

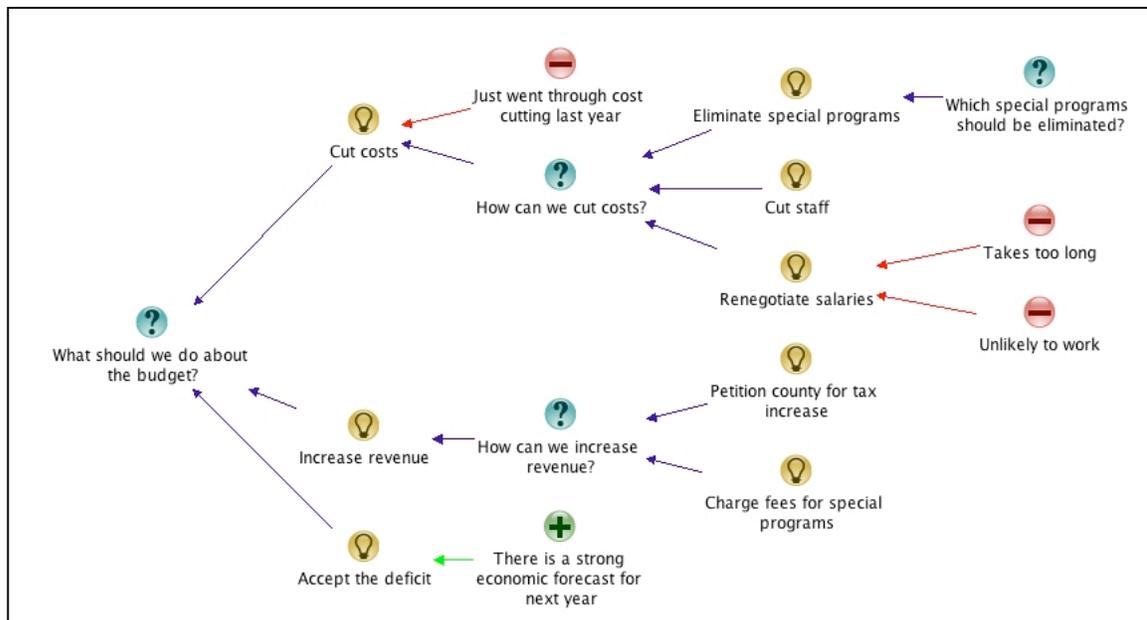
Compendium Basics Exercise

This is a short (approx. 30 minute) exercise to help you start using Compendium for Issue Mapping; the process of creating IBIS (Issue Based Information Systems) diagrams.

This exercise assumes that

- you have a working knowledge of your operating system (Windows or Mac OS)
- you have downloaded Compendium¹ version 1.5.3 Alpha 5 (free) from the CogNexus website
 - PC users: http://www.cognexus.org/Compendium_downloads/compendium-1.5.3-alpha5.exe
 - Mac users: http://www.cognexus.org/Compendium_downloads/compendium-1.5.3-alpha5.dmg
- you have gone through the installation process.

At the end of this exercise you will have created a map that looks like this:



¹ NOTE: Some of the screen shots in this tutorial will not match exactly what you will see on your screen due to differences in version of the Compendium software. The differences are minor and should not affect the functionality you need for this exercise.

Part I: Exercise Steps

1. Launch Compendium.
2. If this is the first time you have started Compendium, you will be asked to create a new Project. Name it something like “My Project” and fill in the Author Name field with your first name. This information is case sensitive. Check the boxes “Make this your default project” and “Make the user below, the default user”.

Check these boxes

Type your name here.

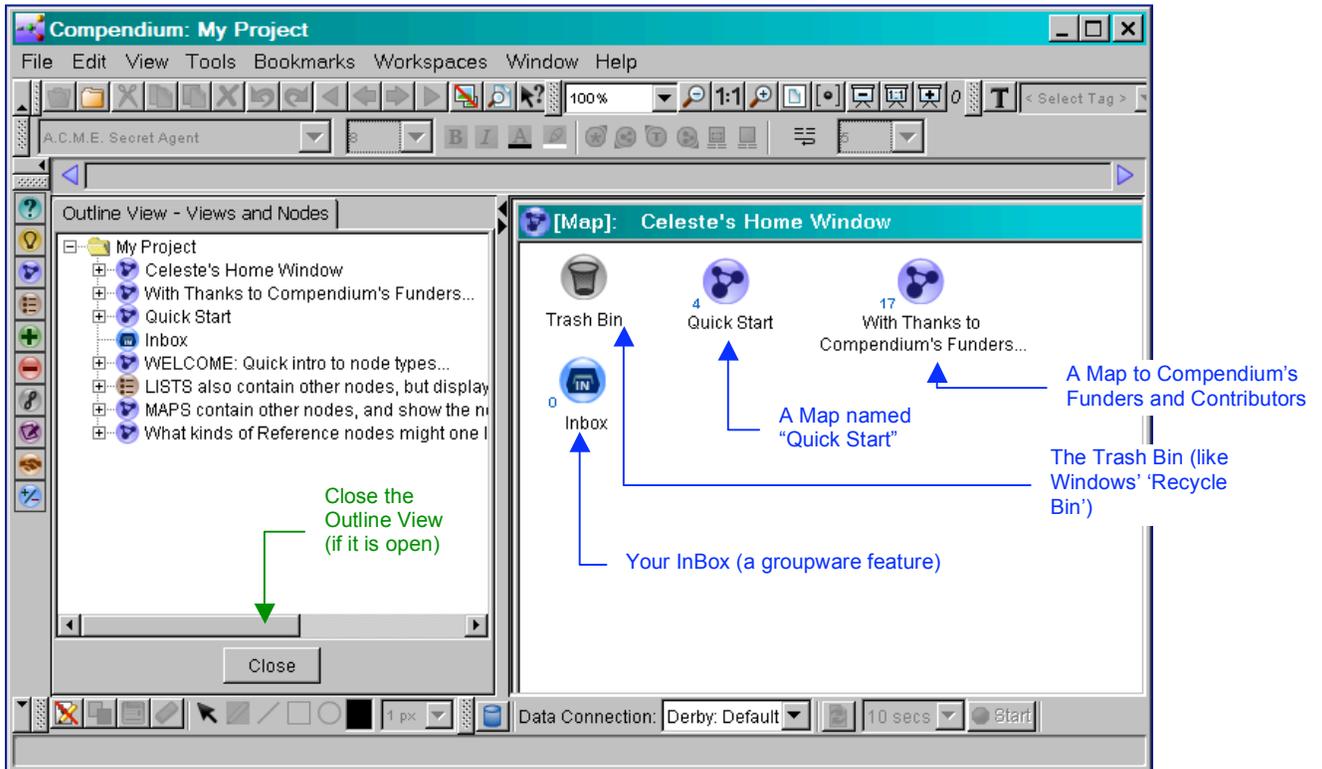
Remember your Login Name and Password!

(NOTE: Don't create more than one Project for now. Inside this Project you will create all the Maps you need.²)

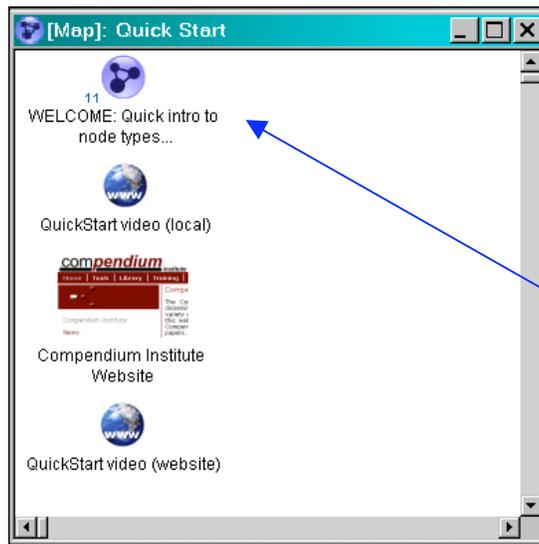
If you are then asked to log into your project, go ahead and do that.

² Think of a Project as being like your desktop, and a Map as being like a folder on your desktop. Don't create a new Project when all you need is a new Map. Generally, you won't need many Projects.

When you complete the login, your screen will look something like this:



3. Close the Outline View, if it is open.
4. Change "Icon Set" to "Default_Mini"
 In Windows use: Tools, User Options, Misc tab
 In Mac OS use: Tools, User Preferences, Misc tab
5. Turn off "Auto Label Searching" (View, Auto Label Searching)
6. Double click on the 'Quick Start' Map icon; it opens to show a window that looks like this:



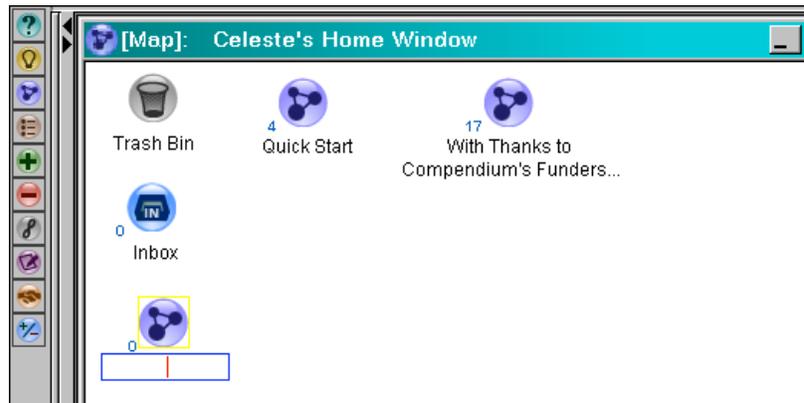
The Quick Start Map opens to show you:
 1) another Map ("Welcome..."),
 2) a link to a video, and
 3) two links to websites

7. Launch the QuickStart video (local). This is very short video that will give you a quick look at what you can do with Compendium. You'll hear Simon Buckingham-Shum (who directs the development of Compendium at the Open University in the UK) talking about Compendium and walking through the basic operations and terms. Make sure your sound is turned up so that you can hear his voice.

NOTE: The icons used in the video are NOT the same as the icons in the current version of Compendium. The basic ideas, though, are the same; so don't be confused or concerned that the icons look different.

8. When you're done, close the Quick Start window. Click on the **Window** menu item and select "Home Window" from the options.
9. Okay, now we're going to create a new Map in your Home Window. There are several ways to bring icons onto your screen, but we are going to use the simplest one for now.

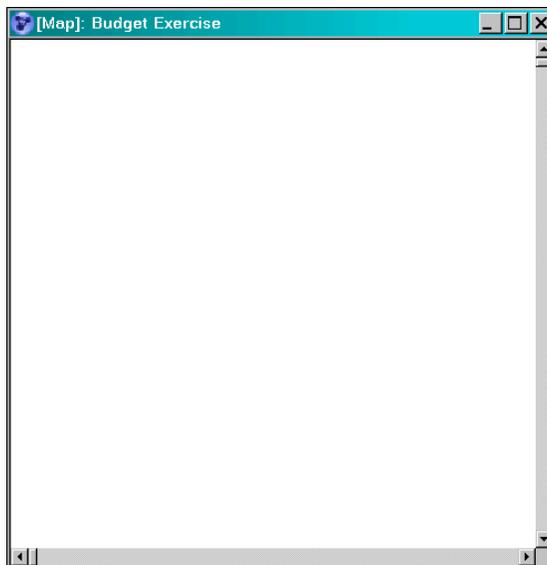
10. Click on the Map icon  in the toolbar on the left side of the screen and drag it onto your screen:



11. Type the text "Budget Exercise" in the label area (where your cursor is) and then Enter or Return. This completes labeling your new

Map node and opens its window, which is of course empty. Notice that you didn't need to click anything to be able to type the label name.

Now you have an empty Map window:



THINGS TO REMEMBER:

1. There is no "Save" command. Everything you do is immediately saved in the Compendium database.
2. In general you should create a new Map for each new topic or major issue that you want to explore in Compendium.
3. Another way to create a new Map is to position your cursor where you want the new Map icon on the screen, and type "M" on your keyboard... a new Map node appears. Type in a label, press Enter or Return, and you'll be in your new, empty map.

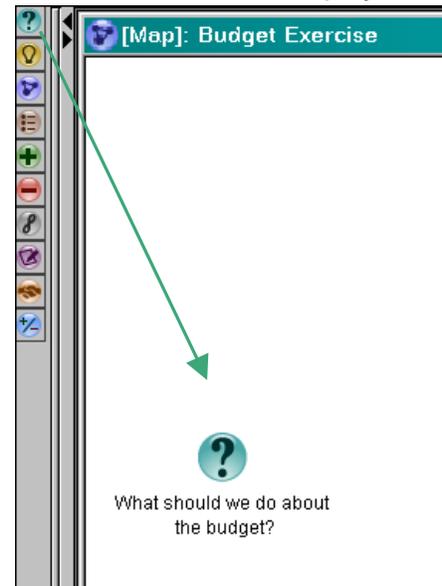
12. Pretend you are in a meeting for a small school district and they have determined previously that there is a budget shortfall for the coming year. The people in the meeting will be working to come up with some solutions and ideas to address the issue. You will be listening for Questions, Ideas (answers), and Pro and Con arguments. It's your job to capture all these elements and create a visual display of the meeting's discussion in Compendium. For this exercise we'll guide you through the specific steps of doing that.

13. Drag a Question icon  to the screen and label it "What should we do about the budget?"

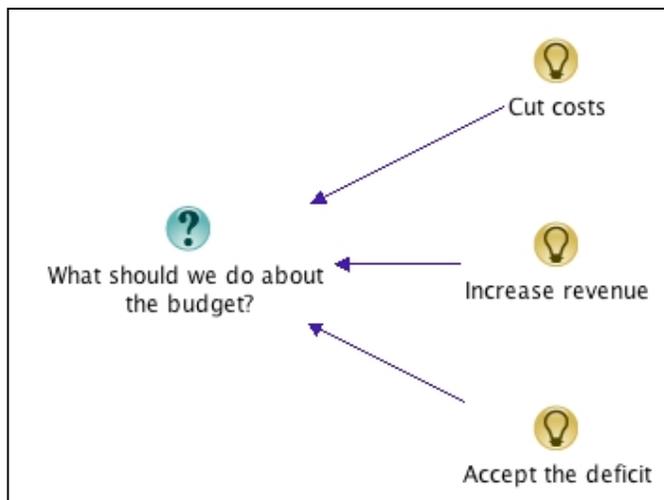
Note: Always end the label of a Question with a question mark.

14. Suppose three people in the meeting each voice an Idea as answer to this Question. Create three Idea  nodes and label them as shown below. You can create these by dragging the Idea icon to the screen or by typing the letter "I" (for Idea) on your keyboard, after you have clicked the mouse in the window where you want the new node to appear.

Note: Use sentence case (capitalize the first word) for all your node labels.



Link the Ideas to the Question by putting your cursor on an Idea and doing a Right Drag³ to create an arrow from the Idea to the Question. Notice that the link goes from *right to left* – *this is very important*. One of the rules of using Compendium for IBIS or Issue Mapping is that links go from the right to the left.



Note: if you don't like where a Node is placed you can easily move it.

On Windows: Place your cursor over the node, hold down the left mouse button and move the Node to where you want. (That's called a "Left Drag")

On Mac: Place your cursor over the node, hold down the mouse button and move the Node to where you want.

³ Windows: With the cursor over an Idea node (so the node has a blue focus box around it), hold down the Right mouse button and move the cursor until the Question node is in focus (blue box). Now release the mouse button.

Mac: Press the Option key and hold it down. With the cursor over an Idea node (so the node has a blue focus box around it), hold down the mouse button and move the cursor until the Question node is in focus (blue box). Now release the mouse button and then the Option button.

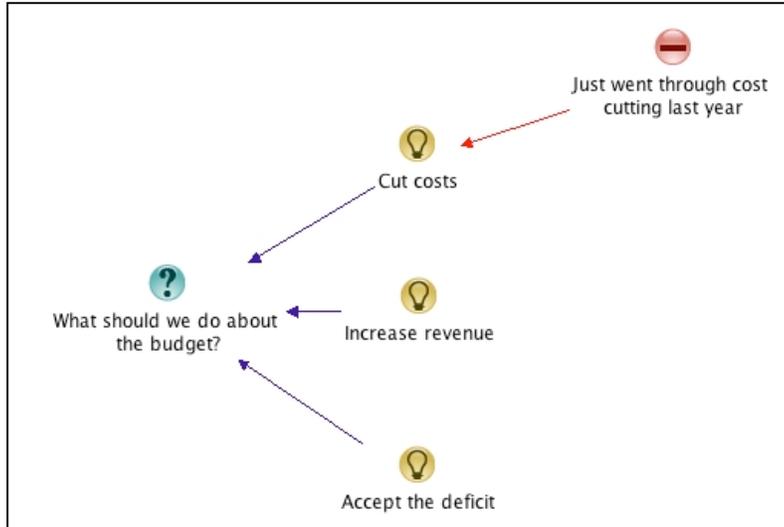
Your window inside Compendium may need to be enlarged a little bit at this point to accommodate the addition of more nodes, so drag the right side of the window over several inches (or just maximize it).

15. "But we just cut costs last year!" someone says.

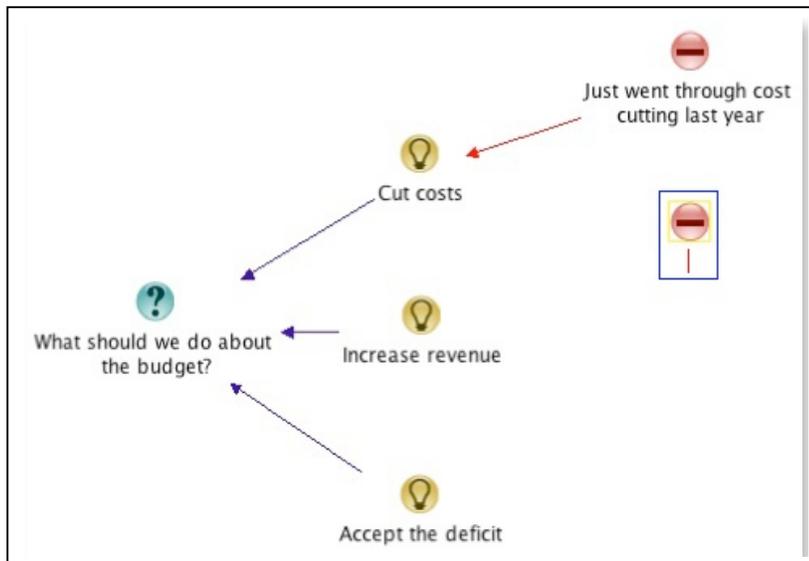
So add a Con node  by dragging the Con icon to the screen, or by typing "-" on your keyboard, after clicking where you want the new Con node to appear. Label it "Just went through cost cutting last year", and Right Drag a link to "Cut costs".

(Notice that the arrow is automatically drawn in red to denote that the Con "objects" the Idea to which it is linked.)

Now your screen should look like this:



16. Before we go any further with the meeting, let's explore how a mistake in node type creation can be fixed. Suppose you "accidentally" create a Con node underneath the Con node you just created. Your window will now look like this:



To remove (delete) the extra Idea node you have several options:

- Option 1: First select it by clicking on it, then click on the Delete icon  in the tool bar at the top of the window
- Option 2: Delete from menu
 - Windows: Right Click on the Idea node. A menu will appear. Select the Delete function from the menu.
 - Mac: Hold down the Control key and click on the Idea node. A menu will appear. Select the Delete function from the menu.
- Option 3: First select the Idea node by clicking on it. Then use the Delete key on your keyboard

Pick one of the options, and delete the node. (You can recreate the node and try the other options, if you want.)

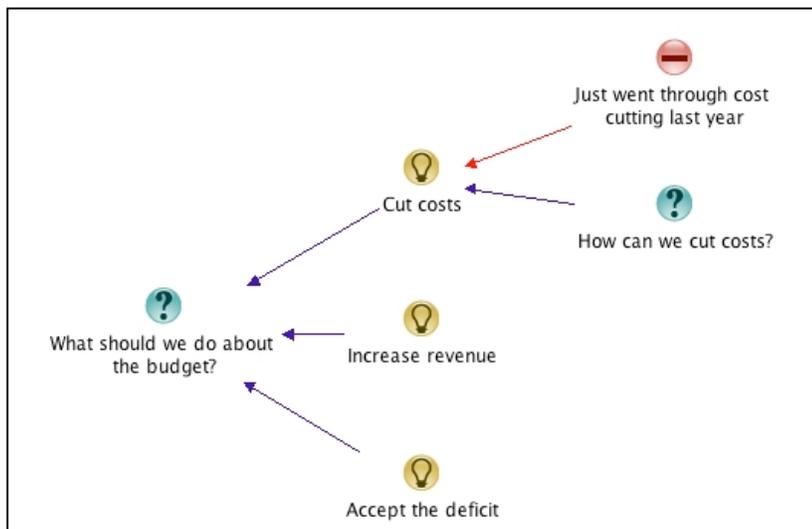
After deleting the Con node, create it again, so your screen once again looks like it did in the picture above. (We're going to use that extra Con node in the next step.)

17. Back at the meeting, someone says "Okay, but how do we cut costs?"

That is obviously a Question, but you have a Con node on your screen. Fortunately Compendium allows us to change the type of a node quite easily:

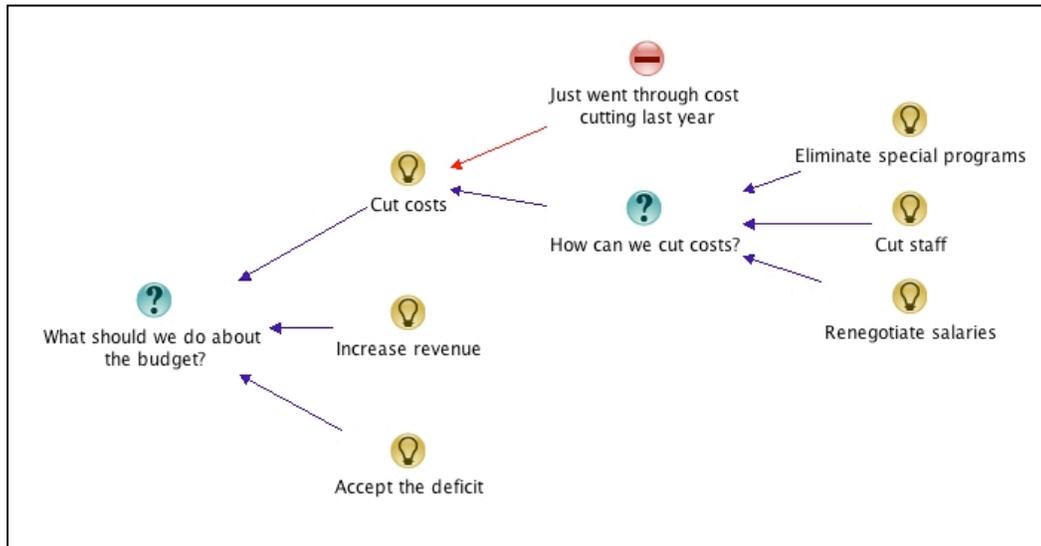
- Windows: Right Click on the Idea node. A menu will appear. Select the "Change Type To..." item from the menu. A second menu will appear. Select "Question" from that second menu.
- Mac: Hold down the Control key and click on the Idea node. A menu will appear. Select the "Change Type To..." item from the menu. A second menu will appear. Select "Question" from that second menu.

When you have changed the node type, you should have a Question node ready for use. Label it "How can we cut costs?" and add a link from that node to the "Cut costs" Idea node.

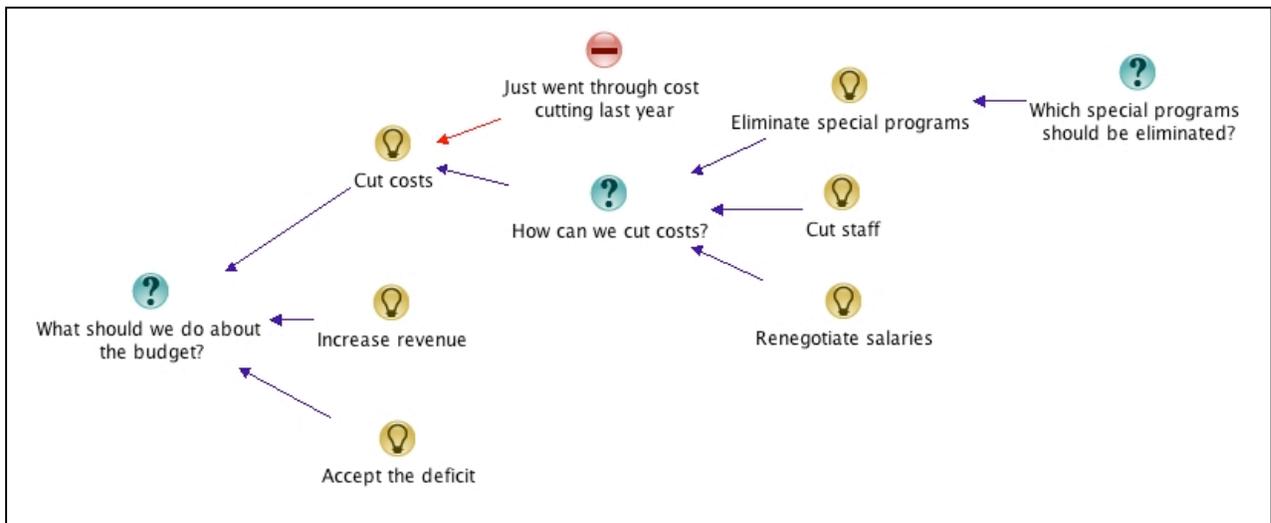


18. Back at the budget meeting, there are three ideas raised about how to cut costs, and you need to capture all three new Ideas: (1) eliminate special programs, (2) cut staff, and (3) renegotiate salaries.

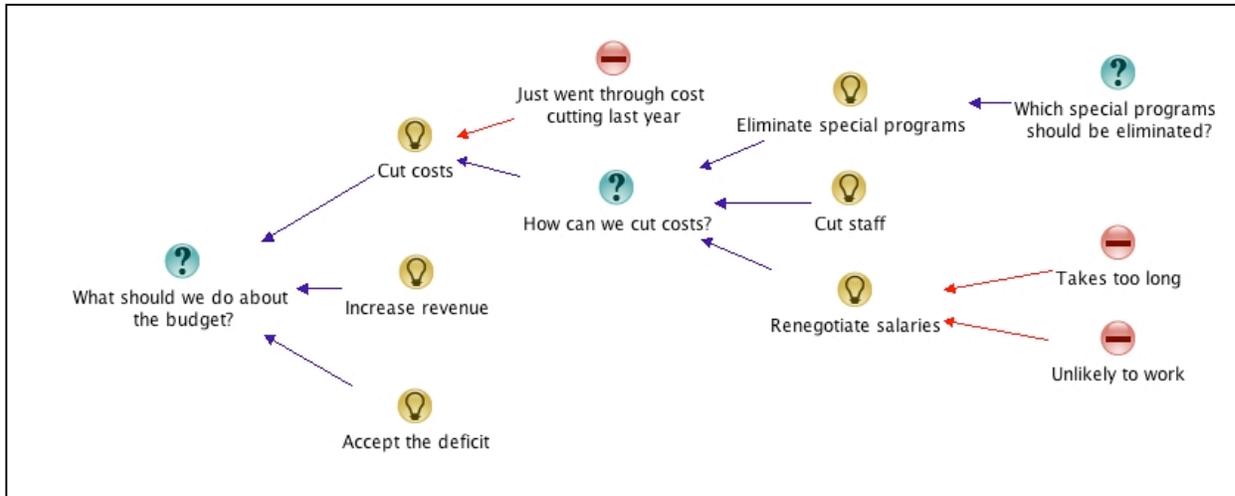
When you are done, your map should look like this:



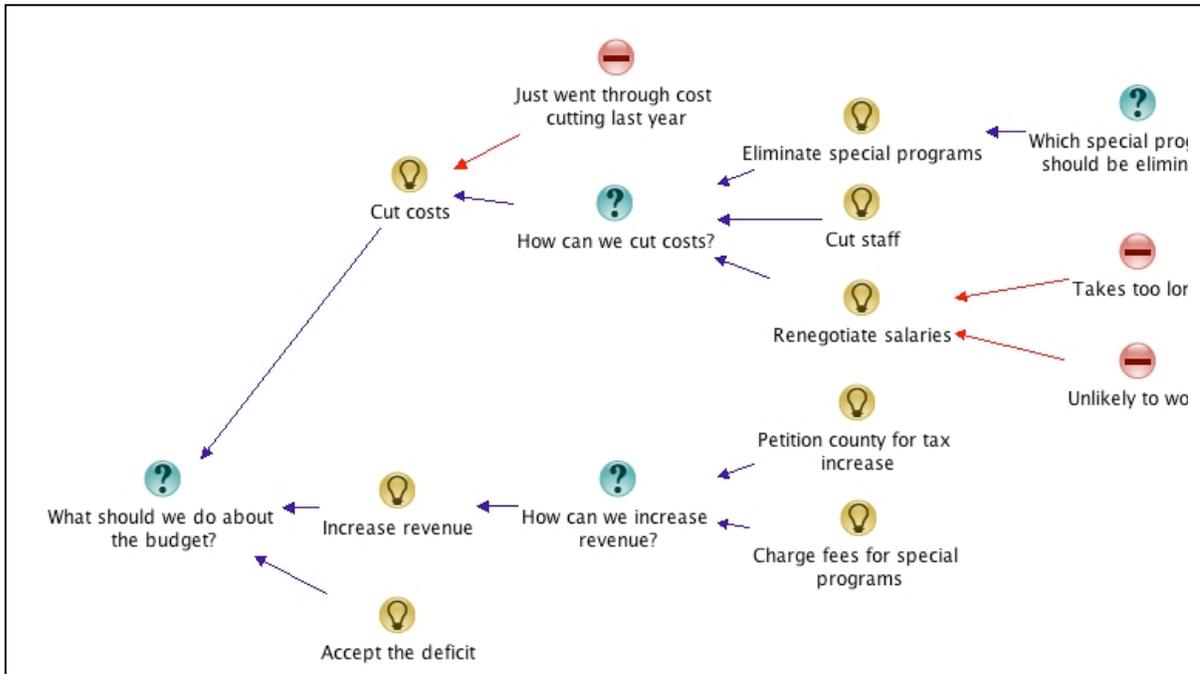
19. As you are adding the “Eliminate special programs” Idea, someone asks, “Which special programs should we eliminate?” Put that Question on the screen too:



20. While discussing the ‘Renegotiate salaries’ Idea, two objections are raised: (1) it takes too long, and (2) it is unlikely to work. Map these as Con arguments:

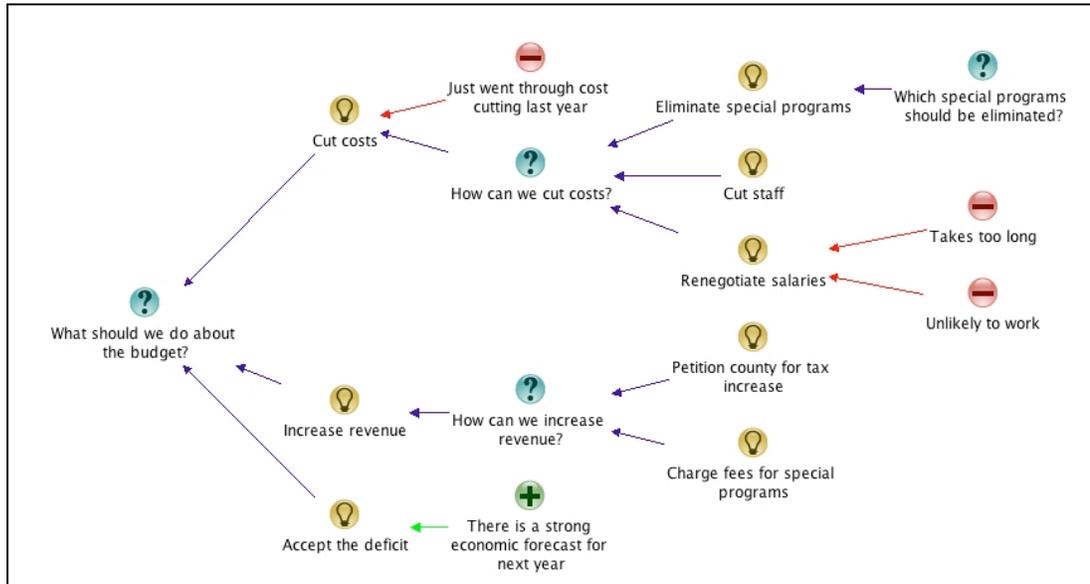


21. Now the conversation at the meeting turns to the ‘increase revenue’ idea. Someone says that we could petition the county for a tax increase, or we could charge fees for special programs. Create these Idea nodes, and then create a Question, “How to increase revenue?” just to the left of them. This Question is a “bridge” from the “Increase revenue” Idea to the specific Ideas about increasing taxes and fees for special programs. Link them together as shown below.



Note: To fit the new nodes in, and still keep everything neat, we needed to move the some of the other nodes around. You do this by selecting the nodes and dragging them to their new location. You can select a group of nodes by clicking and then dragging the mouse to create a rectangle: all of the nodes inside the rectangle will be selected when you release the mouse button.

22. Alright,” someone offers, “but we could also just accept the deficit. There’s a strong economic forecast for next year.” Map “Strong economic forecast” as a Pro + argument linked to “Accept the deficit”. To create the Pro node, either drag the Pro icon onto the window or type “+” on the keyboard after clicking where you want the new Pro node to appear.

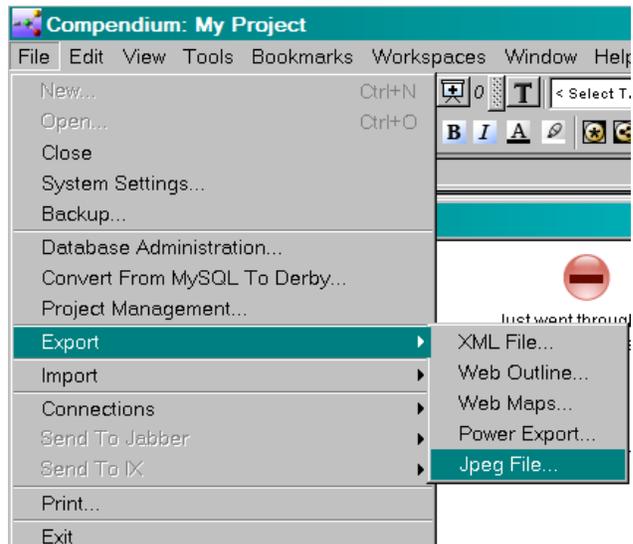


Let’s say the meeting ended here. In reality, this conversation might go on much longer and would result in a much bigger map, including sub-maps regarding the economic forecast and other issues.

When you are done, practice exporting your map to a JPEG file by doing the following:

1. Go to the File menu, select Export, and choose ‘Jpeg File’ from the next menu.
2. Title the file with your name and save it to your desktop (or another location that you will easily remember).

This exported file could potentially be sent by email to others as an attachment. Using JPEGs to share your maps is a good idea only when the map is simple, without sub-maps. This is because JPEGs don’t allow viewers to click into the contents of your sub-maps. As you receive more instruction, we will teach you additional options for exporting and sharing maps.



While this experience is still fresh you might want to write down any questions, concerns, ideas, or other thoughts that came up as you went through this exercise. (You could even do it in Compendium!)

Some conventions and commands

Please study and use these!

→ You can use keyboard short cuts (hot keys) to create nodes more quickly than by dragging them from the menu. To use the keyboard rather than the menu, first click in the window where you want the new node to appear and then type the letter or character on the keyboard. To create IBIS nodes use the following:

| | |
|--------------|---------|
| Q → Question | + → Pro |
| I → Idea | - → Con |

To see a list of keyboard short cuts

- Windows: Right Click on empty space in your map. Mouse over “Create Node” and a drop down menu will show you the node types and their hot keys.
 - Mac: Hold down the Command key and click on an empty space in your map. Select “Create Node” from the menu, and a new drop down menu will show you the available node types and their keyboard short cuts.
- To move a node:
- a. Windows: Left Drag starting over the node to new location
 - b. Mac: Select node and drag it to new location
- To select a group of nodes:
- a. Windows: Left Drag over the empty space surrounding a group of nodes
 - b. Mac: Click in the empty space outside of the group of nodes and drag over the area until the rectangle contains the entire group. Release mouse.
- To move a group of nodes:
- a. Windows: Put the cursor over any one of a group of selected nodes and do a Left Drag to the new location
 - b. Mac: Put the cursor over any one of a group of selected nodes and drag to the new location.

- To select a node and all of its subnodes (in-pointing arrows)
 - a. Windows: Alt-Left-Click:⁴ over the node
 - b. Mac: Hold down the Option key and click the node

- To create a space above a node or set of nodes:
 - a. Windows: Alt-Left-Drag in empty space
 - b. Mac: Hold down Option and Command keys, then drag cursor through empty space

Note: there is no corresponding way to create horizontal separation.

- Moving around in maps – without using the scroll bars
 - a. Windows: You can use Right Drag; the same gesture is used for linking two nodes. If it starts over empty space it moves your view over the map.
 - b. Mac: If your mouse has a scroll ball, that works well.

- Consider your Home Window like a desktop. It should stay small and neat, containing Map nodes only.

- Generally, Maps grow from left to right.

- Avoid using the Print function (in the File menu) ... it doesn't work very well and there are other better ways to do this that we will talk about in the Issue Mapping Webinar Series (IMWS).

⁴ While holding down the Alt key, click the Left mouse button.