coopMaps

A visual approach to documenting and analysing co-operative movements

Version 0.92

<u>User Guide</u>

Product PR0: Co-opMaps - Overview

Co-opMaps: A suite of products supplied exclusively by Principle 5.

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Product PR0 UG0E: Co-opMaps - Introduction

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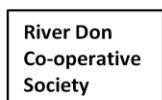7.3 Software development

Section 1. What is Co-opMaps?

Co-opMaps is a suite of software tools and documentation which has been especially designed and developed to provide co-operative analysts and scholars with a standardized, visual, diagrammatic approach to documenting parts or aspects of the co-operative movement. Co-opMaps' **co-operative movement structure diagrams** ("Co-opMaps diagrams" for short) symbolically depict **enterprises** and **relationships** between enterprises.

Co-opMaps classifies **enterprises** into 5 primary types:

- co-operative enterprise
- non-co-operative mutual enterprise
- social enterprise
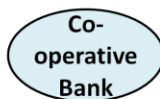- private enterprise
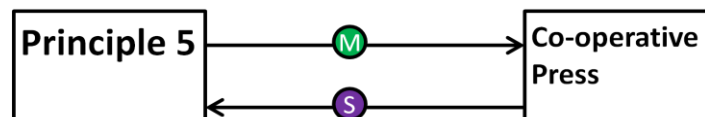- state enterprise.

Figure 1.1: Primary classification of enterprises

A relationship is represented by an arrowed line connecting 2 enterprises.

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Figure 1.2: A very simple Co-opMaps diagram: 2 enterprises connected by 2 relationships

Co-opMaps classifies relationships into 7 types:

7 types of relationship: type is represented by a "badge"

Relationship Type G: "has a reserved governance role in" — ⓖ →

Relationship Type I: "holds an investment in" — ⓘ →

Relationship Type L: "has an asset lock to" — ⓛ →

Relationship Type M: "is a member of" — ⓜ →

Relationship Type O: "owns" — ⓞ →

Relationship Type P: "is a partner member of" — ⓟ →
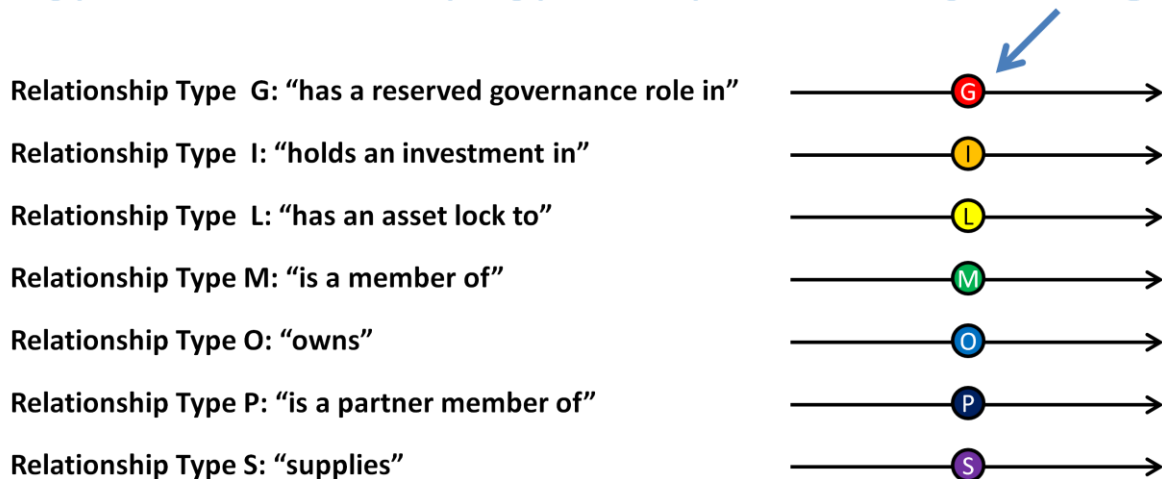
Relationship Type S: "supplies" — ⓢ →

Figure 1.3: Classification of relationships

A **Co-opMaps diagram** models a part or aspect of the real-world co-operative movement, by symbolically depicting enterprises and their key characteristics, and the relationships between those enterprises, also with their key characteristics.

Here is a real-world example diagram showing enterprises and relationships. (The further details featured represent deeper levels of analysis, and will be explained later in the User Guide).
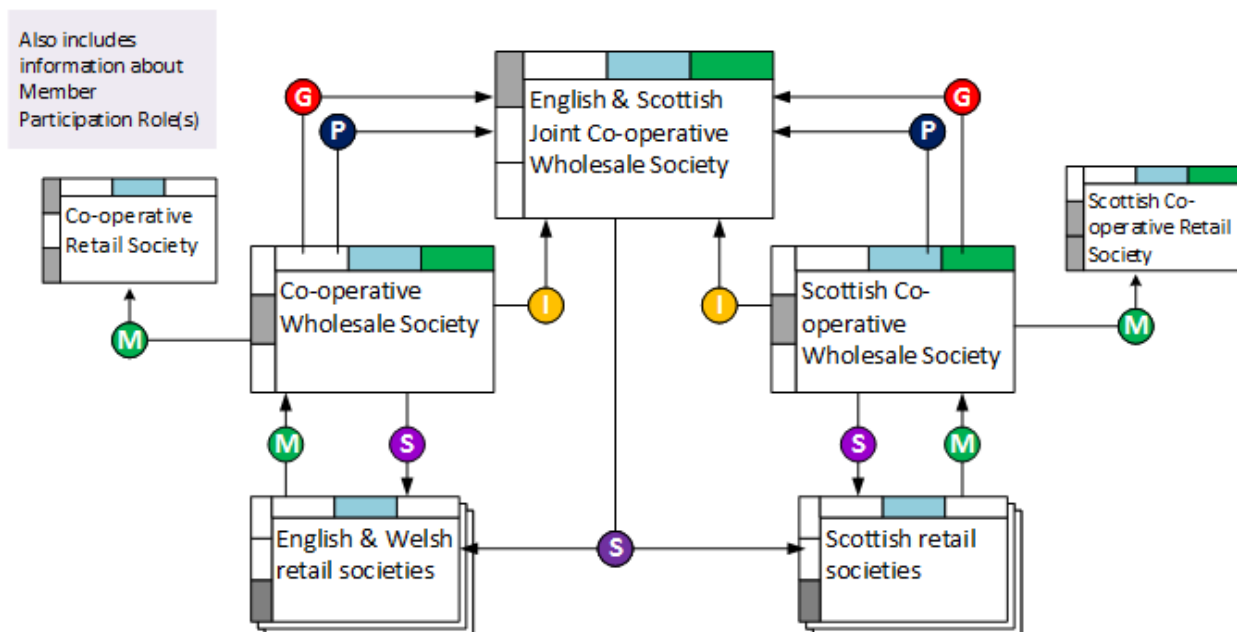

Figure 1.4: Example Diagram: Scotland/England & Wales Federal Structure 1924-3

For more examples, see UG0C This is Co-opMaps (PowerPoint Presentation, available to download from the public area of www.principle5.coop).

Section 2. Who will find Co-opMaps useful?

Anyone who can benefit from producing, developing, viewing and/or analysing **co-operative movement structure diagrams** will find Co-opMaps useful:

• 	academics, students & writers who study co-operation & co-operative movements
• 	co-operative consultants who prepare documentation and proposals
• 	educationalists of the co-operative movement
• 	historians and archivists of the co-operative movement
• 	journalists who specialize in co-operation and the co-operative movement
• 	staff who work for apex or federal-level bodies, including at an international level
• 	lawyers specializing in co-operative law
• 	co-operative politicians and legislators

As users of Co-opMaps, all of the above (and indeed anyone else) will be able to develop Co-opMaps diagrams and then incorporate them into their own publications or other disseminations, such as websites, books, papers in academic journals, presentations, pamphlets, leaflets, newspapers and magazine articles.

Furthermore, Co-opMaps users may post any of their diagrams to **Co-opMaps Worldwide**. From there, the diagrams will be viewable and printable by all members of Principle 5.

To register as a Co-opMaps user, become a member of Principle 5 at the **member services level** which provides for access to the Co-opsMap product(s) which you wish to use. Application forms are available at www.principle5.coop.

Section 3. Co-opMaps Worldwide

Any completed Co-opMaps diagram which conforms to the Co-opMaps Draft Standard may be posted to Co-opMaps Worldwide, where it will be viewable and printable by any member of Principle 5. In the initial version of Co-opsMap Worldwide, diagrams will be uniquely referenced only by:

serial number within **project** within Co-opMaps **user.**

In later developments, diagrams will also be classified and referenced by **scope**, by **period** and by **user-defined aspect.** Co-opMaps Worldwide will thereby accumulate models of parts or aspects of the global co-operative movement, set in the past, present or future.

Over time, the **global diagram store** will accumulate documentation of **historical, contemporary** and **predictive** (past, present and future (or proposed)) co-operative movement structures, so that its value as a research tool will continuously increase. The catalogue will be classified by national territories, economic sector(s), and by user-defined categories.

Send in your diagrams as soon as they have been completed and reviewed!
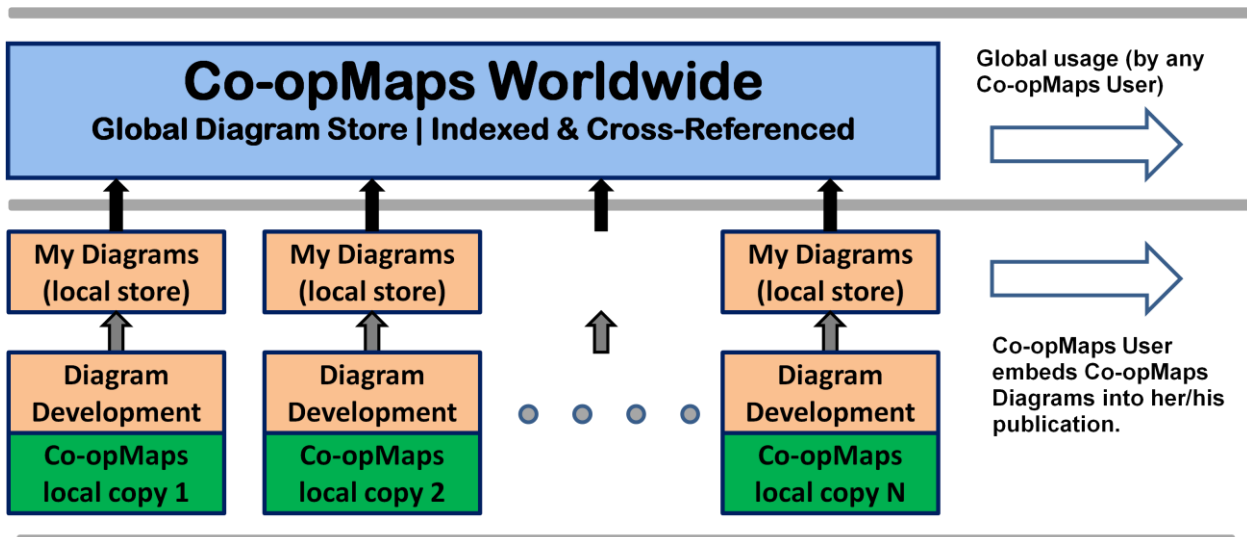

Figure 3.1: Local & Worldwide Diagram Storage & Access

Section 4. Features of Co-opMaps Diagrams

4.1 Draft Standard

All Co-opMaps diagrams conform to the **Co-opMaps Draft Standard,** which is a set of rules, norms and recommendations for **diagram management, referencing, naming, size, orientation, content, symbols** and **layout.** The major advantages of having a standard are:

- Software tools can be designed and configured to assist the user in the efficient production of specialist diagrams which can be readily and accurately understood by fellow co-operators who are also familiar with the standard
- All Co-opMaps users share a common symbolic language for their interpretation.

Principle 5 has originated the Co-opMaps Draft Standard (at version 0.92). It is designated "draft" because for now, no-one else within the co-operative movement has been involved in developing the standard.

The Draft Standard is held in the following Co-opMaps User Guide documents:

UG2A Draft Standard
UG2B Definition of Terms
UG2C Example Enterprise Depictions
UG2D Example Relationship Depictions
UG2E Example Abbs Notes & Refs

4.2 Diagram Scope

Each Co-opMap diagram has a defined **scope,** which has 3 dimensions:

- a **geographic extent** over specified international, national, regional or local territor(ies)
- an **economic extent** over one, several or all of the economic sector(s) which occur within the geographic extent
- a **user-defined aspect,** as applicable within the geographic and economic extents.

4.3 Diagram Period: Past, Present or Future

A Co-opMaps diagram is a **static** depiction. It does not show processes or any other form of change within one diagram (a snapshot rather than a video; a map rather than a flowchart). The diagram applies to a period of time over which its content remains unchanged.

A diagram which models over a period which is entirely in the **past** is termed **"historical";** one which spans the **present** is "**contemporary";** and one which models a period which is entirely in the **future** is **"predictive"** (or, sometimes, a **"proposal").**

Even though a diagram must be a static depiction, an evolutionary process can still be depicted effectively, by producing a series of diagrams, each of which has the same scope but a different period. For example, the history of the Co-operative Bank, from its origin as the CWS Loans & Deposits Department around 1868, can be traced through to the present day.

4.4 Diagram Size & Orientation

There are 7 options for diagram size & orientation. Widescreen is suitable for electronic publication (having proportions close to those of typical present-day laptop screens). The other 6 are based on widely-recognized print medium standards:

Widescreen 16:9	288 x 163 mm		
A3 Landscape	420 x 297 mm	A3 Portrait	297 x 420 mm
A4 Landscape	297 x 210 mm	A4 Portrait	210 x 297 mm
A5 Landscape	210 x 148 mm	A5 Portrait	148 x 210 mm

4.5 Terminology

Terms used in Co-opMaps are defined, explained and cross-referenced in

UG2B Definitions of Terms as used by Co-opMaps.

which is a component of product 2, the **Co-opMaps Draft Standard.**

Section 5. Co-opMaps Editions

There are 3 alternative Co-opMaps **editions.** Each edition comprises a software tool for developing Co-opMaps diagrams which conform to the Co-opMaps Draft Standard.

5.1 Co-opMaps Economy Edition

 As the name suggests, Co-opMaps Economy is inexpensive, but nevertheless it provides the functionality and features which are essential in order to produce good quality diagrams with minimal expenditure of drawing effort.

Co-opMaps Economy not only relieves its users of the considerable effort of learning and understanding all the details of how to drive a general-purpose diagramming tool. By providing **ready-made symbols**, it also saves the effort of deciding how to represent the objects and characteristics of interest. Users can therefore focus their efforts on analysing the co-operative movement.

Co-opMaps Economy uses Microsoft **PowerPoint** as a diagramming platform, so PowerPoint must be present in the IT environment into which Co-opMaps Economy is to be installed.
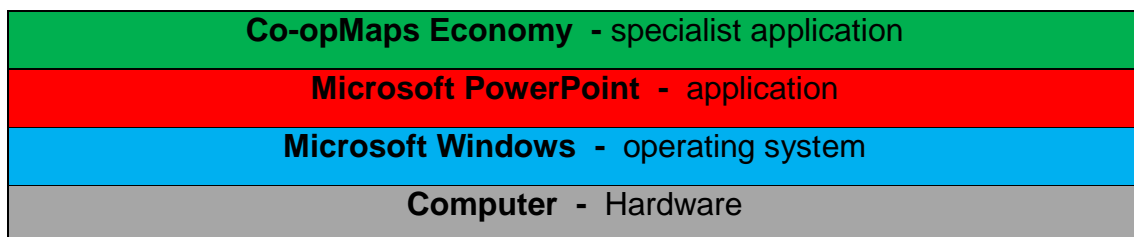

Figure 5.1. Co-opMaps Economy: system architecture

For details of Co-opMaps Economy, including required system environment, memory, installation, configuration and getting started, see section 30 - 31 **UG3A Co-opMaps Economy: Getting Started.**
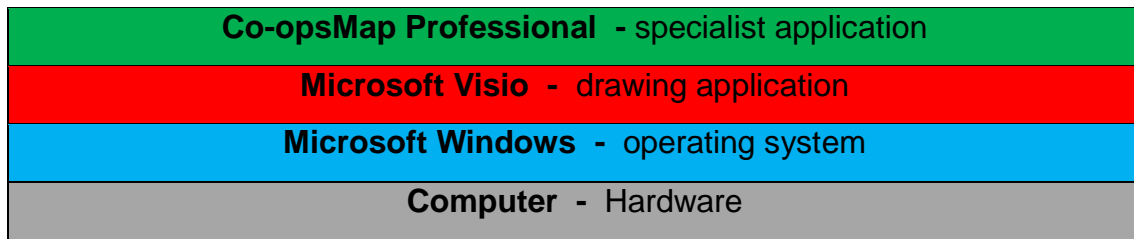
Co-opMaps Economy does not currently use the internet.

See **UG3 PR3 Co-opMaps Economy,** available to Principle 5 members subscribing at **service level 3 or higher.**

5.2 Co-opMaps Professional Edition

Co-opMaps Professional is a software tool (an alternative to **Co-opMaps Economy**) which also has full functionality to support the **Co-opMaps Draft Standard**. It generates diagrams of high visual quality, and it also has several features which increase ease of use and protection against the effects of user errors.

Co-opMaps Professional uses Microsoft **Visio** as a diagramming platform, so Visio must be present in the environment into which Professional is to be installed.

Co-opsMap Professional - specialist application
Microsoft Visio - drawing application
Microsoft Windows - operating system
Computer - Hardware

Figure 5.2. Co-opMaps Professional: system architecture

For details of Co-opMaps Professional, including required system environment, memory, installation, configuration and getting started, see sections 40 - 41 **UG4A Co-opMaps Professional: Getting Started.**

Co-opMaps Professional does not use the internet.

See **UG4 PR4 Co-opMaps Professional,** available to Principle 5 members subscribing at **services level 4 or higher.**

[section to be provided from version 1.0 onwards]

5.3 Co-opMaps Open Edition

[section to be provided from version 1.0 onwards]

Section 6. How is Co-opMaps used?

The Co-opsMap products which are used to develop diagrams are **Co-opMaps Economy** and **Co-opMaps Professional.** They have similar architectures. Their structure and the process which the Co-opsMap user follows are given below.

6.1. Co-opsMap Economy / Professional / Open Modules

- A range of **DIagram Templates** – starting points for creating diagrams
- A range of **Enterprise Galleries** – files which contain symbols for variants of enterprises
- A range of **Relationship Galleries** – files which contain symbols for variants of relationships between enterprises
- A range of **Symbols Keys –** files which decode all of the symbols which may be used in Co-opsMap diagrams
- A **Control Panel,** which enables the user to select, open, use and close modules.
- **User Guide.**

6.2. Core process

Leaving out much detail, the essential process followed by the Co-opMaps user is to construct a visual model of a real-world aspect of the co-operative movement:

1. Create a new diagram by starting from a copy of a chosen template.

2. Identify a real-world enterprise, or set of enterprises, together with basic characteristics.

3. Open an appropriate enterprise gallery and browse for an enterprise symbol with the required characteristics.

4. Copy the symbol to the diagram, to become an enterprise object.

5. Label the enterprise object with its real-world name or definition.

6. Repeat steps 2 to 5, for several enterprises

7. Identify real-world relationships between the enterprises depicted, together with basic characteristics.

8. Open an appropriate relationship gallery and browse for components of a relationship symbol with the required characteristics

9. Copy the required relationship components to the diagram, to form a relationship object.

10. Repeat steps 7 to 9, for several relationships.

11. If more enterprises and/or relationships remain to be modelled, repeat steps 2 to 10

accordingly.

12. Add notes and/or references to the diagram, as appropriate. Finalize the diagram's Supplementary Information.

13. Review, adjust, finalize and incorporate the diagram into the publication.

14. If desired, post the diagram to Co-opMaps Worldwide (always recommended).

Section 7. Future Development

7.1. A living product, not a finished project

The Co-opMaps suite is evolving, so it has numbered **versions** going forward in time. Each product evolves in alignment with the overall versions of the suite. The current version is 0.92.

The first version of **Co-opMaps Draft Standard** is version 0.92. **Co-opMaps Economy Edition version 0.92** complies with Co-opMaps Draft Standard version 0.92. **Co-opMaps Professional** will first be issued at version 1.0, which is intended to include full functionality and features, including a wider range of diagram templates.

Flaws such as logical errors, software errors, inconsistencies, documentation errors and other shortcomings will undoubtedly arise. Principle 5 would like to work with all co-operative organisations and individual co-operators who are interested in helping to promote and improve diagrammatic analysis, design and documentation of co-operative movements. Please contact Principle 5 with your error reports, queries, comments and suggestions, and especially if you would like to participate in a Co-opMaps user forum. (steve.wagstaff@bcs.org.uk).

7.2. Specification development

Developments under consideration for future versions of Co-opMaps include:

- Organisation of diagrams into collections
- Identification of overlap of diagrams which are modelling the real world
- Functionality for Intellectual Property considerations – copyright, creative commons symbols and text
- Addition of referencing, search and selection functions to Co-opMaps Worldwide
- Representation of governance structures
- Representation of organisation units
- Representation of legal form
- Recording of key data items for enterprises (eg. aims/objectives, turnover, number of members, trades/businesses, social purpose) – accessed by clicking on an enterprise symbol

7.3. Software development

Developments under consideration for future versions of Co-opMaps software tools are:

- Extension of the existing software tools as and when needed for the developments listed in section 7.2 above.
- Quarto, folio and letter diagram page sizes
- Improved integration of Co-opMaps Worldwide
- Improved user interface for greater ease of use
- Translation of software and user guide into another language
- Porting of Co-opMaps to a web-based open source diagramming platform.