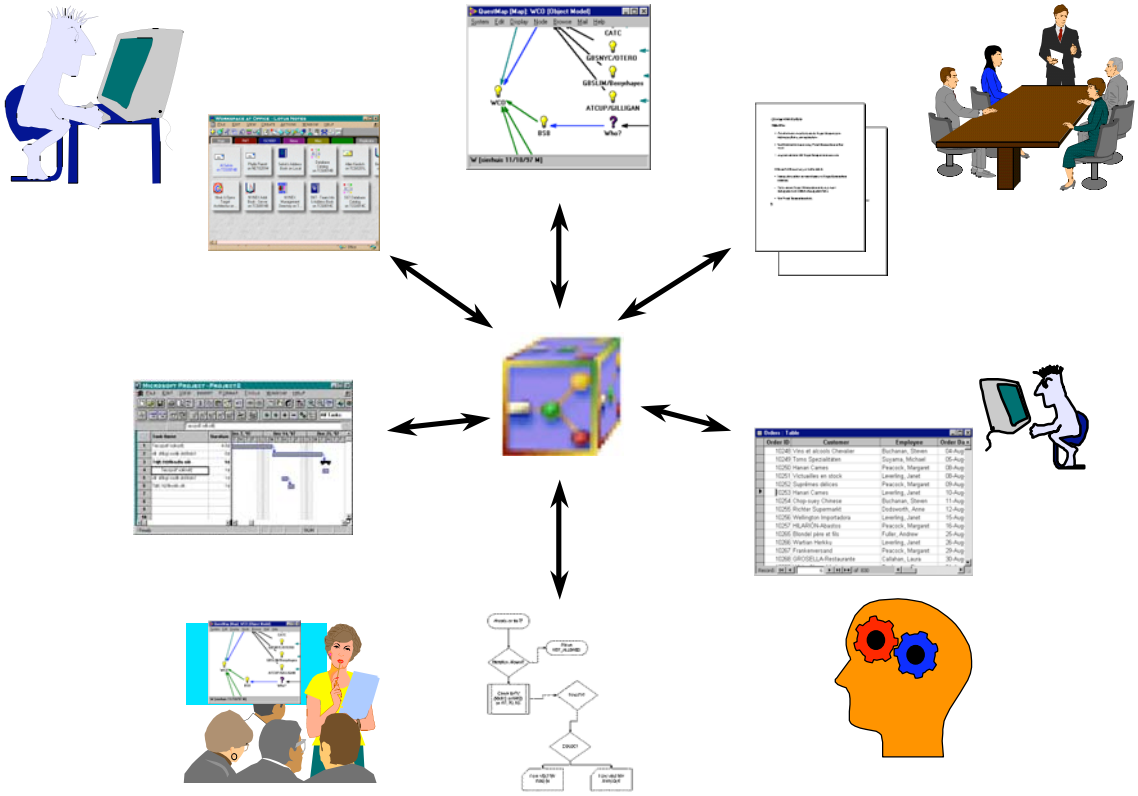
Introduction to Compendium

Exercises



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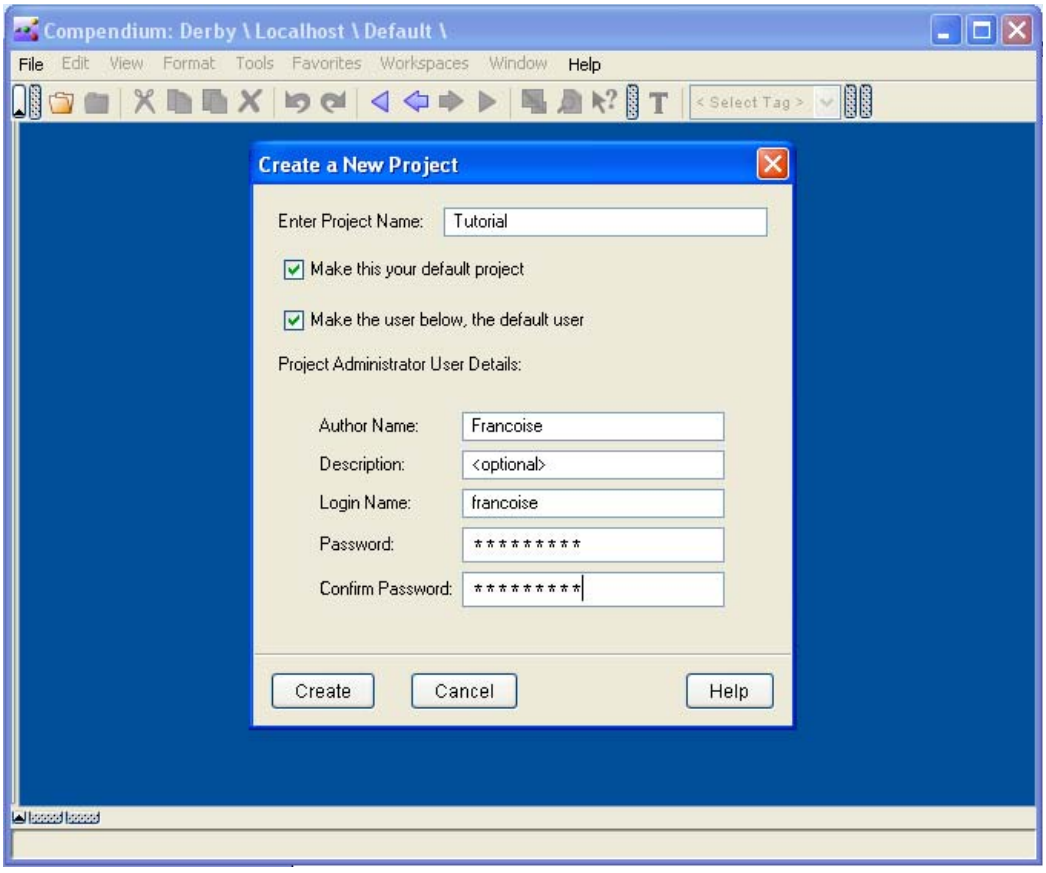
Exercise 1: Create a new Project

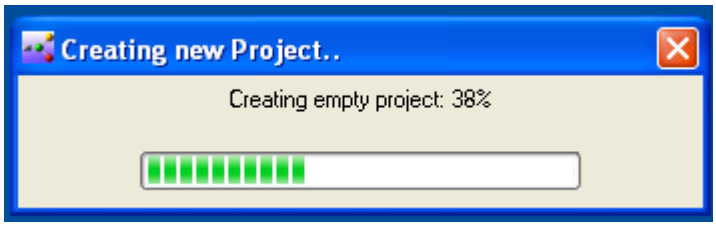
Objective of this exercise:

The objective of this exercise is understand the process of creating a new Compendium project. The first time you launch Compendium, you'll be asked to create a new project.

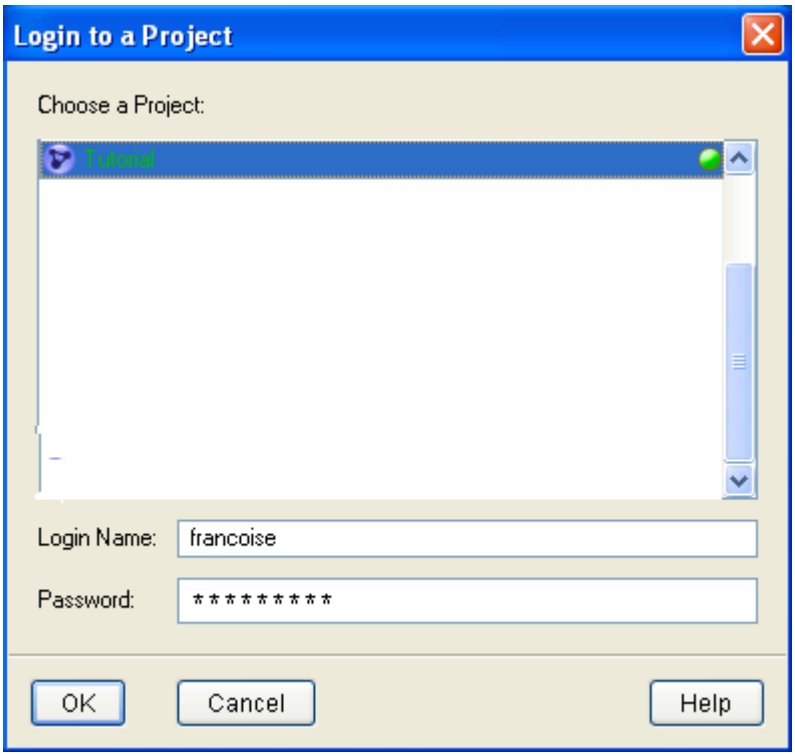
1. Choose **New** from the **File** menu (File…New) if it is not already displaying. Enter the project name "Tutorial" for this exercise. Check the **Make this your default project** and **Make the user below, the default user** checkboxes. In this example, the username, Author name, and password are all "Francoise" but you can use any you like.



2. Click **Create**. Compendium will display the **Creating new Project** dialogue. The process takes a few moments.



When it's complete, the **Login to a Project** dialogue displays. The project you just created will be highlighted. Click **OK** and the project will open.



Conclusion of this exercise:

You now know how to create a new Compendium project. Compendium allows you to create as many different projects as you like.

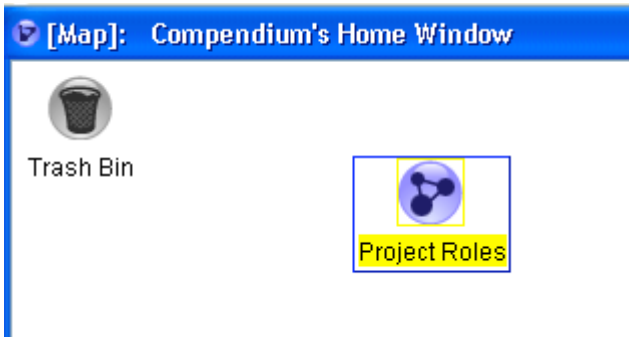
Please return to Chapter 4, Compendium Software Basics, in *Introduction to Compendium - Tutorial*.

Exercise 2: Creating Nodes

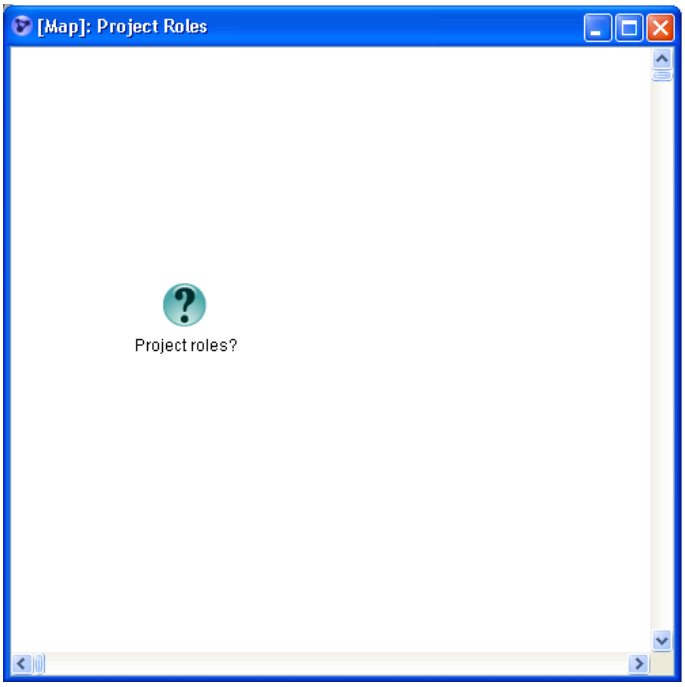
Objective of this exercise:

The objective of this exercise is to practice creating nodes and links.

1. Create a map in your Home Window titled **Project Roles**.



2. Go into the map and create a *Question* node named **Project Roles?**.



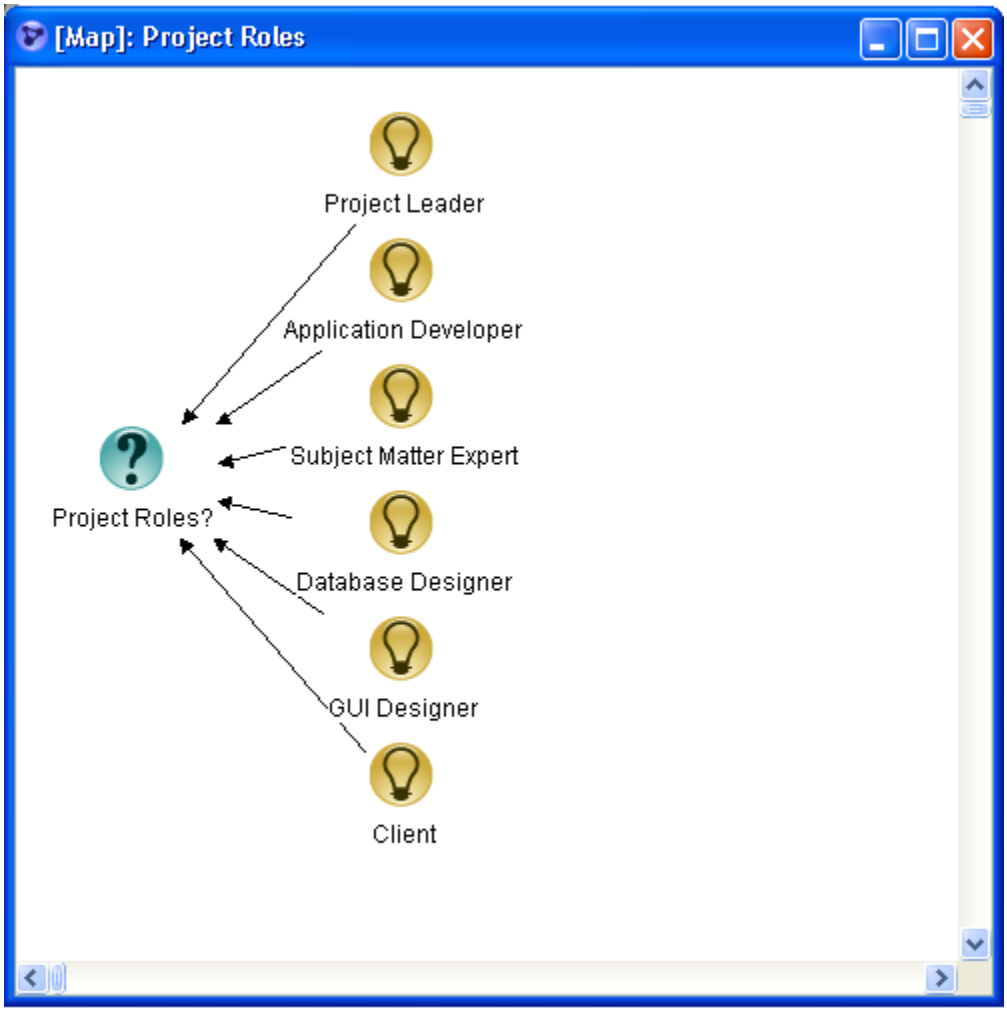
3. Create an *Idea* node for each of the following roles on our example project:

   - Project Leader
   - Application Developer
   - Subject Matter Expert
   - Database Designer
   - GUI Designer
   - Client

4. Link each of the nodes to the *Question* node.

   To do this, move the cursor over one of the *Role* nodes (a blue box will appear around the node), click and hold the right mouse button, and drag the cursor (now with a arrow-line attached to the cursor) to the *Question* Node, then release.

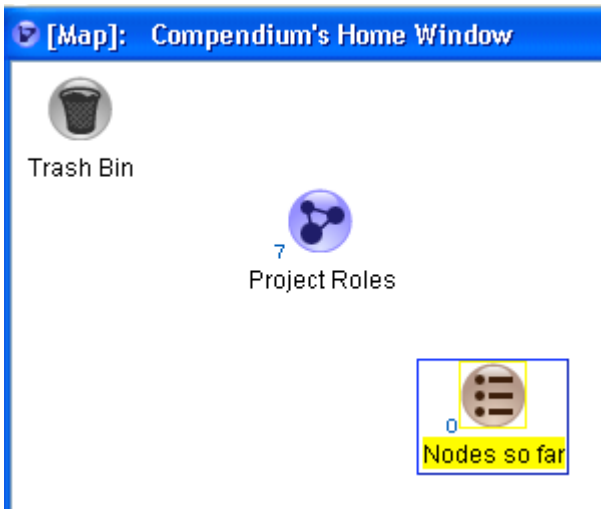
   Repeat for each *Role* node.



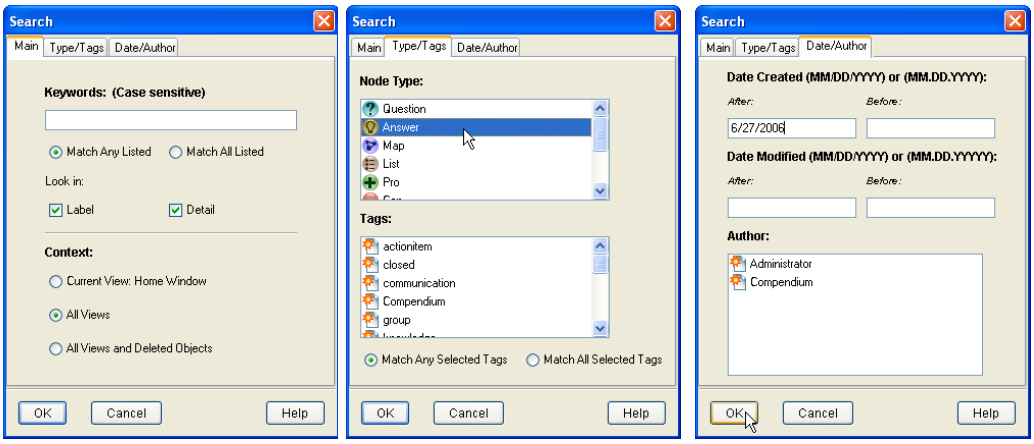
NOTE: Compendium provides an automated "clean-up" tool to make maps look tidy. Choose **View/Arrange** and select 'Left to Right' to see this in action (or press Ctrl-R).

5. Create a *List* view, titled **Nodes So Far** in *Administrator's Home Window*.

   Open that list by double-clicking on it.



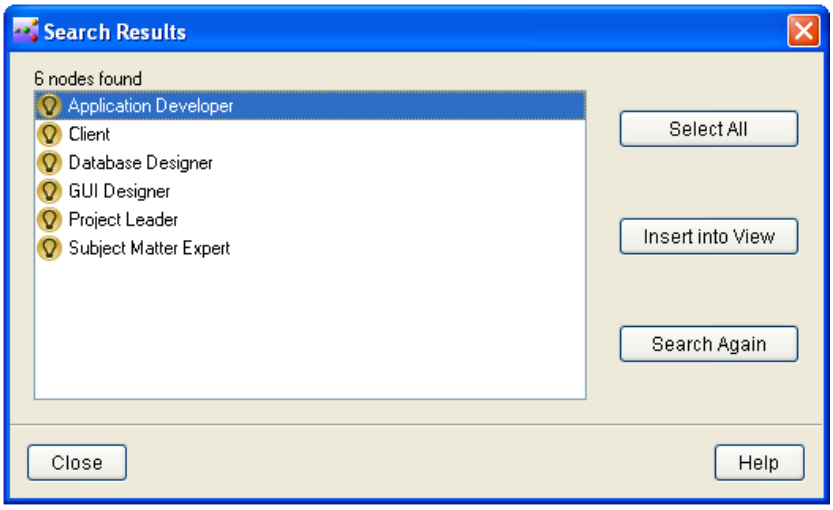
6. Do a search (**Edit/Search**) on all Idea/Answer nodes created after yesterday.



Note: After the **Search** dialogue opens, click the **Type/Tags** tab. To select only Answer nodes, click the Answer icon twice so that only it is highlighted. Then click the **Date/Author** tab.

Enter yesterday's date in Month/Day/Year format (e.g. 11/10/2005) then click **OK**.

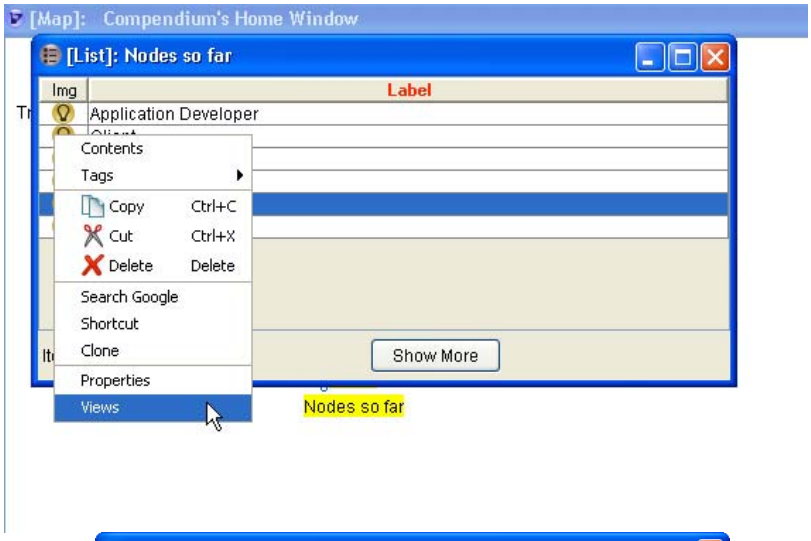
The results of your search should look like this:

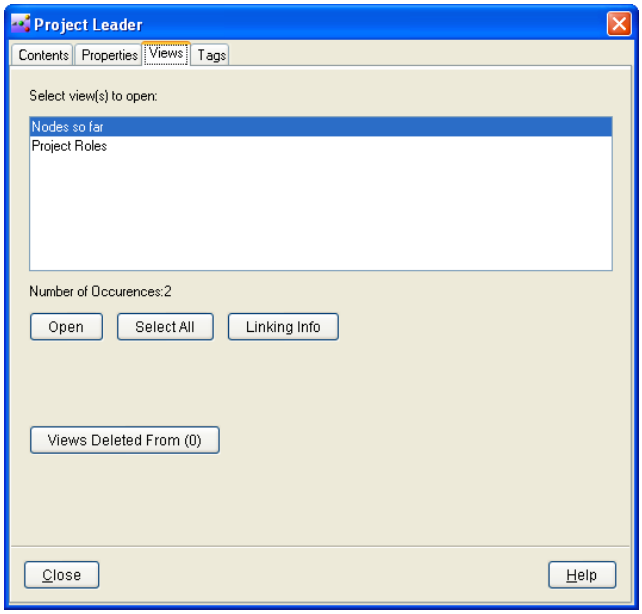


Click on **Select All** and then **Insert into View** to insert the results into the **Nodes so far** list.

7. Now the **Nodes so far** list view looks like this:

8. Right-mouse click on any of nodes, and select the “Views” item. This will show that the node is contained in two maps (the **Nodes so far** list, and the original **Project Roles** map)





Conclusion of this exercise:

You have now learned to create Question, Idea, Map, and List nodes, link nodes together, search for nodes, and insert search results into a view.

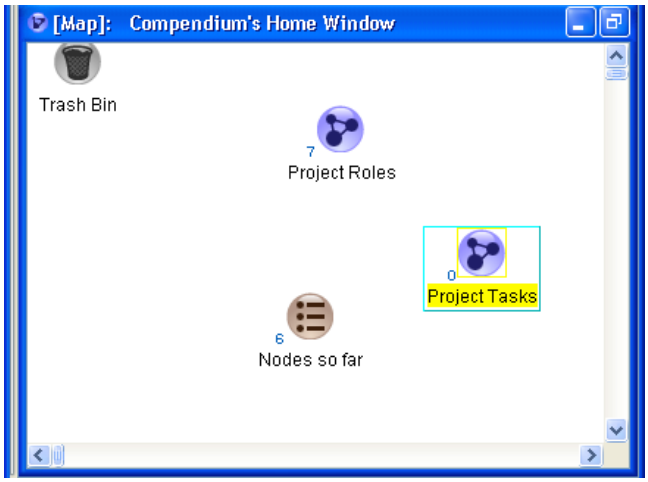
Please return to Chapter 5, Compendium Hypertext Principles, in *Introduction to Compendium - Tutorial*.

Exercise 3: Hyperlinking

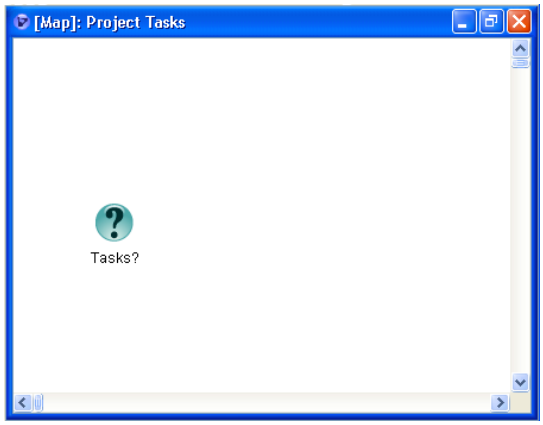
Objective of this exercise:

The objective of this exercise is to gain experience creating associative and transclusive links.

1. Create a second map in your *Home Window*, titled **Project Tasks**.



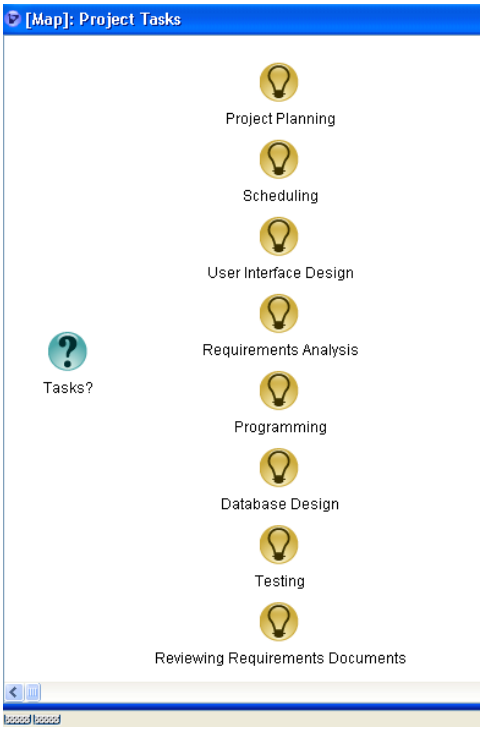
2. Open the new map by double-clicking the map icon. When the **Project Tasks** map is open, create a Question node called **Tasks?**



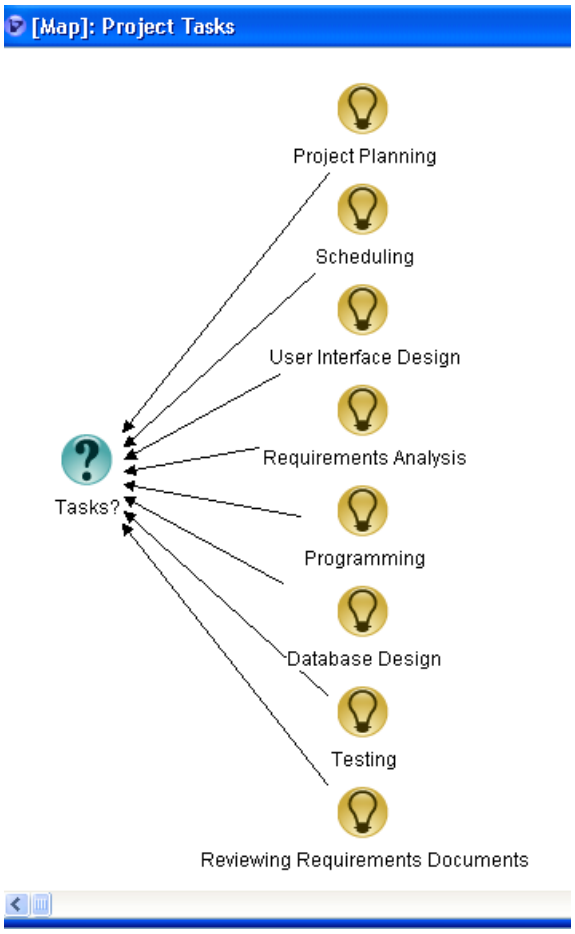
3. List the following activities performed on our project, by creating an Idea node for each:

   - Project Planning
   - Scheduling
   - User Interface Design
   - Requirements Analysis
   - Programming
   - Database Design
   - Testing

- Reviewing Requirements Documents



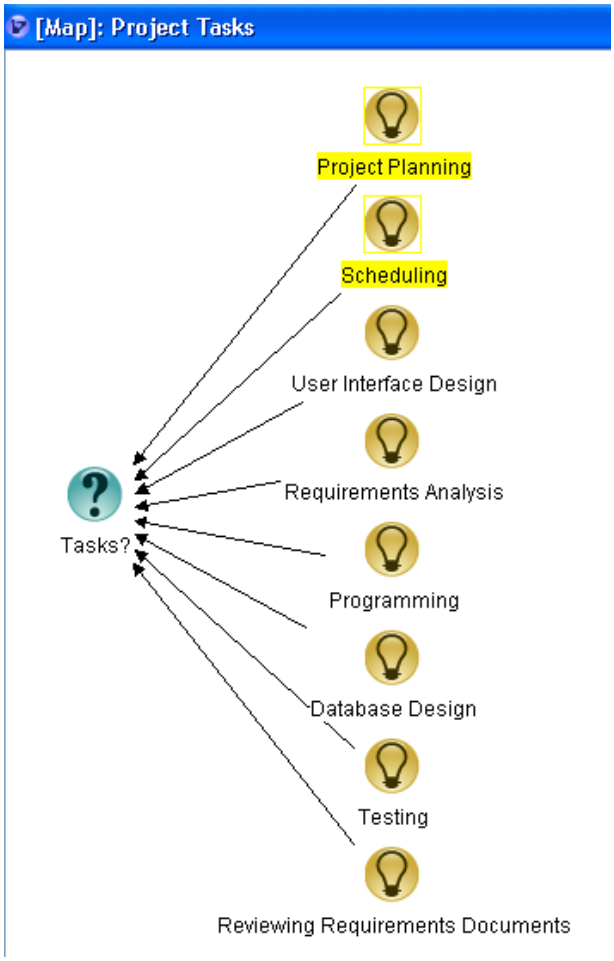
4. Create associative links from each *Task* to the *Question* node.



Note: You can left-click and drag a box around all the nodes you want to link, then Shift-right-click and, holding the right mouse button down, drag to link them all to the **Tasks?** node (hold down the Shift key, click the right mouse button, and drag the cursor to **Tasks?**). Release when you are over the node.

Remember that you can use **View/Arrange** (Ctrl-R) to clean up the map.

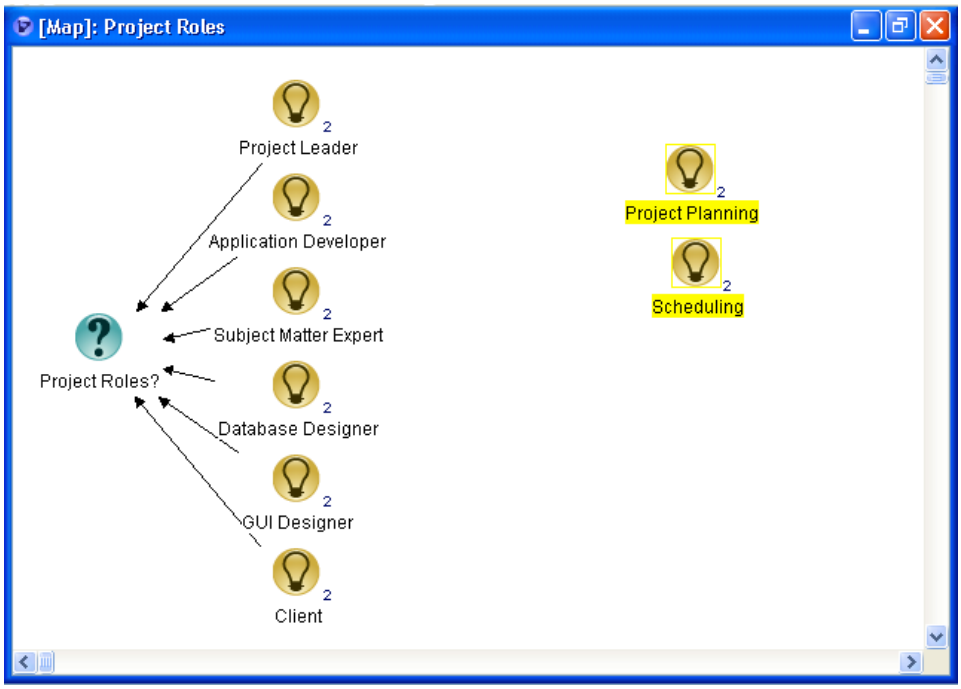
5. Select the activities that are performed by a project leader (**Project Planning** and **Scheduling**). **Copy** (Edit-Copy or Control-C) the selected nodes.



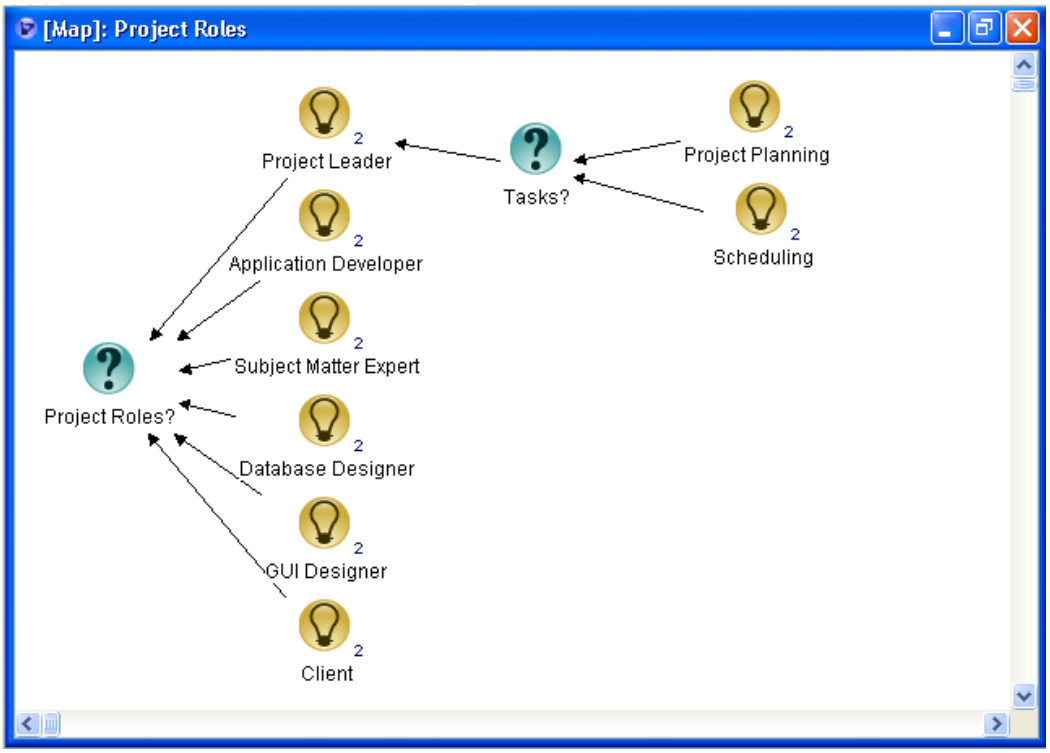
6. Close the **Project** Tasks map to return to the **Home** Window.

   Open the **Project Roles** map.

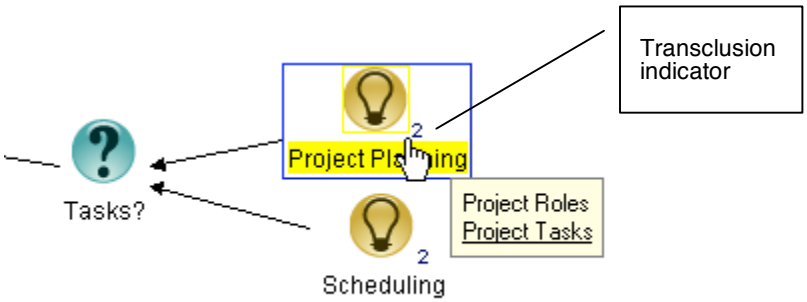
7. Create transclusive links by pasting the nodes you copied in Step 5 into the **Project Roles** map. (Use Edit-Paste or Ctrl-V)



8. Create a *Question* node for the Project Leader role named **Tasks?**, and make associative links from all the Project Leader's tasks to that *Question* node.

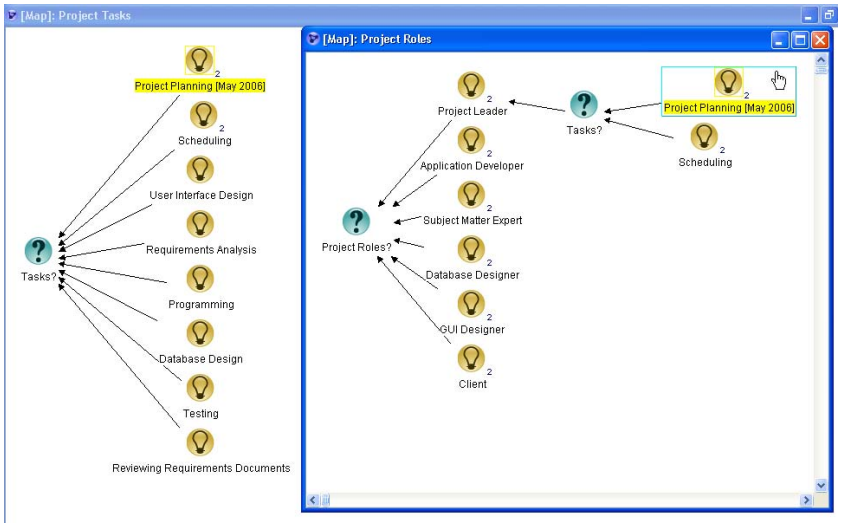


9. Hover the cursor over the small number 2 to the lower right of the icon for the **Project Planning** task. This will show the views that node now appears in (**Project Roles** and **Project Tasks**). Click on the link to **Project Tasks**. The system follows the transclusive link you created to show you the same node in the **Project Tasks** map.



10. Edit the name of the Project Planning node (e.g. add [May 2006] at the end.

11. Use the transclusion indicator as in Step 9 to return to the **Project Roles** map and see that the label of the **Project Planning** node has updated instantly.



Conclusion of this exercise:

You have now learned to create associative and transclusive links.

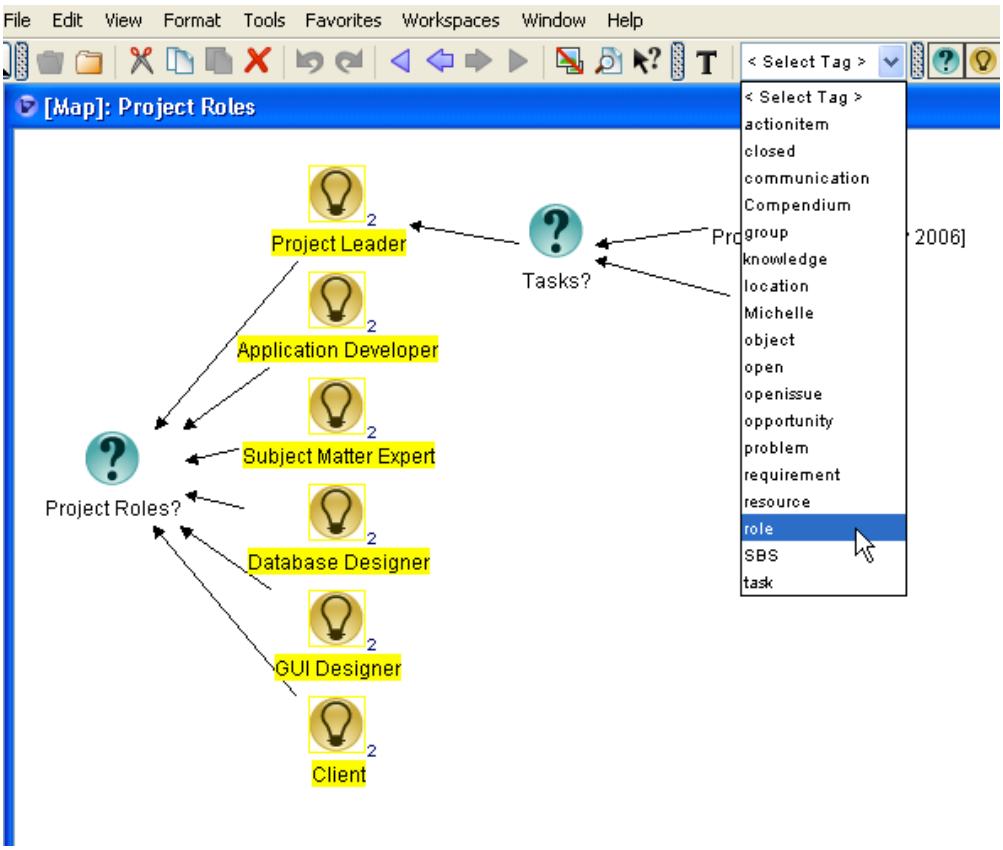
Please return to Section 6, Review of Software Basics, Hyperlinking, in *Introduction to Compendium - Tutorial*.

Exercise 4: Adding 'Tags' to Nodes

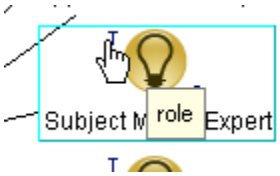
Objective of this exercise:

The objective of this exercise is to become familiar with node tagging techniques.

1. Go into the **Project Roles** map, select all the role nodes, and on the **Tags** menu in the toolbar, select the **role** tag, assigning this to them all.



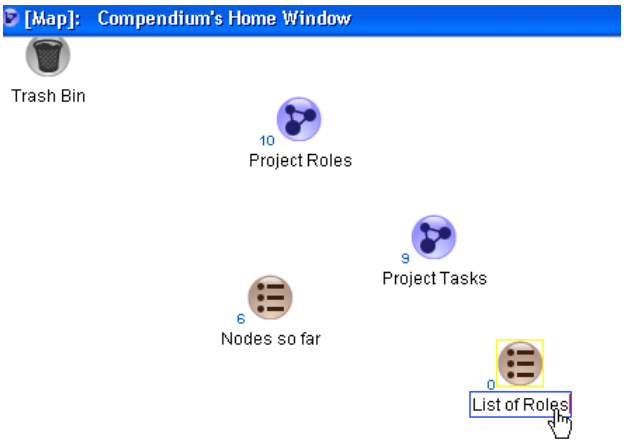
Note that after you **Tag** the nodes, a small **T** appears in the upper left of each node, indicating that the nodes now have Tags. Hover over one of these to see the Tag you've applied.



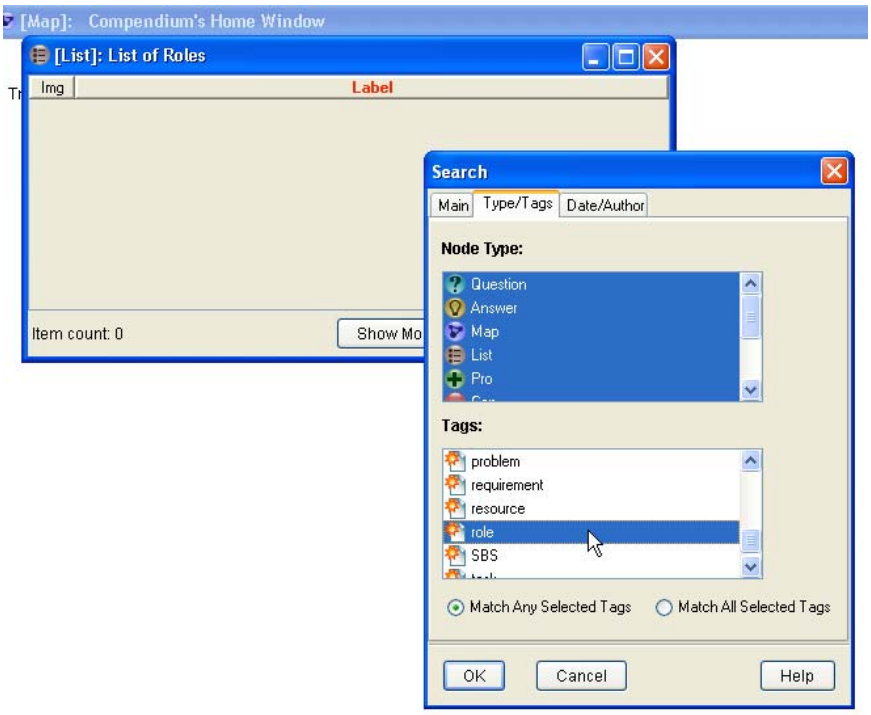
2. Now we'll create an example catalogue built from a Search on tagged nodes.

   Close the **Project** Roles map.

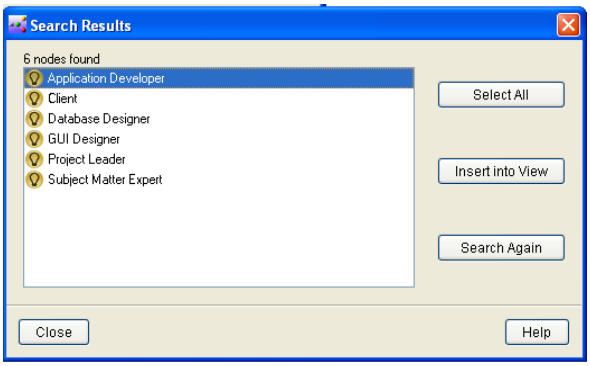
   In your Home Window map, create a list view named **List of Roles**.



3. Open the **List of Roles** view, then do a search on **role** in the **Tags** field (Select **Edit-Search** then click the **Type/Tags** tab. Select **role** in the **Tags** box, then click **OK**).



This displays the **Search Results** dialogue with all the nodes tagged with **role**.



4. Click Select All, then click Insert Into View. This will insert all the nodes tagged with **role** into the **List of Roles** view.

Conclusion of this exercise:

You have now learned to tag nodes and use annotative relationships in searches.

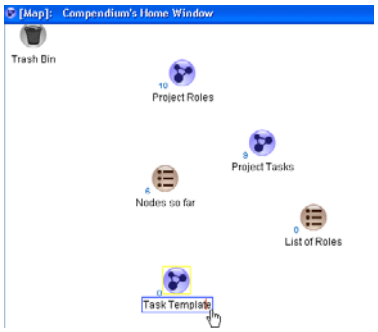
Please return to the Node Labeling section in Chapter 7 in *Introduction to Compendium - Tutorial*.

Exercise 5: Creating a Template

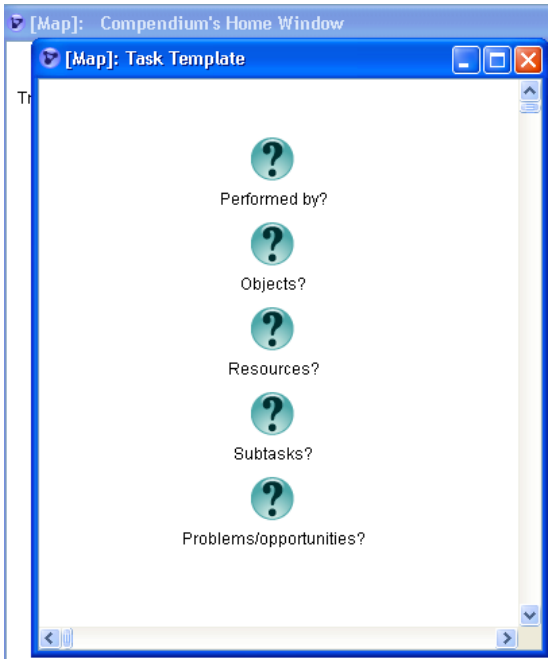
Objective of this exercise:

The objective of this exercise is to practice creating reusable templates.

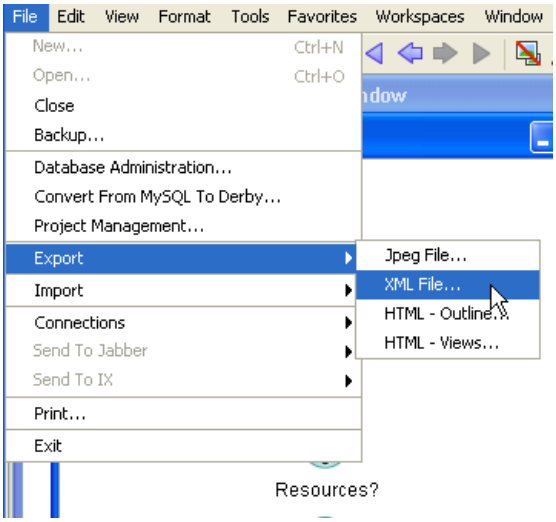
1. Create a new map in your **Home Window** titled “Task Template.”

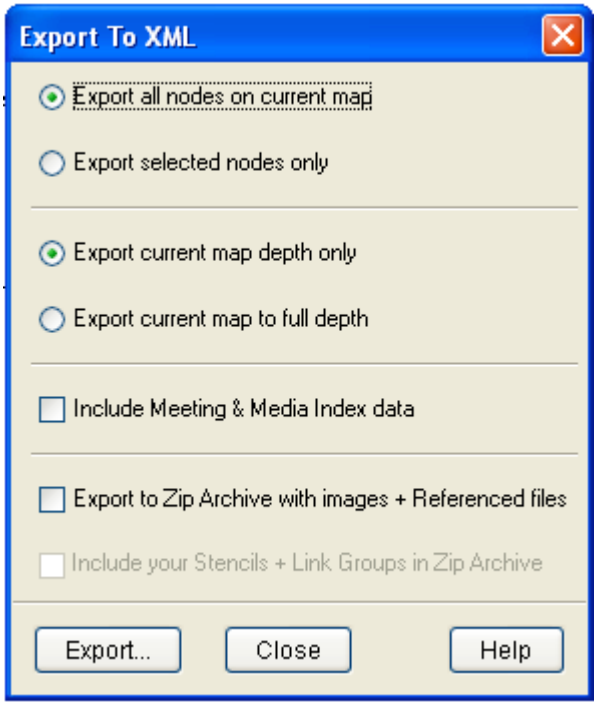


Fill it with these *Task template* Question nodes.


[Map]: Compendium's Home Window
[Map]: Task Template
Performed by?
Objects?
Resources?
Subtasks?
Problems/opportunities?

2. Select **File/Export/Export as XML**. This displays the **Export to XML** dialogue.

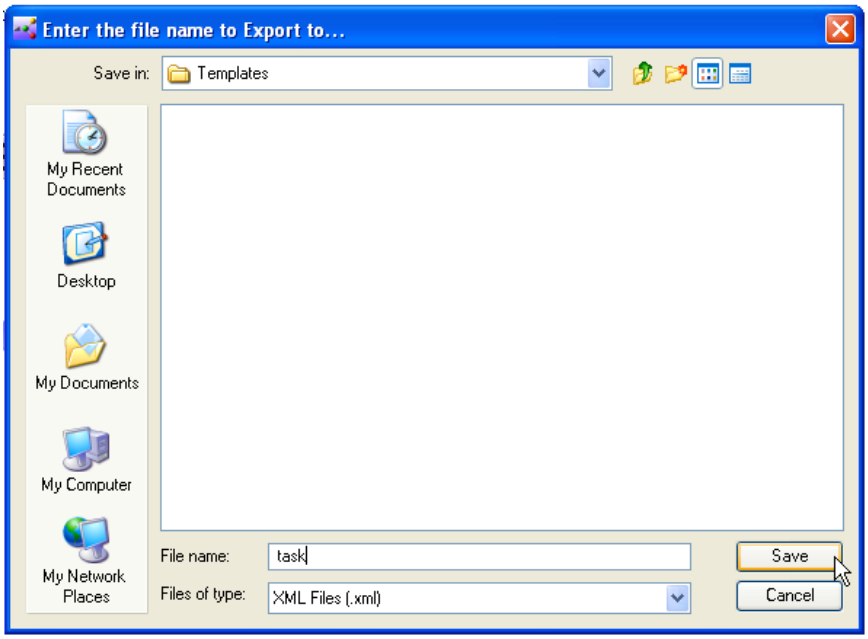




3. Accept default settings (**Export all nodes on current** map and **Export current map depth only**) and click on **Export…**

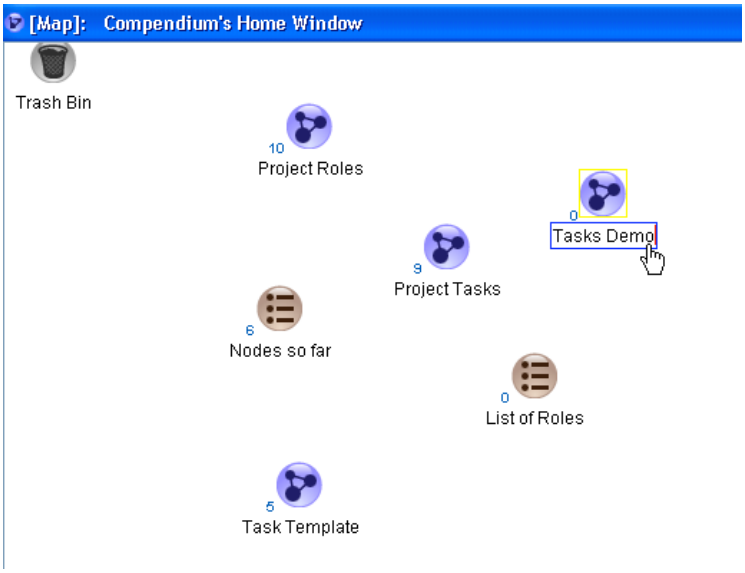
   In the **Choose a file to export to…** dialogue, navigate to the **Templates** directory within your own Compendium installation directory (typically in C:\Program Files\Compendium\Templates).

   Enter **task** into **File name** field and click **Save** to export the map to task.xml.

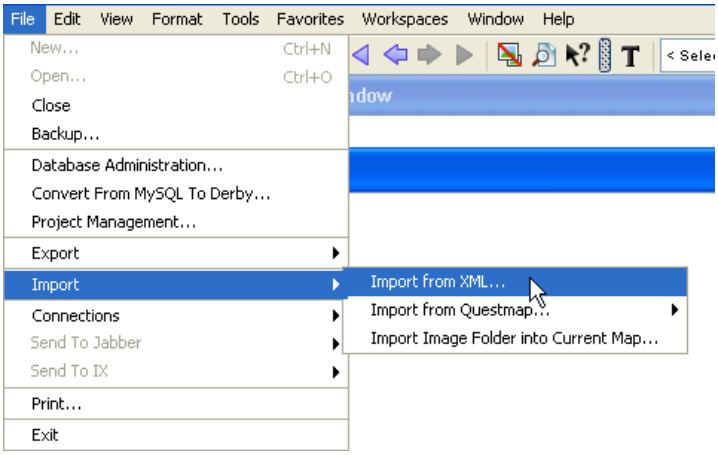


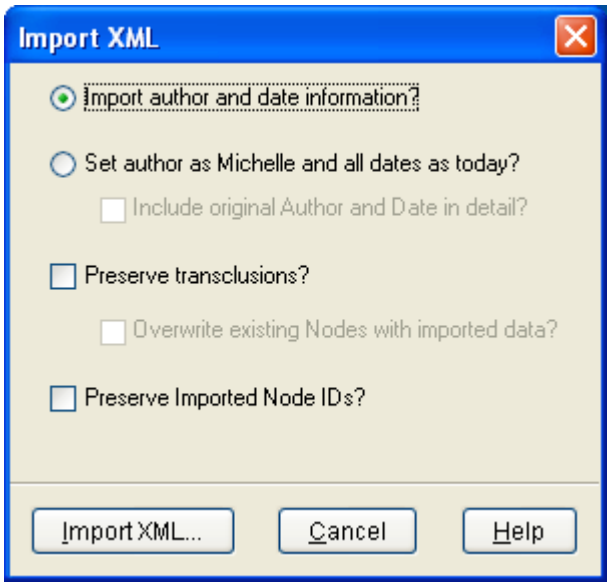
4. You now have an XML file that you can use as a template for creating future maps. To use this XML file as a template you need to import it with the correct import settings.

5. Create a new map in your *Home Window* titled “Tasks Demo” , then open that Map.



6. Select **File/Import/Import from XML**. This displays the **Import XML** dialogue.

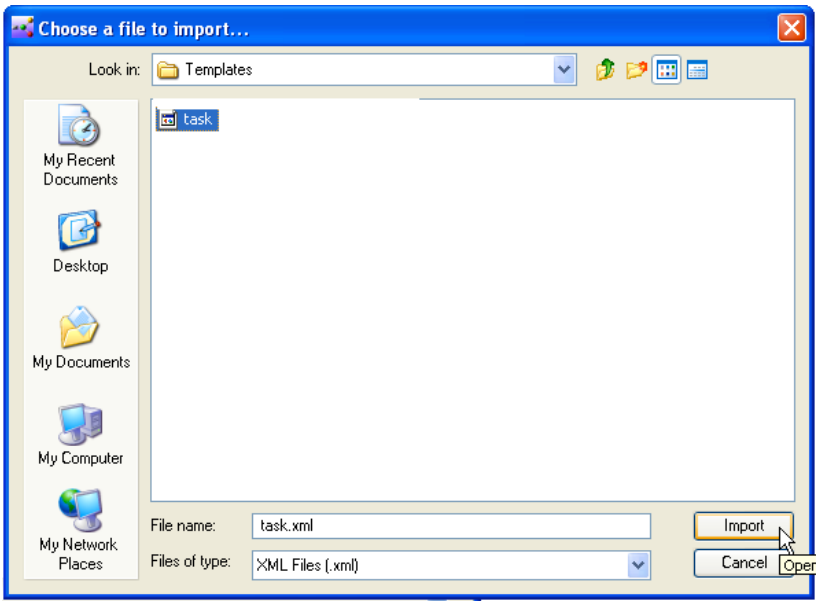




Note: Do not select 'Preserve transclusions?' OR 'Preserve Imported Node IDs?'. Those are advanced options.

7. Click the **Import XML** button.

   In the **Choose a file to import…** dialogue, navigate to the **Templates** folder and select 'task', and then click **Import**. The template nodes will be created in your new "Tasks Demo" map.



Conclusion of this exercise:

You have now learned how to create and import a template.

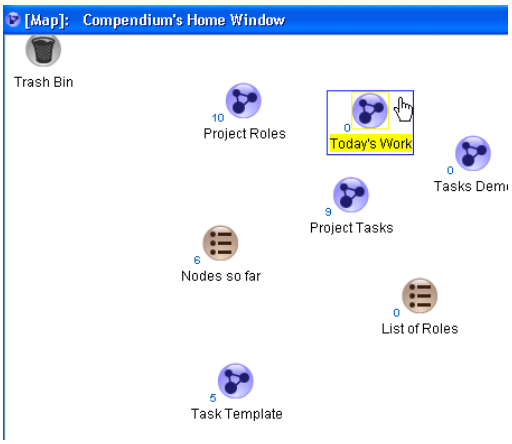
Return to Chapter 7, Publishing Maps on the Web in *Introduction to Compendium - Tutorial*.

Exercise 6: Publishing on the Web – I (Text Outlines)

Objective of this exercise:

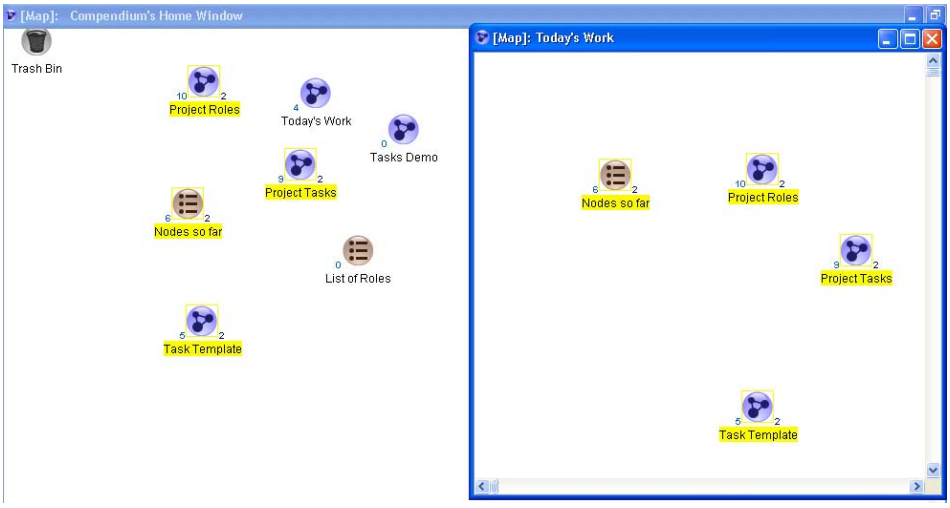
The objective of this exercise is to practice producing web versions of Compendium maps. You can produce textual outlines of maps that can be accessed using any web browser (or loaded into Word). You can also produce interactive graphical web versions of your maps (clickable HTML image maps) that mimic how Compendium looks and operates.

8. In the Home Window, create a new map entitled **Today's Work**.

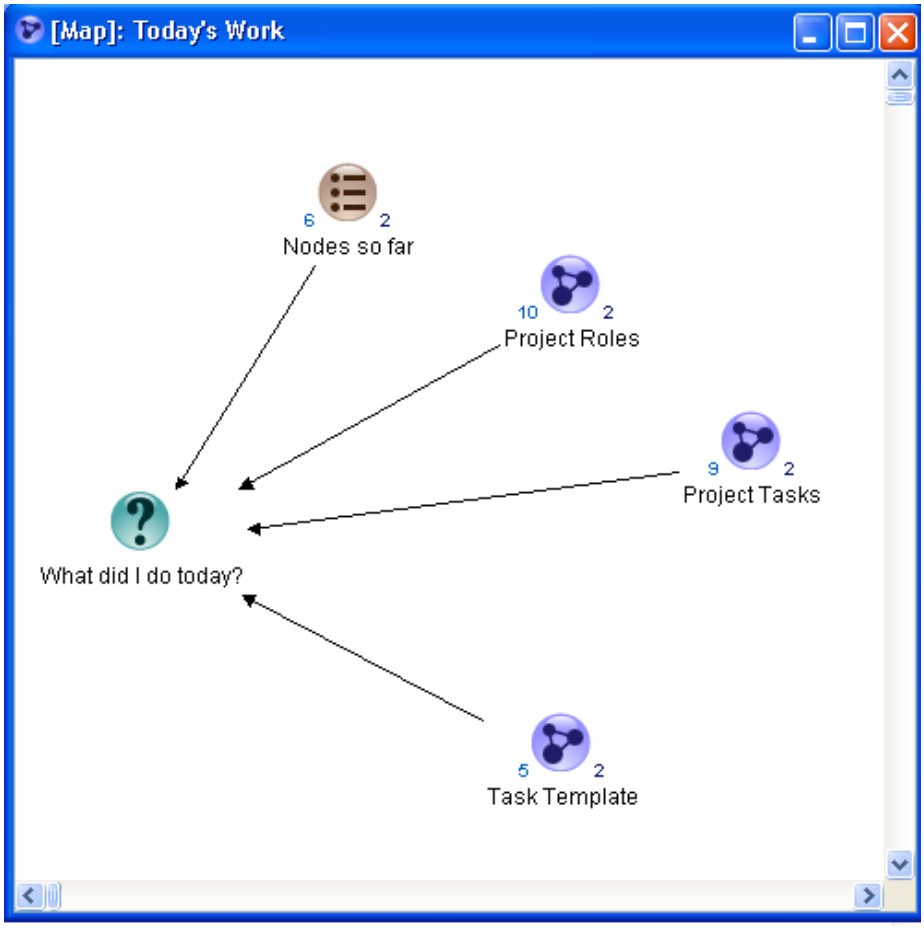


9. Copy the **Project Roles, Project Tasks,** and **Task Template** maps as well as the **Nodes so Far** list. Paste them into **Today's Work**.

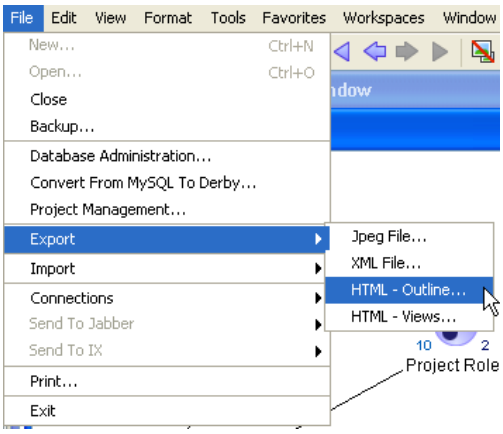
Exercise 6: Publishing on the Web – I (Text Outlines)



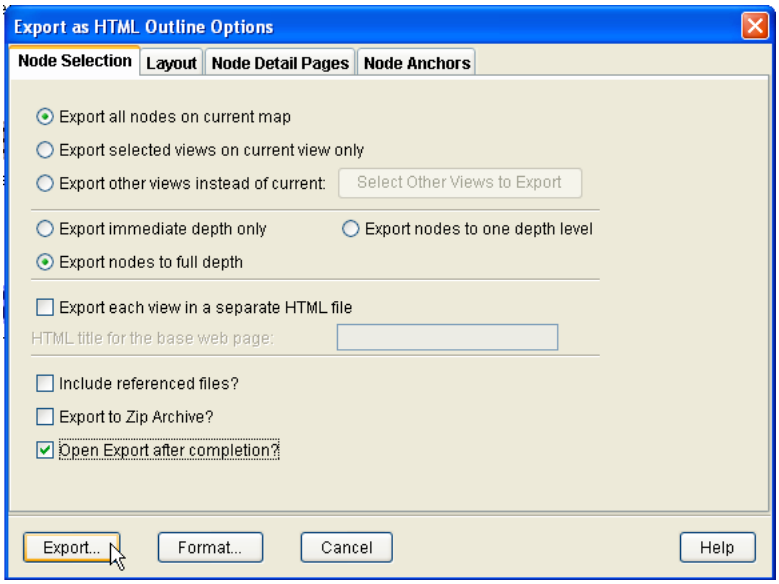
10. Link the four views in **Today's Work** to a Question node labeled "**What did I do today?**"



11. Select **File/Export/Export as HTML – Outline** in the *Today's Work* map. Make sure that no nodes are selected (highlighted) first.

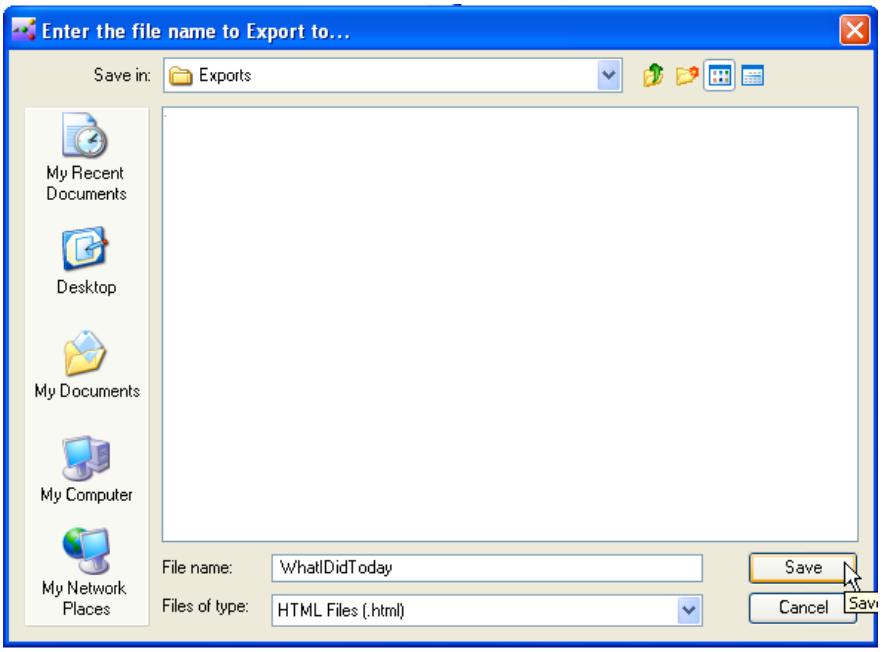


12. Select appropriate options for export. On the **Node Selection** tab, select **Export all nodes on current map** and **Export nodes to full depth**. Also, be sure to check the **Open Export after completion?** checkbox.



Note: If you like, take a moment to explore the various options on the **Format**… screen as well as the other tabs to customize the look of the web output.

13. Click on **Export**… and give the output file an appropriate name (such as “WhatIDidToday”), then click on **Save** to export.



14. Your web browser will open with the export you just created.

Conclusion of this exercise:

You've now published a set of maps as web pages.

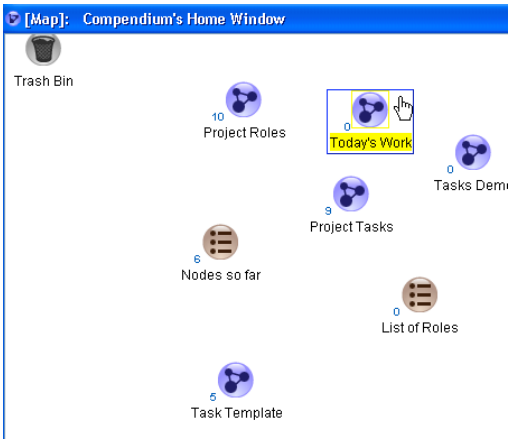
Return to Chapter 8, Applications of Compendium, in *Introduction to Compendium - Tutorial*.

Exercise 7: Publishing on the Web – II (Interactive Maps)

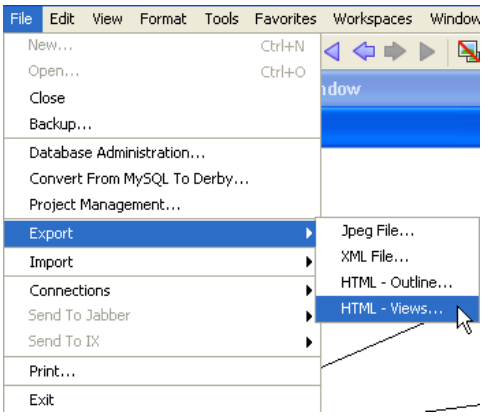
Objective of this exercise:

Following up on the previous exercise, this exercise shows you how to create maps on the web that look and behave just as they do in Compendium.

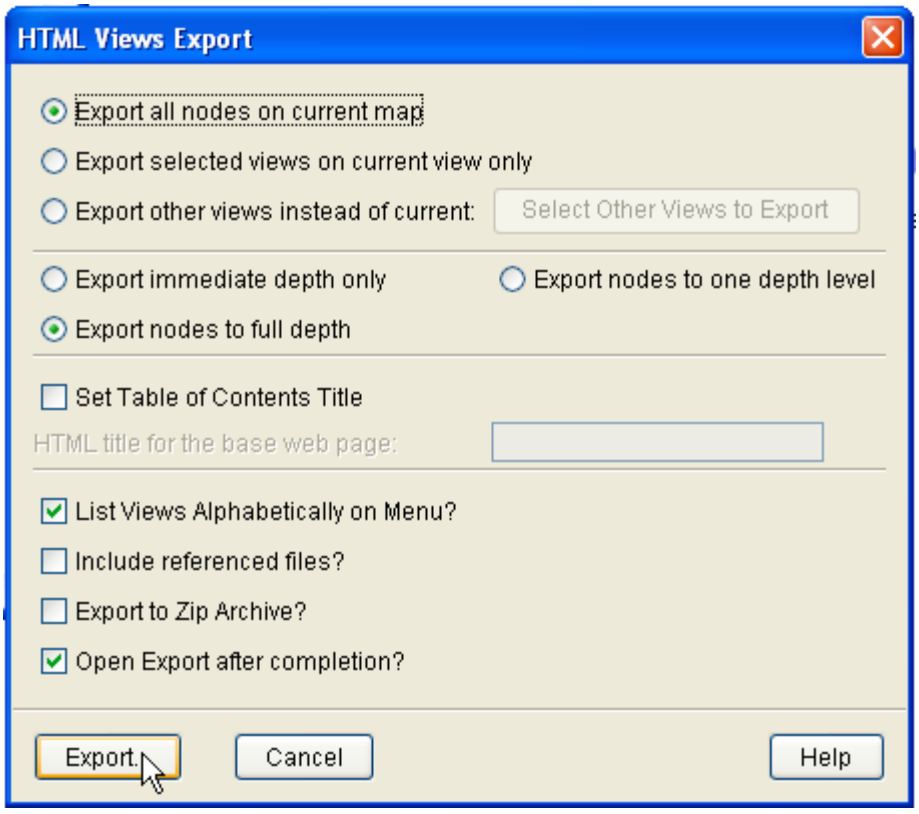
1. Return to the Home Window and open **Today's Work**.



2. Choose File…Export…HTML-Views.

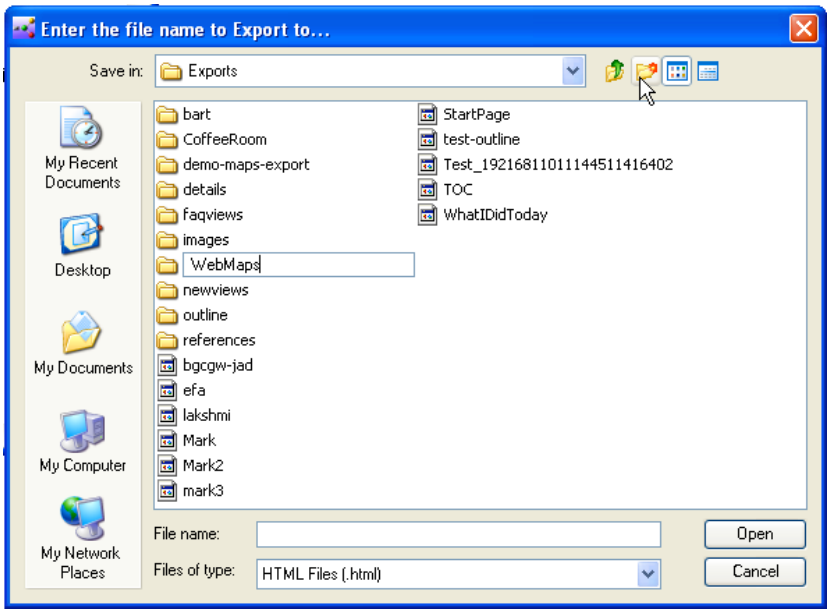


3. Select appropriate options for export: select **Export all nodes on current map** and **Export nodes to full depth**. Also, be sure to check the **Open Export after completion?** checkbox.

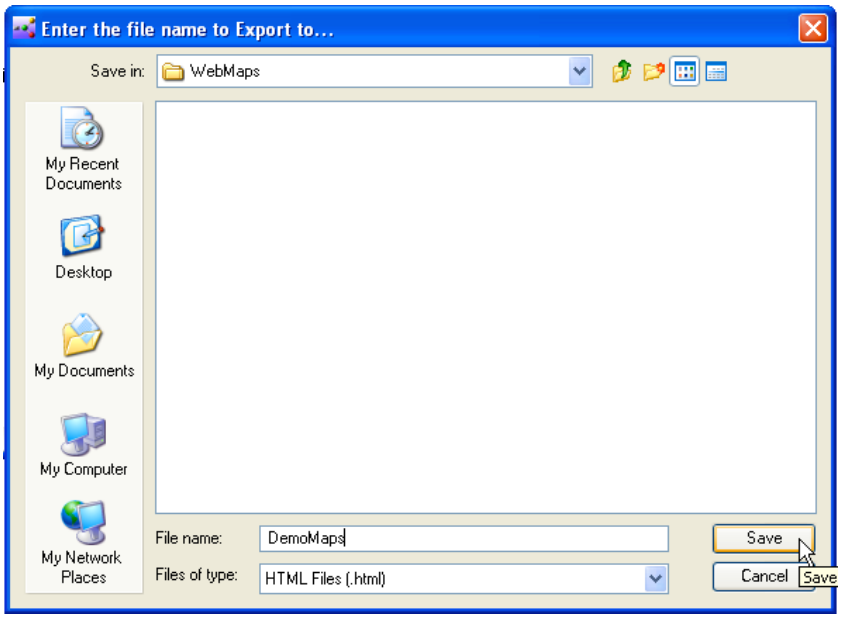


Click **Export…**

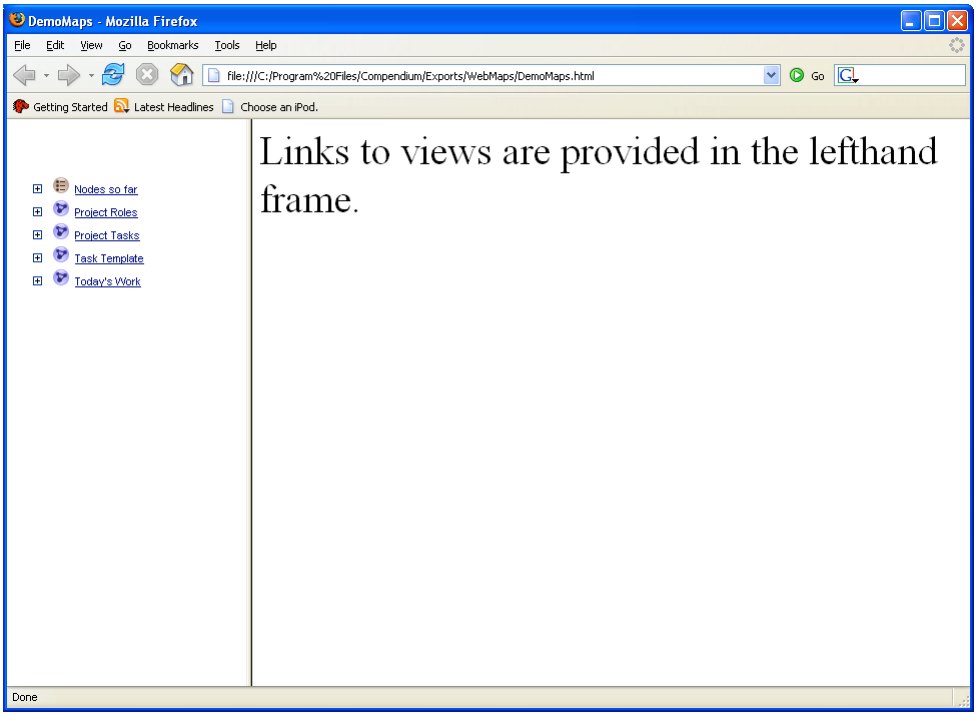
4. Create a new folder in your Exports directory called “Web Maps”.



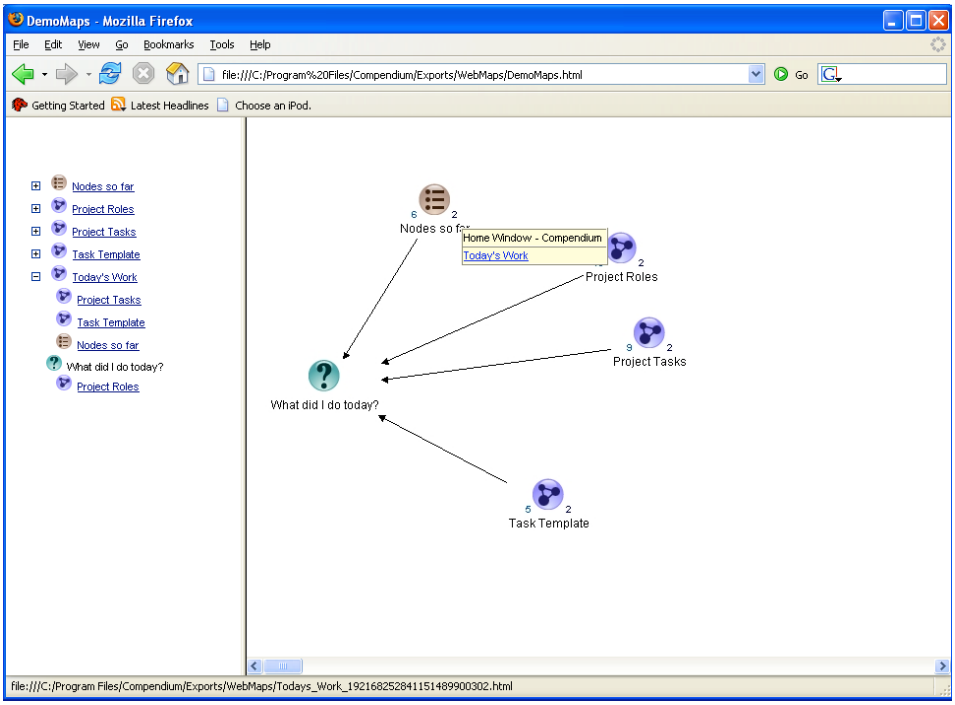
5. Open the WebMaps folder and enter a file name (e.g. "DemoMaps"), then click **Save**.



6. Your web browser will open with the export you just created.



You can click on the underlined view names to display the contents of that view, use the clickable outline symbols (“+” and “-“) to get a listing of the view’s contents, and hover over or click on all the node indicators (tags, transclusions, etc.) just as in Compendium. You can also navigate by clicking once on the map icons in the main map area.



Conclusion of this exercise:

You can now publish your projects (or sections of projects) to the Web in a variety of formats.