

Decision Explorer®

NEWSLETTER



Issue 7 Summer 2001

Welcome!

Welcome to the Summer 2001 edition of the Decision Explorer Newsletter.

This issue continues the themes of learning about people's experiences with Decision Explorer and of getting the most from the software. Of course the training programme is also included as usual, along with other news relevant to our users. Learning from each other is an important part of making the most of our tools and this issue we have an article by Fran Ackermann, one of the original research team and a leading user of Decision Explorer. If you would like to contribute anything from a full article through to simple hints and tips on how you got more from Decision Explorer, please let us know.

We are also very interested to know how you are fitting Decision Explorer models into your day to day work with other applications. Are your models standalone, or are they a part of a wider toolset? If there were three things you'd like Decision Explorer to be able to do, tell us what they are! We expect that the new XML facility will be something that will grow in the years to come but it is also a key part of providing better integration with other software.

As we head into a new academic year, remember that there are many teaching materials on our web site that you can download freely, from the introductory tutorial, through to the User's Guide and the working demo, there is a lot for both the novice and experienced user.

Please remember that we are always interested in hearing from you, so if you have any comments or contributions which you would like to make, please contact us.

Jenny Brightman, Banxia Software Ltd

News

XML - interface with the world

A new feature has been added to Decision Explorer, namely the ability to import and export information using the XML data format. Full details of this feature are given inside this newsletter, but briefly XML is a data transfer format that can be transformed into other data formats. This means that you can now take your maps and use them in other applications. XML is fast becoming a standard that many applications support. We expect to see inter-application transfer using XML to grow over the years to come.

Changes to FTP update service

We have recently completed a major upgrade to our internet provision, and as part of the process we reviewed the services that were being used, and the ease of use that people were reporting to us. Our conclusion has been that most people do not find the internet file transfer protocol (FTP) as easy to use as the web browsing option for file download. Because there is no standard FTP client, and no way of adding comments and information, it is hard to support. Therefore we have closed our FTP servers and switched to web-based downloads.

The new system has been in operation for over a year now, so many people already have the current details. If your install code information mentions FTP access (to either ftp.banxa.com or updates.banxia.com), then you will need to obtain new information next time you want to download. Email info@banxia.com with your current details for the new information.

Ovals for paper-based mapping

Just a reminder that we sell oval-shaped Post-It® pads for oval mapping sessions. These are proving very popular with everyone who tries them. Visit www.ovalmap.com for details.

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Speaking from experience ...

This article was written by Professor Fran Ackermann, University of Strathclyde. Fran has been involved with the development of the cognitive mapping technique since “the early days” at University of Bath. She is one of the original research team who helped to develop the COPE software, which went on to become Decision Explorer. She has used cognitive mapping, both paper based and electronically supported, throughout her working life, she is therefore uniquely placed to offer help and advice on the use of Decision Explorer, in a workshop setting.

While there are a number of different ways of being able to capture contributions and structure them, for example using the Oval Mapping Technique (OMT) or Group Explorer (Eden and Ackermann, 1998) I find myself more often than not working with Decision Explorer in a form of Visual Interactive Workshop (Ackermann and Eden 1999). This is partly as the software allows me to be able to quickly and easily edit, add and delete contributions and relationships, but also because I am able to search [**find**] and analyse the material (either during coffee breaks or sometimes, when appropriate, in front of the group). The groups involved can therefore concentrate on the business at hand and not get distracted by technology or have to worry about making sure that they are writing down their contributions. However, over the years of working in this mode I have found a number of operating procedures that are noted below.

One of the first that comes to mind is in relation to the amount of information presented on a Decision Explorer screen. Although I am comfortable working with very complex maps comprising 40 or more contributions, this can be daunting for participants who are not familiar with working with maps and therefore unsure as to where on the map to start reading or how to navigate around the morass of information. I have found through experience (and there is some good theory to back this up) that starting with around 15-20 contributions on the screen and then slowly building the picture can help manage this sense of being overwhelmed. One way is to use the **Bring** command and gradually drill down the chains of argument developing one chain at a time and allowing what essentially is mental digestion time. Another method that appears to work (although I have only infrequently used this) is that of using sequential views, each showing another level of detail (this mode however is limited to the number of views available which in the full version of Decision Explorer is 40).

Related to this, is the issue of screen space in general. Even with the high-powered projectors available today (and I recommend that if you can you use a projector that supports XVGA i.e. 1024x768 pixels, and has a brightness of 1200 lumens) the number of contributions that can be read on a screen is still limited (even with the building up routines). While it is possible to switch between the fit to view mode to show the overall structure and the normal view to show the text, this can become quite disruptive to a group's thinking process. One means of being able to increase the amount that can be viewed is to turn off the various menus and toolbars and work with an essentially blank screen. I use Decision Explorer with only the view tabs showing and no menus at all. This obviously means being sufficiently familiar with the commands so as to be able to access them without the aide memoir of the menus.

A second benefit from this mode of working is that by not having the menus I tend to use the various short cuts (i.e. hot keys e.g. **Alt Y** for the style selector) that are available. This not only speeds up operations but also more importantly reduces or avoids the disruption caused to the group when a large dialogue box or menu appears on the screen effectively hiding the material beneath it. The only exception to this rule is when I am changing the direction of a link, or adding a new link, as it is useful for the group to see this operation being performed in front of them.

Alongside and related to the consideration of the number of contributions on the screen is the frequency of which you ‘tidy up’ the material. This issue is one I find quite difficult to manage as I am continually wanting to ensure that the view has no links crossing one another and that all of the links are ‘correct’ in a hierarchical sense. Consequently I am frequently tempted to move the contributions around the screen. This continuous moving of contributions however can be disconcerting to the group as they mentally have ‘located’ the contributions and shifting them around can add to the mental complexity of the task. To try to combat this, I forced myself to use the track pad (rather than an external mouse) however unfortunately it didn't take long before I had developed sufficient dexterity to move contributions around easily and quickly and I was back where I started. I now just try to mentally remind myself not to continually move contributions.

Another means of making it easier for participants to manage the complexity of the material is to start with an overview of the material. One analogy for this is the familiar road map as most road maps provide a good overview of the country with all the major cities marked along with the routes between them. If the reader then explores the routes between two cities in more detail, he/she will probably find that it traverses a number of smaller towns not on the overview.

Added to this, is if you have used a colour code to help with navigating around the model (adding to the benefits of having an overview) having a description written on a flip chart in front of the group is helpful. This is also the case with the meeting's agenda. Often, when working with computer based models participants can become concerned about their involvement, and this gives rise to role ambiguities/anxiety. Reviewing the agenda can help reduce this.

Before running a workshop there are a couple of things that are worth considering. The first (which depends on whether a previous form of data collection has been carried out e.g. interviews or OMT) is to ensure that the numbering of concepts does not reveal the proponent. This ensures that members are able to change their mind without penalty. More than one person can also ‘own’ a contribution – which adds to the negotiation process. The **mix** command is helpful here. At the end it is useful to have access to a printer

Finally in relation to the process of facilitating the group's progress. I find that working in around 20 minutes cycles tends to work best. Here you are able to allow the group to contribute and diverge for a period of time and then through reviewing the material converge on an agreed structure. This helps by providing participants with a sense of progress (as each cycle is a milestone) and carried out in conjunction with an agenda written up on a flipchart, items can be ‘marked as done’ and progress easily revealed. This helps to keep the group energised.

XML - what it is and how you use it

For many years, Decision Explorer has been a powerful tool for modelling qualitative information. Users have built many models and they have proved very useful as-is. Once the model is complete, people often want to move parts of it to other applications for display purposes, or to do further analysis. People also often have existing data that they want to be able to create a model from. Banxia has provided a variety of methods to do this, such as copying to clipboard and direct import/export to other applications. Some developers have also used the internal data transfer format to import models, perhaps allowing download from web sites or other applications. Each time the solution is proprietary, and the developers have to work to custom formats.

XML(eXtensible Markup Language) is a data transfer format. It is not a miracle cure, but it is a standardised way of structuring data. This means that if you can get suitable data out of one application in XML format, you can usually use a translator tool (such as XSLT) to transform it into a form suitable for the destination application. This means that transfer of information becomes a lot easier when all applications support XML. Of course, there is no point in taking an XML file with the company accounts and trying to transform them into a cognitive map - the data has to be appropriate - but if you have data that is essentially a map with ideas and links between them then you should be able to use XML as the medium for transfer into Decision Explorer.

Current support

To use XML you must have Decision Explorer 3.2 or later. At the present time, this is only available as a Beta test version, though it should be quite usable for general use. You can download a program that will patch an existing FULL licensed version of Decision Explorer (not usable with Student or Viewer versions at this time).

XML supported in Decision Explorer 3.2

- Export of complete model to XML
- Export of selected concepts to XML
- Import of the Link styles (hold shift in link style editor to get load/save buttons).
- The complete model includes all views, styles, link styles, concepts, links.

How to use it

The XML output is available using the standard Decision Explorer Export Wizard. Simply select the File menu Export

item, and then select the XML option on the first page. Click Next, and you will get the XML wizard page.



Leaving all the check boxes ticked, selecting All views, and All concepts will give you a complete XML representation of the model. If there are parts that you do not wish to have, then you can of course turn the appropriate options off, but XML is designed to be flexible, and your target application should be able to ignore unwanted data.

The data in the XML file is very specific to Decision Explorer, and you will probably need to use a transform application (perhaps using XSLT) as an intermediate stage before importing.

Future support

As use of the XML data increases, we will be adding new capabilities. If you have particular requirements, please let us know. We intend to add the ability to import the XML data, and also to import and store arbitrary (unknown) attributes against concepts and links. For example an identifier may be output by an application so that it knows which concept relates to its own internal data structures. When re-exported, the identifier will allow a proper merge to occur. Note that the file format in Decision Explorer may be changed when this information is stored, losing compatibility with prior versions of Decision Explorer.

Technical Information

More information about XML in Decision Explorer, including a download of the test version with XML support and details of the schema used by Decision Explorer 3.2 are available on our web pages at <http://www.banxia.com/dexplore/xml/>. These pages will be updated as the software develops.

Feedback

We very much welcome comments from readers, news of publications, suggestions about articles that you would like to see in this newsletter and any articles that you would like to submit for publication.

If you have any suggestions or would like to contribute an article then please contact Jenny Brightman, at Banxia Software Ltd, by telephone on +44 (0) 870 787 2994 or by email to news@banxia.com. Thank you.

Toolbar customisation

Decision Explorer has always had the ability to customise the toolbar, but not many people use the facility. Here are two good reasons for doing so! The new **full screen mode** enables you to maximise the map display area, but turning it off requires you to remember either the 'full' command or the Alt-W+F keystroke. If you use the Control->Toolbar->Selection item you can add a new toolbar. Then use Control->Toolbar->Customise to add the Full button (at the bottom of the View items list). Now you can just click to switch modes! The **continuous listing** button at the bottom of the List items allows you to turn off the auto-clear when a command starts, allowing you to build up a longer text view for export.

Events and training courses

If you would like more information about any of the events listed below, please contact either ourselves (Banxia Software Ltd) or the appropriate event organiser. If you are not sure who is the right person to contact, then please just call us or email to training@banxia.com, we will be able to help you. Please check our web pages for the most up to date information.

Tuesday 4th - Thursday 6th September. Bath, UK.

Operational Research Society Conference.

Come and talk to us at the OR conference. We will have a stand in the exhibition area and will be happy to talk to you about any of our products.

Thursday 27th September. London, UK.

Academics "Come & See" day.

A free event for an invited audience of lecturers, researchers and research students. Two sessions, repeated during the day, where you are invited to come and talk about and try out Decision Explorer.

Friday 28th September. London, UK.

Commercial users "Come & See" day.

A free event for an invited audience of managers and management consultants. Two sessions, repeated during the day, where practitioners are invited to come and talk about and try out Decision Explorer.

Monday 29th October, London, UK.

An introduction to Decision Explorer

One-day, hands-on workshop, run by SdG Associates, taking you through the theory and practice of cognitive/ ideas mapping and the use of Decision Explorer.

Monday 5th November. London, UK.

Advanced Decision Explorer workshop.

One-day workshop, tutored by Prof. Fran Ackermann, concentrating less on the mechanics of using Decision Explorer and more on the wider picture of how you would use Decision Explorer and cognitive mapping in a workshop setting, as part of a decision support intervention.

Thursday 29th November. London, UK.

Academics "Come & See" day.

A free event for an invited audience of lecturers, researchers and research students. Two sessions, repeated during the day, where you are invited to come and talk about and try out Decision Explorer

Friday 30th November. London, UK.

Commercial users "Come & See" day.

A free event for an invited audience of managers and management consultants. Two sessions, repeated during the day, where practitioners are invited to come and talk about and try out Decision Explorer.

Monday 10th December, London, UK.

An introduction to Decision Explorer

One-day, hands-on workshop, run by SdG Associates, taking you through the theory and practice of cognitive/ ideas mapping and the use of Decision Explorer.

Recent publications

Ackermann, F. and De Vreede, G.J. (2001) European Research on Group Decision Support Systems: Introduction to the Special Issue, *Group Decision and Negotiation*, 10,1 1-4

Ackermann, F. and Eden, C. (2001) 'Contrasting Single User and Networked Group Decision Support Systems' *Group Decision and Negotiation*, Vol 10, 1 pp 47-66

Eden, C., Williams, T., Ackermann, F. and Howick, S. (2000). "On the nature of disruption and delay", *Journal of Operational Research*. 51, 291-300

Eden, C. and Ackermann, F. (2000) 'Mapping distinctive competencies: a systemic approach' *Journal of Operational Research Society*, 51, pp 1-9

Eden, C. and Ackermann, F. (2001). *Group Decision and Negotiation in Strategy Making*, *Group Decision and Negotiation*, 7 in press.

If you have any Decision Explorer related publications, please let us know.

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Reseller contact details

If this newsletter has been set to you by one of our resellers, their contact details will appear below, otherwise the space below will be left blank. If you are in any doubt as to who your contact is or who your local reseller is, then please contact Banxia or visit our web pages.

Reseller contact details: