

Creating Word Outlines from Compendium on a Mac

Using the Compendium Outline Template and Macro for Microsoft Word for Mac: *Background and Tutorial*

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Once you have created a map in Compendium, there are several reasons to create an outline document in Word from your map:

1. Lets you 'spell check' your map
2. Lets you read through the map quickly to see if you have covered all the issues
3. Lets you share your map with others who don't have Compendium
4. Allows others to give feedback on the map by making comments in the Word outline version of it.
5. Allows you to "outline" a document you are writing by starting in Compendium, so that you can think through the most compelling points and most logical structure. Then you create the outline version in Word and flesh out the outline into a letter, paper, or PowerPoint presentation.
6. Helps you learn how to make better maps by seeing how they read when converted to document form.

Turning a map into a well-written document is rarely a pushbutton process – some editing is usually required to fill in the gaps and smooth the "narrative flow" of the document into a form that readers of a Word document expect and find comfortable. See the final section on "Cleaning up the Word Document" for some ideas and tips

This tutorial describes how to download and use the Compendium Outline Template and Macro for Microsoft Word 2004 for Mac to produce a well-formed Word document outline.

This document has been written using the 1.5.3 Alpha 5 release of Compendium. The instructions have been tested with Microsoft Word 2004 for Mac running under Mac OS 10.5.8. For the macro to function correctly without modification, the hard disk that you have installed Compendium on must be named "Macintosh HD".

Note: because Word 2008 for the Mac uses a different scripting language than Word 2004 for the Mac and earlier versions, this macro will *not* work with Word 2008.

Table of Contents

QUICK START GUIDE	3
STANDARD OUTLINE EXPORT VS. OUTLINE EXPORT WITH WORD MACRO	4
ONE-TIME SET UP FOR OUTLINE EXPORTS	7
STEPS FOR CREATING OUTLINES FROM MAPS	10
First Step: Creating the HTML file in Compendium	10
Second Step: Creating the Word document (Word 2004 for Mac)	10
CLEANING UP THE WORD DOCUMENT	12
Adding Table of Contents	12
Spell Checking	12
Other Clean Up	12
Structuring Large Documents Containing Many Maps	13
Learning about Mapping from the Outline Version	13
Narrative Flow	14

Quick Start Guide

This is a brief overview of the process for tech-savvy users. It assumes you have already installed Compendium 1.5.3 Alpha 5, and that you have set up Mac OS X 10.5.8 and Microsoft Office using the default user options.

Using these instructions, you will download a special Microsoft Word template called *Compendium-outline* and use it to create a well-formed Word document outline.

- Step 1: Download the Compendium-outline template by visiting <http://www.cognexus.org/Compendium/Compendium-outline-mac.zip>.
- Step 2: The *Compendium-outline-mac.zip* file contains the *Compendium-outline-mac.dot* template for Microsoft Word. Unzip it by double clicking on it after you have downloaded it. Install the template by copying the *Compendium-outline-mac.dot* file to Macintosh HD/Applications/Microsoft Office 2004/Templates/My Templates/
- Step 3. *In Compendium*, open a map you want to turn into an outline Word document.
- Step 4: Create an HTML version of the outline by selecting the **File / Export / Web Outline** menu entries. The first time you do this, set up the export options as shown in **Figure 5** and **Figure 6**, below.
- Step 5: Save the HTML file as “temp.html” in the Compendium Exports folder (default location).
- Step 6: *In Word*, select **File / Project Gallery** menu items. Select the **New** tab on the dialog box, if not already selected. Select **My Templates**, under Groups on the left. Then select *Compendium-outline-mac.dot*. A new empty document will appear.
- Step 7: Still *in Word*, select **Tools / Macro / Macros...** A dialog box showing the macro “**Insert_and_Format_Outline**” should appear. Click on the **Run** button. The outline version of your map or maps will appear in the document.
- Step 8: Make any other formatting changes and Save the document.

If this brief description of the process isn't clear, please read the fuller descriptions in sections “One-time Set Up for Outline Exports” and “Steps for Creating Outlines from Maps”, below in this document.

Standard Outline Export vs. Outline Export with Word Macro

Here is a short example of the transformation of a map into text. Suppose you had created the following simple map and you wanted to get feedback on it from people who don't use Compendium.

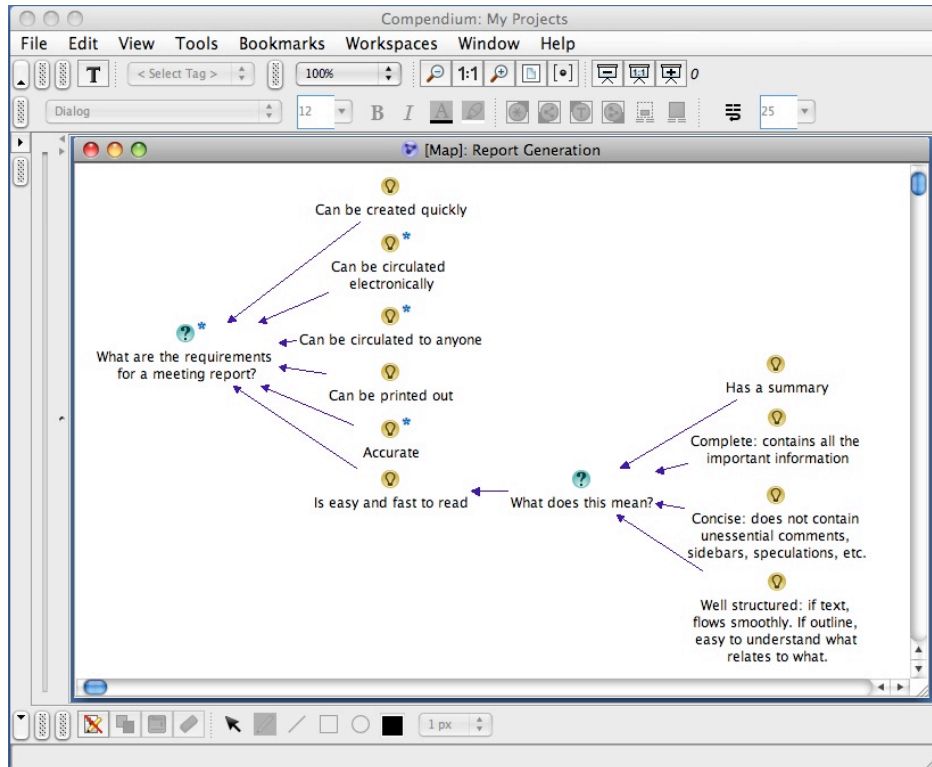


Figure 1: A simple meeting map

If, from this map, you used the Export Web Outline¹ command using the default settings in Compendium, the resulting HTML file would look something like **Figure 2**.

¹ The Export creates a temporary HTML file, which, by default, is placed in the Compendium/Exports folder.

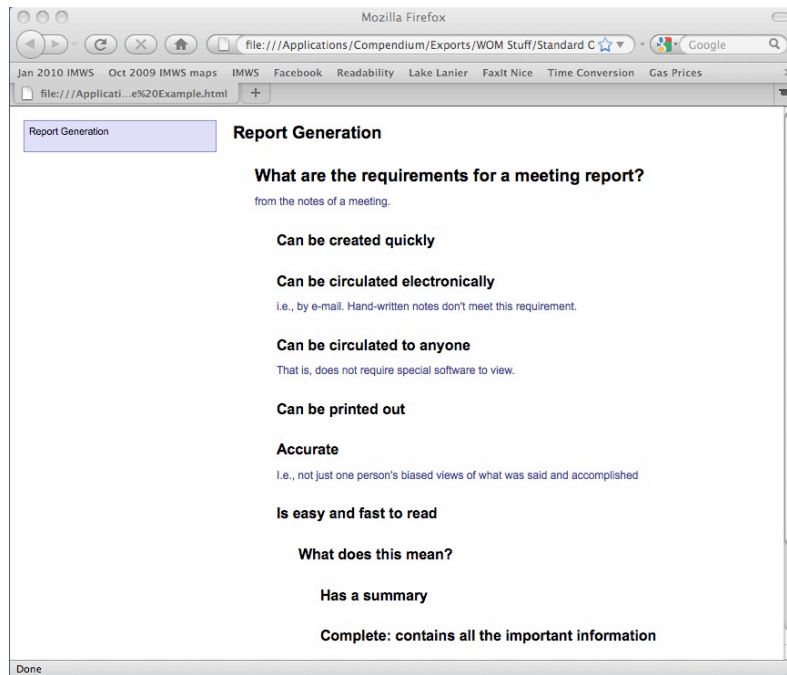


Figure 2: Portion of Outline Export using Compendium export defaults

While for some purposes this HTML file might be sufficient as a textual version of a map, there are several problems that you will probably want to correct:

- Unless one is handy with HTML or has a good web page editor, no one can make any changes, additions, or annotations on this document.
- The HTML version includes an interactive “navigation menu” (the smaller text “Report Generation” on the left) which is meant to be used from a browser.
- The document is longer than necessary because there is a lot of wasted space between the lines.
- If you include the icon images (see below) you’ll have to create a PDF of the HTML document for others to be able to see the icons when they open the file.

If you tried to open this file in Word to edit it and save it as a DOC file, you would find other problems:

- The styles that are 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 white paper or meeting notes document. The vertical spacing is especially problematic, because even a small map can run to several pages, and it is especially difficult to keep track of the structure of the outline (the indentation) when it flows between pages. Instead, by following a two-step process that uses a special Word template, we can get a starting point in Word that looks like **Figure 3** (just bullets) or **Figure 4** (bullets and icons). This more compact presentation of the

map takes the same number of steps to generate as the standard outline export, but is easier to read, makes a better starting point for the editing which will produce your finished meeting report, and can be easily mailed to others for viewing and annotating.

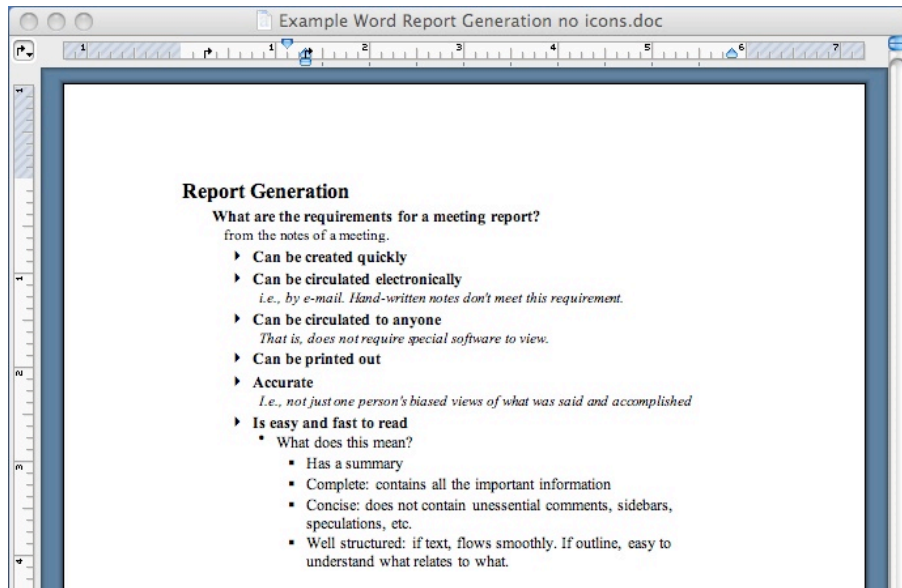


Figure 3: Clearer and more compact outline output in Word

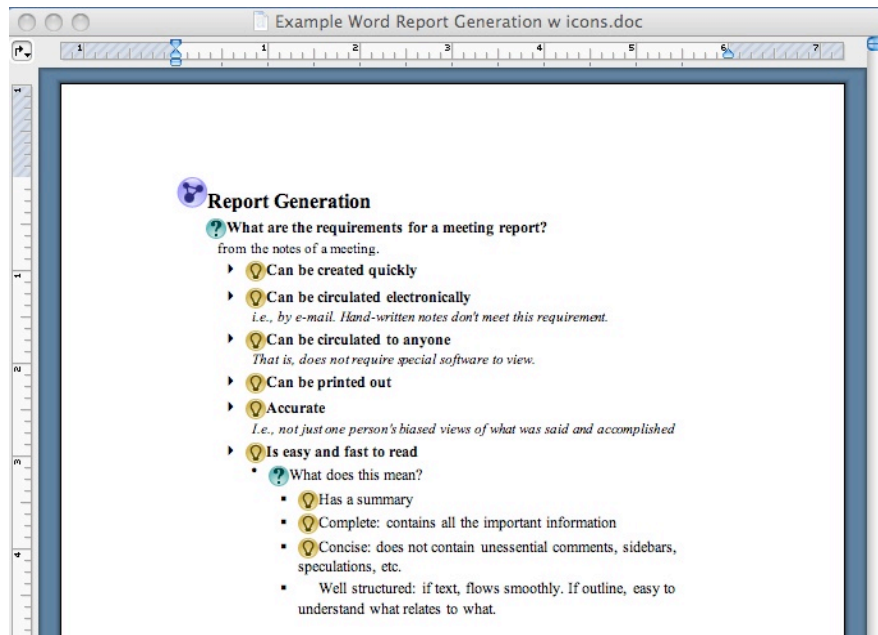


Figure 4: The same outline with Compendium icons (“Include images” turned on)

One-time Set Up for Outline Exports

This section describes how to set the options 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.

First, download the Compendium-outline template by clicking <http://www.cognexus.org/Compendium/Compendium-outline-mac.zip>.

The *Compendium-outline-mac.zip* file contains the *Compendium-outline-mac.dot* template for Microsoft Word. Unzip the file by double clicking on it after the download is complete. Install the template by copying the *Compendium-outline-mac.dot* file to Macintosh HD/Applications/Microsoft Office 2004/Templates/My Templates/.

Next, in *Compendium*:

1. Open a map that you would like to view or send as an outline Word document.
2. Create a temporary HTML version of the outline by selecting **File / Export / Web Outline**².
3. Set up the “Node Selection” tab options to look like **Figure 5**

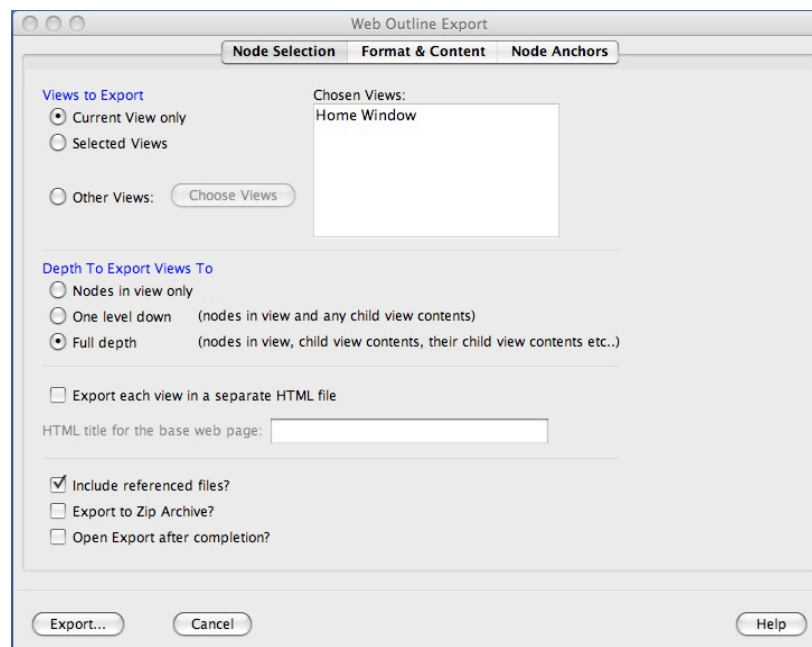


Figure 5: Outline Export settings -- Node Selection Tab

² Some people prefer to use Control-click to get a menu, then select **Export / Web Outline**

Notes on “Node Selection” tab:

Usually you’ll want to include all submaps, thus the “*Full depth*” setting;

4. Set up the “Format and Content” tab options to look like **Figure 6**:

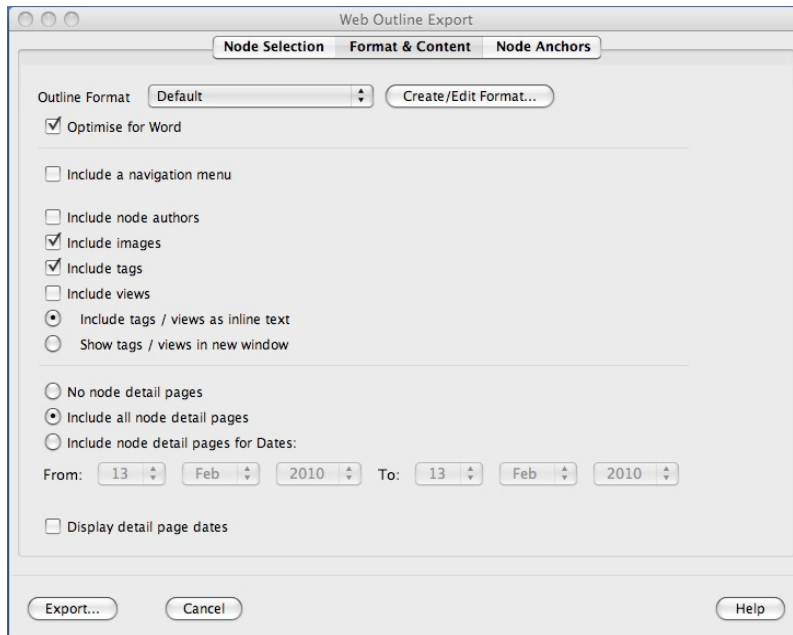


Figure 6: Outline Export settings – Format & Content Tab

Notes on “Format and Contents” tab:

- Check “Optimise for Word” (that’s the British spelling for optimize, so it’s OK!);
- Uncheck “Include a navigation menu”.
- Leave “Include node authors” unchecked. (But keep in mind that if your map was created by several users, you can check this option to have each outline entry show who authored it.)
- Select “Include images” if you want your outline to have the icon images at the beginning of each line (as in **Figure 4**). The icons can increase the size of the document by 15%, but they add color, and they clarify the text by, for example, making it clear which arguments are Pros and which are Cons. Use of this is purely a personal preference and will probably be dictated by your target audience.
- Select “Include tags”. Tags such as “Actionitem” are usually useful information and you can uncheck this later if you don’t want that information to show in the outline.
- Unselect “Include views”.
- Select “Include all node detail pages”.

5. There should not be any changes in the “Node Anchors” tab, but just for reference, **Figure 7** shows what it should look like.

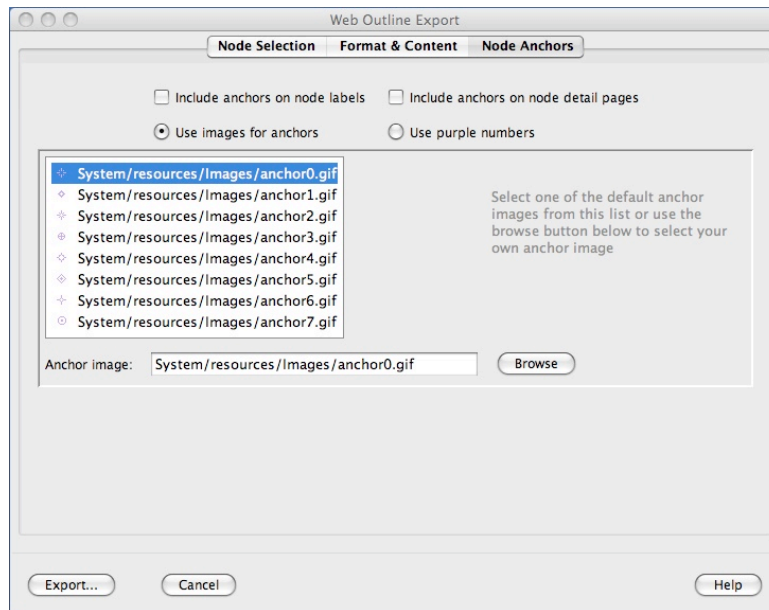


Figure 7: Outline Export settings – Node Anchors Tab

6. Click Export to create the temporary HTML output file. Name the file “temp.html”, make sure it is in the Exports folder, and click Save. It is very important to use this file name and location, because the Word macro looks for this specific file, in this specific location. After you do this the first time, you will just type or select the “temp.html” file and click “OK” when you are told that the file already exists and you are asked if you want to overwrite it.

You are now done with the one-time set up process. In the future you will just need to select **File / Export / Web Outline**. The options you selected here will be set as the defaults for all of your projects. Now you can create professional outline reports in a few seconds.

Are these always the best or ‘right’ settings? No. You may find settings and combinations that work better for you, in certain situations. But these work fairly well for most situations.

Steps for Creating Outlines from Maps

Once you have everything set up, the process of getting a map or set of maps from Compendium into Word takes two steps, which you can do in less than 2 minutes. The first step is creation of a temporary HTML export file in Compendium – using a shorter version of the one-time setup process in the last section.

First Step: Creating the HTML file in Compendium

To create the temporary HTML export file:

1. *In Compendium*, select **File / Export / Web Outline**.
2. Click the **Export** button (you’ve already set up everything in “One Time Set up for Outline Exports”, described above.)
3. You will see a dialog box with the title “Enter the file name to Export to...” In the **Save As** field, type “temp” or select the “temp” file, from the list of files. Make sure that the file will be saved into the Exports folder.
4. Click **Save** and then, if prompted, click “Yes” to overwrite the last temporary file you generated.

Second Step: Creating the Word document (Word 2004 for Mac)

Now *in Word*³:

1. Select **File / Project Gallery** menu items. You will see the Project Gallery dialog box. Select the **New** tab on the dialog box, if it is not already selected. Select **My Templates**, under Groups on the left.

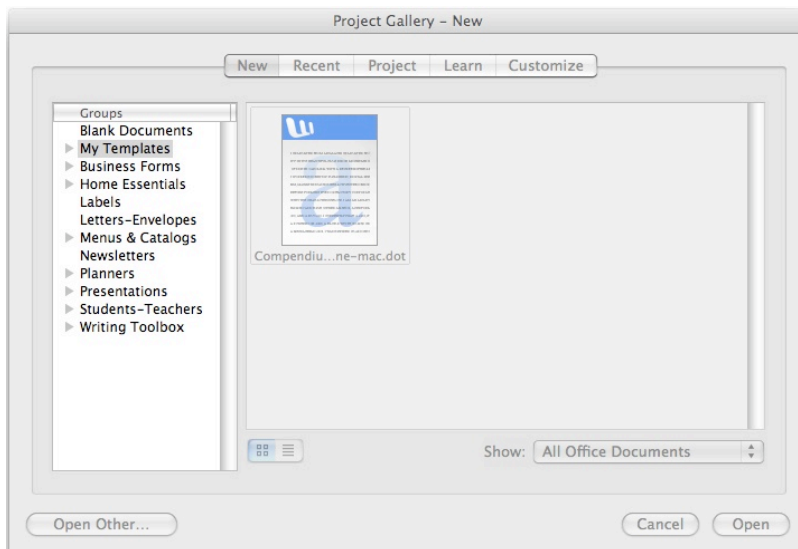


Figure 8: Project Gallery Dialog Box

³ Screenshots from Microsoft *Word 2004 for Mac*, Mac OS X 10.5.8.

2. Double-click *Compendium-outline-mac.dot*. A new empty document will appear.
3. Now select **Tools / Macro / Macros**.... A dialog box showing the macro “**Insert_and_Format_Outline**” should appear.

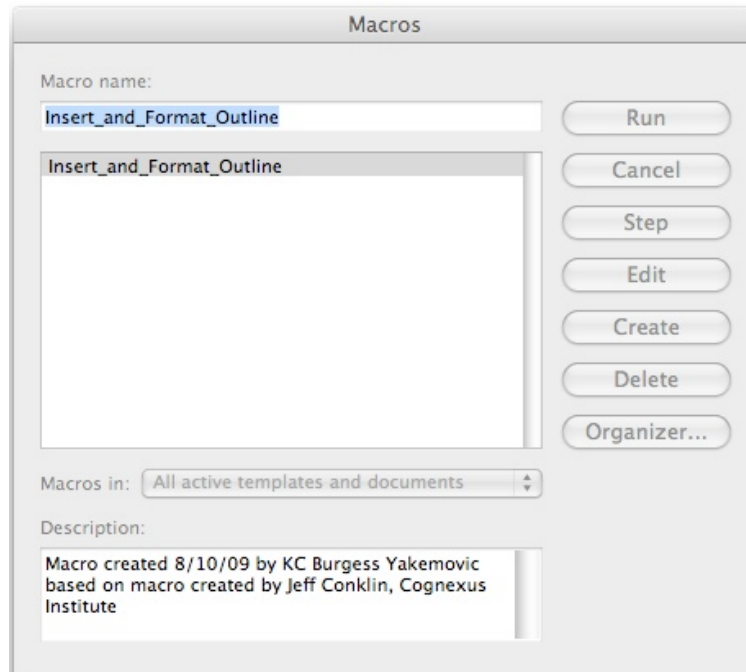


Figure 9: Macros Dialog Box

4. Click on the **Run** button. The outline version of your map or maps will appear in the document.
5. Save the document.

You can now circulate the Word document to others to get their comments on the content of your map. But before you hit the ‘Send’ button it’s a good idea to read through the outline version and make sure that it conveys what you want it too. There can be a surprising difference between how a Compendium map reads and how a Word document based on it reads – sometimes you’ll want to do some editing in the Word document before sending it.

Cleaning up the Word Document

Adding Table of Contents

If your map had submaps, you may want to insert a Table of Contents (i.e. **Insert / Index and Tables**, then select **Table of Contents tab**) to help readers with the overall structure of the outline document.

Spell Checking

As you have probably noticed, Compendium does not have a 'spell check' command. Creating an outline of a map in Word allows you to easily spot any spelling errors in the map.

If the map is large, the trick is to find the misspelled word. Having had to correct many spelling mistakes in large maps, Jeff has developed a process that may seem complex at first glance but once you've done it a few times it becomes quite easy. Let's assume you have Compendium open, displaying your map and also have Word open, with the outline of the map showing.

1. Highlight and **Copy (command-C)** a misspelled word.
2. Switch to the Compendium window
3. Use **command-F** to bring up the **Search** command (or **Edit, Search**).
4. **Paste (command-V)** to the word into Keywords.
5. Click **OK**. Compendium will find all the nodes with that misspelling, and you can edit them right there in the Search Results window by double clicking on each node's icon.
6. Switch back to Compendium (**Alt + Tab**) and repeat these steps.

By correcting the spelling errors, you have improved the literary quality of your map, and if you ever need to print the map out again, you have corrected the spelling problems at their source.

Other Clean Up

You may want to do some more clean up ... add logos, write an Executive Summary, add a list of action items or next steps, etc. You may even want to rewrite the text, creating standard paragraphs with full sentences, bulleted lists, figures, etc. By following these steps you now have a compact starting point for crafting your map into a conventional document.

Structuring Large Documents Containing Many Maps

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.

Learning about Mapping from the Outline Version

Studying the outline version of a map can teach you a lot about the consequences of the 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, and the flow from one to the other, can have a big impact on the readability of the outline output. *It is a good idea to routinely create and study the outline view of every map you make.* As you find parts of the outline that don't read well or are confusing, go back to those nodes in Compendium and adjust them to address the issue.

Some changes you are likely to make are:

1. Rewriting node Labels to make them more descriptive of the key idea.
2. Using the Detail section of nodes to elaborate and clarify the Label.
3. Arranging the ideas on a Question node in a natural sequence. In many cases the most natural sequence for ideas is the historical sequence in which the proposals were advanced or considered over time.
4. Arranging the nodes on an Idea node in a natural sequence. A good sequence is:
 - i. All the Pros
 - ii. All the Cons
 - iii. Any Reference and Note nodes (i.e. relevant documents and emails)
 - iv. Any Question nodes (i.e. questions that expand on or challenge the idea)
5. Avoiding having one node link to several other nodes. In the outline the node will appear once for each link, which may seem repetitive.

Ultimately, creating and linking nodes in ways that create flowing outlines teaches you how to make maps that are easier to read as well.



Narrative Flow

The importance of editing the outline version of a map increases when you are going to send it to a non-Compendium user. When you are reading a map in Compendium you are aware that you are reading a kind of hypertext that lets you scan the nodes in the map and pick which ones you want to read. If a node doesn't quite make sense, you understand that you have to click around some, usually on the nodes to the left of the one you started with, to understand its context. And if it still doesn't make sense you know that you can add a question to the map or send a message to the person who posted it asking for clarification.

However, when a map is printed out in a document and handed to someone who doesn't use Compendium, his or her expectations are different. When someone picks up a Word document, even an outline, they expect a certain level of "narrative flow" from the text. In prose each sentence expresses a whole thought, each thought builds on the one before, and the sequence of sentences and paragraphs deliberately follows the logic of "telling a story", even if the document is a legal brief.

To meet these expectations, Compendium users need to look at their outline draft document with "beginners mind" and make adjustments to it that make it less "telegraphic" and more flowing.

If you find any errors or have any questions about using this document, please send an email to KC Burgess Yakemovic: kc@cognexus.org.