



## User Guide

### For Southbeach Modeller v4

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A companion guide, MyCreativity Reference, is available describing the integrated idea generation engine and the associated rules, macros, cues and reporting language. This allows power users to customize or template virtually any visual thinking and problem-solving approach.

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# 1 Introduction

Southbeach is a unique visual modelling tool (desktop application) that supports 100s of creativity, problem-solving, lateral thinking and idea generation approaches.

The software comes bundled with carefully curated ideation scripts and rulesets, 3000 application-specific tags/tag groups, and over 100 pre-configured grids/charts/swimlane/pool templates.

Containing an embedded rules (ideation) engine (MyCreativity), the software is both scalable and extensible, allowing power users to customize or template virtually any visual thinking and problem-solving approach.

To kick-start creative thinking and to inspire the development or refinement of any visual model, the application also provides an extensive library of over 200 'lists' of reusable elements, covering a wide range of topics.

At the most basic level, Southbeach allows the user to:

- Capture a situation or system in a simple diagram/model
- Using a small number of symbols and a straightforward approach, then:
- To develop the model and significantly enhance/expand its usability
- Generating ideas from the model based on installed or custom user rules
- Access the model as a report or a script as well as a diagram
- Using a wide range of powerful tools and analytical approaches
- Which are built-in to the application in a consistent and holistic way
- Scaling from the generalist to the specialist

Why the name? The early ideas for Southbeach Notation were drawn in the sand on South Beach, Miami, Florida, June 2005. The name was memorable and seemed to stick.

We are improving Southbeach all the time. Register your copy with a valid email address to be kept up to date. We welcome your feedback. Click on the Feedback icon (telephone) in the toolbar or write to [feedback@southbeachinc.com](mailto:feedback@southbeachinc.com)

## 1.1 NEW in v4

Southbeach v4 is a major upgrade over v3. As well as numerous usability enhancements, there are several new modules and a significant expansion of installed content:

- Tags, now with over 3000 application-specific tags/tag groups (Toolbox - Tags)
- Grids, Over 100 pre-configured grids/charts/swimlane templates (NEW Toolbox - Grids)

- Lists, Over 200 topic-specific 'lists' of reusable elements (NEW Toolbox - Lists)
- Creativity, 100s of carefully curated ideation scripts and rulesets (Toolbox - Creativity)
- Cues, new 'combinatorial' creativity engine (Toolbox - Cues)

The following is a summary of new features in v4:

Fixes	Various	All reported v3 bugs fixed
NEW	Canvas	Trim canvas feature
NEW	Content	100s of carefully curated ideation scripts and rulesets
NEW	Content	3000 application-specific tags/tag groups
NEW	Content	Improved set of standard tags in new models
NEW	Content	Over 100 pre-configured grids/charts/swimlane templates
NEW	Content	Over 200 topic-specific 'lists' of reusable elements
NEW	Creativity	Choices of rulesets and cues are persisted in environment
NEW	Creativity	Copy rulesets from library to 'model' creativity
NEW	Creativity	Expanded and updated rulesets
NEW	Creativity	New 'Cues' panel and MyCues directory
NEW	Engine / MyC	! (not) now supported for MR in MyReports
NEW	Engine / MyC	Creativity (idea generation) limits set by user
NEW	Engine / MyC	Several new derived 'pattern' keywords, see engine guide
NEW	Engine / MyC	Underscore ( _ ) matches spaces in tag groups/tags
NEW	Explorer	Drill down into 'lists' (.txt files) as with models/sub-models/elements
NEW	Export	Export all resource tree/branches as hierarchical markdown lists
NEW	Grids	Quick grids replaced by new grids panel/tree, user customizable
NEW	Lists	Create agents from list
NEW	Lists	Jackson Pollack from list
NEW	Lists	New 'lists' panel/tree and MyLists directory
NEW	Lists	Paint agents from list
NEW	Notation	Visual effect for 'Dysfunctional' finalised for both agents and effects
NEW	Search / Find	Tags, Lists, Creativity, Cues and Assist tools are now searchable
NEW	Select	Invert selection
NEW	Select	Select causes/implications
NEW	Select	Select exact match

NEW	Select	Select like me
NEW	Shortcut keys	Expanded shortcut keys, see shortcuts guide
NEW	Tags	Create grid 'boxes' from any tag group
NEW	Tags	Create grid 'columns' from any tag group
NEW	Tags	Create grid 'rows' from any tag group
NEW	Tags	Extended tags library and functionality
NEW	Tags	Spaces now supported in tag groups/tags
NEW	Toolbar	Creativity 'extent' (laser, wider etc.) in toolbar
NEW	Toolbar	Cues on/off in toolbar (turns on/off cues ideation)
NEW	Toolbar	Engine on/off in toolbar (turns on/off ideation)
NEW	Toolbar	Expanded and updated research/web/patent sources
NEW	Toolbar	Follow causes of highlighted agents (root cause)
NEW	Toolbar	Follow effects of highlighted agents (implications)
NEW	Toolbar	Highlight 'patterns', w/ many patterns supported
NEW	Toolbar	Search model via substring, exact string or notation pattern
NEW	Tools	More harmful
NEW	Tools	More useful
NEW	Tools	Randomize counter effects
NEW	Tools	Randomize effect direction
NEW	Tools	Randomize perspective
NEW	Tools	Shuffle agents
UX	Assist	Improved organisation of the assist tools panel
UX	Browser	Internal browser removed, now always uses external browser
UX	Explorer/Tags	Now allows for faster entry of multiple new tags
UX	Toolbar	Toolbar icons wrap correctly for smaller window

## 2 Use cases

Southbeach visual models provide a consistent approach to describing any 'situation', whether this resides in a system, a product, a service, a process, an organization, an industry, a community or the wider society.

Typical use cases include:

Argument / case making	Expert interview	Perspective alignment
Best practices	Failure analysis	Problem statement
Blueprinting	Futures / horizons	Requirements analysis
Business motivation	Goal planning	Root cause / risk
Contradiction analysis	Ideality / trimming	Scenario planning
Course correction	Impact analysis	Stakeholder interview
Design review	Improvement projects	Structured interview
Dilemmas / tensions	Innovation process	Voice of the customer
	Options workshop	Wicked problems

### 2.1 Who uses Southbeach?

Southbeach appeals to visual thinkers and structured problem-solving enthusiasts alike. Southbeach is mind-mapping on steroids for problem/solution knowledge. Southbeach Modeller is a Swiss army knife for creativity.

Users of Southbeach include strategy and digital consultants, business and engineering professionals, enterprise architects, business process analysts, innovation managers, organisational change leaders and TRIZ practitioners.

Applicable in both technical and non-technical fields, Southbeach Modeller has supported clients - and the consultants who work with clients - in a wide range of personal, professional and industrial contexts.

Southbeach has been used in many diverse projects, including:

- Product innovation
- Service and enterprise design
- Root cause analysis
- Investigations & legal process
- Business process change

- Enterprise transformation
- Systems dynamics modelling
- Coaching and counseling
- Writing a book!

Southbeach Modeller scales from the simplest to the most complex design problem. The approach allows deep introspection of any global, societal, corporate or personal challenge. Southbeach is at home with wicked problems, contradictions and dilemmas.

Southbeach diagrams can capture and resolve the perspectives and distinct requirements of everyone involved in a project: team members, clients, partners and stakeholders.

## 2.2 Methods supported

Southbeach was developed by studying 100s of creativity techniques, problem-solving methods, and associated diagrammatic conventions. They include:

5Whys	Cause/effect	SCAMPER
7Questions	DfSS	Scenarios
8Ds	Futures	Six Sigma
Affinity	Horizons	Six Thinking Hats
Backcasting	KANO	SWOT
Before&after	Lean	Theory of constraints
Blue ocean	PEST	TRIZ
Boston Matrix	Pros and cons	Value analysis
BSC	Root cause analysis	What if?

Using a single 'unified' visual style (Southbeach Notation), the software can depict the essential characteristics of well-known diagrams. The advantage of this over a general-purpose 'drawing package' is that every Southbeach model has a well-defined meaning (semantic). Furthermore, the rules engine included in Southbeach (MyCreativity) can generate 'directions' (new intellectual property, ideas, reports) from any Southbeach model.

If you are familiar with any or all of the following approaches/diagrams, you will adapt quickly to Southbeach:

9Boxes	Decision tree	Reality chart
Affinity diagram	Dialog map	Scenario map
Argument map	Force-field diagram	Sign diagram

Boston Matrix	Influence map	Star burst
Causal loop	Mind map	SWOT chart
Concept map	Polarity chart	TRIZ model

## 2.3 Detailed functionality

At its core, Southbeach empowers users to capture a situation or system in a simple diagram or model, utilizing a limited set of symbols and a straightforward methodology. From there, users can refine the model, greatly amplifying its functionality. They can generate ideas based on both pre-installed and custom user rules.

The model can be accessed in various formats, whether as a report, script, or diagram, thanks to a suite of powerful, built-in tools and analytical methods. These tools are seamlessly integrated into the application, providing a comprehensive experience that caters to both generalists and specialists.

More specifically:

- Create visual models to stimulate creative thinking, ideation, problem-solving and design
- Maintain a library of abstract or concrete models, sub-models or modelling elements
- Export graphical models and entity relationships to text lists and spreadsheets
- Model problems and solutions, issues, events, decisions, actions, goals and risks
- Annotate model elements with tags and tag groups, both exclusive and inclusive
- Model over grids such as consulting charts (XY), swimlanes (rows), pools (columns) and labelled boxes
- Visual elements automatically inherit additional tags from the axis labels of charts, grids and boxes
- An extensive library of consulting charts and grids is provided, each modifiable or extended by the user
- Generate ideas from any visual model using the embedded rules engine
- Craft scripts for specific methods or applications using the creativity and reporting rules language
- Idea generation operates in two modes: interactively while modelling or on-demand to generate a report
- Keep additional notes, web links and file references with any model or model elements
- Refine models using a variety of built-in effects, relationships or user-defined arrows



- Refine elements and relationships using attributes such as insufficient, dysfunctional, questionable and more
- The rules language allows for the definition of matching patterns and macros against all visual details and tags
- Search the web, patent bases and other resources using selected parts of the model
- Configurable auto-layout functions include freeform, tree and graph mode
- Pin (fix) or clamp (user position) objects on the canvas so that auto-layout elements move around them
- Define a build sequence for the model and step through the logic of your design
- Highlight individual model elements and the critical problem-solving patterns
- Follow any highlighted element forward or backwards through the cause-effect chain
- Assist tools accelerate model building using tools such as elaboration, decomposition and improvement
- View, sort and edit the text of the model using list views of individual elements and relationships
- Capture model text live in a team meeting or client interview without the distraction of visualization
- Anonymize, shuffle or randomize any model or selection of elements to stimulate creativity
- A library of lists on a variety of business, engineering and social topics helps to kick-start the modelling process
- Add to the model, or paint over, existing visual elements from any list, subset of items or individual entity
- Copy/paste visual elements to/from the clipboard as text or images for inclusion in external reports
- Select elements on the canvas manually or according to their tags, attributes and shape
- Define sentence structures from which ‘cues’ are generated; seeds for the development of new ideas
- Use any generated sentence for lateral thinking or to craft new rules for the creativity and reporting engine
- Everything other than the standard notation is configurable: tags, grids, lists, creativity, reports
- Shortcuts and accelerator keys are available for essential functions and tools

- Create template models with default settings, initial content, notes, tags and their own specific creativity rules

## 2.4 The rules (idea generation) engine

Modeller comes bundled with 100s of carefully curated ideation scripts and rulesets. However, using any text editor, users can write their own rulesets or copy and adapt existing rulesets. A detailed guide to the rules language is provided for advanced users (MyCreativity Reference.pdf).

- Southbeach visual modeller contains an embedded rules engine
- The user writes rules that generate creative suggestions from any model
- Rules can be reused across any visual model, in any field of analysis
- Suggestions generated support the users' creative thinking and problem solving
- A rule is a pattern plus a sentence containing expandable macros
- Sentences can have embedded newlines to generate paragraphs
- Patterns and macros are formed using keywords from the Southbeach notation
- Every agent or effect attribute in the notation is supported by the engine
- Patterns and macros can also match any user supplied text in the model
- User text is any agent name, effect name or label, tag or grid position on the canvas
- A ruleset is a group of such rules intended to support the intent of the analyst
- Rulesets can be named and organized into a hierarchy for easy access
- Users turn on and off rulesets as they work through an analysis
- As the user clicks around a model, rules are matched to the model content
- Rules trigger within a defined extent / scope, set by the user at run time
- Where a pattern matches the model within the extent, sentences are output
- Macros embedded in the sentences are expanded as they are generated
- Creative suggestions (ideas) are listed in creativity panels within the application
- Ideas generated are saved with the model in panel in which they are generated
- Model-specific rules can also be embedded in the creativity panels
- Model-specific rules can be turned on or off by the user at run time

- In addition to the interactive mode, reports can also be generated
- A report is a template containing embedded rules and reporting instructions
- After any change to a model, reports can be re-generated and updated
- Reports extend the pattern language to allow for the processing of indirect effects
- Reports contain formatting instructions for bulleted, numbered and lettered lists
- Reports can be run over one or all models of a model file set

## 3 Installation

Southbeach Modeller is a native Microsoft Windows (Dot.net) application. The software is maintained in Microsoft Visual Studio and written in C#. The official download site is:

<https://www.southbeachinc.com/software/download/index.html>

An industry standard installer is provided. Installation takes less than one minute. A wizard guides you through a short set of options, including choice of installation directory. A reliable uninstaller is provided as part of the download.

The software is compatible with Windows 10 and Windows 11. It has been tested on Apple macOS (Intel and Apple Silicon) running under Parallels.

### 3.1 Quality assurance

We package, protect and distribute our software using professional industry standard tools from Pantaray (QSetup) and SofPro (PCGuard). The software is thoroughly checked for viruses and malware during the build process using the latest signature files (McAfee).

### 3.2 Installed Help

In addition to this introductory guide, the following resources (documents, models) are installed with the software. They appear in the Explorer panel - Model tab in the application and can be found, by default, in the directory:

Documents > Southbeach

Welcome.sbm	visual model	Displayed at startup after a new installation, this model explains how to get started with Southbeach, lists the new features in v4 and highlights use cases and main areas of functionality.
Getting started.sbm	visual model	A good place to visit as a new user.
Notation guide.sbm	visual model	Covers all visual elements possible in Southbeach.
Sample models.sbm	visual model	A subset of sample models provided by the community. Hundreds more are available to download from the menu File - Browse Examples Online.
Southbeach 101.sbm	visual model	A 101 primer about Southbeach Notation.
The Big Picture.sbm	visual model	An infographic, describing our 'big picture' vision for Southbeach.
Southbeach User Guide	PDF	This document.

MyCreativity Reference	PDF	Companion document for pwoer users. The definitive reference to the rules engine, creativity language, reporting macros and (NEW in v4) cues engine.
Southbeach Overview	PDF	A comprehensive set of annotated screenshots of Modeller v4. Illustrates important areas of functionality.
_help/shortcuts	PDF	List of shortcut keys (printable guide).
_help/toolbar	PDF	List of toolbar functions (printable guide).
_help/v4 upgrade	PDF	List of new functions and tools in v4.
_help/hintsandtips	.txt	Hints and tips. Also available via the Notes - Tips panel of the application.
_help/license	.txt, HTML	Software License (displayed during installation).
_help/readme	.txt, HTML	Readme file (displayed during installation).

### 3.3 Installed Content

Southbeach is a user-extensible application. All tags, grids, creativity rules and cue definitions are defined in readable .txt files. These are open to inspection and form part of the documentation. Each file has a header explaining the syntax.

We do not recommend that the installed files are modified as they may be overwritten in a later version or upgrade. However, the user can provide additional files, in the same format, to extend or modify (override) installed content.

At startup, Southbeach Modeller iterates over each directory (and any sub-directories) looking for .txt fles. It then proceeds to 'merge' all definitions found. It then builds consolidated trees of the content for display in the Toolbox panels.

The installed content with v4 of the software comprises:

Southbeach > MyCreativity	mycreativity.txt	EXPANDED in v4, 100s of carefully curated ideation scripts and rulesets.
Southbeach > MyCreativity	_examples.txt	v3 rules, legacy support.
Southbeach > MyCreativity	_lateral-thinking.txt	v3 rules, legacy support.
Southbeach > MyCreativity	_suh.txt	NEW in v4, experimental rules, will be released as an official product in later version.
Southbeach > MyCues	southbeachcues.txt	NEW in v4, example cues definitions; will be expanded in later version.
Southbeach > MyGrids	southbeachgrids.txt	NEW in v4, over 100 pre-configured grids, charts and swimlane/pool templates .

Southbeach > MyLists >	e.g. innovation, KPIs	NEW in v4, over 200 topic-specific 'lists' of reusable elements.
Southbeach > MyTags	southbeachtags.txt	NEW in v4, approx 3000 application-specific tags/tag groups.

### 3.4 Getting Support

We are a user-driven company and will attempt to respond to support calls within 24 hours.

Please write to [support@southbeachinc.com](mailto:support@southbeachinc.com).

## 4 Getting started, click by click

### 4.1 Exercise 1 – Your first model (2-5 minutes)

1. Drag a green box (useful agent) from the Toolbox palette onto the canvas.
2. Enter a name for the useful agent.
3. Try moving the agent around the canvas by dragging it while holding down the left mouse button. The mouse pointer will change to a 'hand' when it is roughly in the middle of the agent.
4. Now drag a red box (harmful agent) from the palette. Alternately, just position your mouse somewhere on the canvas and type Ctrl+H on the keyboard. This is one of many short cuts which speed up the modelling process.
5. Take a look at the Insert menu. This is another way to add agents to the canvas.
6. Now we are going to create an effect from the useful agent (green) to the harmful agent (red). Place your mouse just inside the border of the useful agent, hold down the left mouse button and move the mouse over the harmful agent. You will see an effect line connect the two. When you release a mouse button, a dialog box will appear. Enter a name for the harmful agent in the description field. Your cursor should already be in that field by default. Don't worry about all the other options in the dialog box, we'll come to those later. For now, just click on OK or press the return key on the keyboard.
7. Congratulations, you have just modelled a harmful side effect of a useful function.

Now go on to make some changes:

1. You can edit the text of the boxes. Just select a box with the mouse. The resize handles will appear. Now click again on the text to edit it. Another way of entering text edit mode is to press F2 while the box is selected.
2. Now drag one of the box around the canvas. The effect line will follow.
3. Southbeach is a modelling tool which provides a visual language for innovation, problem solving, change and alignment. Each box and line has a right mouse menu. Move your mouse over an agent, and press the right mouse button. A context menu will appear. Try some of the options.
4. Do the same for the effect line. Position your mouse accurately anywhere on the line, and press the right mouse button. A similar menu will appear. Again, try some of the options. (Note - if you don't get your mouse accurately on the line it will be on the canvas background which has its own right mouse menu.
5. Try the right mouse on the canvas. Here you set properties for the model, and defaults for modelling.

6. You can get to the Model Properties dialog box via the canvas right mouse menu, or by double clicking on the tab. Because this was a new model, its name will currently be 'noname1'. Double click on the tab. A dialog box will appear. Give the model a name in the description field. If you like, type some notes to explain your model. Then select OK.
7. Now try saving your model file. Use the File menu. By default the file will be given the name of the model. But you can change the name if you wish. Each model file can actually contain several model tabs. Each model tab is a separate model, held in the same file. Each model has a description and notes, separate from the file name. This allows you to store several related models in the same file. Southbeach files have the extension .sbm. When you click on them in folders or on the desktop, they will launch Southbeach Modeller if it is correctly installed.
8. Congratulations, you have created and saved your first model. It should be visible in the Explorer Models panel on the left, if you put it in the Southbeach documents folder created for you when you installed the software.

## 4.2 Exercise 2 – Keeping notes (2 minutes)

1. Open any model using the File menu or the Open Document icon in the application bar.
2. Can you see a Notes panel to the right of the canvas? If not, use the View menu to turn on the Notes panel.
3. You can edit your model's notes. This will be saved with the model.
4. You can also make notes for any agent in the model. Click on the "This" tab in the Notes panel. It will stay like this while to go around the model, adding notes.
5. When you click on an agent, the "This" tab will turn from grey to white, signifying that you can type in the panel.
6. By adding notes to the model, or to elements of the model, you are creating a report about the model. Later, this can be exported. Notes is a convenient way to build your model or concept map and keep notes about all the things you don't want to model visually.

## 4.3 Exercise 3 – Editing a model (5-15 minutes)

This exercise covers many of the ways you can dive in, edit or transform models.

1. Open any model. In Explorer, there is an MyModels folder. This contains example models that were installed with the Southbeach software.
2. To change the attributes of an agent, move the mouse over the box, and press the right mouse button. Using the menu you can change many attributes.
3. As you change attributes, there will be a visual change of appearance. For example, useful is a green box, a risk is a red filled box, focus is a yellow highlight.
4. You can also change attributes of an agent by double clicking with the left mouse button.



This brings up a dialog box.

5. If you have 'Hover help' turned on (Help menu), you will see a panel to the right of the dialog box. As you move your mouse over the dialog box fields, an explanation will be given.
6. The dialog box provides more options. Click on [-] More. If this is grayed out, you are in Core Mode, not Advanced Mode. You can change this in the Tools menu. Advanced mode gives you access to more attributes.
7. Double click on an effect. It too has a dialog box.
8. Right mouse on an effect. It too has a menu. Once again, in Core mode you see fewer attributes.
9. Right click on an effect, and try the reverse and counter effect menu options.
10. Move agents around by dragging them from their middle.
11. Resize an agent by clicking on its handles. Select an agent by clicking once anywhere in it.
12. If you like the new size, make it the default. Use right mouse - Default size for new agents.
13. Now apply that size to another agent. Use right mouse - Default size.
14. If you click on a blank part of the canvas, hold down the left mouse button and drag out a rubber band, you can select multiple objects. Alternately, hold down the Shift key on the keyboard and click on objects to extend the selection.
15. You can also select effects.
16. You can change attributes of a selected set of agents and/or effects. Select the set of objects, so that their handles are showing. Then move your mouse over one of the objects and press the right mouse button. You will see the same menu as before. Make a change, and it will be applied to all of the objects.
17. Select a set of objects. Now look in the Format menu. Here you can perform alignment and resizing.
18. Model properties are available in the File menu, or right click on canvas.
19. Right click on an effect, and try out the Style options - bezier and square. Select and move the handles to see the shapes you can create.
20. In the effect Style menu (right click on an effect) you can reset bezier and square back to their original shape.
21. Edit the notes of the model, and agents within it, by using the Notes panels to the right of the canvas. If they are not visible, enable them in the View menu.
22. To edit the text of an agent, click inside it, then click again. (or press F2)

23. Effect lines can also have a label. Select the effect, then click near the arrow head. If you cannot find the spot, press F2.
24. You can undo or redo all edits. See the undo and redo icons in the application bar. The tool tip of the icons will explain what is about to happen.
25. Positioning your mouse over an agent, roughly in its middle, shows a 'hand' cursor. This is for dragging the position of the agent. Positioning your mouse near the edge, but still inside the box, allows you to drag out (left mouse) and create a new agent and an effect in one operation.
26. If you want to draw an effect between two existing agents, drag between them. Start at the edge of the source agent. A dialog box will appear to set attributes.
27. If you need to draw lots of effect lines in fast, press the heart shape icon in the application bar. It should now be green. Now, dragging between agents puts an effect in, but within the dialog box popping up. We love the heart.

Now try these:

1. Select the Models tab in the Explorer panel, left of canvas.
2. You can also list, sort and edit the attributes of agents and effects using the Agent and Effect tabs in the Explorer panel. This is to left of the canvas. If not visible, see the View menu. We don't cover this in this exercise. Explore it yourself or refer to other documentation.
3. The Tags tab in the Explorer panel lets you create tag groups and tags. You can drag these to the model. The Tick icon in the application bar determines whether they are visible. It has three states - all visible, none visible, visible if selected on the agent.
4. You can also drag tags from the Tag library in the Toolbox. (if not visible look in the View menu) Drag a file to the canvas. The model in the file is added to the canvas.
5. Right click on a model in the Explorer and select Merge. The model in the file is added to the canvas.
6. Right click on a model in the Explorer and select Browse. The elements or sub-models in the file are displayed. If sub-models, right mouse again and Browse to the individual elements. Drag sub-models or individual elements to the canvas.
7. See how the right mouse menu on an agent has a Tags menu for changing tags also. It picks up the tag groups and tag values you set in the Tag tab in the Explorer.
8. Complex transformation of the model is possible using the Assist Tools in the Toolbox. This is covered in detail in other documentation. Try double clicking on a tool or right mouse on it for options.

That's it for now. You can now perform many different kinds of edits of the model. Don't forget to save your work. Southbeach Modeller has many more features, including the auto-layout tools (tree and graph), assist tools, tag library and the unique embedded creativity and reporting engine. Enjoy!

## 5 Appendices

### 5.1 Toolbar icons

New document	New blank canvas. Set default zoom level in Tools/Options/View. Create multiple model tabs [+] on the canvas as required.
Open document	Open existing model or other document. Also see File menu/Recent files and Most Recent (shortcut key F9) to open last file worked on.
Save current document	Save the currently active model. Resets Undo.
Save All open documents	Save All models, whether modified or not.
Refresh Explorer	Refresh the Explorer view to reflect changes to directories and files made outside of Southbeach application.
Cut to clipboard	Cut selected objects or effects to clipboard. Paste to another part of any Southbeach canvas/model tab, or Paste to a word processor document. An image of the model is inserted.
Copy to clipboard	Ditto but does not delete the selected objects.
Paste from clipboard	Paste clipboard to canvas. If clipboard contains only text, text is converted to agents (one per line of text). Alternately, right mouse on the canvas to create one agent containing all the text. A default agent type is created.
Delete	Deletes objects or effects without copying them to the clipboard.
Undo	Undo last change to model. Unlimited undo/redo is supported.
Redo	Redo last change to model.
Creativity engine on/off	Turn on/off the rules engine (MyCreativity) (a lateral thinking/ideation function)
Cues engine on/off	Separately, turn on/off the cues engine (MyCues) (a combinatorial sentence generator)
Model specific rules on/off	Separately, turn on/off 'model specific' creativity, i.e. the rules held in the model's .sbm file as creativity tabs.
Creativity extent	Adjust the extent of pattern matching from point of selection in visual model. Drop down options are: laser, narrow, extended, wide, wider, widest.
Research	Perform web research using one of several search engines, including patent search. Drop down menu to select search engine.

Cycle canvas	Alternate canvas backgrounds: crossed paper, graph paper, dot paper, white canvas (best performance for large or complex models).
Canvas style	Cycle through various visual styles which thicken object outlines and effect arrows. To personalize settings further see menu Model/Visual Style (or right mouse on canvas).
Cycle color	Cycle through color variations: standard, gray shades, monochrome. If using monochrome opt to turn on useful/harmful (U/H) annotations in Visual Styles (Tools/Options/Images).
Draw effects with/without dialog	'Favorite' the effect you use the most when creating links between objects, bypassing the effect properties dialog. Choose a favorite in Effect Preferences dialog (Right mouse on canvas background or Model menu).
Tag visibility options	Select how to show 'tags' on agents: none, all or only those marked 'Always Show'. Right mouse on an object - Tags sub-menu.
Show/hide effect labels	Show a label to explain effect arrowheads. This can be useful when first learning Southbeach Notation or when giving a presentation or tutorial.
Show/hide annotations	On by default. Annotation indicate when an agent links to related information e.g. another document, model, website or has 'This' tab notes.
Wands	Use 'wands' to click around a model to quickly make simple changes, e.g. add an agent, change useful to harmful, sufficient to insufficient. In workshops this can help keep the participants focused on the problem being modelled and not become distracted by dialogs or menus.
Show/hide Goals	Show/hide 'goal' objects. Show/hide is a useful consulting aid. Temporarily show or hide objects in a model to explain the cause-effect logic, problem, argument being made or details of design.
Show/hide Useful	Ditto.
Show/hide Harmful	Ditto.
Show/hide Risks	Ditto.
Show/hide Actions	Ditto. A consultant can show a model with and without their recommended actions and solutions.
Show/hide Knowledge	Ditto. Show or side background knowledge about the situation modelled.
Show/hide Comments	Ditto. Remove distracting comments during presentation.
Show/hide Drawing objects	Ditto. Remove distracting annotations during presentation.

Highlighter tool	Similar to a whiteboard marker, highlight agents or effects. Saved with the model. Highlights can be used to follow cause-effect chains. See below.
Highlight patterns	Automatically highlight agents associated with problem-solving patterns in the model, e.g. contradictions, barriers, silver linings and more. Drop down to select a pattern. The selected option becomes a default when single-clicking on the toolbar icon.
Effects of highlighted agents	Follow a cause-effect chain. Highlight agents that are affected by highlighted agents. Click again for the next set of effects.
Causes of highlighted agents	Follow a cause-effect chain. Highlight agents that are causes of highlighted agents. Click again to find root causes.
Clear highlights	Clear all highlights in model.
Freeform pen	A scribble pen, useful in workshops and presentations. Not saved with the model.
Laser pointer	Draw attention to an object during a team meeting. Move the cursor around the screen and the attention shifts. This tool complements the highlighter tool.
Find / search	Select agents or effects in model by searching for matching text or a notation pattern. Use either a substring, an “exact text” or <code>^&lt;notation&gt;</code> . Pattern example: <code>^useful+insufficient+@to_do</code> . The pattern example says: a useful but insufficient agent tagged to do.
Build a sequence	Define an order for agents or groups of agents in the model. Then use the presentation functions to show the model step-by-step. Useful when presenting to clients. Present the model agent by agent (effects are displayed automatically) or in groups of agents (subset of the model). See below.
Start presentation	Begin the presentation. No agents visible.
Previous	Step back through the presentation.
Next	Step forward through the presentation.
End, All	Jump to the end of the presentation. All objects in the model become visible.
Apply layout	Southbeach Modeller supports three layout modes: freeform, tree and graph. Via a single click, this function re-applies the selected layout after changes have been made to a model. See menu Model/Auto layout (or right mouse on canvas) to set the layout mode. Graph and tree mode have many variations and parameters to modify how models are automatically organized. See the Tree Properties and Graph Properties dialogs. When on, applies the current layout each time an agent or effect is added to the model. Attempts to maintain the layout.

Continuous auto-layout	When enabled, applies the current layout each time an agent or effect is added to the model. For example, adding a tree node in the middle of a complex tree will neatly organize all other nodes around it, creating space as required. All layout parameters are respected.
Spread	‘Spreads’ a model within the constraints of its layout, automatically creating more space between objects. Works in all three layout modes, including freeform.
Compact	‘Compacts’ a model within the constraints of its layout, moving objects closer together to create a more compact visual. Works in all three layout modes, including freeform.
Clamp	Exclude an object from auto-layout operations. The object can still be moved manually, however. Thus, you can arrange the model, and re-apply layout, without the need to pin/unpin objects that must be in certain positions.
Pin	Fix an object in position. The object cannot be moved, even manually, until unpinned.
Pan and zoom	Invokes an overview window of the model. Pan the main model canvas by moving the box in the preview window. Select an edge, and drag. Zoom the model by selecting a corner, and resize.
Fisheye zoom	A magnifying glass. Move the fisheye lens over the model to read small details or text in larger models that would be unreadable unless zoomed in. In a workshop, the attendees can be shown the whole model but still read selected elements. Change the size of the lens in Tools/Options/View. Change the zoom level while using the fisheye by using the mouse wheel.
Send To	Email a model to a colleague. Dropdown menu provides four attachment options: .sbm file (Southbeach XML format) only, image in JPEG or PNG, or both. Note: requires email client.
Submit feedback	The simplest way to tell us what you think about Southbeach. Please send suggestions for new features, bug reports or feedback. If you expect a reply, please ensure you have registered a current email address. Menu License/Register.

## 5.2 Shortcut keys

Alphanumeric	A to Z, 0-9		Round robin select matching object or list item
Arrow keys	Up, Down, Left, Right, selected object(s)		Move selected object(s) up, down, left, right
Arrow keys	Up, Down, Left, Right, NO selected object(s)		Scroll canvas up, down, left, right
Arrow keys	Ctrl+Arrow keys		Fine object movement; object(s) or canvas
Arrow keys	Alt+Left Arrow		Spread objects on canvas
Arrow keys	Alt+Right Arrow		Compact objects on canvas
Arrow keys	Alt+Up Arrow	Shift+]	Grow object size
Arrow keys	Alt+Down Arrow	Shift+[	Shrink object size
Double-click	Ctrl+Double-click		Launch object's related URL
Double-click	Ctrl+Double-click on model in Explorer		Drills down to sub-models (model tabs)
Double-click	Ctrl+Double-click on sub-model in Explorer		Drills down to individual model elements
Double-click	Double-click on canvas		Insert object with properties
Double-click	Double-click on object or effect		Edit properties of object or effect
Double-click	Double-click on object or effect		Invoke object or effect properties dialog
Double-click	Shift+Double-click		Open object's related model
Drag	Alt+Drag text from external application to canvas		Create object with name of text
Drag	Drag between windows (tiled or cascade)		Copy objects between windows

Drag	Drag from edge of one object to another		Via a dialog, insert an effect between two objects
Drag	Drag from edge of one object to blank area of canvas		Via a dialog, insert an effect and a new object
Drag	Drag models, sub-models and model elements to canvas		Inserts reusable model elements to current model
Drag	Drag object handles		Change size of object
Drag	Drag objects from Toolbox-Palette to canvas		Create new objects
Drag	Drag over a group of objects and/or effects		Select the group of objects and/or effects
Drag	Drag tags to canvas		Create a new tagged agent
Drag	Drag tags to objects		Tag the existing object
Drag	Drag text from external application to canvas		Create object with full text in object notes
Drag	Drag URL from web browser address bar to canvas		Creates an object having that related URL
Drag	Drag URL from web browser address bar to object		Sets the related URL of that object
Drag	Hold Ctrl and drag selected object(s)		Copy selected object(s)
Drag	Hold Ctrl when resizing grid using its handles		Resizes grid maintaining object's grid cell positions



Drag	Hold Ctrl while dragging out an effect from object		Inserts the reversed effect
Drag	Hold Shift while dragging out an effect from object		Inserts the counter effect
Drag	Hold Shift+Ctrl while dragging out an effect from object		Inserts the counter and reversed effect
Drag	Shift+Drag object handles		Change size retaining aspect ratio
Mouse wheel	Ctrl+Mouse wheel		Zoom canvas in/out
Mouse wheel	Mouse wheel		Slide canvas view up/down
Mouse wheel	Shift+Mouse wheel		Slide canvas view left/right
Right mouse	Right mouse in panels		Invoke panel context menu for additional functions
Right mouse	Right mouse on any panel tab		Invoke tab sub-menu for additional functions
Right mouse	Right mouse on files in Explorer		Invoke sub-menu for additional functions
Right mouse	Right mouse on object(s) or effect(s)		Invoke context menu additional properties
Scroll	Home		Scroll to left hand side of canvas
Scroll	End		Scroll to right hand side of canvas
Scroll	Page Up		Scroll canvas up
Scroll	Page Down		Scroll canvas down
Select	Hold down the Ctrl key		Select/deselect objects or effects
Select	Hold down the Shift key		Extend the selected set of objects or effects
Select	Select object and then click on object text		Edit text of object
Select	Select the effect arrowhead		Add or edit an optional effect label
Shortcut	Alt+0		Cause(s) of highlighted object(s)
Shortcut	Alt+1		Effects(s) of highlighted object(s)

Shortcut	Alt+2		
Shortcut	Alt+3		
Shortcut	Alt+4		
Shortcut	Alt+5		
Shortcut	Alt+6		
Shortcut	Alt+7		
Shortcut	Alt+8		
Shortcut	Alt+9		
Shortcut	Alt+F1		
Shortcut	Alt+F2		
Shortcut	Alt+F3		
Shortcut	Alt+F4		Exit application
Shortcut	Alt+F5		
Shortcut	Alt+F6		
Shortcut	Alt+F7		
Shortcut	Alt+F8		
Shortcut	Alt+F9		
Shortcut	Alt+F10		
Shortcut	Alt+F11		Enter/leave Full Screen mode
Shortcut	Alt+F12		
Shortcut	Alt+BkSp		
Shortcut	Alt+Home		Start presentation  <
Shortcut	Alt+Page Down		Previous, step back <
Shortcut	Alt+Page Up		Next step, step forward >
Shortcut	Alt+End		End, All >
Shortcut	Ctrl+0		More harmful; decrease ideality randomly
Shortcut	Ctrl+1		More useful; increase ideality randomly
Shortcut	Ctrl+2		
Shortcut	Ctrl+3		
Shortcut	Ctrl+4		
Shortcut	Ctrl+5		

Shortcut	Ctrl+6		
Shortcut	Ctrl+7		
Shortcut	Ctrl+8		
Shortcut	Ctrl+9		
Shortcut	Ctrl+F1		Submit feedback, report bugs
Shortcut	Ctrl+F2		
Shortcut	Ctrl+F3		
Shortcut	Ctrl+F4	Ctrl+Shift+F4	Close current document with option to save changes
Shortcut	Ctrl+F5	Ctrl+Plus(+), Ctrl+Shift+Plus(+)	Zoom in
Shortcut	Ctrl+F6	Ctrl+Shift+F6, Ctrl+TAB	Cycle open documents / windows
Shortcut	Ctrl+F7		Open object's related document / file
Shortcut	Ctrl+F8	Ctrl+Double click	Launch object's related URL
Shortcut	Ctrl+F9		Create model tab from name of selected object
Shortcut	Ctrl+F10		
Shortcut	Ctrl+F11		Zoom to fit
Shortcut	Ctrl+F12		
Shortcut	Ctrl+A		Select All
Shortcut	Ctrl+B		Web browser
Shortcut	Ctrl+C		Copy
Shortcut	Ctrl+D		
Shortcut	Ctrl+E		Open/close Explorer panel
Shortcut	Ctrl+F		Find
Shortcut	Ctrl+G	Ctrl+]	Grow font size
Shortcut	Ctrl+H		Insert Harmful
Shortcut	Ctrl+I		Save as opaque image
Shortcut	Ctrl+J		Insert Conjunction
Shortcut	Ctrl+K		Open/close Creativity panel
Shortcut	Ctrl+L		Draw text
Shortcut	Ctrl+M		Pan and Zoom
Shortcut	Ctrl+N		New document

Shortcut	Ctrl+O		Open document
Shortcut	Ctrl+P		Print
Shortcut	Ctrl+Q		
Shortcut	Ctrl+R		Open/close Notes panel
Shortcut	Ctrl+S		Save
Shortcut	Ctrl+T		Open/close Toolbox panel
Shortcut	Ctrl+U		Insert Useful
Shortcut	Ctrl+V		Paste object(s) from clipboard
Shortcut	Ctrl+V		Creates one object for each line of text in clipboard
Shortcut	Ctrl+W		
Shortcut	Ctrl+X		Cut
Shortcut	Ctrl+Y		Redo
Shortcut	Ctrl+Z		Undo
Shortcut	Ctrl+Shift+0		Clear highlighted objects
Shortcut	Ctrl+Shift+1		Invert selection
Shortcut	Ctrl+Shift+2		Select grid with handles
Shortcut	Ctrl+Shift+3		Select 'like' me
Shortcut	Ctrl+Shift+4		Select exact match
Shortcut	Ctrl+Shift+5		
Shortcut	Ctrl+Shift+6		
Shortcut	Ctrl+Shift+7		
Shortcut	Ctrl+Shift+8		Insert Action
Shortcut	Ctrl+Shift+9		
Shortcut	Ctrl+Shift+F1		
Shortcut	Ctrl+Shift+F2		
Shortcut	Ctrl+Shift+F3		
Shortcut	Ctrl+Shift+F4		Close current model with option to save changes
Shortcut	Ctrl+Shift+F5	Ctrl+Minus(-), Ctrl+Shift+Minus(-)	Zoom out
Shortcut	Ctrl+Shift+F6		
Shortcut	Ctrl+Shift+F7		
Shortcut	Ctrl+Shift+F8		

Shortcut	Ctrl+Shift+F9		
Shortcut	Ctrl+Shift+F10		
Shortcut	Ctrl+Shift+F11		
Shortcut	Ctrl+Shift+F12		
Shortcut	Ctrl+Shift+A		Select All with Grid
Shortcut	Ctrl+Shift+B		Insert Balloon Comment
Shortcut	Ctrl+Shift+C		Insert Comment
Shortcut	Ctrl+Shift+D		Insert Default
Shortcut	Ctrl+Shift+E		Multi-edit tool
Shortcut	Ctrl+Shift+F		
Shortcut	Ctrl+Shift+G	Ctrl+[	Shrink font size
Shortcut	Ctrl+Shift+H		Highlight tool
Shortcut	Ctrl+Shift+I		Highlight tool using default pattern
Shortcut	Ctrl+Shift+J		
Shortcut	Ctrl+Shift+K		Insert Knowledge
Shortcut	Ctrl+Shift+L		Laser pointer tool
Shortcut	Ctrl+Shift+M		Same sizes
Shortcut	Ctrl+Shift+N		Insert Neutral
Shortcut	Ctrl+Shift+O		
Shortcut	Ctrl+Shift+P		Pen tool
Shortcut	Ctrl+Shift+Q		
Shortcut	Ctrl+Shift+R		Open/close Reports panel
Shortcut	Ctrl+Shift+S		Save As
Shortcut	Ctrl+Shift+T		
Shortcut	Ctrl+Shift+U		
Shortcut	Ctrl+Shift+V		
Shortcut	Ctrl+Shift+W		
Shortcut	Ctrl+Shift+X		
Shortcut	Ctrl+Shift+Y		
Shortcut	Ctrl+Shift+Z		Fisheye zoom
Shortcut	DEL	Shift+DEL, Ctrl+DEL	Delete selected objects/text
Shortcut	ESC		Escape from tools or dialogs

Shortcut	INSERT		From a selected file in Explorer, Open the file
Shortcut	INSERT		From a 'drilled down' sub-model, Add to canvas
Shortcut	INSERT		From a 'drilled down' model element, Add to canvas
Shortcut	INSERT		Insert object on canvas from the Toolbox - Palette
Shortcut	INSERT		From any Panel tree view, Insert <whatever> on canvas
Shortcut	INSERT		From Toolbox, Grids tab, Add grid on canvas
Shortcut	Shift+DEL		Delete selected objects/text
Shortcut	F1		Help contents
Shortcut	F2		Enter edit mode, e.g. edit selected object's text
Shortcut	F2 in a panel		Show/hide an editor sub-panel, if any, e.g. rules
Shortcut	F3		
Shortcut	F4		
Shortcut	F5		In a Reports panel/tab, Refresh Report
Shortcut	F5		In a Toolbox panel/tab, Reload Library
Shortcut	F6		
Shortcut	F7		
Shortcut	F8		Search the web using selected object(s) and effect(s)
Shortcut	F9		Open most recent document
Shortcut	F10		
Shortcut	F11		Toggle between Canvas only/All panels visible
Shortcut	F12		Toggle creativity/ideation engine On/Off
Shortcut	Shift+F1		Hover panes (additional help) on/off
Shortcut	Shift+F2		
Shortcut	Shift+F3		

Shortcut	Shift+F4		
Shortcut	Shift+F5		Trim canvas
Shortcut	Shift+F6		
Shortcut	Shift+F7		
Shortcut	Shift+F8		
Shortcut	Shift+F9		
Shortcut	Shift+F10		
Shortcut	Shift+F11		Zoom normal (100%)
Shortcut	Shift+F12		
Special	Shift+ENTER		Newline where ENTER would have a completion action