary) file into Word with as few steps and keystrokes as possible.
10. Done! You are now ready to create lovely professional outline reports in under a minute!

Are these the best or right settings? No, they are just my personal preferences, based on my experience to date. Obviously there are thousands of possibilities, and you may well find settings and combinations that work better in certain situations. I hope you will share them with me. Perhaps we can create a library of templates, macros, and style guides for different kinds of reports.

Creating Outline Reports in Word

The process of getting a map or set of maps from Compendium into Word takes two steps, as mentioned above. The first step is creation of a temporary HTML export file.

Creating the HTML file

Here are the sub-steps to creating the temporary HTML export file in Compendium:

1. In Compendium, select File, Export, Web Outline.
2. Press the Export button (you've already set up the parameters)
3. In the File Name field click on the "Compendium outline" file.
4. Click Save and then click "Yes" to overwrite it.

Creating the Word document

Now in Word ...

1. Click on File, Open
2. Go to Desktop and select "Compendium outline".⁵
3. Click File, Save As

⁵ I have created a Word Macro which does Steps 1 and 2 with a single button click, making the process of getting from Compendium to Word even faster.



4. Create a suitable file name and save as type “Word document (.doc)”
5. In the Edit menu, in the Links dialog, check the box for “Save picture in document”. This will make sure that the people you send the Word document to see the icons; otherwise they’ll see broken links.

That’s it! You probably want to do some more clean up ... add logos, a summary, a table of contents, etc. You may even want to rewrite the text, creating standard paragraphs with full sentences, bulleted lists, figures, etc. At least you now have a compact starting point for crafting your meeting report document.

Cleaning up the Word document

It is very useful to work with the styles in the document. First, select Normal View (under the View menu). If you haven’t done this before, open the Style Area on the left edge of the window by going to Tools -> Options ->View tab and setting the Style Area width (at the bottom of the window) to about .5. Now you can see the styles that Word has assigned each of the “paragraphs” in the document.

Compendium has reserved the style “level0” for map Labels, the names of the map or maps you have exported. The other styles are fine and you can work with them as you usually would. But the first thing I do is a global replace to change all “level0” styles to “Heading 1”, which is special style that word uses for creating tables of contents (along with the other heading styles, Heading 2, Heading 3, etc.).

In Word 2000 and older, change all the level0’s using “Replace”: you click the “More” button, click the cursor in the “Find what” field (but don’t type anything), click Format, Style, and select “level0” from the menu; then click in the Replace with field, and set the style for “Heading 1”. If you create a lot of reports you could even create a Word macro to do this in a single keystroke.

In Word 2002, you can right click on the text in level0, select “Select Text with similar formatting”, then choose Heading 1 from the drop-down style menu.

If you are creating a report from a large set of maps, you will probably want to take advantage of the Heading styles to organize the sections for the maps into a hierarchical structure that mirrors the map nesting structure in Compendium. For example, if Map A contains Maps B and C, in the outline A should be Heading1 and B & C should be Heading2. This way you can very quickly produce a table of contents for a larger document and the document structure would correspond to the map nesting structure. Word’s Outline View is especially useful for this sort of structuring.

The other thing I always do with an outline document is look for spelling errors. If I find any, I select and copy the misspelled word, Alt-Tab over to Compendium, Ctrl-f to bring



up Search, Ctrl-v to paste the word into Keywords, and then click OK. Compendium will find all the nodes with that misspelling, and I can edit them right there in the Search Results window by double clicking on each node's icon. That way, if I ever need to come back later and use those maps or print them out again, I have corrected the spelling problems at their source.

Studying the outline version of a map teaches you the subtle consequences of choices you are making as you create and link nodes in Compendium maps. For example, when creating the maps, the choice of what's in the Label and what's in the Detail can have a big impact on the readability of the outline output. It's a good idea to routinely create and study the outline view of meeting maps. If nothing else, Word will point out spelling and grammatical errors! Ultimately, creating and linking nodes in ways that create flowing outlines teaches you how to make maps that are easier to read as well.