

Southbeach Modeller v4 Overview



<https://www.southbeachinc.com>
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What is Southbeach Modeller?

- Comprehensive visual modeling software
- Built-in ideation rules engine
- Tailored for creativity, design, and analysis
- Distinct "situational improvement" methodology
- Enhances communication, facilitation, and understanding
- Adept at problem-solving, root cause analysis, and tackling wicked problems
- Addresses both human-centric and engineering design challenges
- Facilitates idea generation and stakeholder alignment
- Paves the way for improvement, innovation, and strategic pivoting
- Highly extensible and customizable rules engine

Download Modeller v4

- Full function free trial
 - <https://www.southbeachinc.com/software/download/index.html>



PRODUCT APPLICATIONS NOTATION TECHNOLOGY

Download Southbeach Modeller

This page provides the latest version of Southbeach Modeller. If this is the first time you have installed the software, you will enjoy a full unrestricted 30-day free trial period. If you are an existing customer and updating, please download and install the latest version. Your existing license will be valid. A new licence may be required for major upgrades.



Windows 11, 10

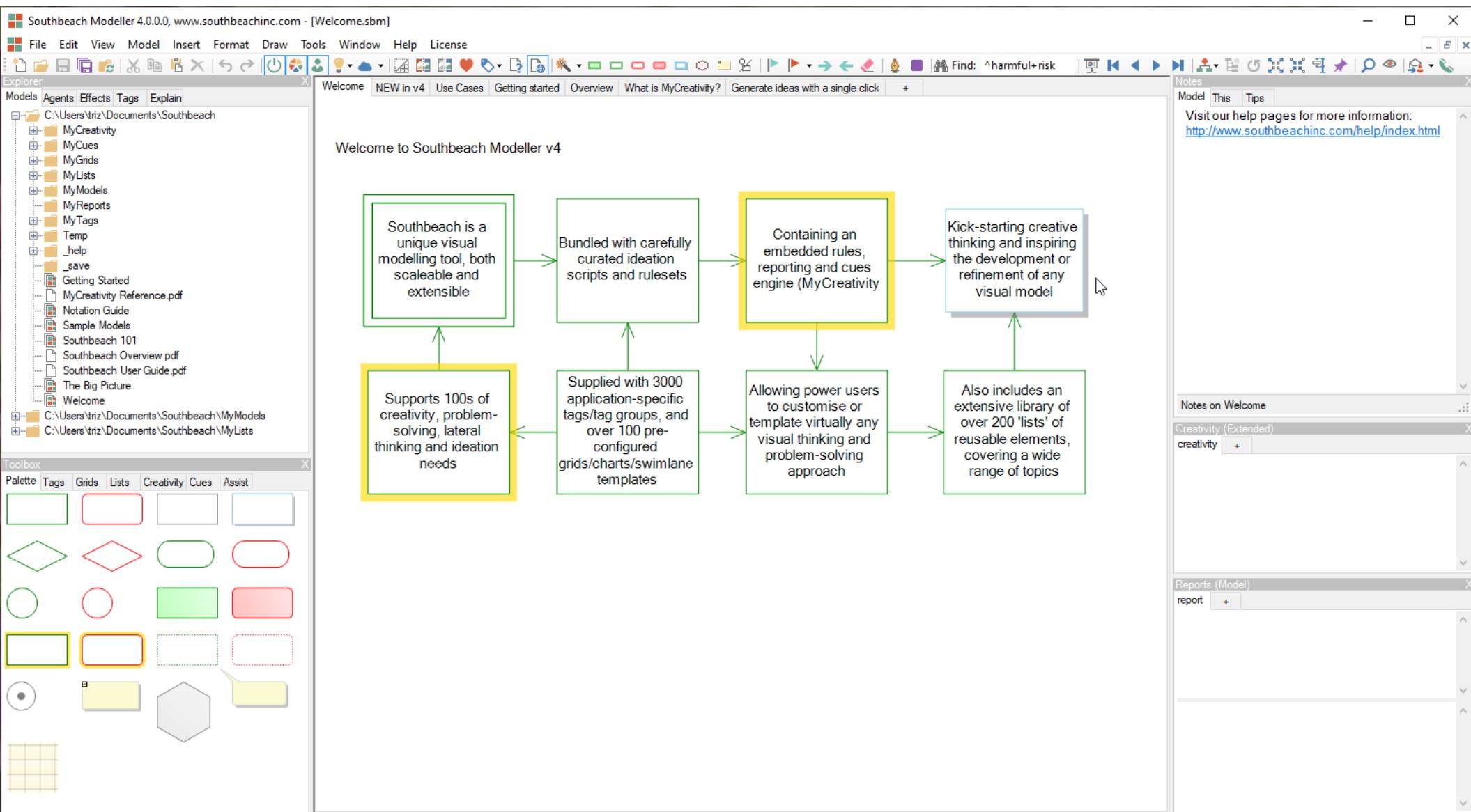


Use Parallels or Fusion.

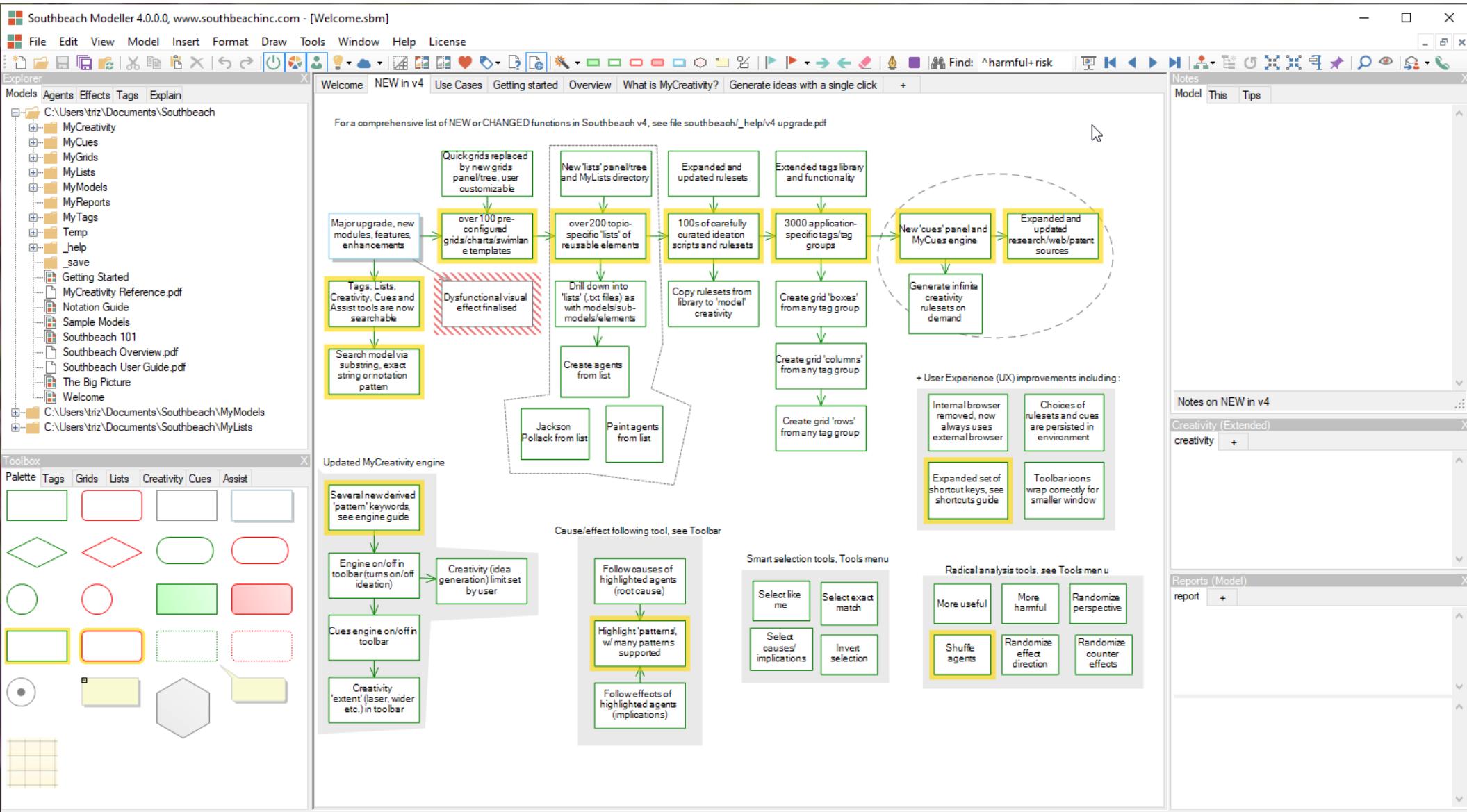
User guides

- Provided with the installation:
 - Southbeach Modeller v4 User Guide
 - MyCreativity Reference v4 (Ideation engine)
 - Updated engine with 30+ new problem-solving keywords
- Library content:
 - 100s of curated ideation scripts and rulesets (MyCreativity)
 - 3,000+ application-specific tags/groups (MyTags)
 - 100+ pre-set grids, charts, and swimlanes (MyGrids)
 - 200+ lists of reusable elements by topic (MyLists)

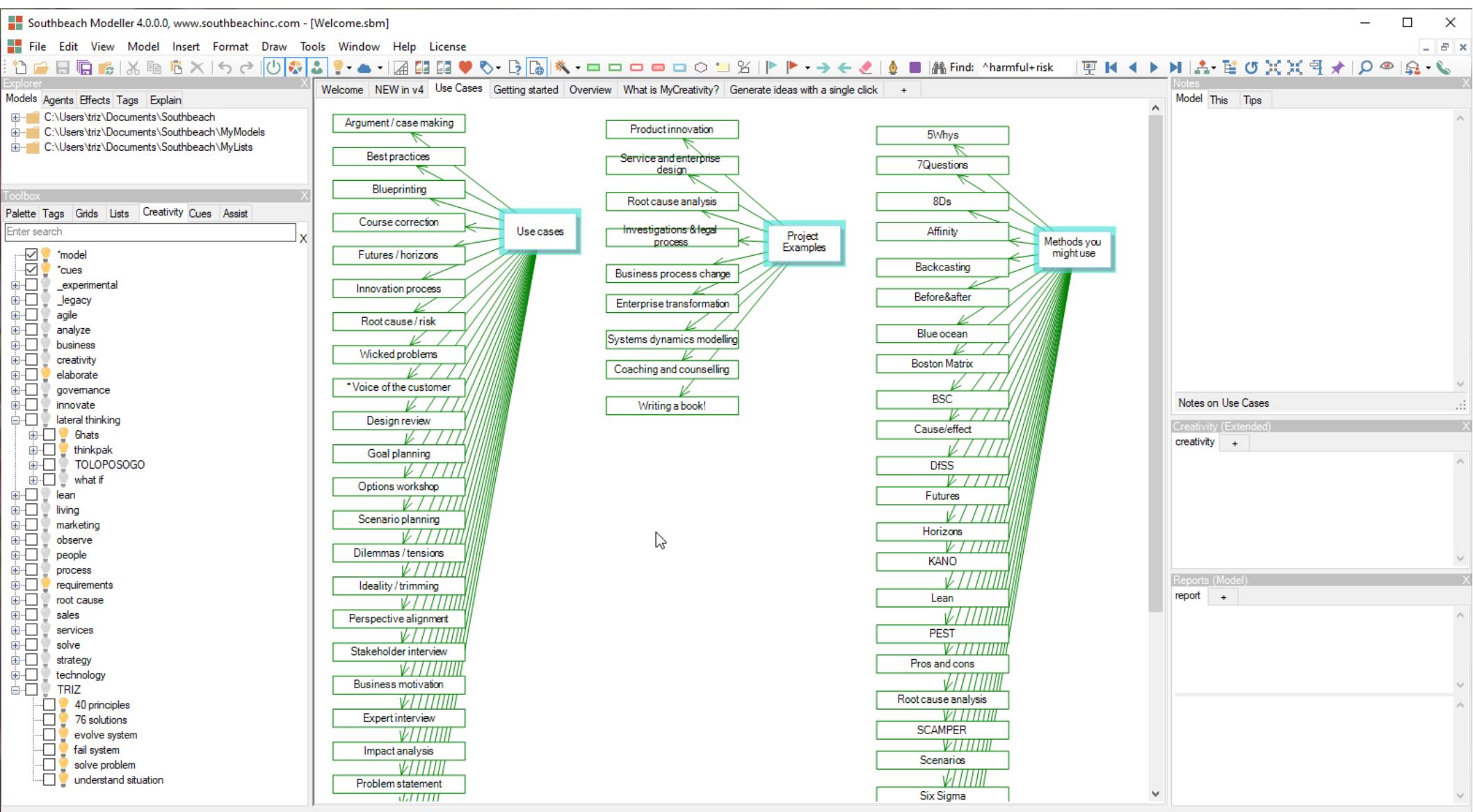
Upon installing the latest version of Modeller, users are greeted with a "Welcome" model. This model encompasses multiple panels including the Explorer, Toolbox, Notes, Creativity, and Reports. Within the Welcome model, are various sub-models, each presented on its distinct canvas tab. Furthermore, each of these panels offers multiple tabbed sections. For instance, the Toolbox not only presents a modeling palette but also features an array of resource libraries such as tags, grids, lists, creativity rule sets, cue definitions, and assistive tools.



Within the Welcome model, a "NEW in v4" tab showcases the expansive updates and functionalities. Users can access over 100 preset grids, charts, and swimlane templates, delve into more than 200 topic-specific lists with reusable elements, and benefit from hundreds of meticulously crafted ideation scripts and rule sets, alongside a vast repository of 3,000 application-specific tags and tag groups. The ideation engine has been revamped, introducing a 'cues' feature for combinatorial creativity. Search filters are now seamlessly integrated into all resource tree panels, also allowing efficient model searches via text or notation patterns. Additionally, the highlighter tool has been expanded to support all built-in pattern macros.



The versatility of Southbeach Modeller has been significantly enhanced with the addition of new v4 content. This includes tags and tag groups, grids/charts, topic-specific resource lists, and creativity rule sets that encompass areas like lateral thinking, ideation, and enterprise modeling, among others. Additionally, cues have been integrated to further expand its utility. All these resources are systematically organized in a hierarchical manner, allowing for easy filtering and searching within each panel tab. Users have the flexibility to modify or extend any content to suit their unique needs.



Following installation ... from the Explorer panel, select "Models" and then open the "Getting Started" model.

We recommend new users briefly go through each sub-model to acquaint themselves with the core functionalities of the tool.

Southbeach Modeler 4.0.0.0, www.southbeachinc.com - [Getting Started.sbm]

File Edit View Model Insert Format Draw Tools Window Help License

Explorer Models Agents Effects Tags Explain

C:\Users\trz\Documents\Southbeach MyCreativity MyCues MyGrids MyLists MyModels MyReports MyTags Temp _help _save Getting Started MyCreativity Reference.pdf Notation Guide Sample Models Southbeach 101 Southbeach Overview.pdf Southbeach User Guide.pdf The Big Picture Welcome C:\Users\trz\Documents\Southbeach\MyModels C:\Users\trz\Documents\Southbeach\MyLists

Advanced - MyCreativity engine + Getting Started Adding Notes Web Research Assist Tools Layout and AutoLayout Grids Tags and Tagging Workshop Tools Draw Hints and Tips

Learn how to add agents and effects to the canvas to build up a Southbeach model
Tip: Zoom In/Out by holding down Ctrl key+Mouse Wheel (or see View menu)

This is creating a contradiction, producing both something useful, and something harmful
Red signifies 'harmful', you want less of this
Right mouse or double click on an agent to set properties
perspective of non-green power co.
Every Southbeach model is drawn from some perspective. In this model, burning fossil fuels is seen as a useful way to generate cheap energy.

burning fossil fuels produces release of CO2

release of CO2 produces global warming

global warming counteracts Economic growth

Green signifies 'useful', you want more of this
Right mouse or double click on an effect to set properties
Right mouse to change effect type, in this case counteracts

cheap energy produces Economic growth

Key useful goal
harmful risk
It A increases, B decreases, if A decreases, B decreases
produces:
A produces B
counteracts:
A counteracts B
It A increases, B decreases, if A decreases, B increases

Notes on Getting Started Creativity (Extended) creativity

Toolbox Palette Tags Grids Lists Creativity Cues Assist

Ways to add objects to the canvas:

1. You can drag objects from the palette to the canvas. (View - Toolbox - Palette)
2. You can use the Insert menu
3. You can double-click on the canvas to create a default object, and then change its properties
4. You can use shortcuts on the canvas, e.g. position mouse and then Ctrl-u for a useful agent, Ctrl-h for a harmful agent, Ctrl+Shift+8 for an action, etc. (for a full list of shortcuts see Help - Shortcuts)
5. You can drag out new objects from existing objects. Drag from the edge of the object (or the middle of an effect) to a blank part of the canvas.
6. You can create effects between agents by dragging between them. A dialog pops up allowing you to select the effect and its properties. (Tip: if you wish to avoid the dialog press the 'Heart' icon in the application bar)

More ways to add objects to the canvas:

6. You can reuse models or elements from any other model, even if it is not open. View - Explorer - Models. Right mouse on Southbeach files to 'Drill down' to individual elements. Drag models, or elements of models, to the canvas. Right mouse on items in Explorer for more options.
7. You can create objects from text or links in the Clipboard. Right mouse on the canvas - Paste (one object is created per line) or Paste Single.
8. You can use assist tools (View - Toolbox - Assist). Double click on a tool to apply it to the whole model, or to selected objects. Right mouse on a tool for more options.
9. As well as tagging objects, you can convert the names of tag groups and tags into new agents. From either the tag library (View - Toolbox - Tags) or the tag view of the model (View - Explorer - Tags), right mouse on a tag group, or tag name.
10. Use menu Tools - Live Capture
11. Use menu Tools - Multi-Edit

Reports (Model) report +

Getting Started (Freeform) 79% 5/4/ideality = 56%

The creativity and reporting engine is a core feature of Southbeach Modeller. When one or more creativity scripts are activated and the engine is 'enabled' (as indicated by the power on/off icon on the toolbar), the ideation results are displayed in the creativity panel as users navigate through the model. Each model, including its sub-models, retains its own unique output. Users have the flexibility to create multiple sub-models, creativity and reporting tabs. All generated content is stored within the model's .sbm file.

Southbeach Modeller 4.0.0.0, www.southbeachinc.com - [Getting Started.sbm]

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Toolbox

Palette Tags Lists Creativity Cues Assist

Notes

Model This Tips

Getting Started Adding Notes Web Research Assist Tools Layout and AutoLayout Grids Tags and Tagging Workshop Tools Draw Hints and Tips

Advanced - MyCreativity engine

Enter search

Preparation 1: Ensure you have the Creativity, Report and Toolbox panels visible (View menu)

Preparation 2: Find the manual MyCreativity Reference.pdf (Southbeach documents folder)

Southbeach Modeller contains an in-built creativity and cues engine. It is used in two ways in the software:

1. To interactively generate ideas from any model.
2. To generate rich reports from the model.
3. To generate creativity via combinatorial grammar definitions.

The scope of these functions lies beyond what can be explained in this tutorial model

To learn how to write creativity rules, interactive reports and cues, refer to the MyCreativity Reference manual

Before referring to the manual, which is mostly concerned with the syntax of rules, reports and cues, it is useful to learn how the panels work

These two panels have similar behavior

Ctrl+T then select Creativity tab

Toolbox - Creativity panel

- I this panel displays the names of your creativity rules library, arranged in a hierarchy according to the names of the rule sets you define.
- A set of examples is provided. Check the boxes to turn on/off any rule set.
- Right mouse in this panel to edit the rules. You may edit the file, or add new rule sets in their own .txt files to the MyCreativity folder.

Ctrl+T then select Cues tab

Toolbox - Cues panel

- I this panel displays the names of your cues library, arranged in a hierarchy according to the grammar definitions. Check the boxes to turn on/off any cue set.

Ctrl+K

Creativity panel/tabs

- I his panel starts with a default tab called 'creativity'. Double click on the name of the panel to change it. Click on + tab to create a second tab. Etc.
- I he panel serve two purposes, an output area for ideas generated by the rules engine, and an editable area for model-specific rules. Press F2 in the panel to show/hide the editable area. The panel will split in two horizontally.
- Like the creativity panel, the tabs you create here split in two, the editable part for the report definition, and the generated report F2 once again.
- Right mouse in the editable region, or the output region, for more options
- Right mouse on the panel title to change extent, e.g. from 'Narrow' to 'Laser' or 'Extended'
- Right mouse on the panel title to change extent, e.g. from 'This model' to 'All models'

Ctrl+Shift+R

Report panel/tabs

- I his panel starts with a default tab called 'report'. Double click on the name of the panel to change it. Click on + tab to create a second tab. Etc.
- Like the creativity panel, the tabs you create here split in two, the editable part for the report definition, and the generated report F2 once again.
- Right mouse in the editable region, or the output region, for more options, including F5 (Refresh Report)
- Right mouse on the panel title to change extent, e.g. from 'This model' to 'All models'

Learn more about these two panels

As you can see, both the creativity and reports panels, allow you to create multiple tabs. These are stored in the .sbm file with the model tabs you create on the canvas. A single .sbm file can therefore hold several models, several creativity rule sets, and several reports.

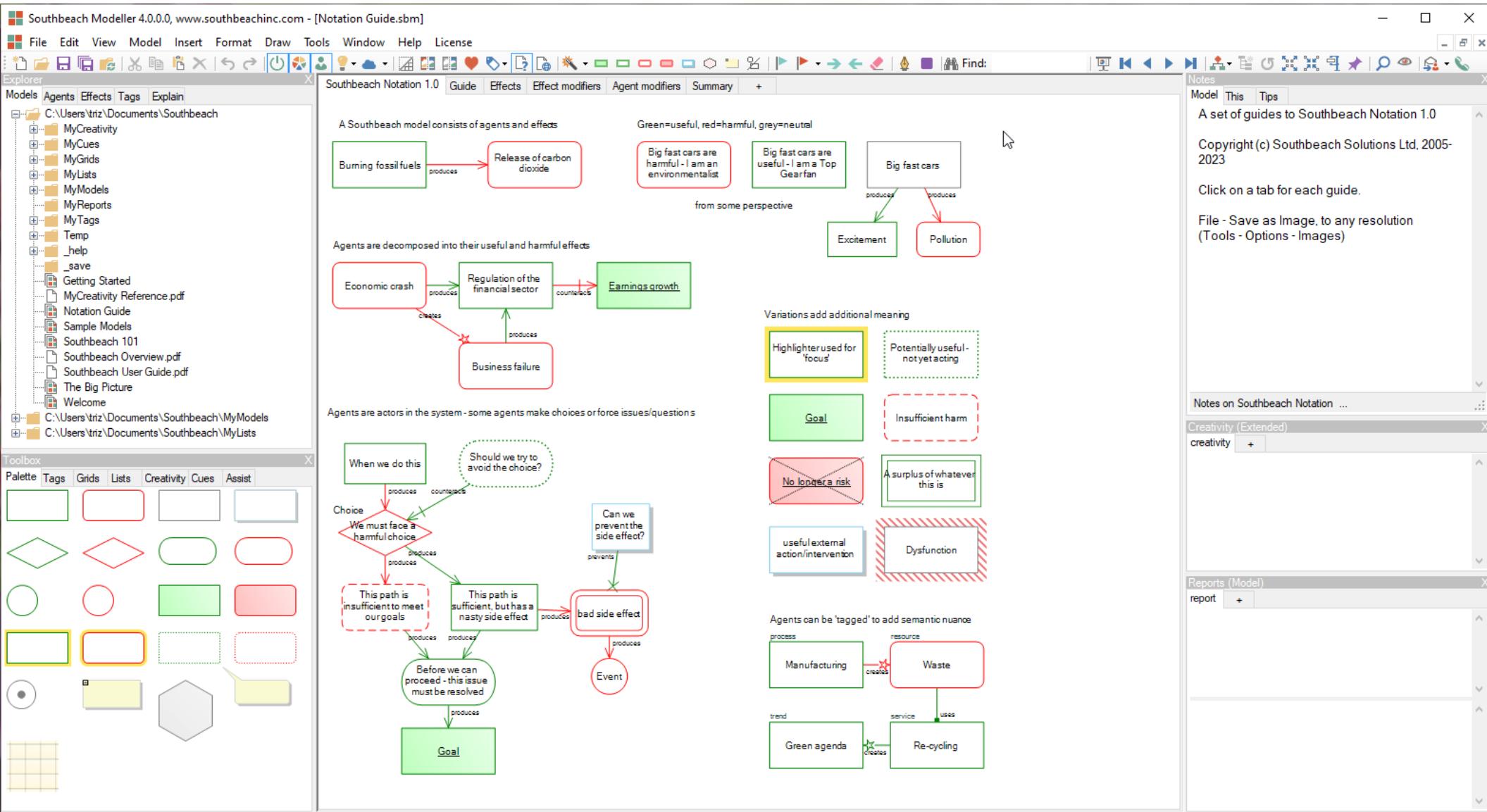
Notes on Advanced - MyCreativity ...

Creativity (Extended) creativity

Reports (Model) report

0 new directions generated 79% 6/1/ideality = 86%

Navigate to the "Notation Guide" model within the Explorer panel. To open, either double-click it or use the "File open" menu option. This model offers a comprehensive overview of the Southbeach Notation. Version 4 of Modeller is aligned with Southbeach Notation 1.0, serving as the reference implementation. It encompasses all notation shapes, modifiers, attributes, and types of effects/arrows.



The summary tab in the notation guide consolidates all the key features of Southbeach Notation 1.0 in a single handy model.

Southbeach Modeler 4.0.0.0, www.southbeachinc.com - [Notation Guide.sbm*]

File Edit View Model Insert Format Draw Tools Window Help License

Explorer
Models Agents Effects Tags Explain
C:\Users\triz\Documents\Southbeach
MyCreativity
MyCues
MyGrids
MyLists
MyModels
MyReports
MyTags
Temp
_help
_save
Getting Started
MyCreativity Reference.pdf
Notation Guide
Sample Models
Southbeach 101
Southbeach Overview.pdf
Southbeach User Guide.pdf
The Big Picture
Welcome
C:\Users\triz\Documents\Southbeach\MyModels
C:\Users\triz\Documents\Southbeach\MyLists

Toolbox
Palette Tags Grids Lists Creativity Cues Assist

Summary

Annotations

Effect modifiers

Agent modifiers

Notes
Model This Tips

Notes on Summary
Creativity (Extended)
creativity +

Reports (Model)
report +

Box types - denoted by shape

- Agent
- Choice
- Issue
- Action
- Event
- Knowledge

Usefulness - denoted by colour and shading

- Goal (filled green)
- Useful (green)
- Neutral (grey)
- Harmful (red)
- Risk (filled red)

Sufficiency - denoted by box line type

- Potential ddd
- Insufficient
- Sufficient
- Surplus
- Dysfunctional

Effects - denoted by line end

- produces
- counteracts
- creates
- destroys
- stores
- consumes
- opposes
- is a
- prevents
- is related to
- becomes
- replaces
- any affects
- contributes to
- detracts from
- uses
- temp visual*
- temp visual*
- implements
- specifies

Effect modifiers

- necessary
- inevitable
- after a delay
- questionable?
- emphasis
- does NOT produce
- insufficient
- excessive
- potential
- dysfunction
- accelerated

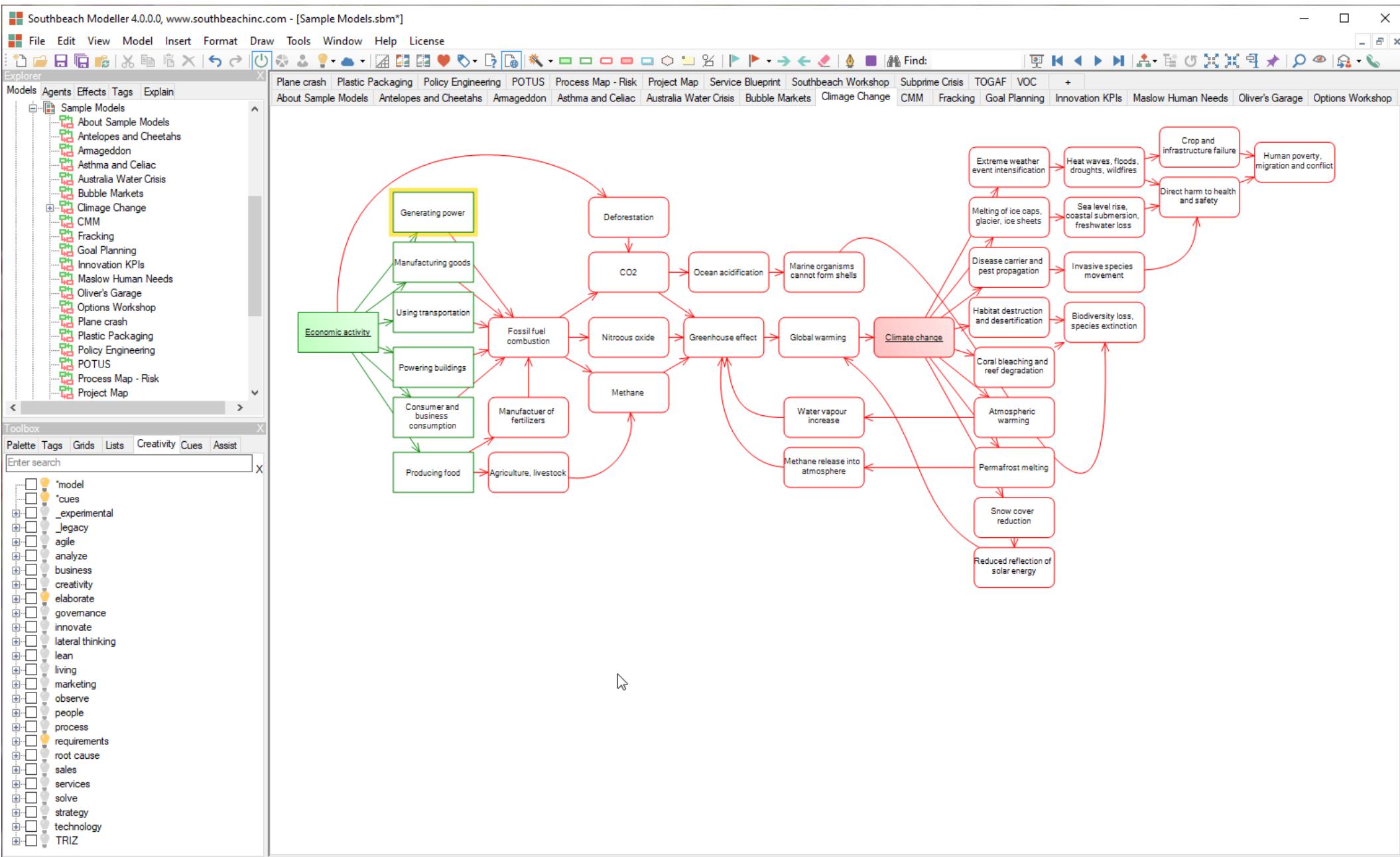
Annotations

- Historical
- Focus
- Emphasis
- Highlight
- Typed
- Symbol
- Tagged

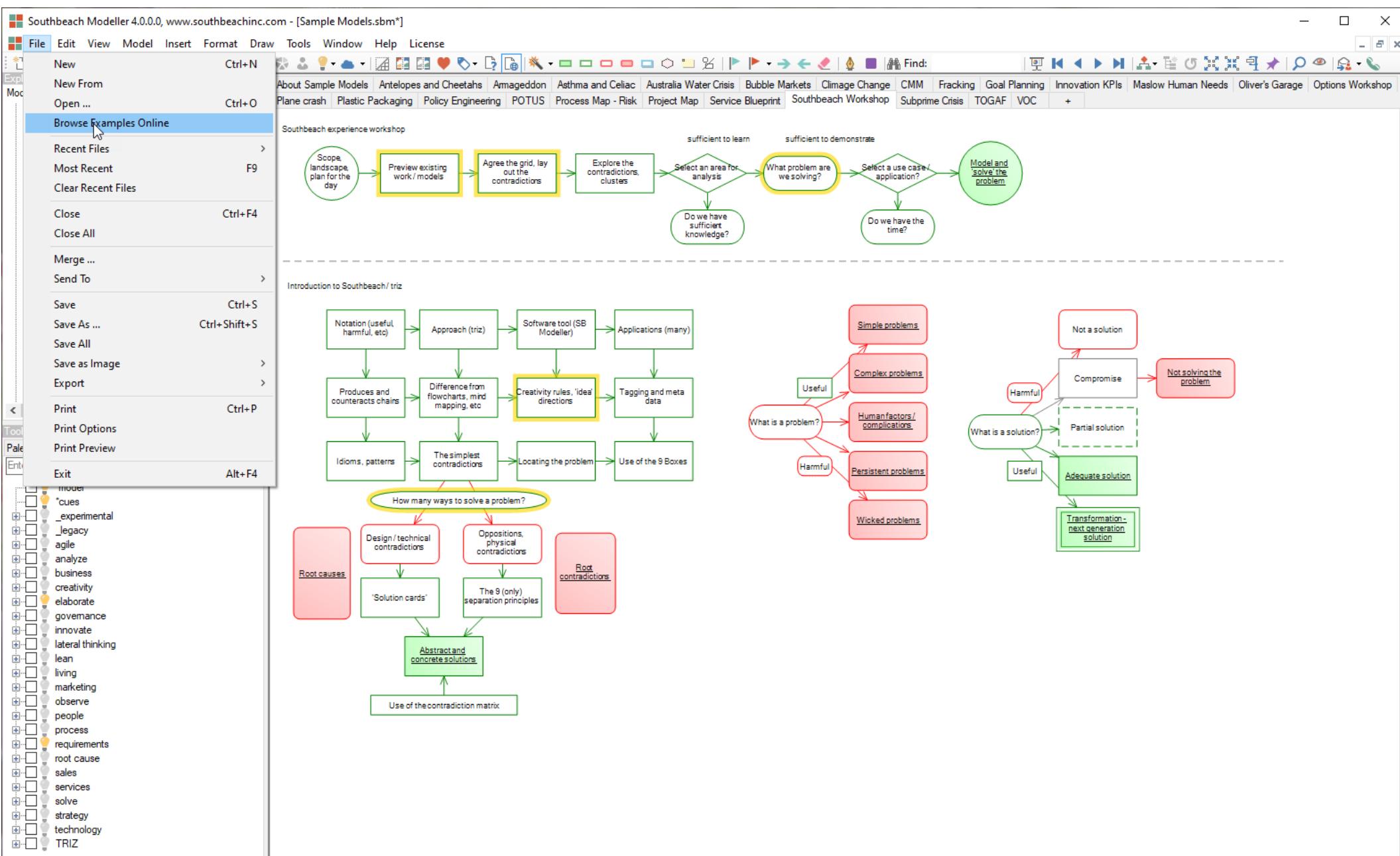
Usefulness and Sufficiency modifiers can be used in combination on any shape
Annotations can be combined with any modifiers
Effect modifiers can be used in combination and with sufficiency on effects
* visual for this effect pending final release of Southbeach Notation 1.0

Summary (Freeform) 98% 63/4/ideality = 94%

From the Explorer panel, select and open the 'Sample models'. These models, contributed by the Southbeach community, are not official products of Southbeach Solutions. To access the full library, navigate to File > Browse Examples Online. The screenshot demonstrates the capability to delve deeper into the model, exploring its sub-models and individual elements. Right-click on any model or sub-model within the Explorer. You can then drag sub-models or elements onto the canvas, re-purposing them in a new model.



To access the comprehensive library of sample models, navigate to File > Browse Examples Online. While these models aren't official products of Southbeach Solutions, they serve as valuable illustrations of Modeller's diverse use cases. Please be aware that these examples were crafted during the release phases of versions 2 and 3, and therefore, may not showcase the enhanced features introduced in version 4.



Open the model 'Southbeach 101' from the Explorer panel. This model is helpful in understanding the basics of the notation, e.g. useful and harmful elements, different kinds of effects, use of 'tags', 'grids', 'separations', 'creativity' and 'reports'. The image shows the user enabling a legacy ruleset from Southbeach v3 (#consulting.reduce harmful).

Southbeach Modeller 4.0.0.0, www.southbeachinc.com - [Southbeach 101.sbm]

File Edit View Model Insert Format Draw Tools Window Help License

Explorer Models Agents Effects Tags Explain

Southbeach 101 Effects Tags Grids Separations Creativity Reports +

Creativity (Widest) creativity +

1. How can you prevent the [a] from producing the [c].
2. Put measures in place to deal with the [c].
3. Isolate the part of the [a] that is producing the [c] and remove it.
4. How else could the [a] be accomplished that would not result in the [c]?
5. What else could give the benefits of the [a] that would not result in the [c]?

Visit the Toolbox panel - Palette tab, and the Insert menu

The diagram shows three main categories of elements:

- Everything is useful OR harmful:** Contains boxes for "useful" (green rounded rectangle) and "harmful" (red rounded rectangle).
- Everything is useful AND harmful:** Shows a flow from "useful" to "useful in this way" (green box), which then branches to "pro" (green box) and "harmful in another way" (red box). The "harmful in another way" box has a "con" (red box) below it.
- Harmful things can also have useful side effects:** Shows a flow from "harmful" (red rounded rectangle) to "useful" (green box), which then leads to "silverbullet" (green box) and "harmful effect" (red box).

Toolbox Panel:

- Palettes: Tags, Grids, Lists, Creativity, Cues, Assist.
- Search bar: Enter search.
- Legacy section (checked): consulting (elaborate, increase useful, reduce harmful, simplify, hello world, improve, more ideas), root cause, SCAMPER, six hats, TOLOPOSOGO, agile, analyze, business, creativity, elaborate, governance, innovate, lateral thinking, lean.

Right mouse context menus:

- Change effect and effect properties: "intensify b so that c is irrelevant".
- Change agent properties: "replace a in order to obtain b without c".
- Prevent a from producing c: "prevent a from producing c".
- Reduce c: "reduce c".

Diagram details:

- Models are developed from one or more perspectives:** Shows a flow from "a" (green box) to "b" (green box), which then leads to "c" (red box).
- Models are extended with solutions and interventions (blue):** Shows a flow from "a" to "b", and from "b" to "c". A blue box labeled "replaces" is positioned between "a" and "b".
- Right mouse to change effect and effect properties:** Points to a blue box labeled "intensify b so that c is irrelevant".
- Right mouse to change agent properties:** Points to a blue box labeled "replace a in order to obtain b without c".
- Model something as useful if you wish to retain or increase it in the final solution:** Points to a green box labeled "b".
- Model something as harmful if you wish to reduce or eradicate it from the final solution:** Points to a red box labeled "c".
- prevent a from producing c:** Points to a blue box labeled "prevent a from producing c".
- reduce c:** Points to a blue box labeled "reduce c".

Bottom status bar: 5 new directions generated 100% 10/5/ideality = 67%

In this screenshot, The right mouse (context) menu on an object is shown. All objects (agents and effects) have a context menu, giving quick access to all types and modifiers available in Southbeach Notation 1.0.

Southbeach Modeller 4.0.0.0, www.southbeachinc.com - [Southbeach 101.sbm*]

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Explorer Models Agents Effects Tags Explain

C:\Users\triz\Documents\Southbeach MyCreativity MyCues MyGrids MyLists MyModels MyReports MyTags Temp _help _save Getting Started MyCreativity Reference.pdf Notation Guide Sample Models Southbeach 101 Southbeach Overview.pdf Southbeach User Guide.pdf The Big Picture Welcome C:\Users\triz\Documents\Southbeach\MyMode C:\Users\triz\Documents\Southbeach\MyLists

Visit the Toolbox panel - Palette tab, and the Insert menu

Everything is useful OR harmful

useful harmful

Everything is useful AND harmful

useful in this way pro con harmful in another way

Harmful things can also have useful side effects

useful

useful in this way pro con harmful in another way

Right mouse effect and ef properties

replace a in order to obtain b without c replaces b

Right mouse to change agent properties

prevent a from producing c reduce c

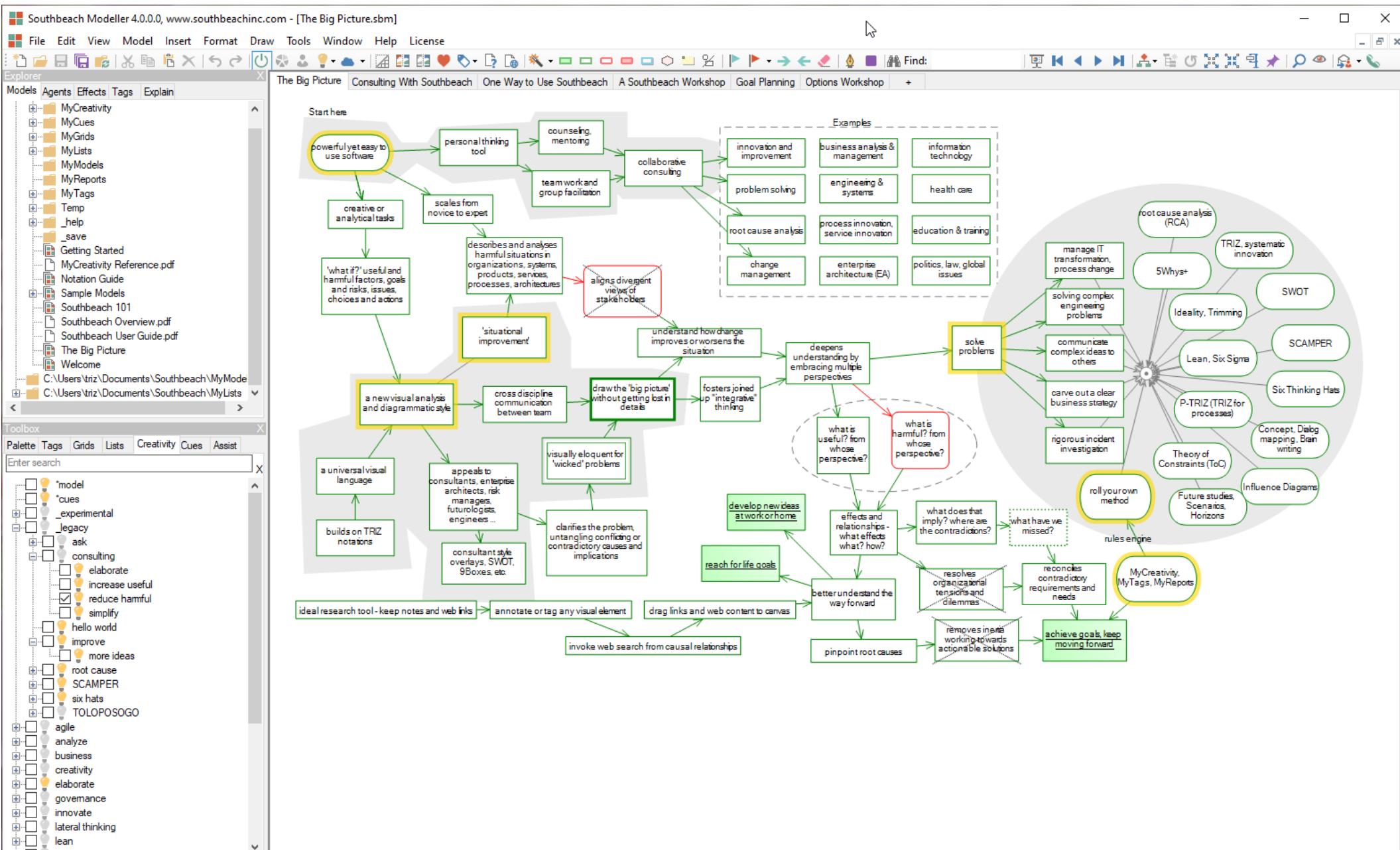
Notes Model This Tips < Prev Next >

The right mouse button plays a vital role in the UI, access to many additional functions without cluttering the interface.

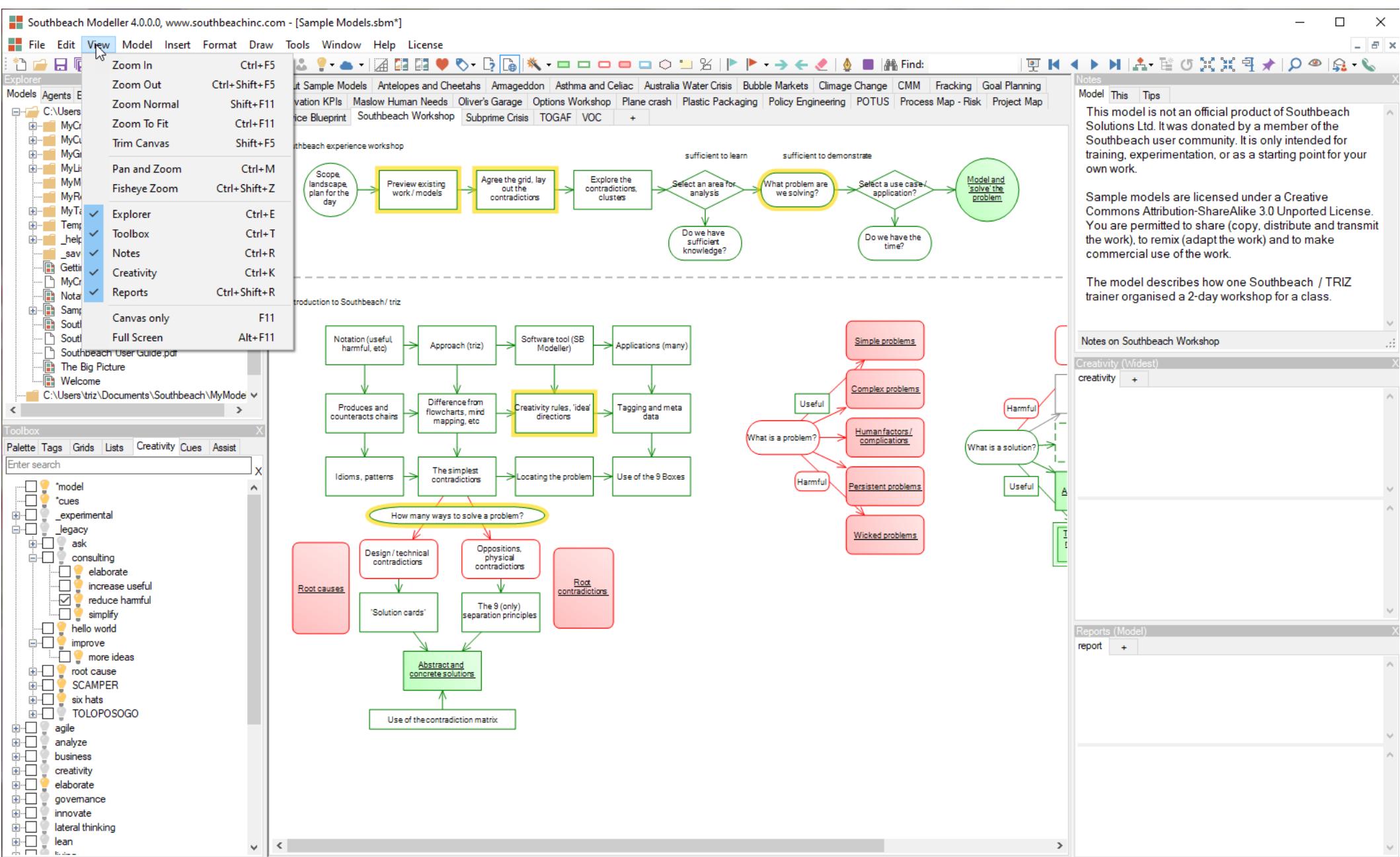
Convert to > Agent, Issue, Choice, Event, Action, Knowledge, Comment, Balloon Comment

Insufficient, Surplus, Potential, Dysfunctional, Goal, Focus, Historical, Emphasis, Tags, Go to, Bring to front, Send to back, Default size, Default size for new agents, Fixing, Properties

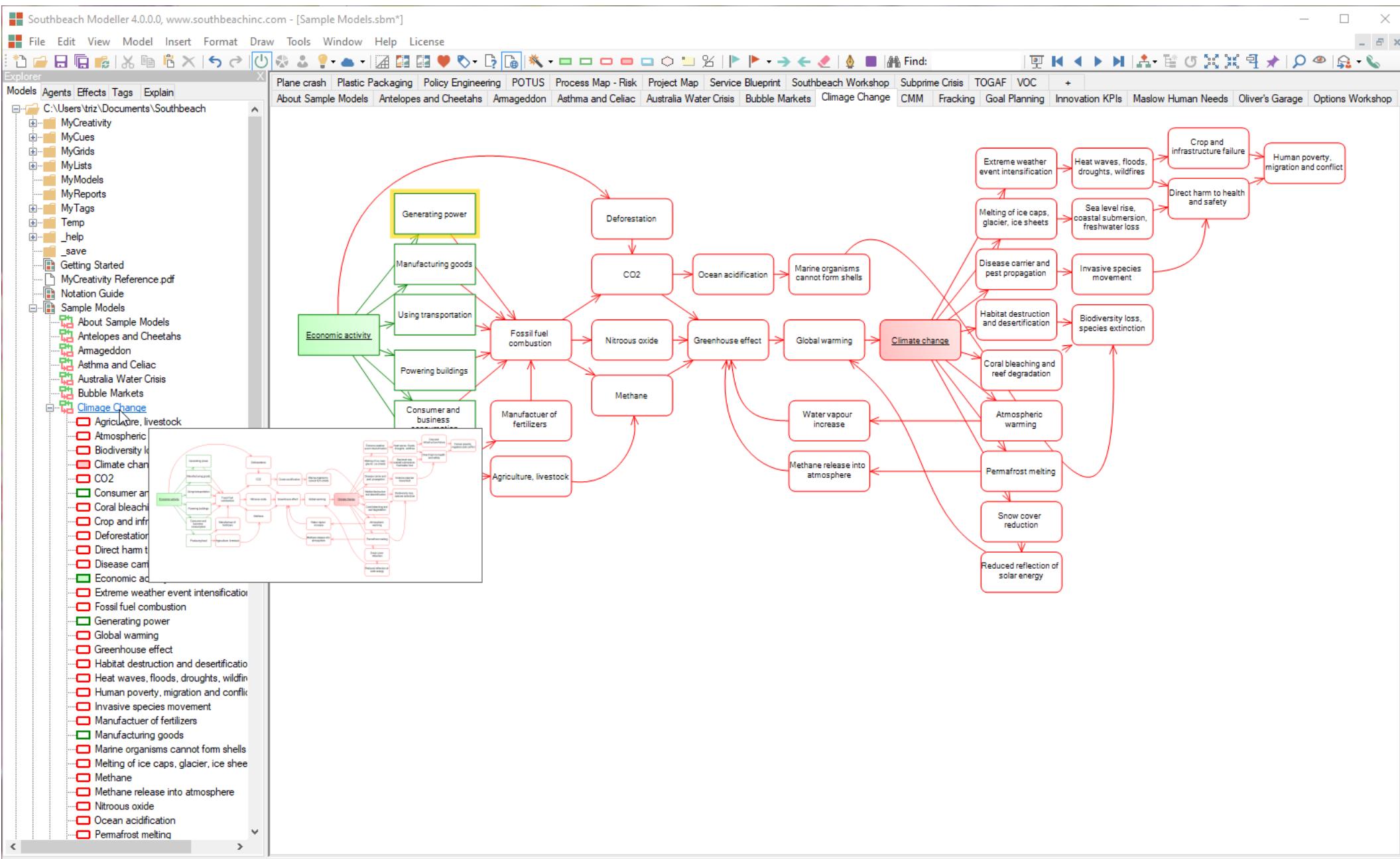
Open the ‘Big Picture’ model from the Explorer panel. It describes, visually, the range of applications for Southbeach Modeller. Unlike other visual modelling tools which typically support a specific methodology (UML, BPMN, EA etc), Southbeach Notation is a synthesis of existing visual methods. The core notation of useful and harmful elements, produces and counteracting effects, is often sufficient for a wide variety of modelling and analysis tasks, especially when combined with an appropriate ideation ruleset and/or domain-specific tags and grids/charts.



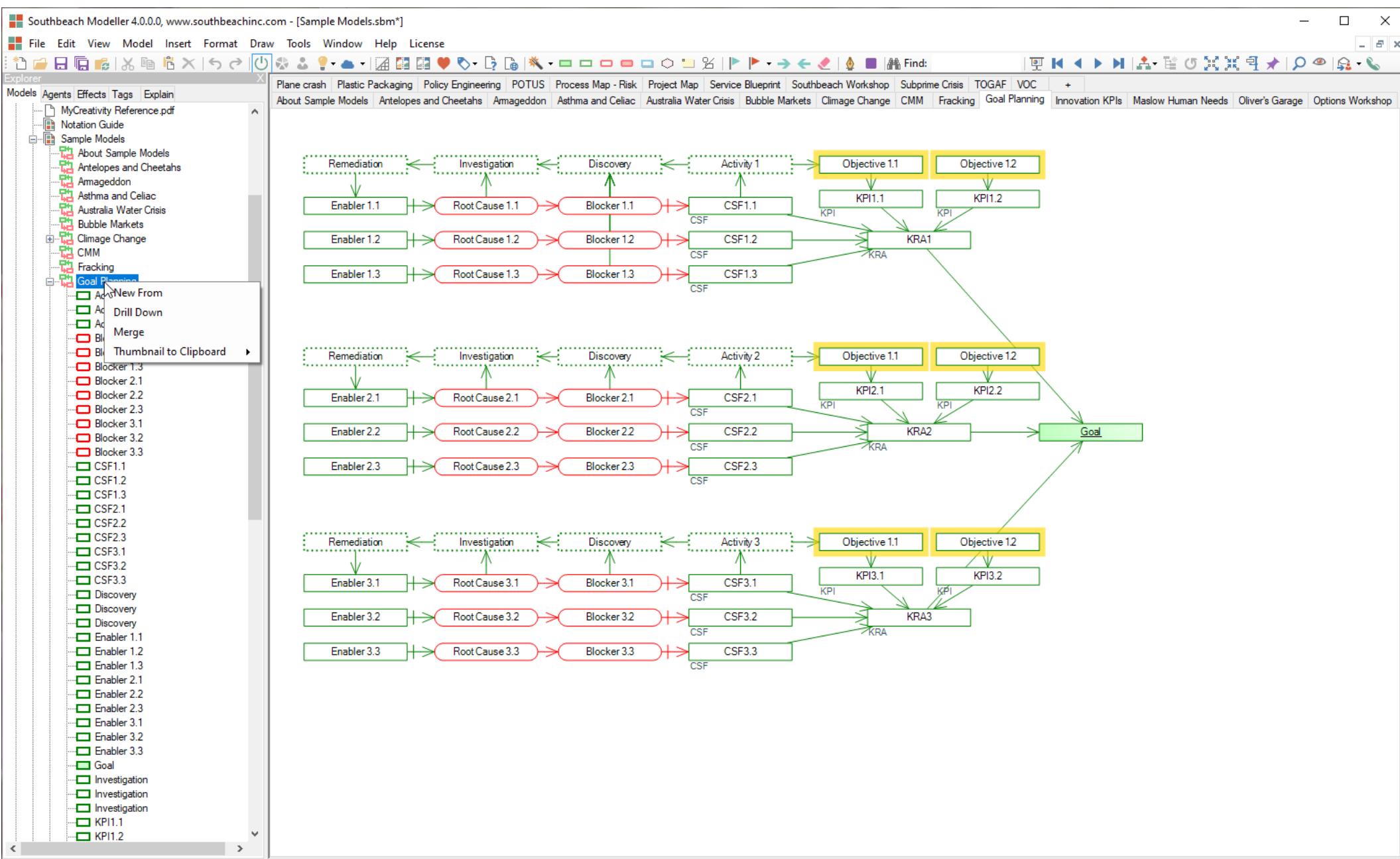
It is often unnecessary for all panels to be visible at once. For example, the user may only need the Toolbox and Canvas and not the model Notes, Creativity and Reports. The View menu and function keys provide control of panels and canvas zoom level. The mouse wheel also controls zoom level.



In this screenshot, the user has ‘drilled’ down into the ‘sample models’ file revealing the sub-models and elements within each. This works with all models created by the user and forms, in effect, a reuse repository of visual patterns and elements. Notice how hovering over a model or sub-model generates a visual ‘preview image’ without the need to ‘open’ the model for editing.



The 'drill down' functionality of the repository/file tree is obtained by using the right mouse on any file. Right mouse plays a huge role in the Southbeach UI/UX. All panels, panel tabs, tree items, and panel, tab and canvas background, provide a right mouse 'context' menu. This greatly contributes to the usability of the software keeping secondary functions hidden when not in use.



The Explorer provides a rich repository functionality for Southbeach. It is important therefore that it can be configured to point to any directory path or paths. See menu Tools – Options – Paths. Up to six paths can be defined. Network drives are supported. (Cloud services will be provided in an upcoming release.)

Southbeach Modeler 4.0.0.0, www.southbeachinc.com - [Sample Models.sbm*]

File Edit View Model Insert Format Draw Tools Window Help License

Explorer

Models Agents Effects Tags Explain

C:\Users\triz\Documents\Southbeach

- MyCreativity
- MyCues
- MyGrids
- MyLists
- MyModels
- MyReports
- MyTags
- Temp
- _help
- _save
- Getting Started
- MyCreativity Reference.pdf
- Notation Guide
- Sample Models
- Southbeach 101
- Southbeach Overview.pdf
- Southbeach User Guide.pdf
- The Big Picture
- Welcome
- C:\Users\triz\Documents\Southbeach\MyModels
- C:\Users\triz\Documents\Southbeach\MyLists

Plane crash Plastic Packaging Policy Engineering POTUS Process Map - Risk Project Map Service Blueprint Southbeach Workshop Subprime Crisis TOGAF VOC +

About Sample Models Antelopes and Cheetahs Armageddon Asthma and Celiac Australia Water Crisis Bubble Markets Climate Change CMM Fracking Goal Planning Innovation KPIs Maslow Human Needs Oliver's Garage Options Workshop

Options

View Creativity Images User Paths Fonts Export

C:\Users\triz\Documents\Southbeach

C:\Users\triz\Documents\Southbeach\MyModels

C:\Users\triz\Documents\Southbeach\MyLists

OK Cancel

Activity 1 → Objective 1.1, Objective 1.2 → KPI1.1, KPI1.2 → KRA1

Activity 2 → Objective 2.1, Objective 2.2 → KPI2.1, KPI2.2 → KRA2

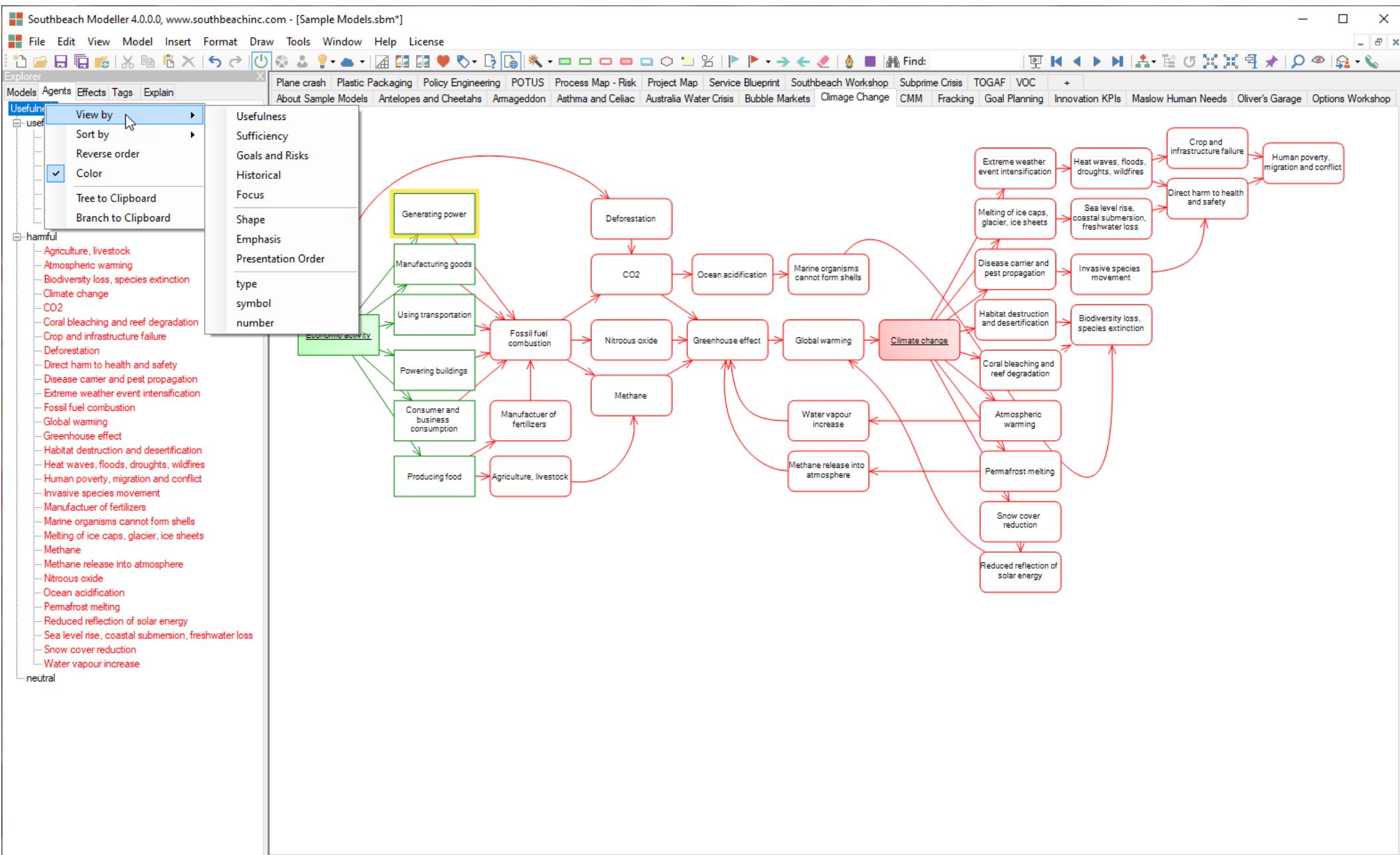
Activity 3 → Objective 3.1, Objective 3.2 → KPI3.1, KPI3.2 → KRA3

KRA1, KRA2 → Goal

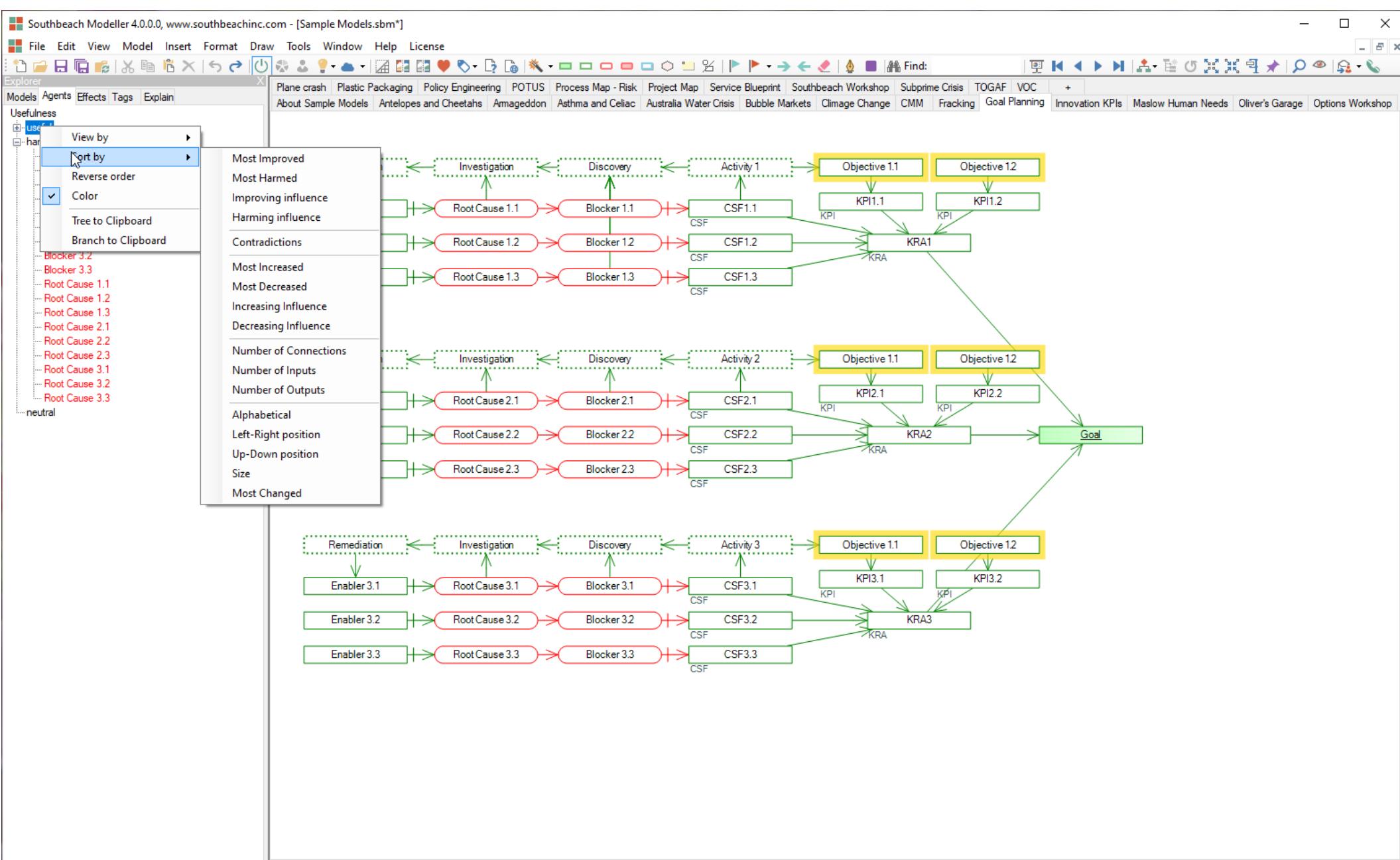
Enabler 3.1, Enabler 3.2, Enabler 3.3 → Root Cause 3.1, Root Cause 3.2, Root Cause 3.3 → Blocker 3.1, Blocker 3.2, Blocker 3.3

Goal Planning (Freeform) 96% 46/18/ideality = 72%

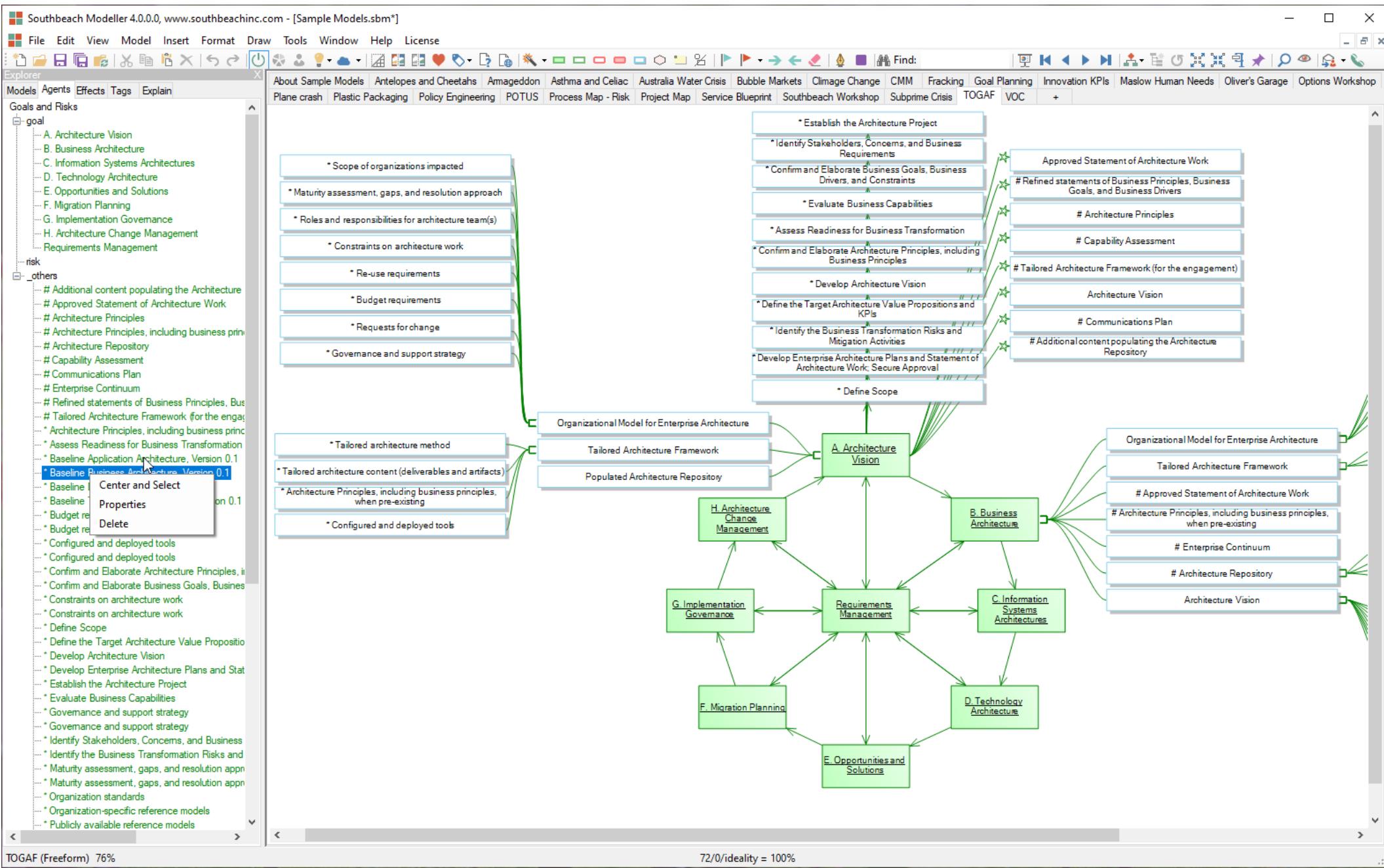
The Explorer panel provides five tabs. One points to the model/file tree itself. The others provide access to the current ‘open’ model: to the list of agents, list of effects (relationships between objects and to any tags/tag groups used in the model. The list of objects can be viewed and sorted in numerous ways. This capability to view a model as a list is a useful alternative to the visual representation, especially for large/complex models. In addition, the list can be copied to the clipboard for export to other applications.



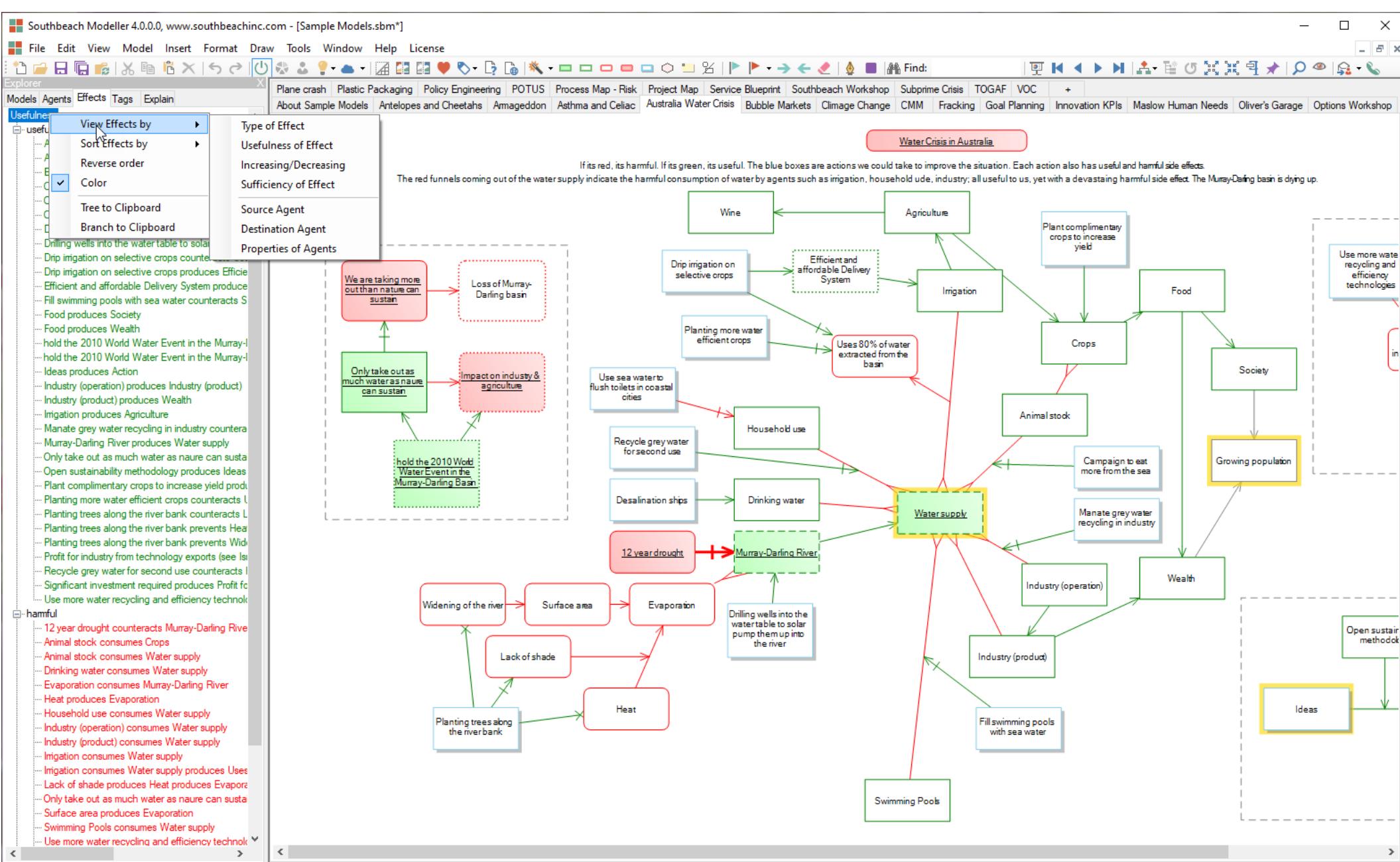
Here, the agent list in the Explorer panel is being used to sort the objects according to their 'effect' within the model, for example, 'most improved', 'improving influence', etc. The range of view and sort functions provides a simple way to explore any visual model and is often 'good enough' for simple idea development and improvement suggestions.



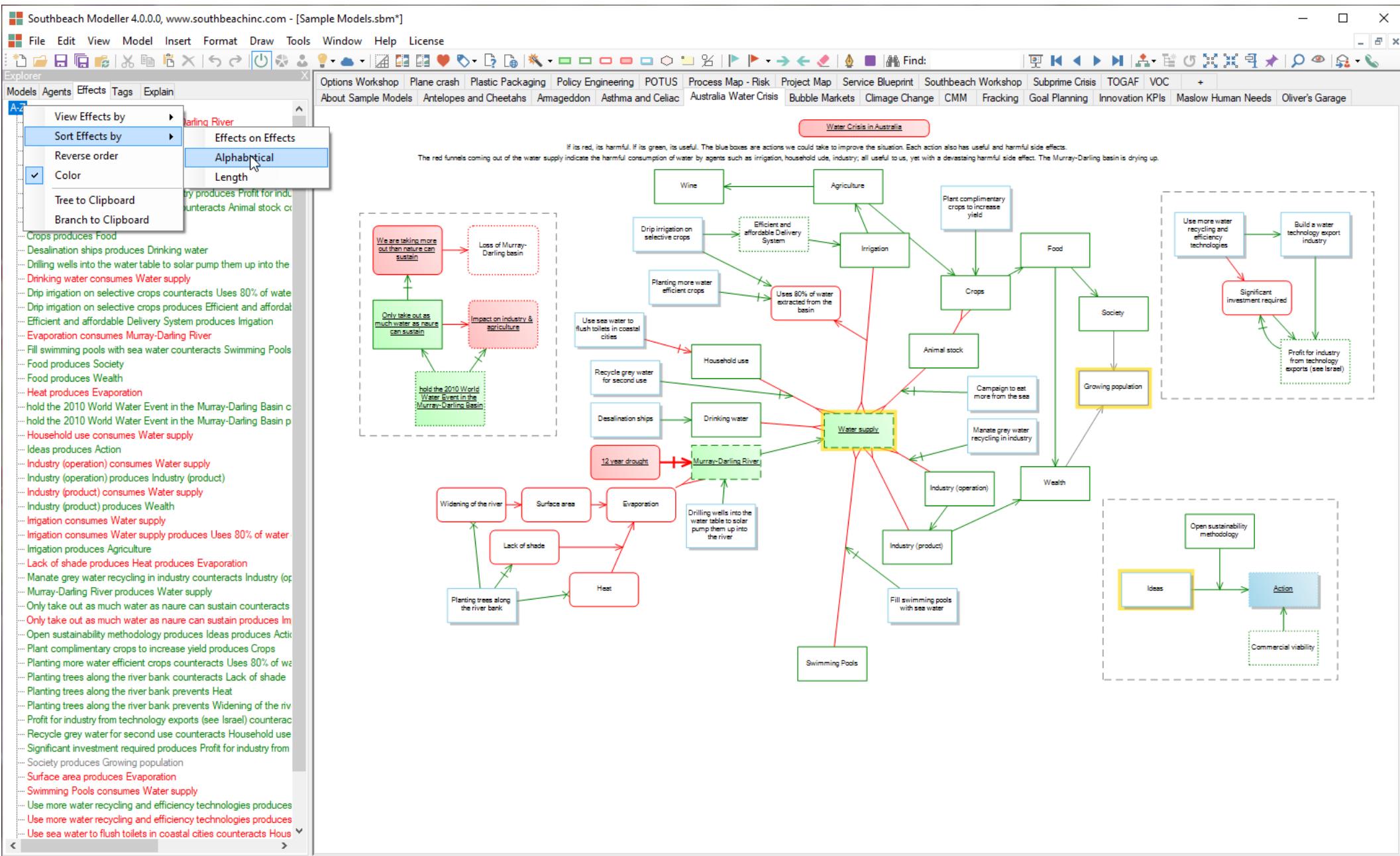
From the Explorer panel – Agents tab and Effects tabs, it is possible to view and sort the visual elements in numerous ways. This provides another important function. The right mouse context menu on an element in the list provides a ‘center and select’ function. The element is selected on the visual canvas. If the object is off-screen it is moved on-screen. This function is especially helpful when navigating large models and is one of many functions that give Southbeach Modeller its excellent scalability over a range of modelling tasks.



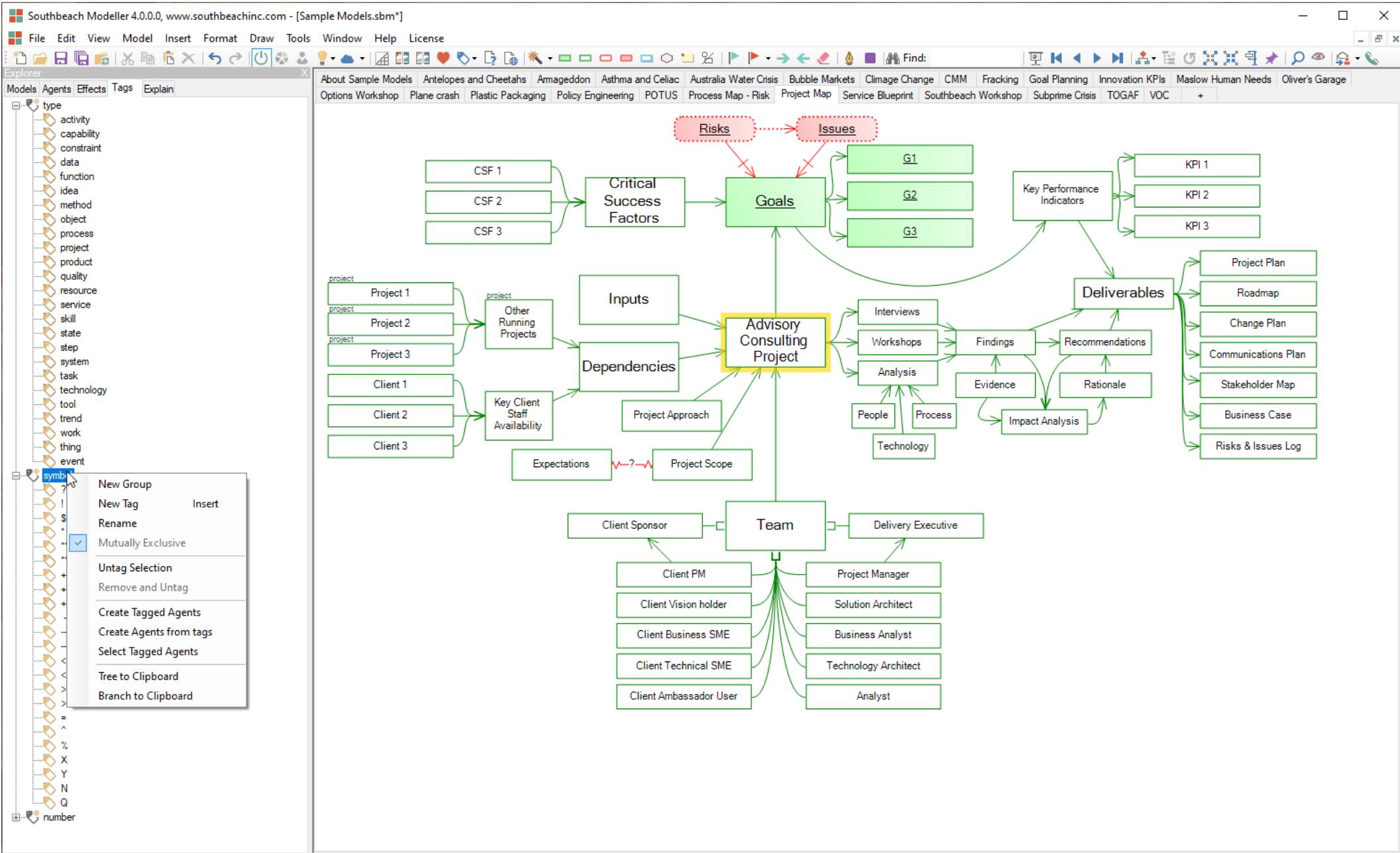
As with the agent list in Explorer panel, so with the effect list. All relationships between objects are listed and can be viewed and sorted in numerous ways. Again, the list of effects can be exported via the system clipboard. The whole tree or a selected branch of the tree can be copied to clipboard. These functions make it extremely straightforward to extract information from the visual models for use in other documentation.



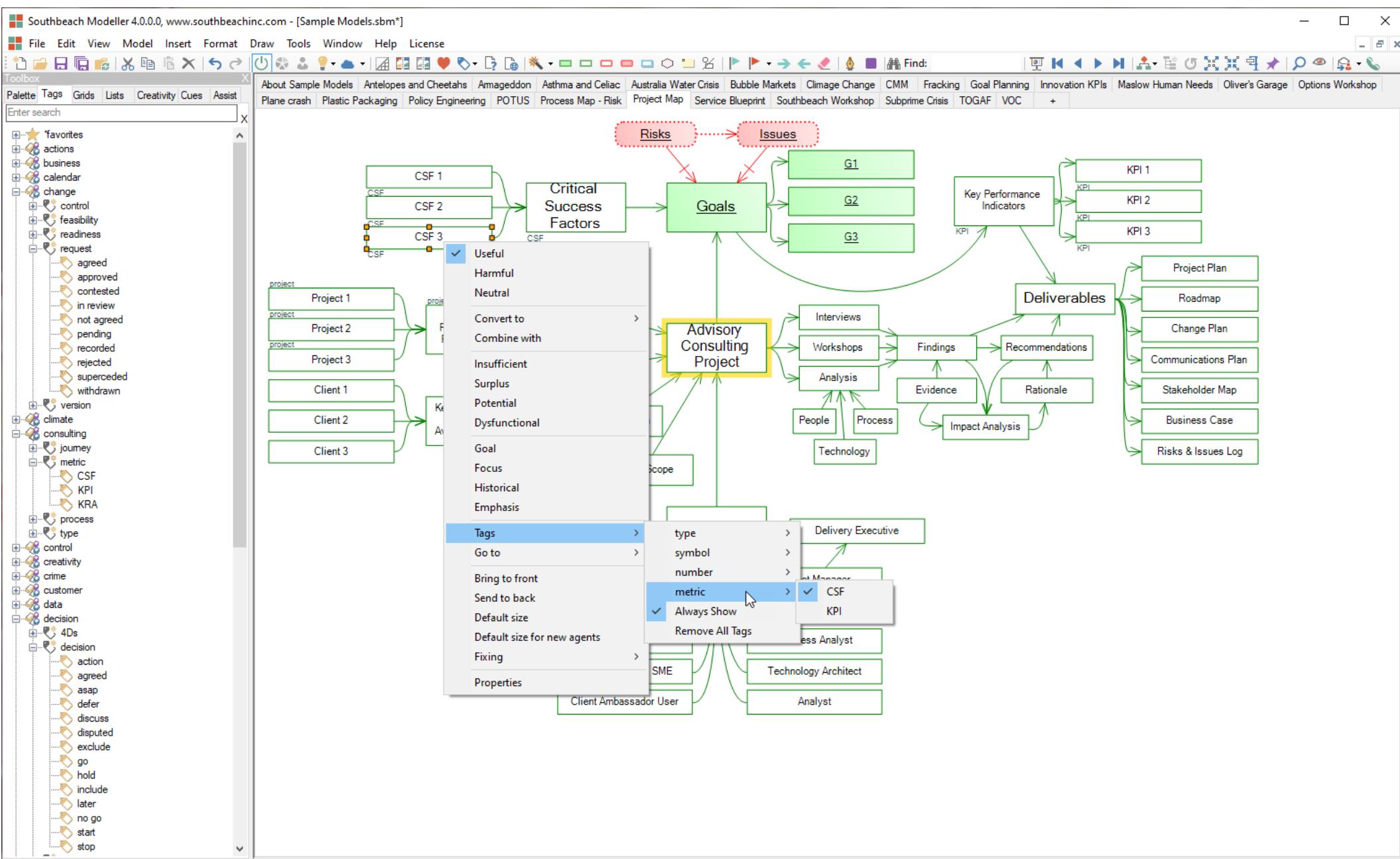
As well as supporting effects and relationships between objects, the notation supports ‘effects on effects’ and ‘effects from effects’. For example, if object A produces (increases) B, an effect E can be added which counteracts the ability of A to generate the effect on B. The ability to list such indirect effects is useful in a range of applications.



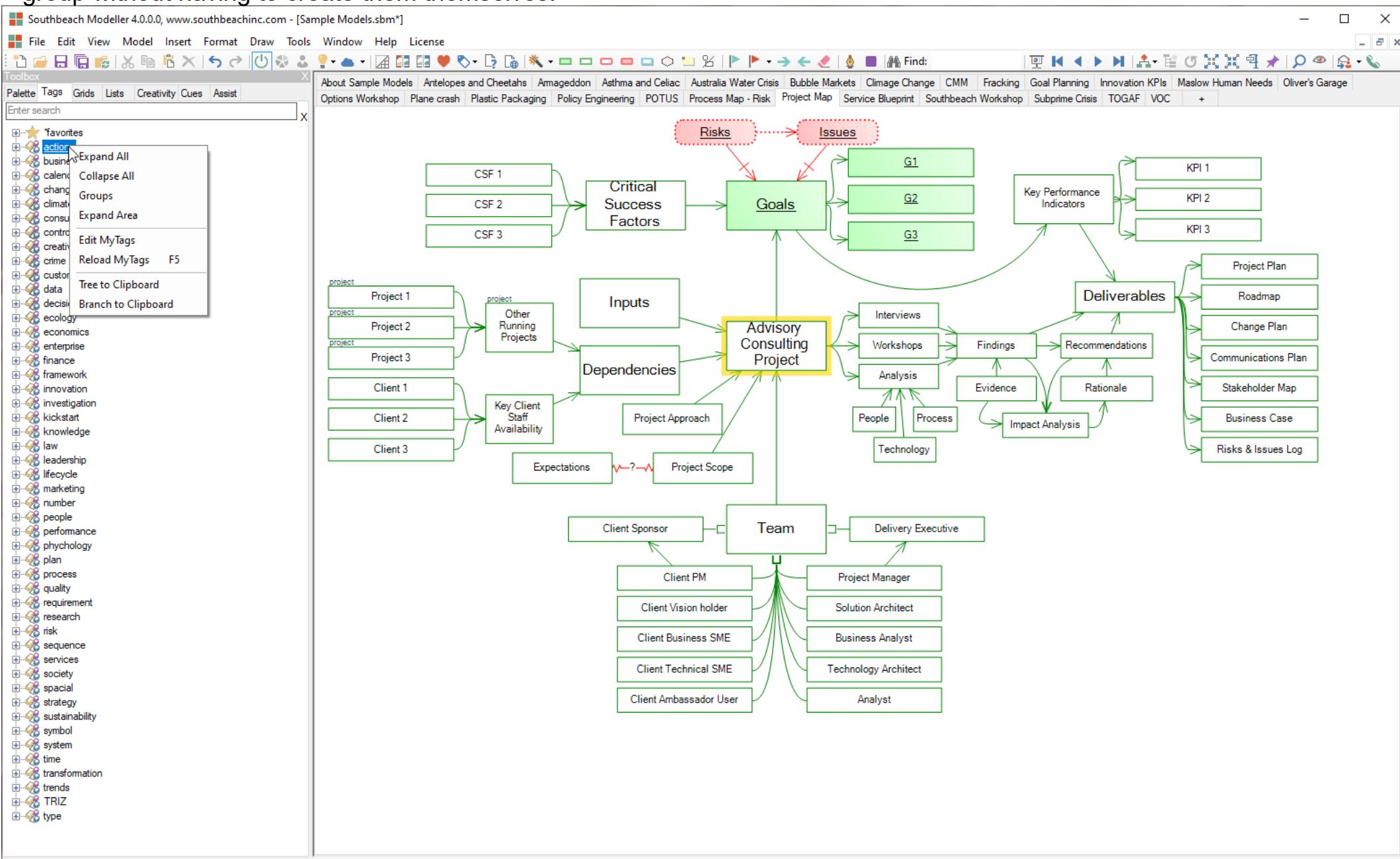
Tags extend the Southbeach Notation to any domain-specific applications. Every object in a model can be tagged in one or more tag groups. Both inclusive and exclusive tag groups are supported. All new models are created with three standard tag groups: type, symbol and number. From the Explorer panel, the user can add, remove or rename any tag, or can create a new tag group. Tags can also be used to create new agents of the same name. Simply dragging a tag to an object or to the canvas is all that is required. From the object's right mouse menu its tags can be changed. The object inherits the tag group.



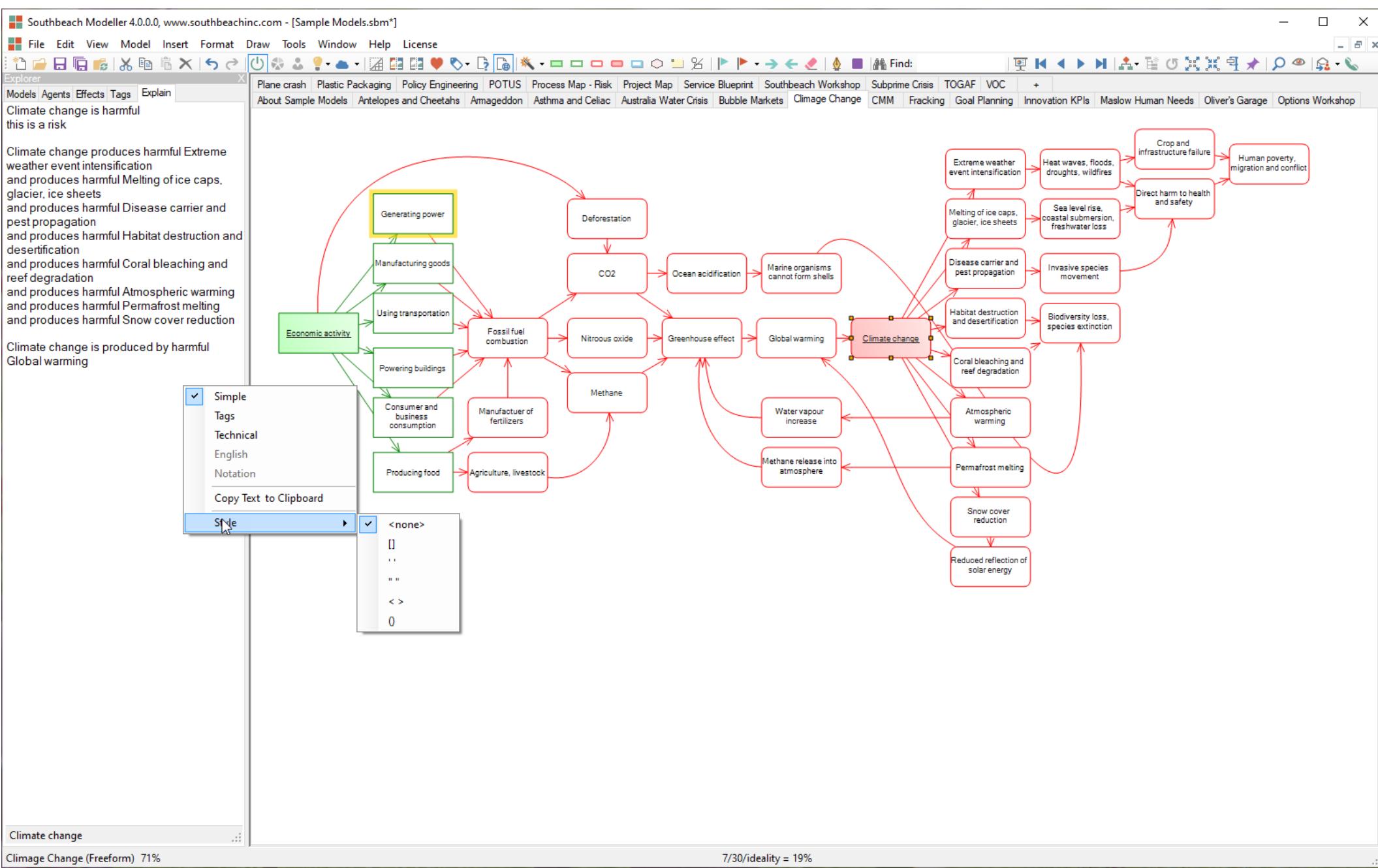
Here, the user has clicked right mouse on an object. Any attribute of the object can be modified, including the tags and tag groups in which the object appears. On the left, a small section of the extensive tag library provided with the software is shown. There are over 3000 tags/tag groups, all searchable. Individual tags can be directly dragged to objects or to the canvas. Alternately, tag groups can be added to the model which makes them available via the Explorer views and sorts.



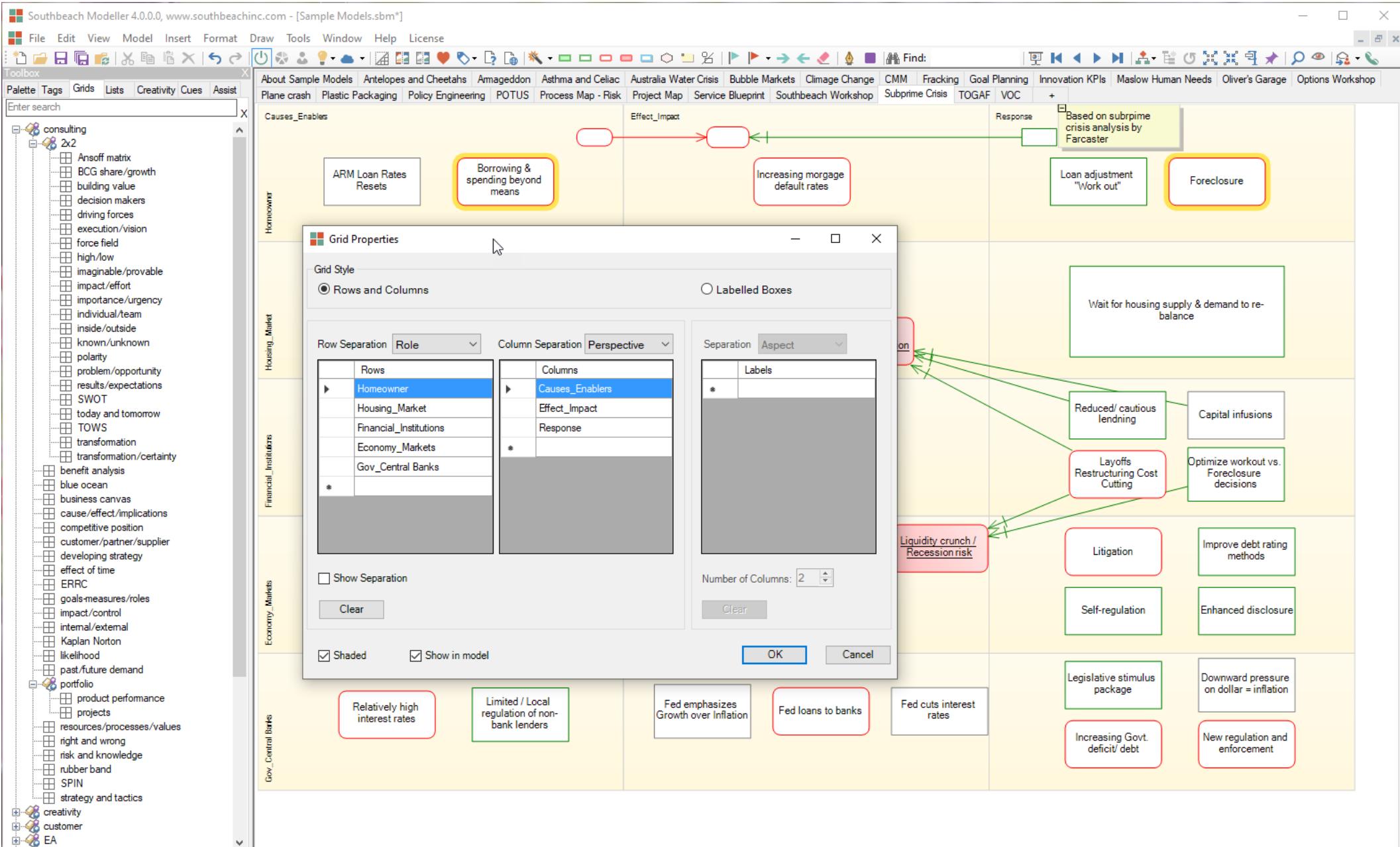
As with all resource trees, the tag library is expandable at multiple levels of detail. The right mouse menu at a level will contain functions relevant at that level. Here, the top level menu provides the basic functions of collapsing and expanding the tree, and editing the tag definitions. Right mouse on a tag group, for example, provides an option to copy the entire group to the model, where it will then appear in the Explorer panel views. Having tag groups 'in' the model itself (not just the individually tagged objects) means that if the model is shared with a colleague they can use any of the tags in the group without having to create them themselves.



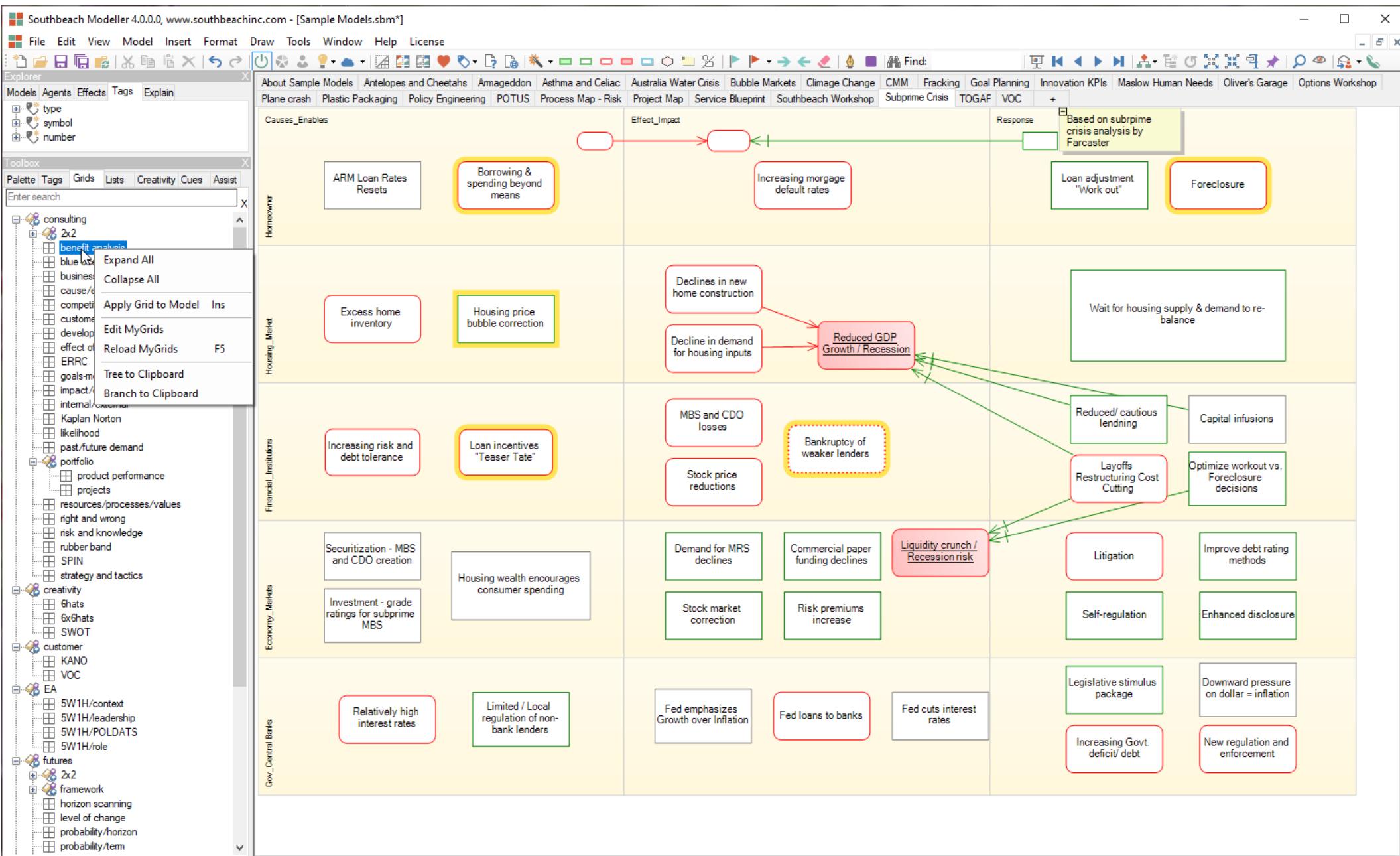
The Explain tab in the Explorer panel provides a variety of descriptions of any object or effect in a model. As with the agent and effect views, this can be helpful in both understanding a model in text form, as well as generating simple text export for use in external documentation.



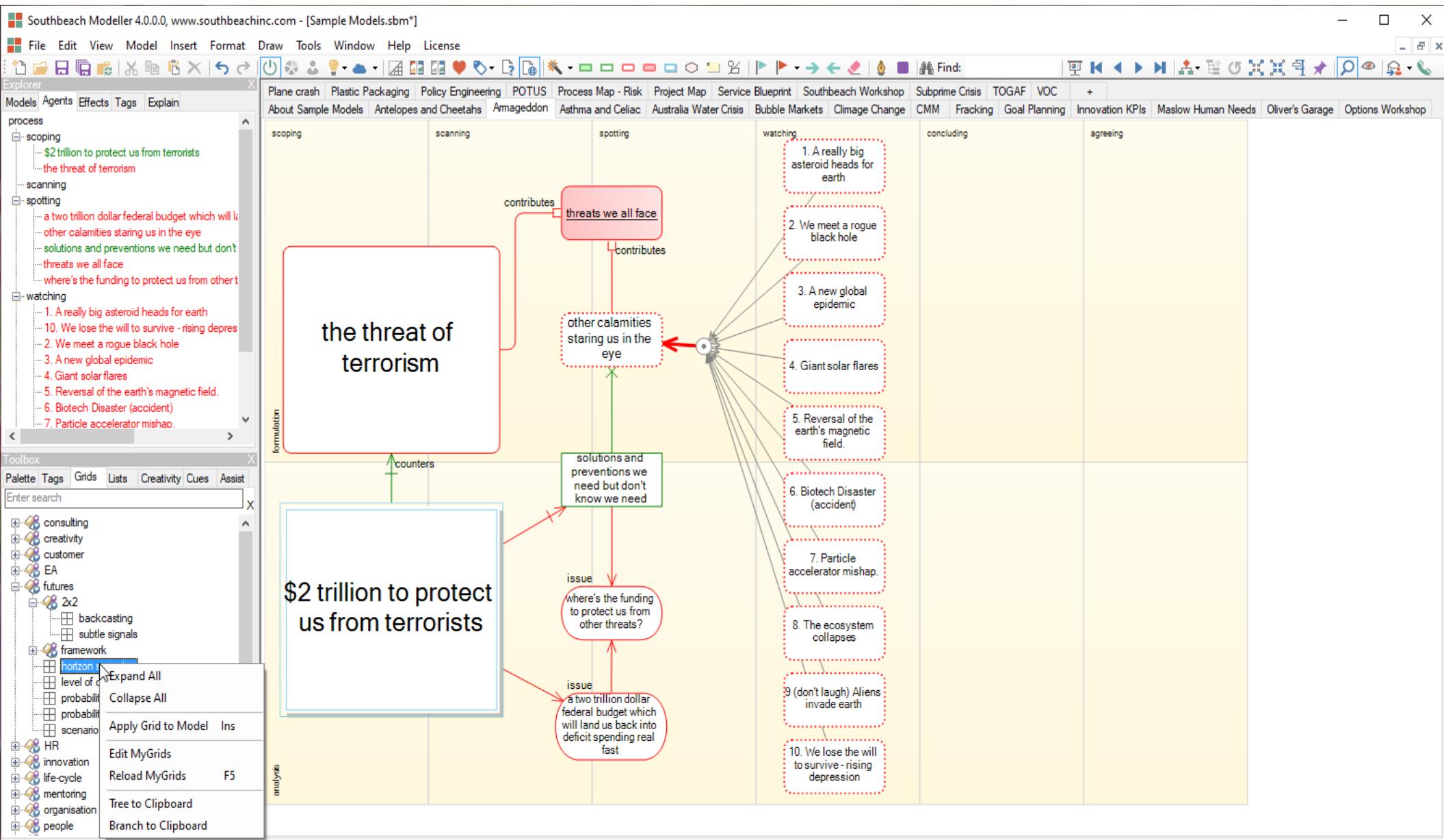
Southbeach Modeller supports the concept of grids. These can be used to implement overlays for any visual model as either grids, pools, swimlanes or simple labelled boxes. The user specifies whether they need one or two axes, vertically (pools) or horizontally (swimlanes) and then specifies the axis labels. Objects inherit ‘tags’ from these values depending on their position on the canvas. A row or a column is a virtual tag group. The user is free to implement any consulting or analysis ‘grid’ for their application or use case. As with normal tags, this metadata is available to the creativity/ideation engine.



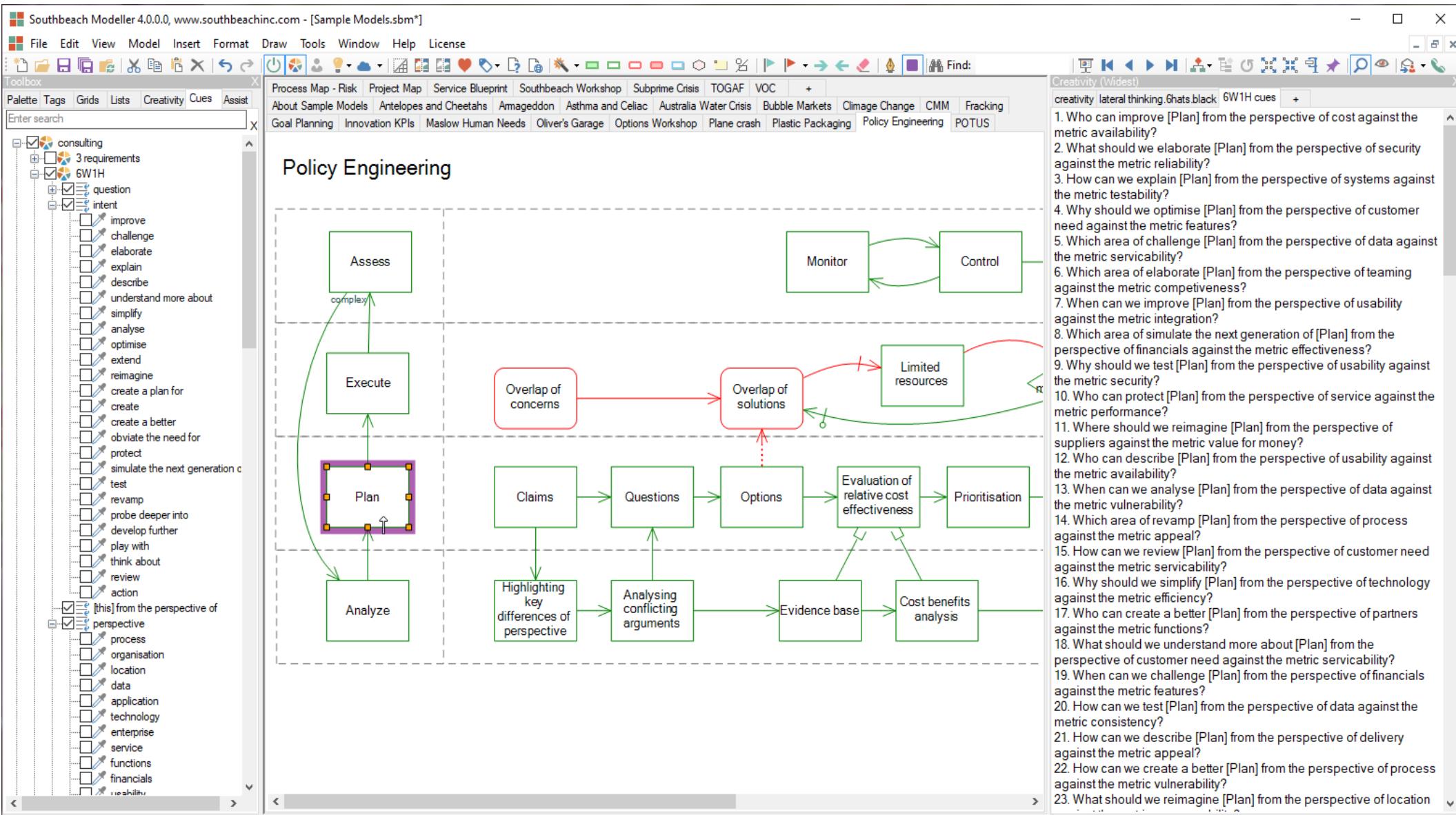
Southbeach comes pre-installed with a library of over 100 standard grids based on accepted consulting practice, e.g. a range of 2x2s. It is hard to overstate the importance of this feature. Southbeach visual models are not dumb diagrams. Grids add tag metadata to the model, simply by virtue of the position of objects on the grid canvas. These values can be referred to in creativity scripts, reporting templates and more. Thus, models become active as ideation is generated.



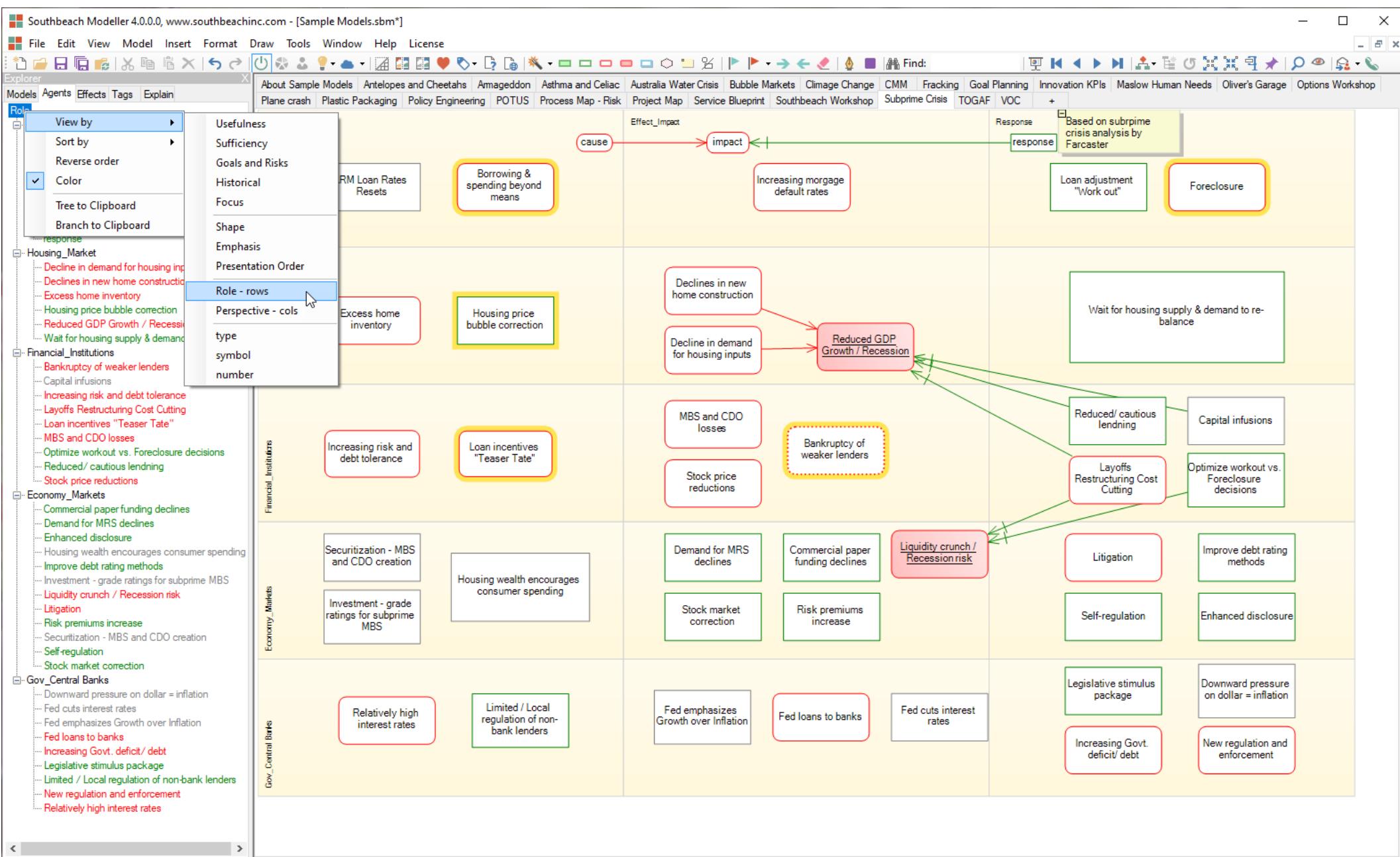
In this example, the user has added a grid to an existing model, thereby creating rows and columns according to a ‘horizon scanning’ project. The objects on the grid have therefore inherited tags from their position on the canvas. This is reflected in the Explorer panel – Agent list view ‘by column’. The integration of grids with tags, the creativity engine and views and sorts makes for a powerful way to package up ‘best practices’ as template Southbeach models.



Cues is a major new function in v4 of the software. All pre-installed or user-defined cues definitions are displayed as a tree, set out according to the grammar of the sentences to be generated. If the cues engine is on (icon in toolbar), sentence alternatives are generated as the user clicks around the model, similar to the way creativity works. Cues can be individually enabled or disabled as with creativity rulesets. In addition, cues can be customized by selecting or de-selecting combinations in the grammar. For example, if the cue defines combinations for 'who', 'why', when, 'where', 'what' questions (5whys), the user may choose at run time to only generate 'why' and 'what' questions.



As we have explained, grids are implemented under the hood as virtual tags. If a model has a grid, the objects inherit the tags from the cell in which they appear. This means that agent views and sorts can list the objects according to the rows and columns in which they appear.



This screenshot shows the main File menu. Note that as well as the normal function of opening a model, it is also possible to create a new model from an existing model, in effect using it as a template model. It is also possible to merge the content of an existing model with the current open model. Models can also be exported as images (both opaque and transparent), useful for insert into external documentation or to share on social channels.

File Edit View Model Insert Format Draw Tools Window Help License

New Ctrl+N
New From
Open ... Ctrl+O
Browse Examples Online
Recent Files F9
Most Recent
Clear Recent Files
Close Ctrl+F4
Close All
Merge ...
Send To
Save Ctrl+S
Save As ... Ctrl+Shift+S
Save All
Save as Image
Export
Print Ctrl+P
Print Options
Print Preview
Exit Alt+F4

Main functional areas of Southbeach Modeler

```

graph TD
    A[Create visual models to stimulate creative thinking, ideation, problem solving and design] --> B[Annotate model elements with tags and tag groups, both exclusive and inclusive]
    B --> C[Model overlaid grids such as consulting charts (XY), swimlanes (rows), pools (columns) and labelled boxes]
    C --> D[Visual elements automatically inherit additional tags from the axis labels of charts, grids and boxes]
    D --> E[Keep additional notes, web links and file references with any model or model elements]
    E --> F[Create template models with default settings, initial content, notes, tags and their own specific creativity rules]
    
    G[Model problems and solutions, issues, events, decisions, actions, goals and risks] --> H[Maintain a library of abstract or concrete models, sub-models or modelling elements]
    H --> I[An extensive library of consulting charts and grids is provided, each modifiable or extendable by the user]
    I --> J[Idea generation operates in two modes: interactively while modelling or on-demand to generate a report]
    
    K[Generate ideas from any visual model using the embedded rules engine] --> L[Craft scripts for specific methods or applications using the creativity and reporting rules language]
    
    M[Refine models using a variety of built-in effects, relationships or user-defined arrows] --> N[Highlight individual model elements and the critical problem-solving patterns]
    N --> O[Follow any highlighted element forward or backwards through the cause-effect chain]
    O --> P[Assist tools accelerate model building using tools such as elaboration, decomposition and improvement]
    P --> Q[View, sort and edit the text of the model using list views of individual elements and relationships]
    Q --> R[Capture model text live in a team meeting or instant interview without the distraction of visualisation]
    R --> S[Anonymise, shuffle or randomise any model or selection of elements to stimulate creativity]
    S --> T[Define a build sequence for the model and step through the logic of your design]
    
    U[Search the web, patent bases and other resources using selected parts of the model] --> V[Configurable auto-layout functions include freeform, tree and graph mode]
    V --> W[Pin (fix) or clamp (user position) objects on the canvas so that auto-layout elements move around them]
    W --> X[Define a build sequence for the model and step through the logic of your design]
    
    Y[Add to the model or paint over existing visual elements from any list, subset of items or individual entity] --> Z[Copy/paste visual elements to/from the clipboard as text or images for inclusion in external reports]
    Z --> AA[Select elements on the canvas manually or according to their tags, attributes and shape]
    AA --> AB[Define sentence structures from which 'cues' are generated; seeds for the development of new ideas]
    AB --> AC[Use any generated sentence for lateral thinking or to craft new rules for the creativity and reporting engine]
    AC --> AD[Everything else than the standard notation is configurable: tags, grids, lists, creativity, reports]
    AD --> AE[Shortcuts and accelerator keys are available for essential functions and tools]
  
```

Notes
Model This Tips

Notes on Overview
Creativity (Widest)
creativity +

Reports (Model)
report +

Toolbox
Palette Tags Grids Lists Creativity Cues Assist

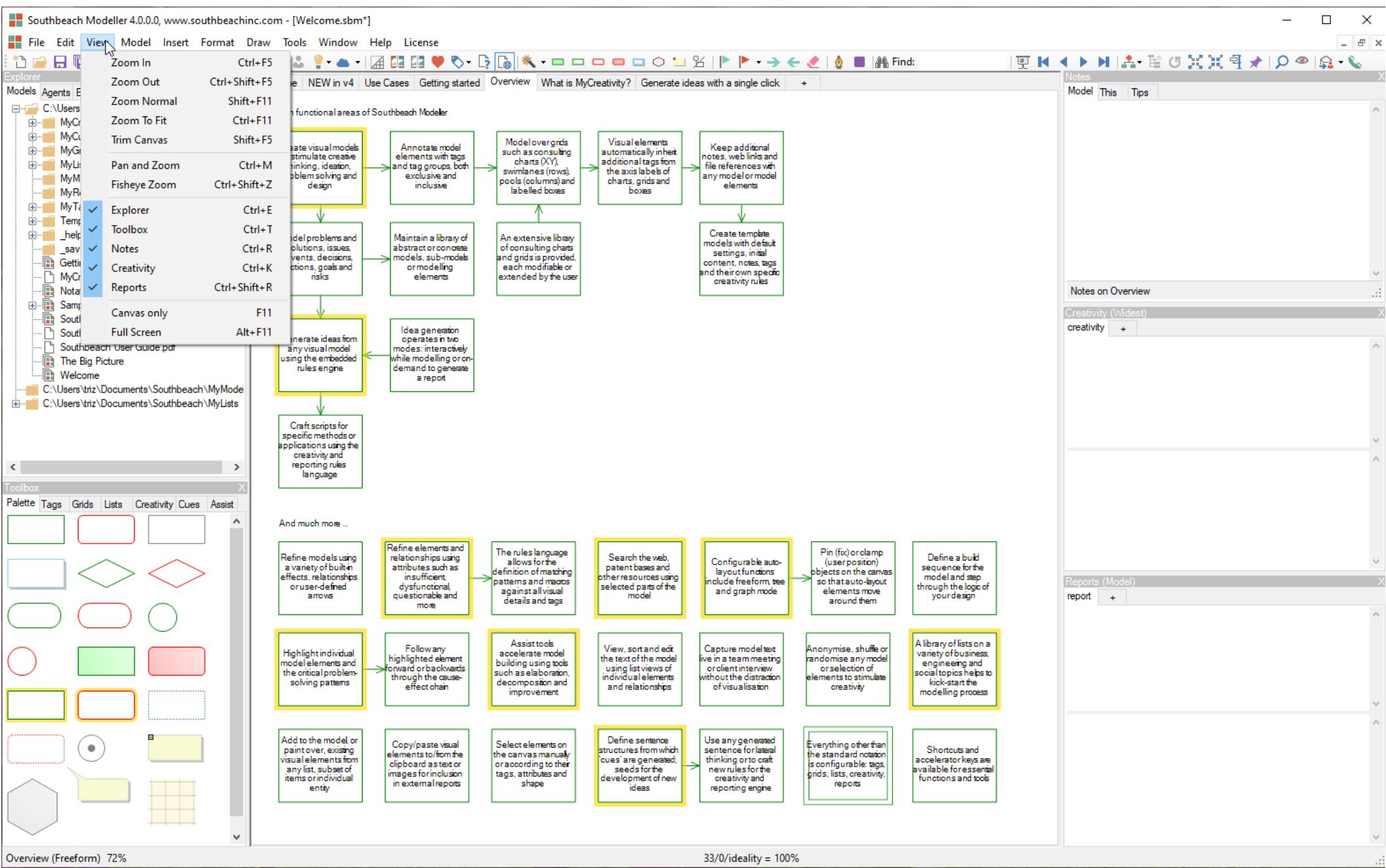
And much more ...

Overview (Freeform) 72% 33/0/ideality = 100%

The View menu provides the usual cut/copy/paste functions for objects on the canvas and in other panels. Objects can also be ‘selected’ (given handles) according to their properties. For example, select a ‘useful goal’ on the canvas and then use ‘select like me’ and similar objects will be selected.

The screenshot displays the Southbeach Modeler 4.0.0.0 application window. The menu bar includes File, Edit, View, Model, Insert, Format, Draw, Tools, Window, Help, and License. The View menu is highlighted. The left sidebar shows the Explorer panel with a tree view of models and lists, and the Toolbox panel with various modeling shapes. The central workspace is titled 'Main functional areas of Southbeach Modeler' and contains a flowchart illustrating the software's features. The flowchart starts with 'Create visual models to stimulate creative thinking, ideation, problem solving and design', leading to 'Model problems and solutions, issues, events, decisions, actions, goals and risks', then to 'Generate ideas from any visual model using the embedded rules engine', and finally to 'Craft scripts for specific methods or applications using the creativity and reporting rules language'. Other nodes include 'Annotate model elements with tags and tag groups, both exclusive and inclusive', 'Model overlords 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', 'Keep additional notes, web links and file references with any model or model elements', 'Maintain a library of abstract or concrete models, sub-models or modelling elements', 'An extensive library of consulting charts and grids is provided, each modifiable or extended by the user', 'Create template models with default settings, initial content, notes, tags and their own specific creativity rules', '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 instant interview without the distraction of visualisation', 'Anonymise, shuffle or randomise 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', and 'Everything other than the standard notation is configurable: tags, grids, lists, creativity, reports'. The bottom status bar shows 'Overview (Freeform) 72%' and '33/0/ideality = 100%'. The right side of the interface includes a Notes panel, a Creativity (Widest) panel, and a Reports (Model) panel.

The View menu provides access to the panel visibility controls as well as zoom level. Zoom normal is 100%. Zoom level is always displayed bottom left of the application window. As models grow or shrink it can be helpful to 'fit to canvas' or 'trim canvas' in areas where there are no visible objects. Pan/zoom and Fisheye tools are provided for navigating large, complex or detailed visual models. Icons for these two tools also appear in the toolbar.



The Model menu provides access to dialogs for setting important attributes of a Southbeach model. This includes any agent or effect preferences, a visual style, grid properties, and auto-layout (if required). Southbeach includes a powerful auto-layout feature supporting a wide range of tree and graph behaviors. Toolbar icons are provided for ‘fixing up’ the layout of a messy tree or graph, for example, with a single click. Alternately ‘continuous’ auto-layout can be enabled. In addition, single click ‘spread’ and ‘compact’ functions expand or reduce the space between objects. Certain objects can be ‘pinned’ (fixed position) or ‘clamped’ (free to be moved by the user but not the engine) within an auto-layout where required.

Southbeach Modeller 4.0.0.0, www.southbeachinc.com - [Welcome.sbm*]

Model (selected)

- Auto Layout
- >
- Tree Properties
- Graph Properties
- Agent Preferences
- Effect Preferences
- Visual Style
- Grid Properties
- Model Properties

Auto Layout (selected)

Freeform

Tree

Graph

Notes on Overview

Creativity (Widest)

creativity

Reports (Model)

report

Overview (Freeform) 72%

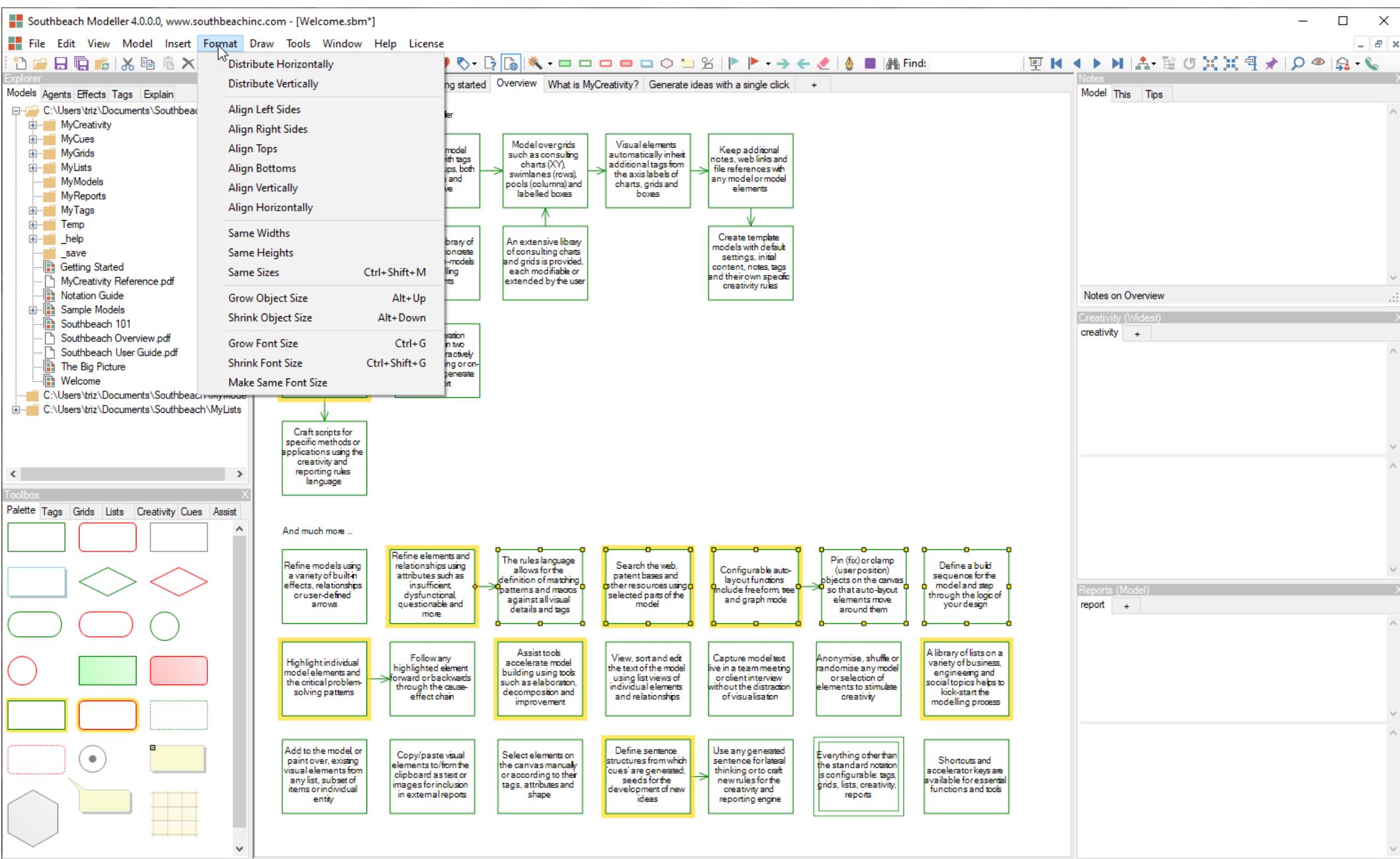
33/0/ideality = 100%

The screenshot shows the Southbeach Modeller 4.0.0.0 interface. The main window displays a flowchart titled 'MyCreativity' with various nodes and connections. The 'Model' menu is open, specifically the 'Auto Layout' submenu, which is highlighted. The submenu contains options for 'Freeform', 'Tree', and 'Graph'. To the left, the 'Explorer' panel shows a file tree with categories like 'Models', 'Agents', 'Effects', and 'Tools'. Below it is the 'Toolbox' with various modeling tools. On the right, there are panels for 'Notes' (with tabs for 'Model', 'This', and 'Tips'), 'Notes on Overview', 'Creativity (Widest)', and 'Reports (Model)'. The bottom status bar shows 'Overview (Freeform) 72%' and '33/0/ideality = 100%'. The overall interface is clean and professional, designed for business modeling and creativity.

Objects can be added to the canvas in numerous ways, including 1) ‘dragging out’ from an existing object to create a new object and its effect, 2) double-clicking on the canvas, 3) control keys (see separate guide), 4) using ‘assist tools’ (Toolbox panel) or 5) dragging items from any list of resources including ‘drilled down’ elements from existing models, from the tag library, the list library and more. However, the Insert menu is another way to create objects.

The screenshot shows the Southbeach Modeler 4.0.0.0 interface with the 'Insert' menu selected. The 'Insert' menu contains several categories: Useful (Ctrl+U), Harmful (Ctrl+H), Neutral (Ctrl+Shift+N), Default Agent (Ctrl+Shift+D), Issue (selected), Choice, Event, Action, Knowledge, Conjunction, Comment, Balloon Comment, Background Image, and Identifier. A tooltip for 'Issue' indicates it's a visual model using the embedded rules engine. The main workspace displays a flowchart with nodes like 'Model overlaid 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', 'Keep additional notes, web links and file references with any model or model elements', 'Maintain a library of abstract or concrete models, sub-models or modelling elements', 'An extensive library of consulting charts and grids is provided, each modifiable or extendable by the user', and 'Create template models with default settings, initial content, notes, tags and their own specific creativity rules'. Below this, a section titled 'And much more ...' lists various features: Refine models using a variety of built-in effects, relationships or user-defined arrows; 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 visualisation; Anonymise, shuffle or randomise 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; and Shortcuts and accelerator keys are available for essential functions and tools.

The Format menu applies to currently selected objects and effects. In addition, right mouse on any object to access a function to set that object's size to become the default size for new objects of the same notation type/shape.



In addition to notation objects and effects, Southbeach Modeller provides a set of ‘drawing objects’. These have no semantic significance and are purely decorative. They exist in their own ‘layer’ of the model and so can be positioned independently without disturbing the model. Use the ESC key to complete shapes with N sides, e.g. polygon, flexigon.

The screenshot shows the Southbeach Modeller 4.0.0.0 interface. The top menu bar includes File, Edit, View, Model, Insert, Format, Draw (selected), Tools, Window, Help, and License. The left sidebar has sections for Models, Agents, Effects, Tags, and Explain, with a tree view of local files like MyCreativity, MyCues, MyGrids, etc. The central workspace displays a flowchart titled 'Getting started' with several boxes connected by arrows. A tooltip for 'Filled Polygon' is visible. The bottom left shows a 'Toolbox' with categories like Tags, Grids, Lists, Creativity, Cues, and Assist, containing various geometric shapes. The bottom status bar shows 'Draw Polygon stopped 72%' and '33/0/ideality = 100%'. On the right, there are 'Notes' and 'Reports' panels.

Toolbox Categories:

- Tags
- Grids
- Lists
- Creativity
- Cues
- Assist

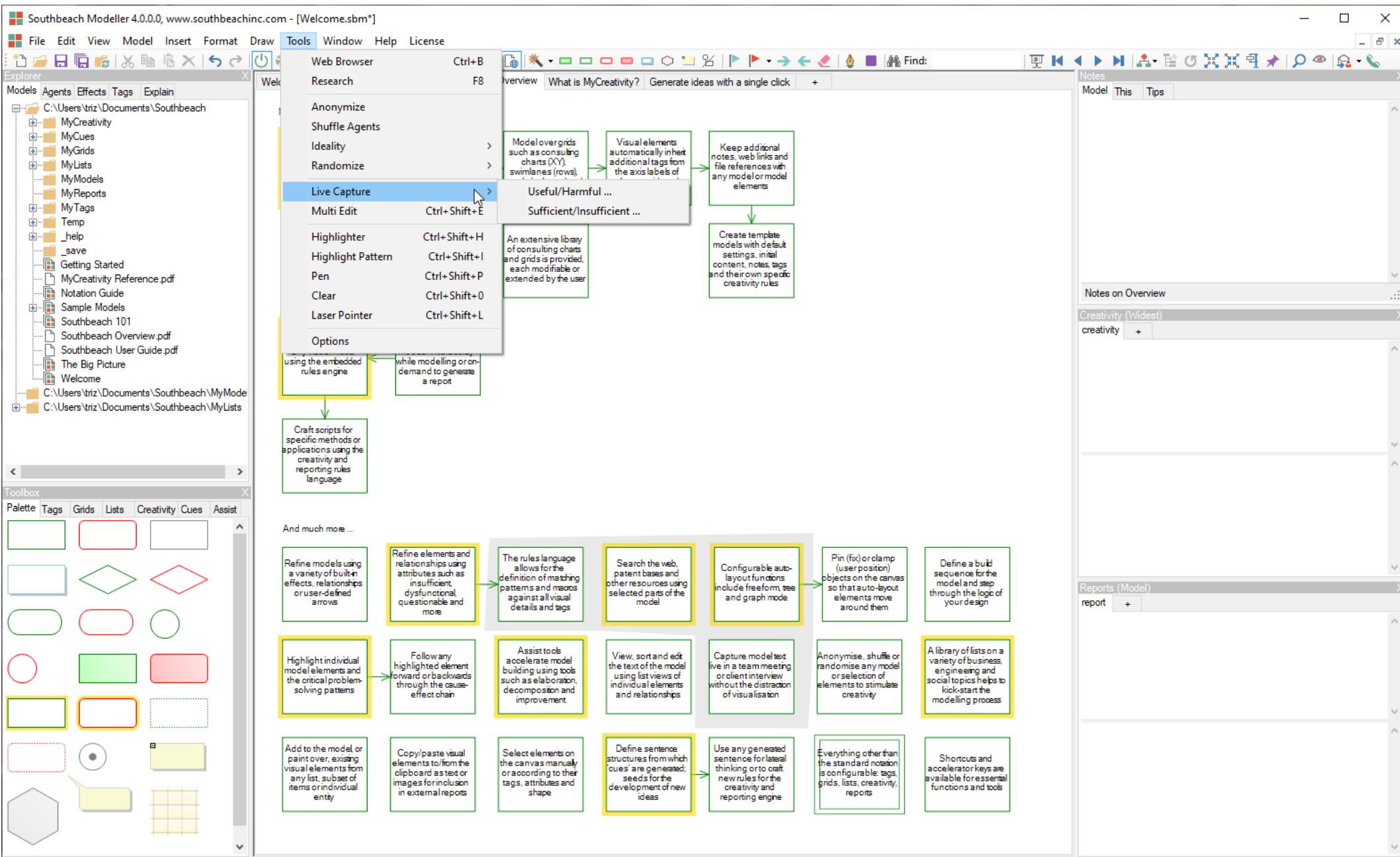
Toolbox Items:

- Line
- Dashed Line
- Circle
- Dashed Circle
- Filled Circle
- Box
- Dashed Box
- Filled Box
- Polygon
- Dashed Polygon
- Filled Polygon
- Flexigon
- Dashed Flexigon
- Filled Flexigon
- Text
- Block Arrow

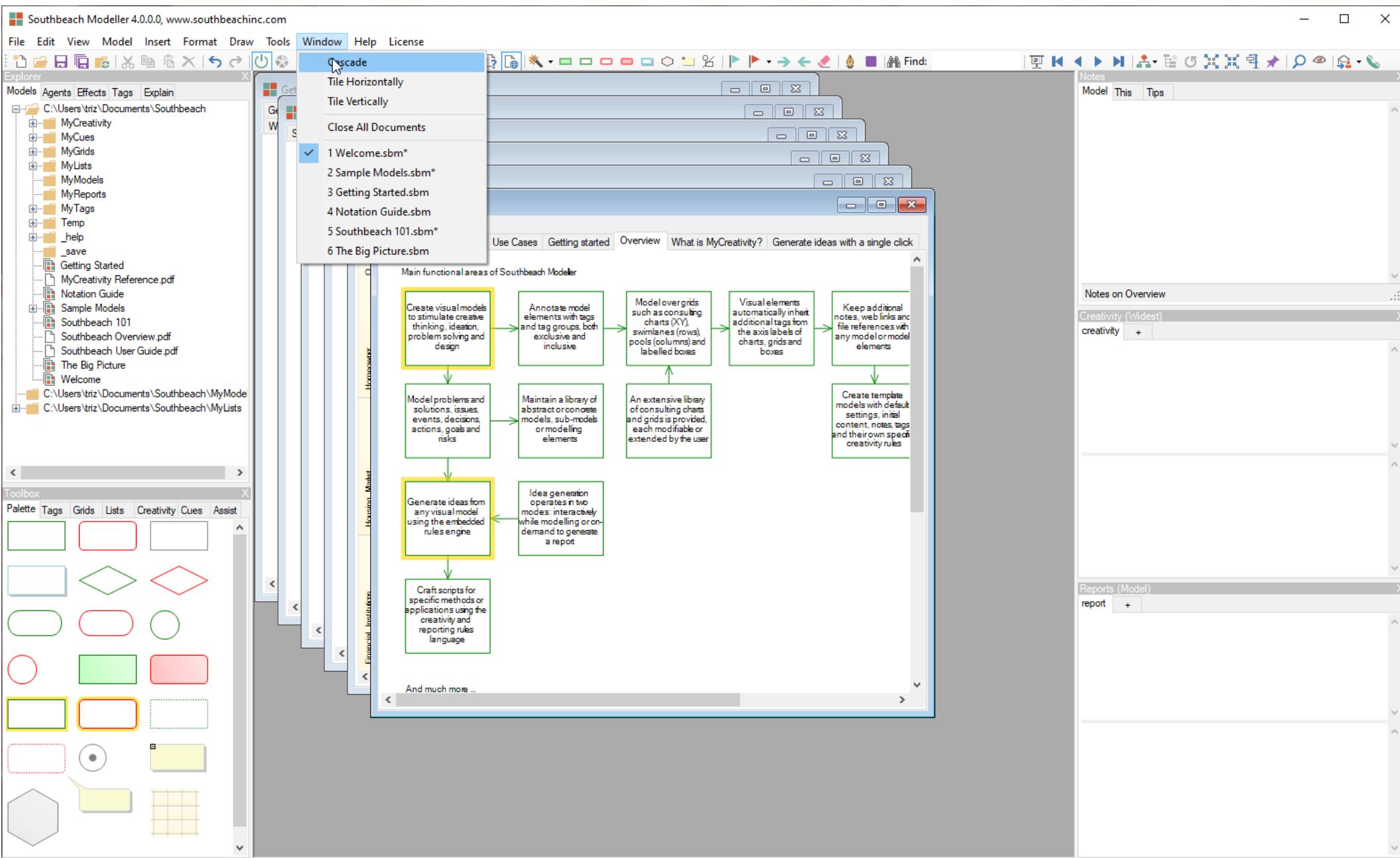
Bottom Status Bar:

Draw Polygon stopped 72% 33/0/ideality = 100%

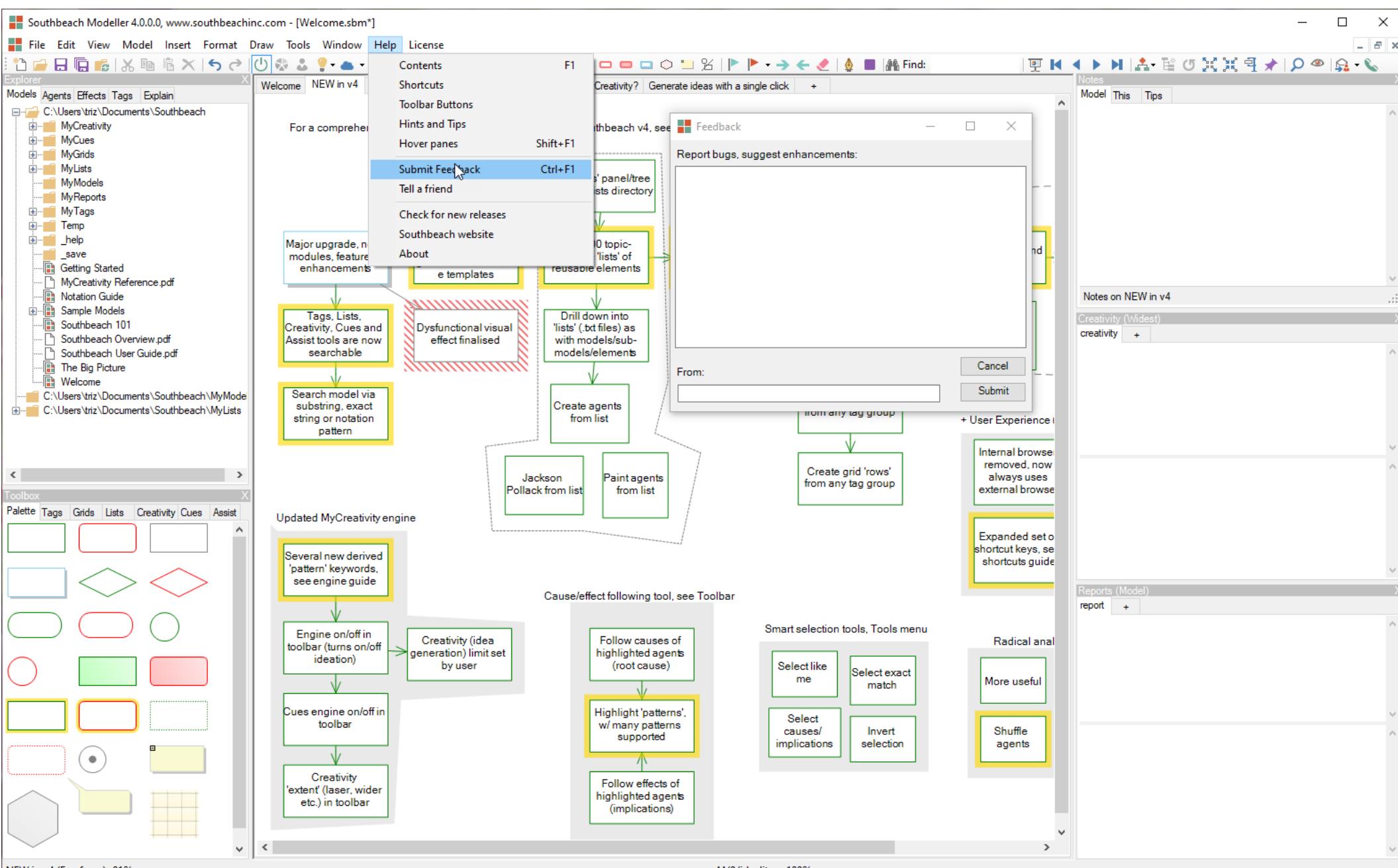
The Tools menu provides access to a range of auxiliary functions. These include: 1) a research function that can use objects in the model to search web resources and patent databases, 2) transformations of the model, e.g. to increase ideality, 3) highlight individual objects or patterns (see default pattern, e.g. contradictions in the toolbar dropdown, 4) invoke dialogs to capture new objects or edit existing object names in bulk without the need to select each object individually, 5) access the global options for the software.



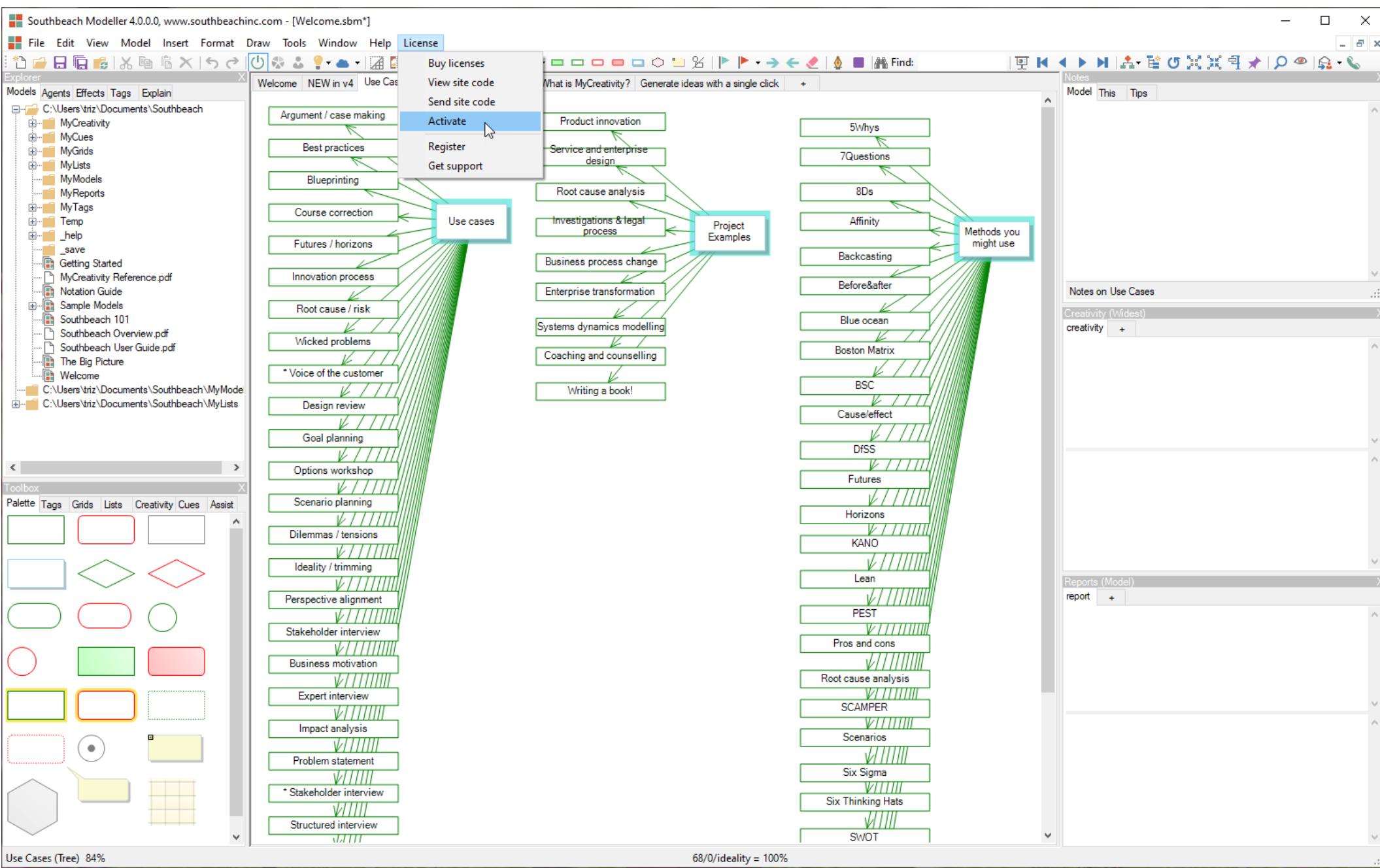
As for many applications, Southbeach Modeller can cascade or tile (vertically or horizontally) the canvas when multiple models are open. Note, sub-models are always tabs in the same window (same .sbm file) allowing for one-click access.



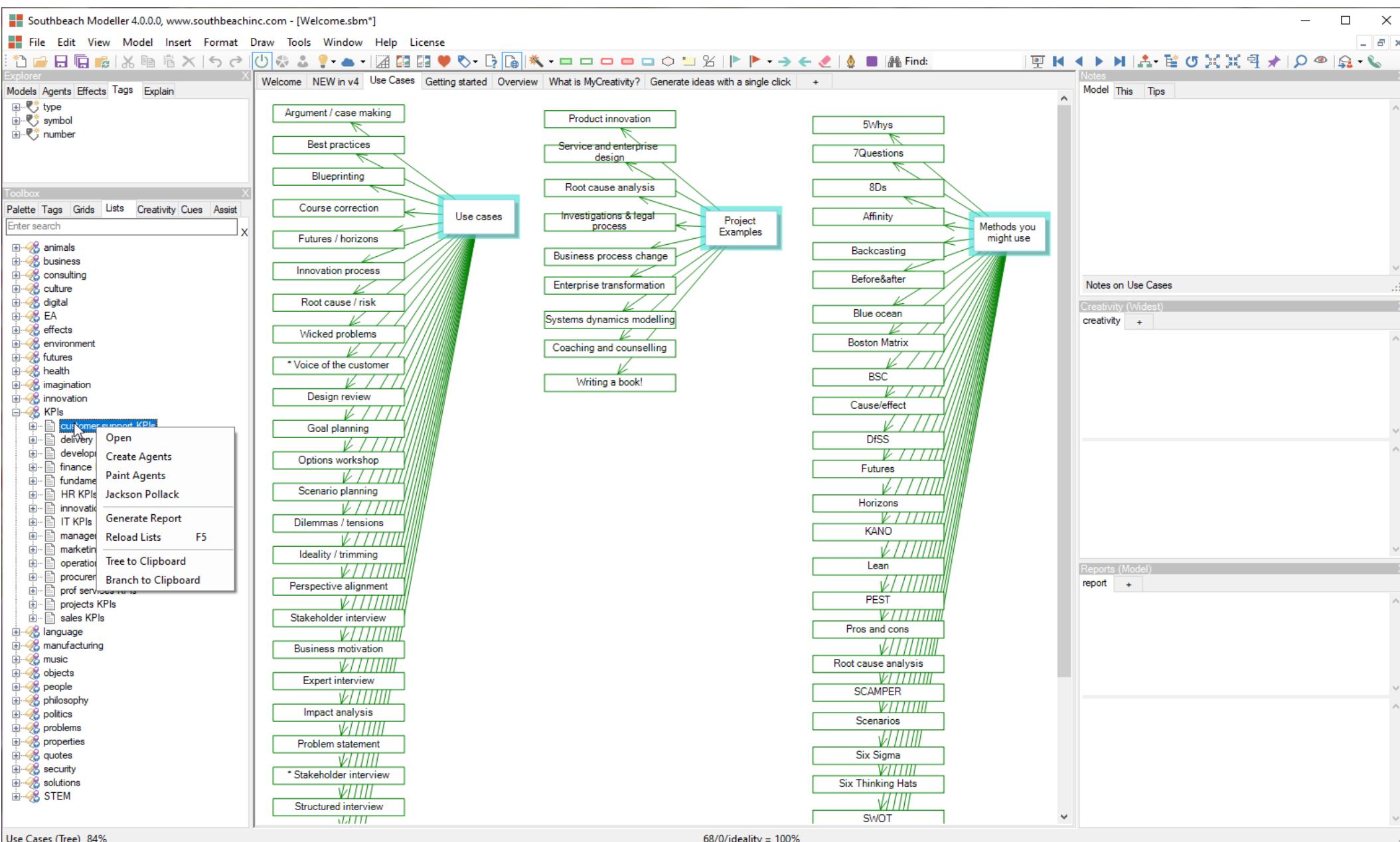
The Help menu provides access to online help for Southbeach Modeller. Please note the 'check for new releases' function. We particularly value feedback. The option makes this easy. Feedback is submitted via a web service directly to our database. A telephone icon in the toolbar performs the same function.



The License menu provides options for accessing our shop, sending a unique site code for your system and activating a license key. We also encourage you to register your software. If your email address changes, please consider re-registering. If you need support, please use the menu option or write to support@southbeachinc.com.



The List library is new in v4. Organized as a tree, over 200 topic-specific 'lists' of reusable elements is provided, totaling 10000s of items, each of which can be converted to objects with a single click or by dragging to the canvas. In addition, entire lists can be converted to objects in a single operation or 'painting over' the names of existing objects. A list is a simple .txt file. As with all other resource libraries/trees in Southbeach, the user is free to add content of their own. This will appear in the Toolbox trees as for the pre-installed content. Note, list trees and branches, as all resource trees, can also be copied to the system clipboard.



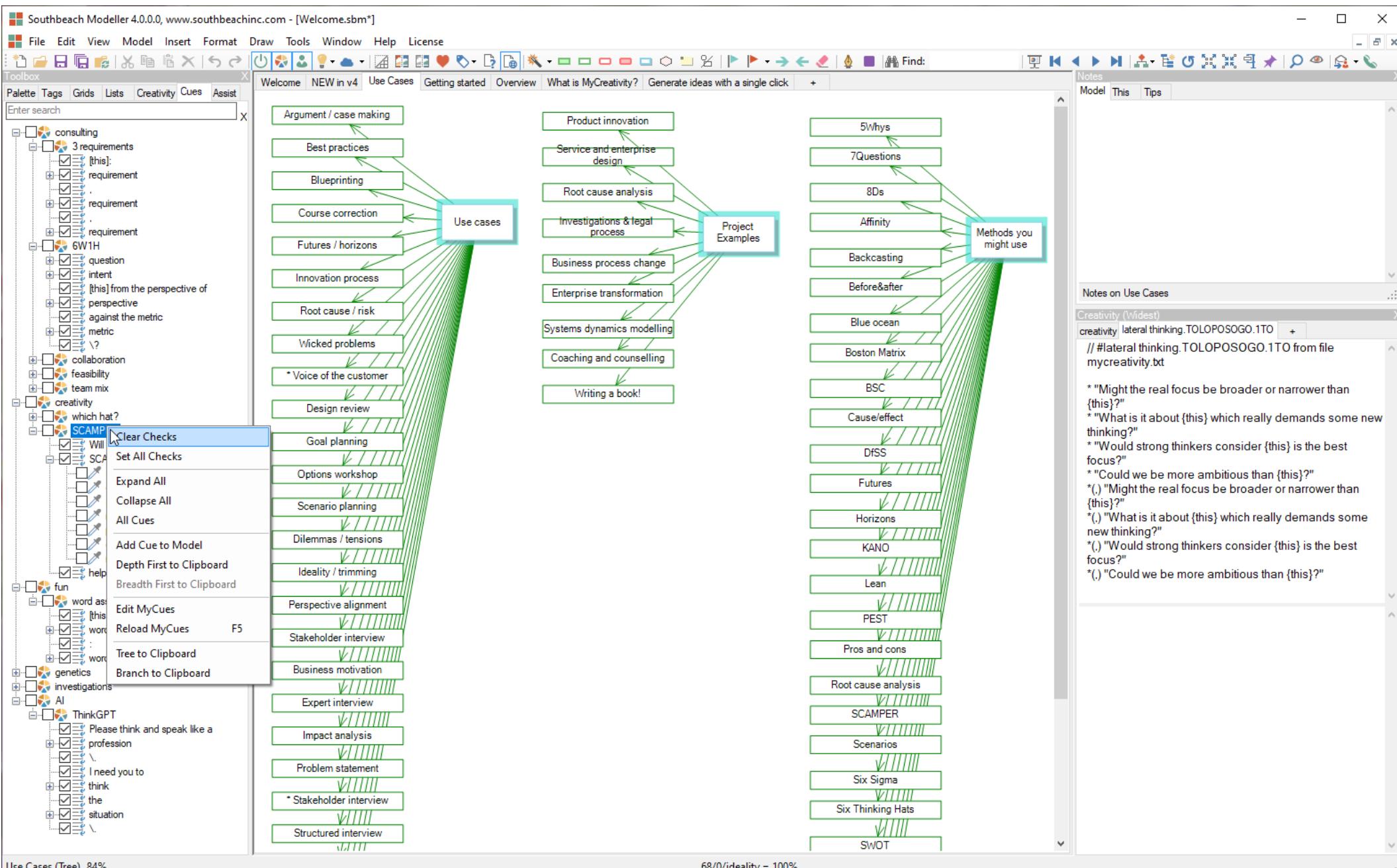
The Creativity ruleset library has been significantly expanded in v4 of the software. It now totals 100s of carefully curated ideation scripts and rulesets, all searchable. These can be used 'as is' or as templates for producing your own customized ideation rules. As in v3, individual or multiple rulesets can be enabled. In v4, however, these selections are now persisted in the application environment. In addition, v4 makes it easy to copy rulesets into a model for sharing with anyone who has access to the model but not the local creativity library. Note, the new toolbar icons for turning on/off the ideation engine, model creativity and cues.

The screenshot shows the Southbeach Modeller 4.0.0.0 interface with the 'Creativity' tab selected in the top menu bar. The main workspace displays three clusters of cards:

- Use cases**: A cluster of cards including Argument / case making, Best practices, Blueprinting, Course correction, Futures / horizons, Innovation process, Root cause / risk, Wicked problems, Voice of the customer, Design review, Goal planning, Options workshop, Scenario planning, Dilemmas / tensions, Ideality / trimming, Perspective alignment, Stakeholder interview, Business motivation, Expert interview, Impact analysis, Problem statement, * Stakeholder interview, and Structured interview.
- Project Examples**: A cluster of cards including Product innovation, Service and enterprise design, Root cause analysis, Investigations & legal process, Business process change, Enterprise transformation, Systems dynamics modelling, Coaching and counselling, and Writing a book!
- Methods you might use**: A cluster of cards including 5Whys, 7Questions, 8Ds, Affinity, Backcasting, Before&after, Blue ocean, Boston Matrix, BSC, Cause/effect, DfSS, Futures, Horizons, KANO, Lean, PEST, Pros and cons, Root cause analysis, SCAMPER, Scenarios, Six Sigma, Six Thinking Hats, and SWOT.

A context menu is open on the left side, listing options such as 'Add Ruleset to Model' (which is highlighted), 'Copy Ruleset to Clipboard', 'Edit MyCreativity', 'Reload MyCreativity F5', 'Tree to Clipboard', and 'Branch to Clipboard'. The status bar at the bottom left shows 'Use Cases (Tree) 84%' and the status bar at the bottom right shows '68/0/ideality = 100%'. On the right side, there is a 'Notes' panel with tabs for 'Model', 'This', and 'Tips', and a 'Notes on Use Cases' section containing a list of lateral thinking techniques and their descriptions.

Cues is a significant new function in v4 of the application. It complements the rules engine by allowing for the definition of sentence grammars that then generate multiple variations of the sentence template. The sentences generated can be used as extended rule sets, greatly increasing the ability of Southbeach to generate new ideas. Users turn on/off cues, or parts of cues, and the engine generates sentence alternatives as the user clicks around a model. Cues can be instantly converted to a normal ruleset and added to a model.



The Assist tools have been rationalized and re-arranged in v4 of the software. Assist tools perform transformations on a model. For example, by invoking 'add outputs' a new object is added everywhere one is required. As in v3, the assist function is intelligent and if the 'missing only' checkbox is ticked only necessary new objects will be created. Note also, Assist functions can operate on the whole model or a selected part or set of objects.

Southbeach Modeler 4.0.0.0, www.southbeachinc.com - [Sample Models.sbm*]

File Edit View Model Insert Format Draw Tools Window Help License

Toolbox

Palette Tags Grids Lists Creativity Cues Assist

Enter search

Elaborate

- Add causes
- Add implications
- Insert between
- Invert perspective

Decompose

- Add inputs
- Add outputs** (highlighted)
- Add pros
- Separate
- Separate

Effects

- Counter
- Relate p
- Remove
- Reverse
- Expand All
- Collapse All

Flow

- Left to rig
- Right to
- To leftmost
- To rightmost

Tree to Clipboard

Branch to Clipboard

Combine

- Convert effects to agents

Improve

- Add benefits
- Add enablers
- Add improving factors
- Add silver linings

Worsen

- Add drawbacks
- Add barriers
- Add worsening factors
- Add necessary evils

Complicate

- Add contradictions
- Add compromised solutions
- Add problems solved
- Add causes of effects
- Add implications of effects

Succeed

- Additional benefits
- Counteracts harmful
- Harmful counteracting harmful
- Harmful producing useful
- Produces useful
- Silver linings
- Useful side effects

Fail

- Additional drawbacks
- Counteracts useful

Agents Only Missing Only Highlight

Innovation KPIs Maslow Human Needs Oliver's Garage Options Workshop Plane crash Plastic Packaging Policy Engineering POTUS Process Map - Risk Project Map Service Blueprint Southbeach Workshop Subprime Crisis TOGAF VOC +

About Sample Models Antelopes and Cheetahs Armageddon Asthma and Celiac Australia Water Crisis Bubble Markets Climate Change CMM Fracking Goal Planning

Notes

Model This Tips

This model is not an official product of Southbeach Solutions Ltd. It was donated by a member of the Southbeach user community. It is only intended for training, experimentation, or as a starting point for your own work.

Sample models are licensed under a Creative Commons Attribution-ShareAlike 3.0 Unported License. You are permitted to share (copy, distribute and transmit the work), to remix (adapt the work) and to make commercial use of the work.

The Goal is the primary objective

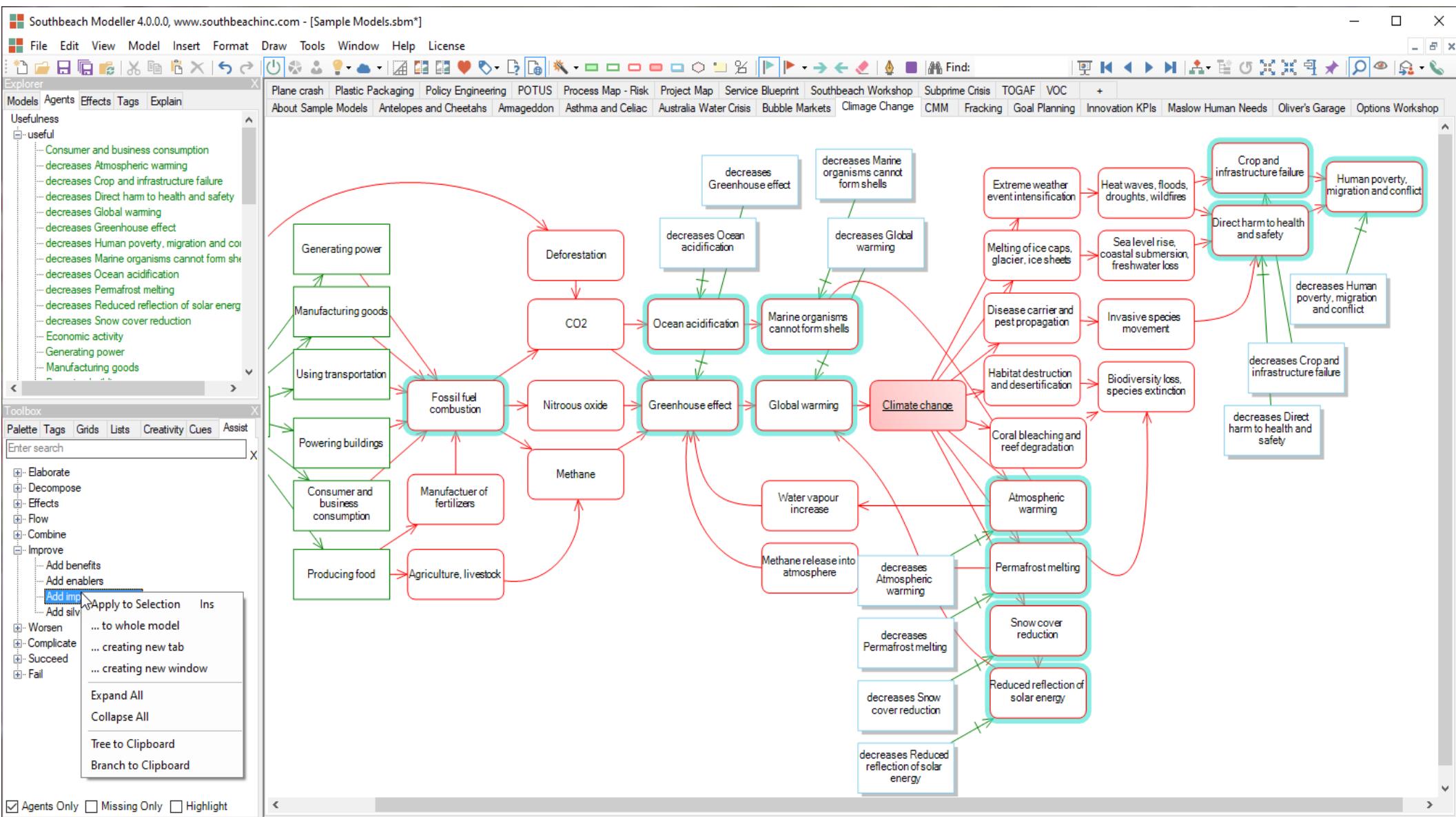
Notes on Goal Planning

Creativity (Widest)

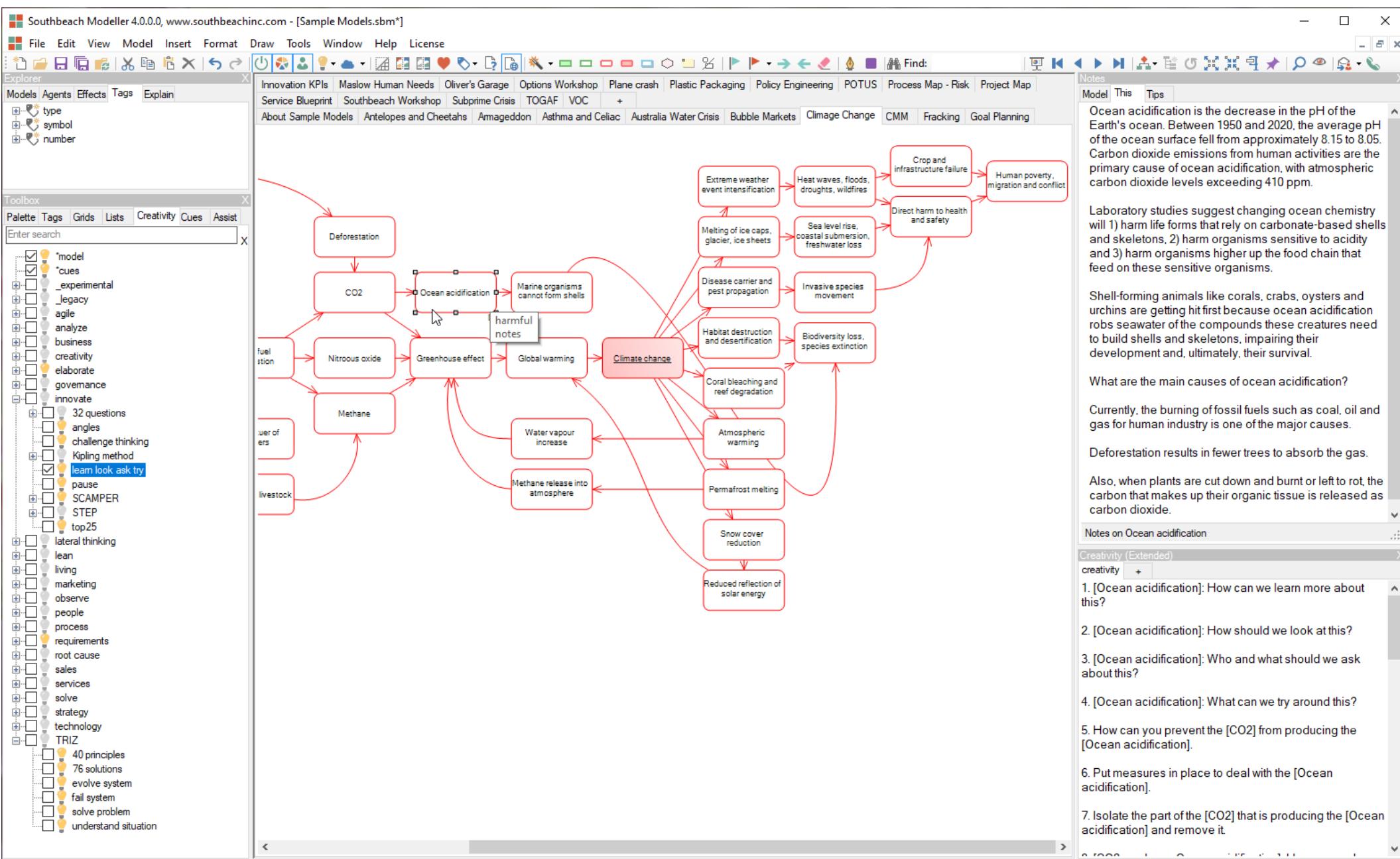
creativity +

Goal Planning (Freeform) 96% 46/18/ideality = 72%

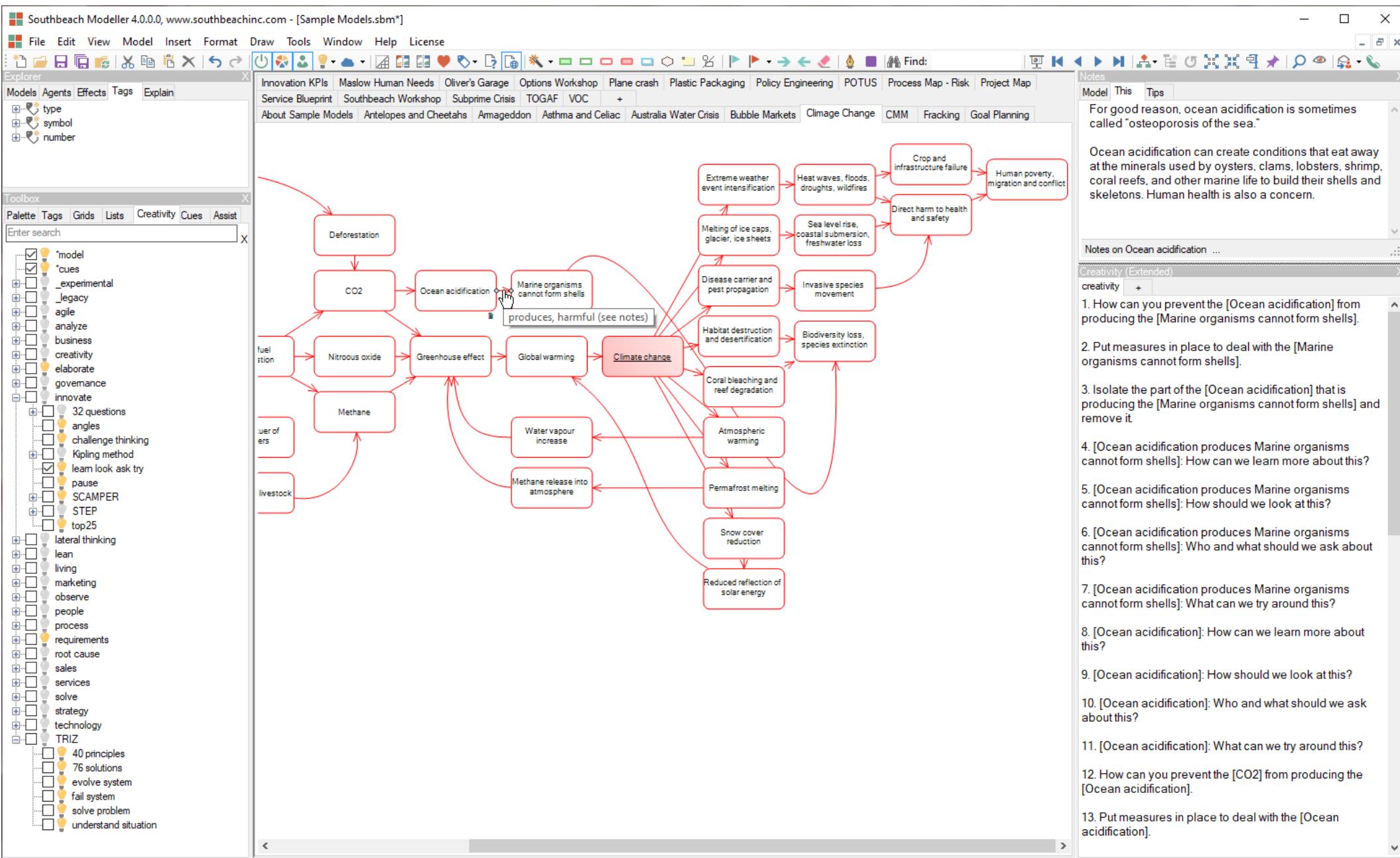
In this example of using the 'Assist tools', 'improving factors' (new useful objects with a 'countering' effect on harmful objects) have been added to parts of the model where they are needed. The 'highlight' checkbox (bottom of the assist panel) is useful in order to clearly see the newly inserted objects. Remove highlights later in the normal way using the Toolbar 'eraser' icon.



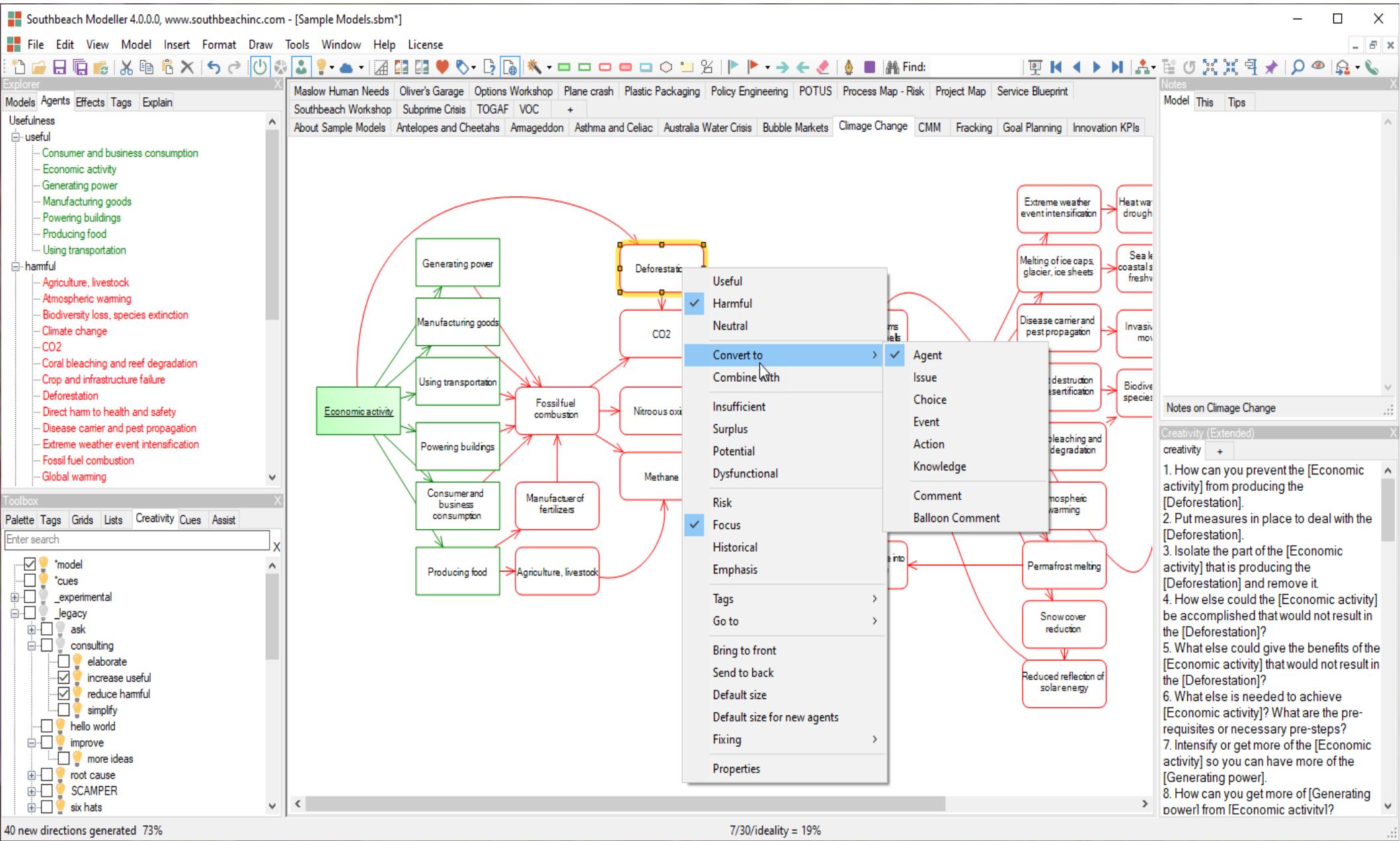
The Notes panel (right) is a convenient way to keep notes on the model and on any object or effect in the model. There are two tabs: model notes and ‘this’ notes (the selected object or effect). Just type into the panels as required. Right mouse for edit controls. In this screenshot an object is selected and its notes are shown in the ‘this’ panel.



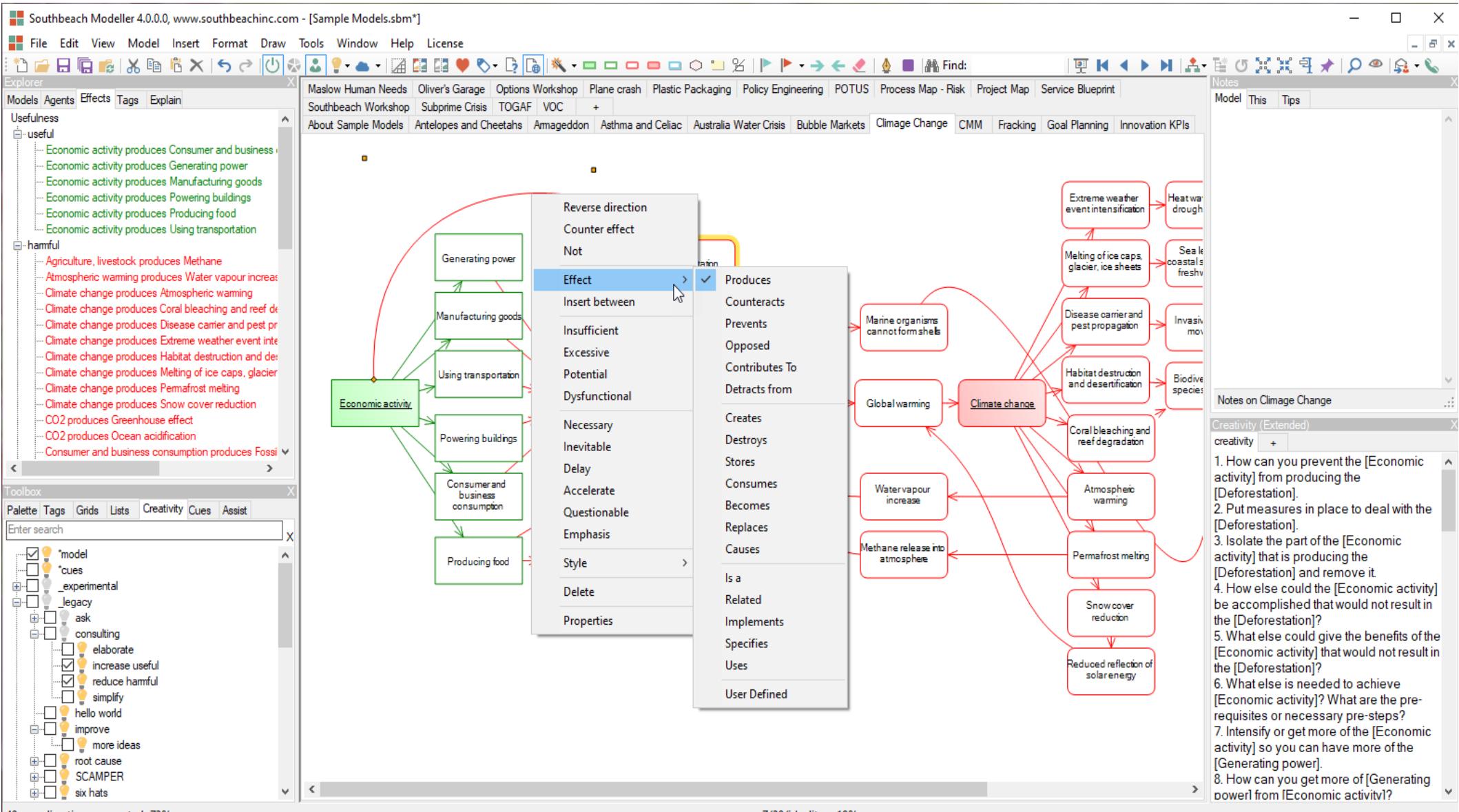
In this screenshot, a single effect in the model is being selected. Its notes are shown in the 'this' panel (right hand side top). Below is 'ideation' associated with the element. This dynamic content is generated using the ruleset selected in the creativity panel.



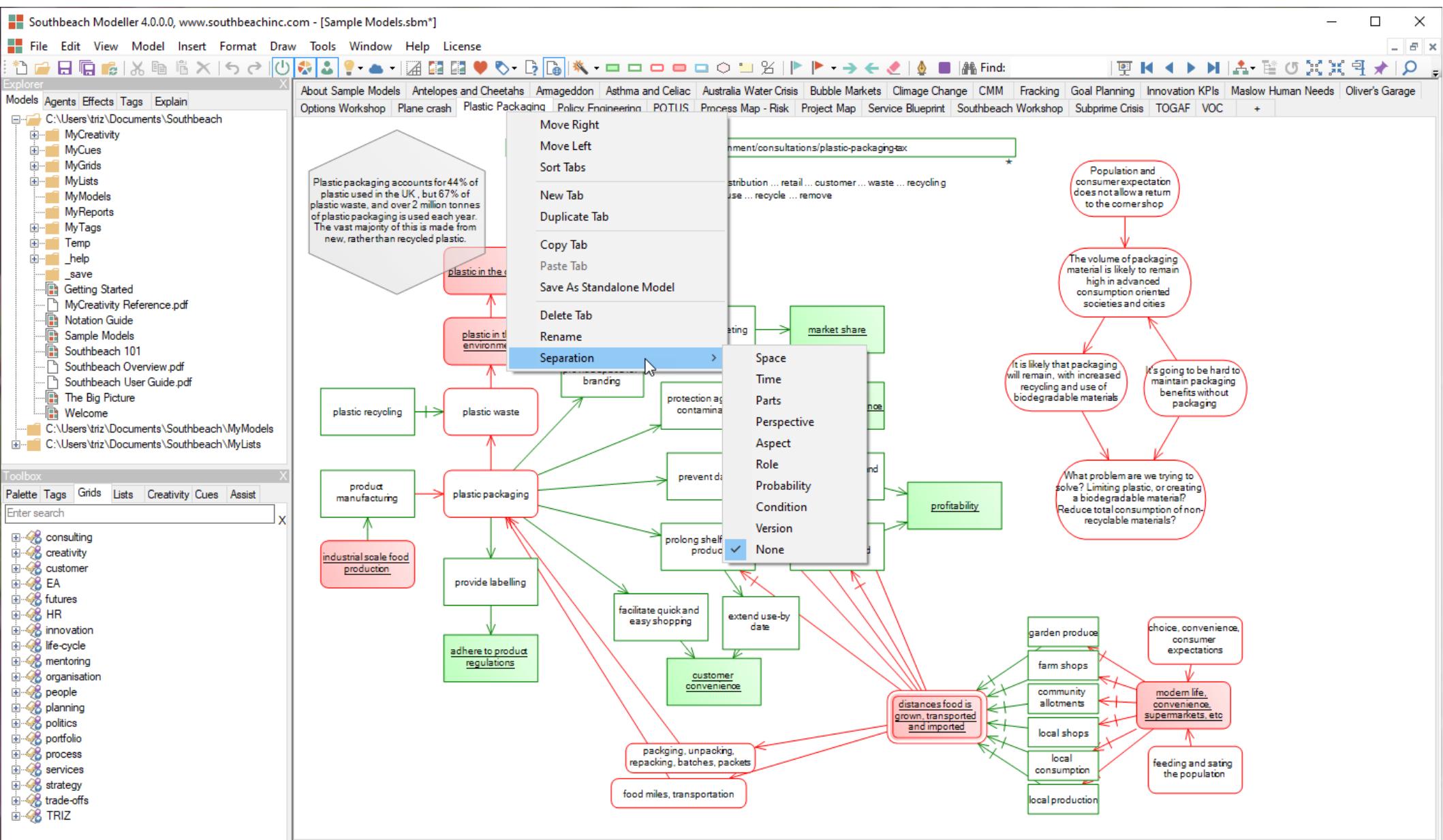
Many editing operations in Southbeach are completed using only the canvas. Right mouse on any object to access its context menu. The menu displays all of the available modifiers and attributes as well as the option of changing the objects type (shape). There are sub-menus for tagging, fixing and using object URLs.



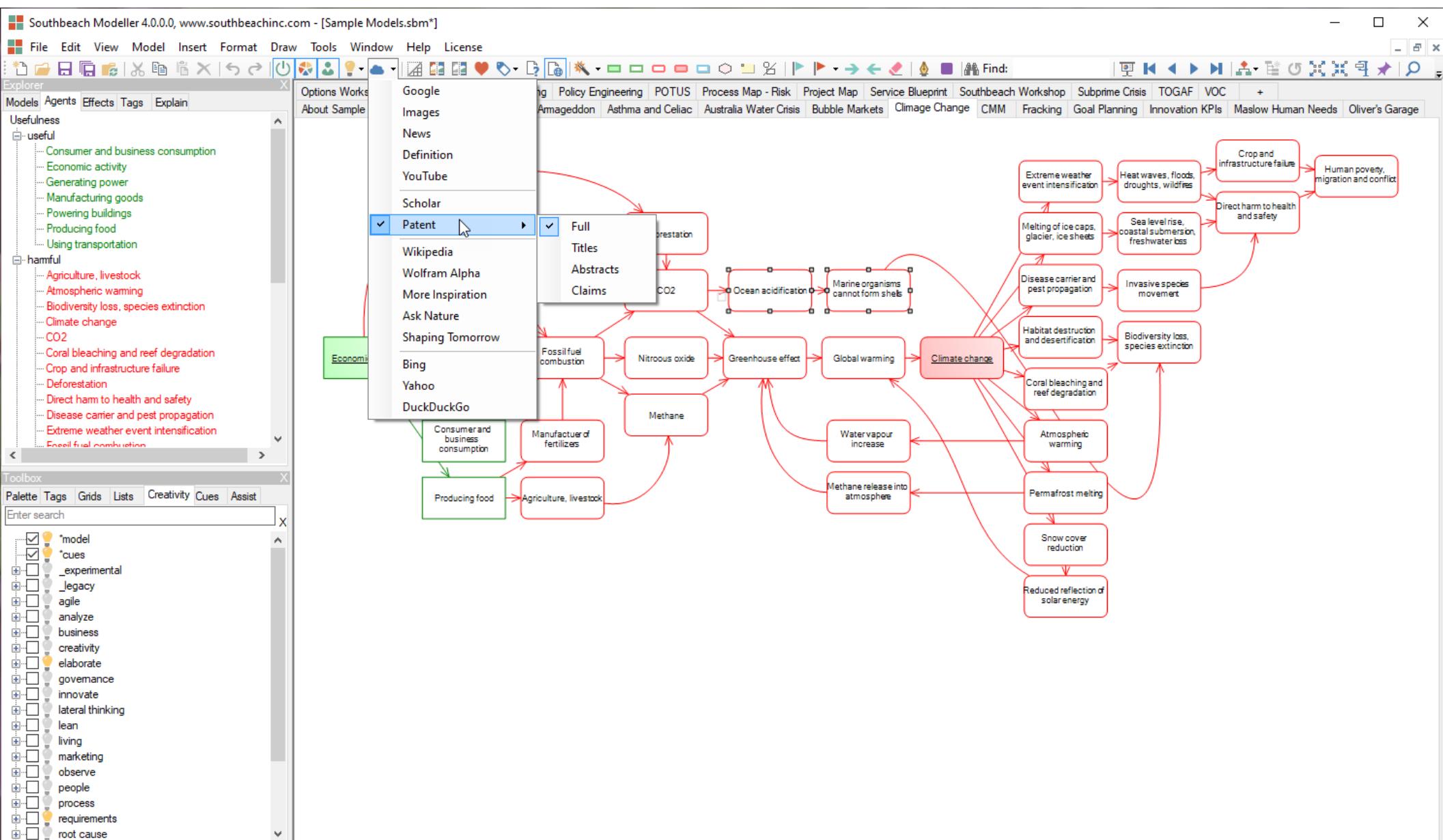
As with the agent context menu, effects also have a context menu. The menu displays all of the available modifiers and attributes as well as the option of changing the effect type (arrow style and semantic). In addition, convenient functions are providing for reversing the direction of an effect (A to B, B to A) and its semantic opposite or 'counter' effect. For example, a 'creates' effect would become a 'destroys' effect. An effect visual style sub-menu is also provided.



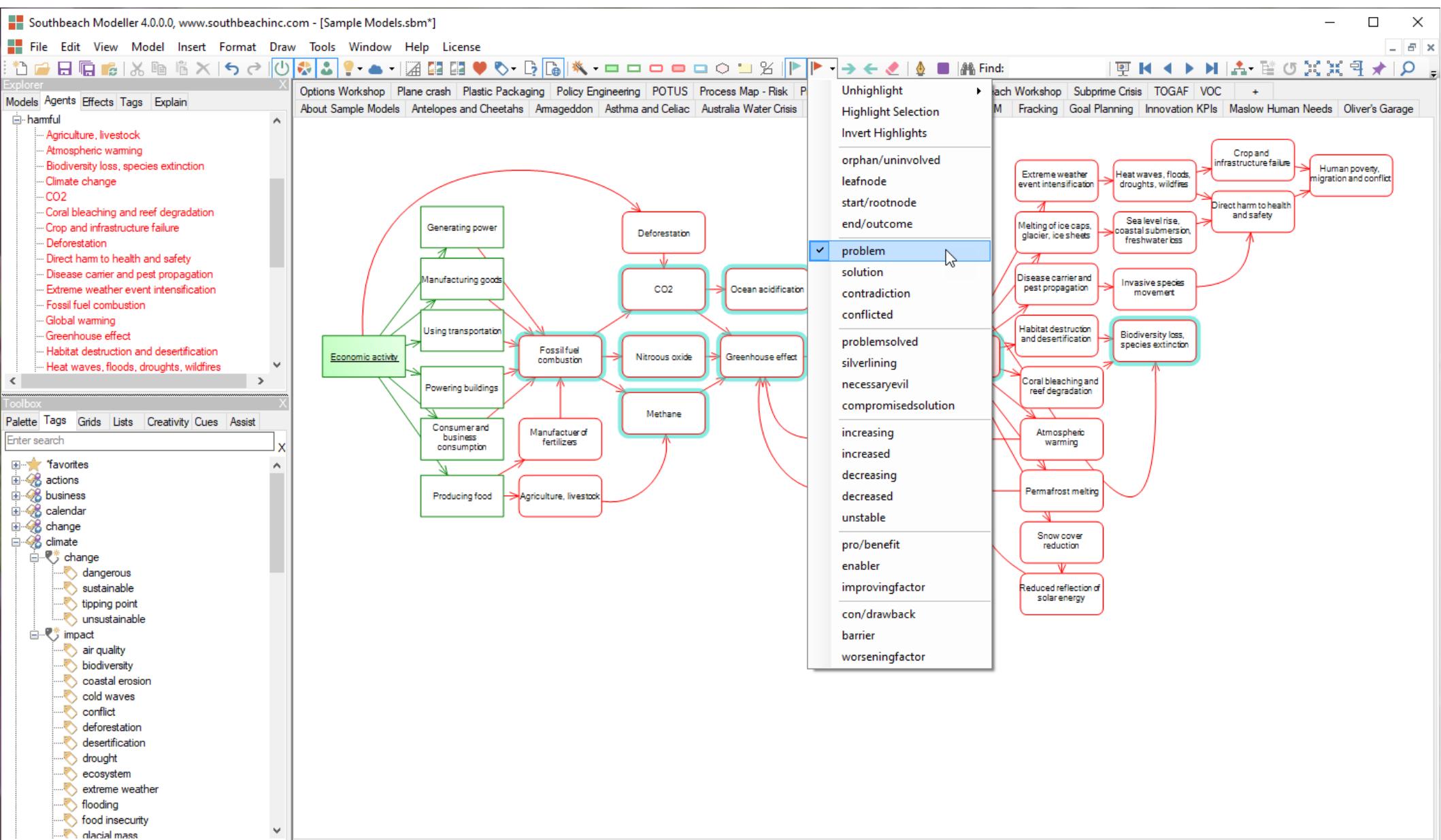
In a model with multiple sub-models, each will be displayed in its own canvas tab. The tabs also have a context (right mouse) menu allowing tabs to be re-named, re-arranged, added, deleted and ‘separated’. The latter refers to associating the sub-model in its tab with a formal ‘separation’ of content. For example, a model containing three sub-models for ‘system’, ‘super-system’ and ‘sub-system’ might be separated by ‘structure’. This means that all elements in each sub-model inherit a ‘tag’ of those names in a tag group ‘structure’. This consistently extends all tagging and grid/chart functionality to sub-models.



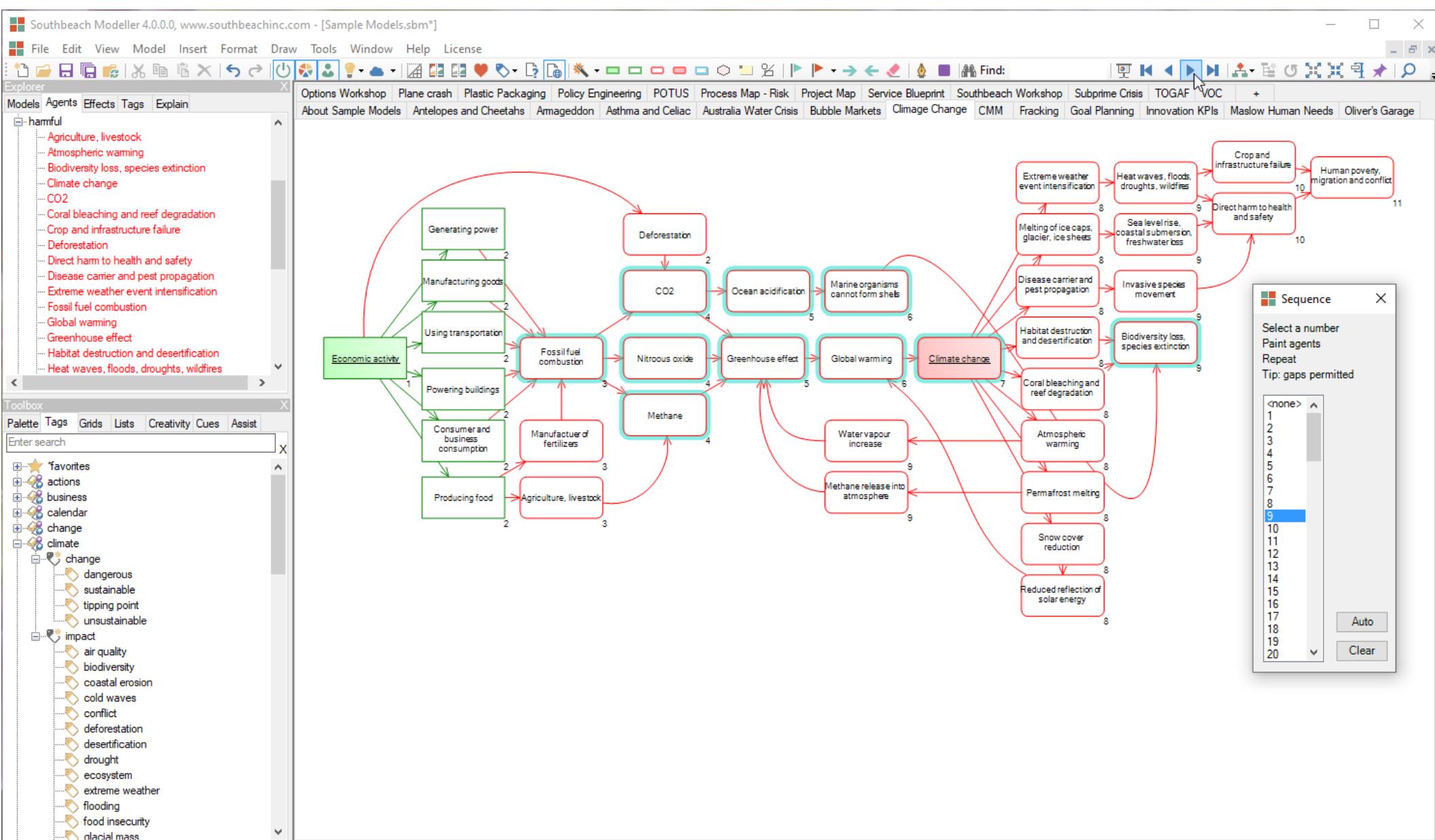
The 'cloud' icon in the Toolbar gives options for searching web resources and patent databases based on the names of objects and effects in the model. The drop down allows the user to select their preferred source. Thereafter, selecting an object or group of objects and then clicking on the cloud icon invokes the specified web search. Results are presented in the system web browser. Note, each agent and effect in the model has a URL attribute field to accompany any 'this' panel Notes.



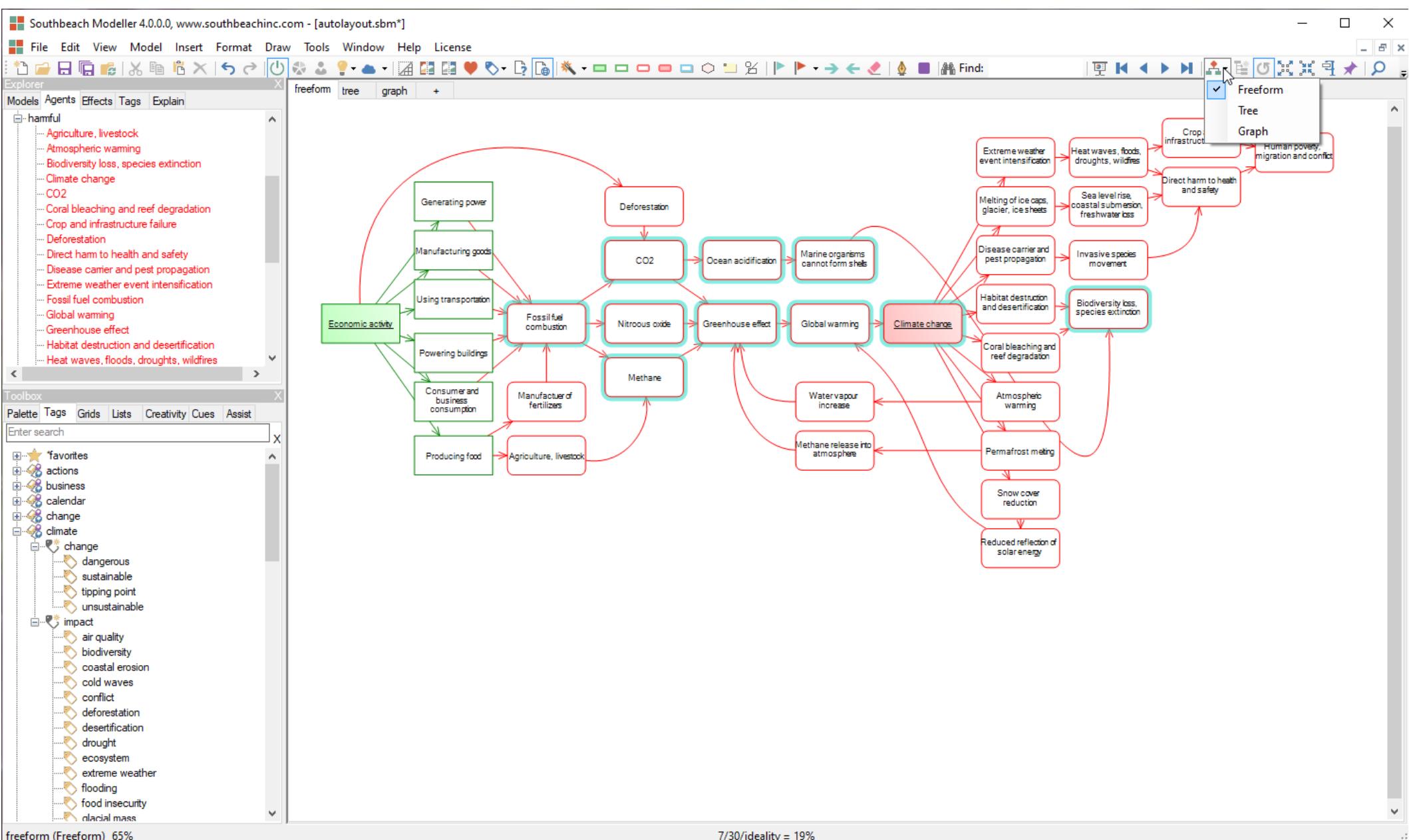
New in v4 is a powerful pattern-based highlighter. Every ‘derived’ parameter in the rules engine can be used to highlights agents that match that pattern in the model. As with all drop down menus from the toolbar, the user can select a preferred option which becomes a default for subsequent clicks on the icon. In the screenshot example, the user has found a ‘problem’ in the model and then used the arrow keys to follow highlighted causes and effects in the model.



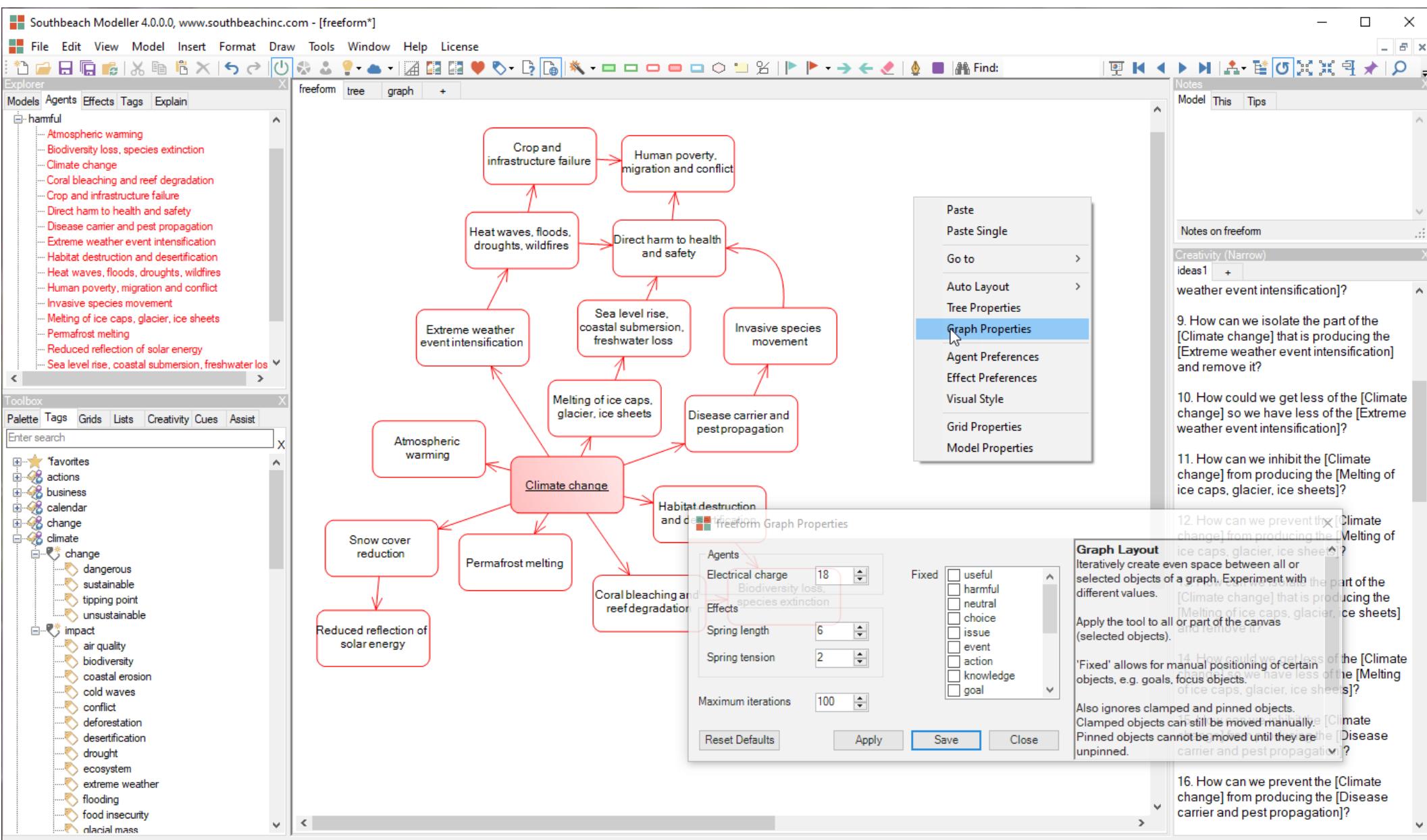
Models can be presented to an audience in ‘sequence’. Building a sequence just means labeling the order in which individual objects or groups of objects are displayed. The build can then be ‘played’ using the tape recorder controls in the toolbar. The sequence is stored with the model (.sbm file). The ordering numbers only appear when the build dialog is invoked.



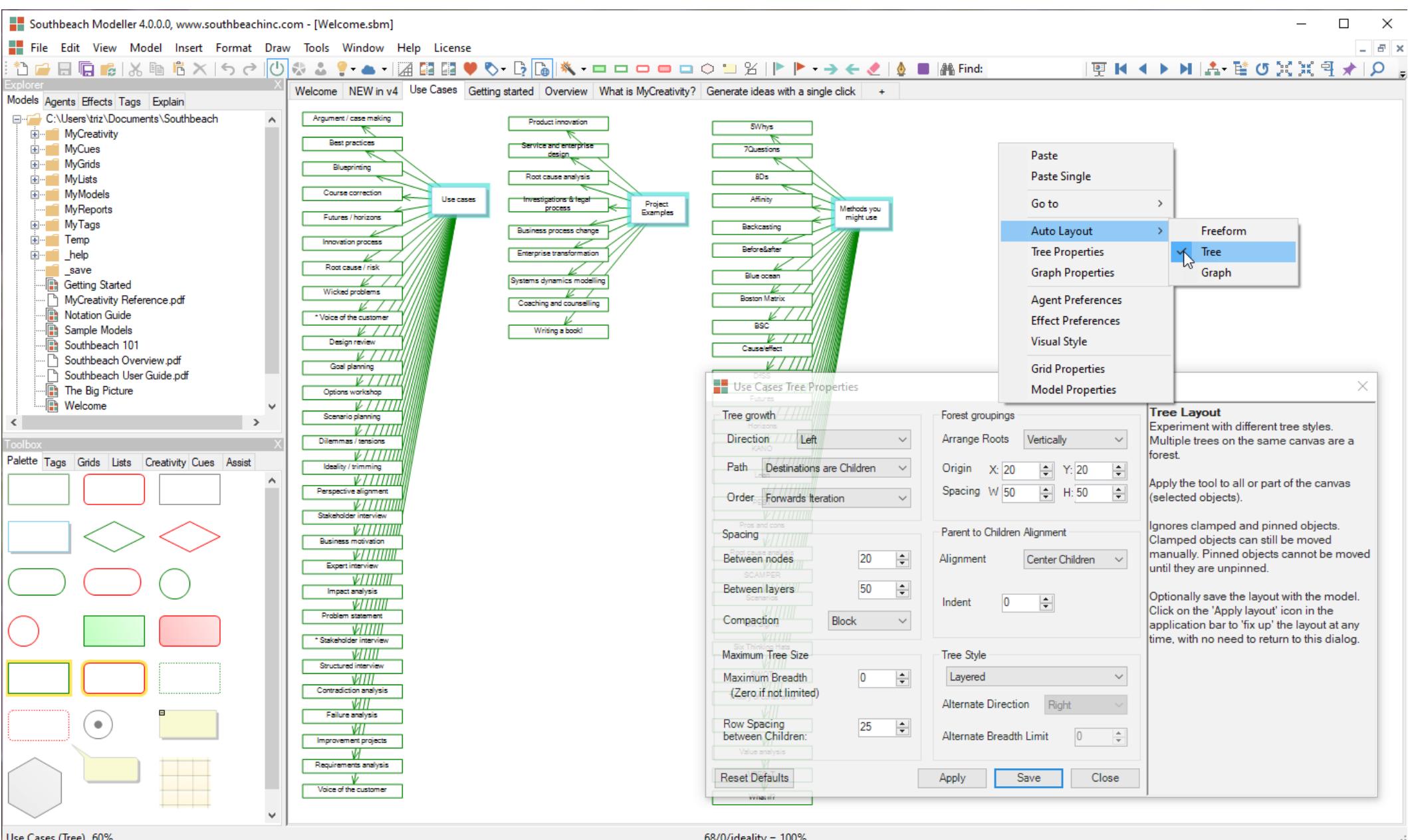
Southbeach has an auto-layout function. Models can be free form, trees or graphs. The type of the model can be changed from the toolbar icon, the Model menu or the right mouse (context) on the canvas. Icons are provided to apply the format to the model following a change, or to turn on 'continuous' auto-format and to 'spread' or 'compact' the space between objects. The layout engine provides parameters able to emulate the look and feel of any different kinds of trees and graphs. Individual objects can also be 'pinned' or 'clamped' to exclude them from layout changes. The difference between 'pinning' and 'clamping' is that clamping allows the user to re-position an excluded object without 'unpinning' it.



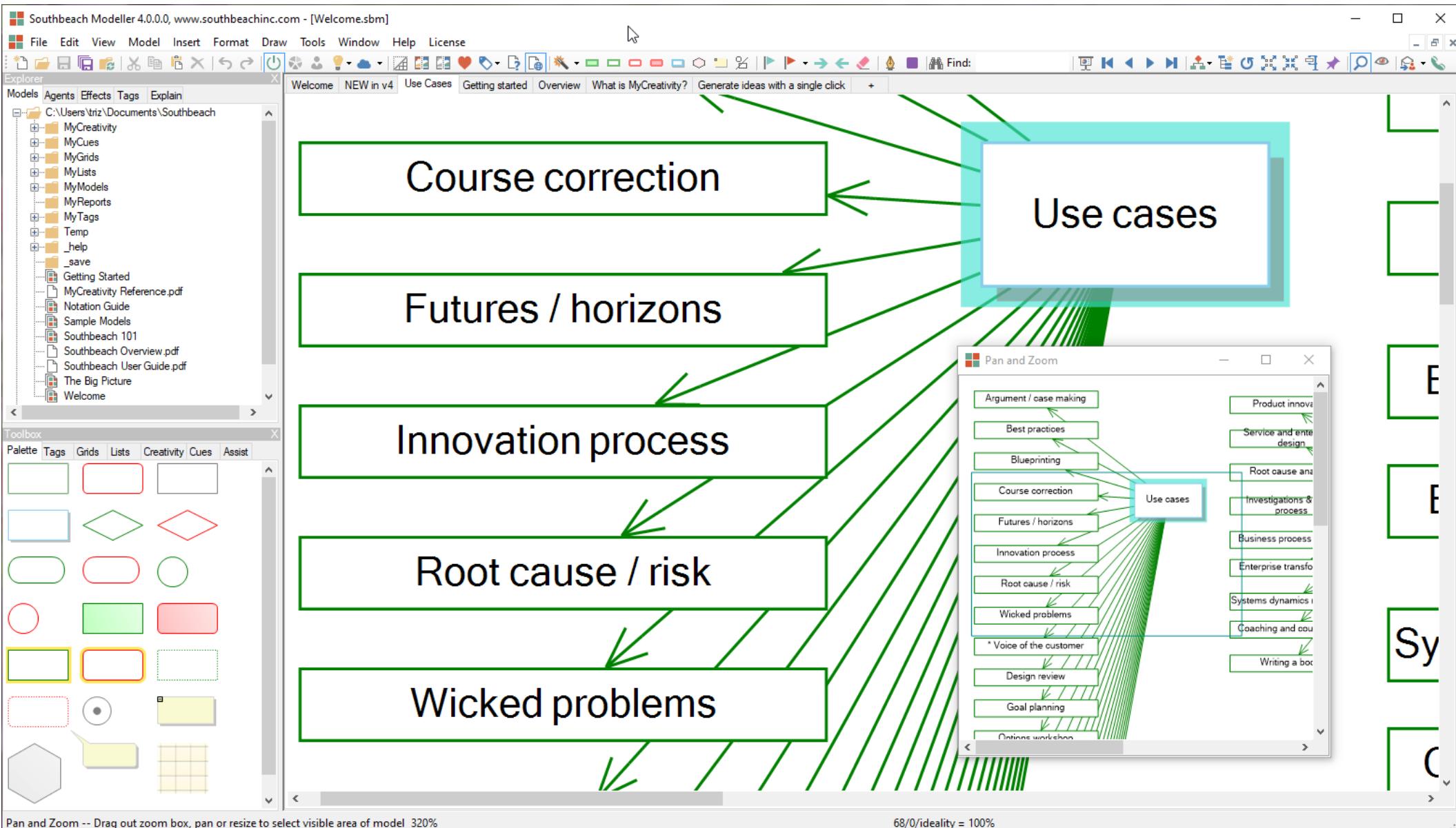
Auto-layout properties, in this case the graph properties, can be customized and stored with the model. They can be applied immediately, after the model has changed, or continuously during editing of the model. In the case of graphs, options are provided to fix the position of objects with certain attributes. This is a short cut to avoid ‘pinning’ or ‘clamping’. For example, fixing the ‘focus’ objects in the model while other object re-arrange themselves around them.



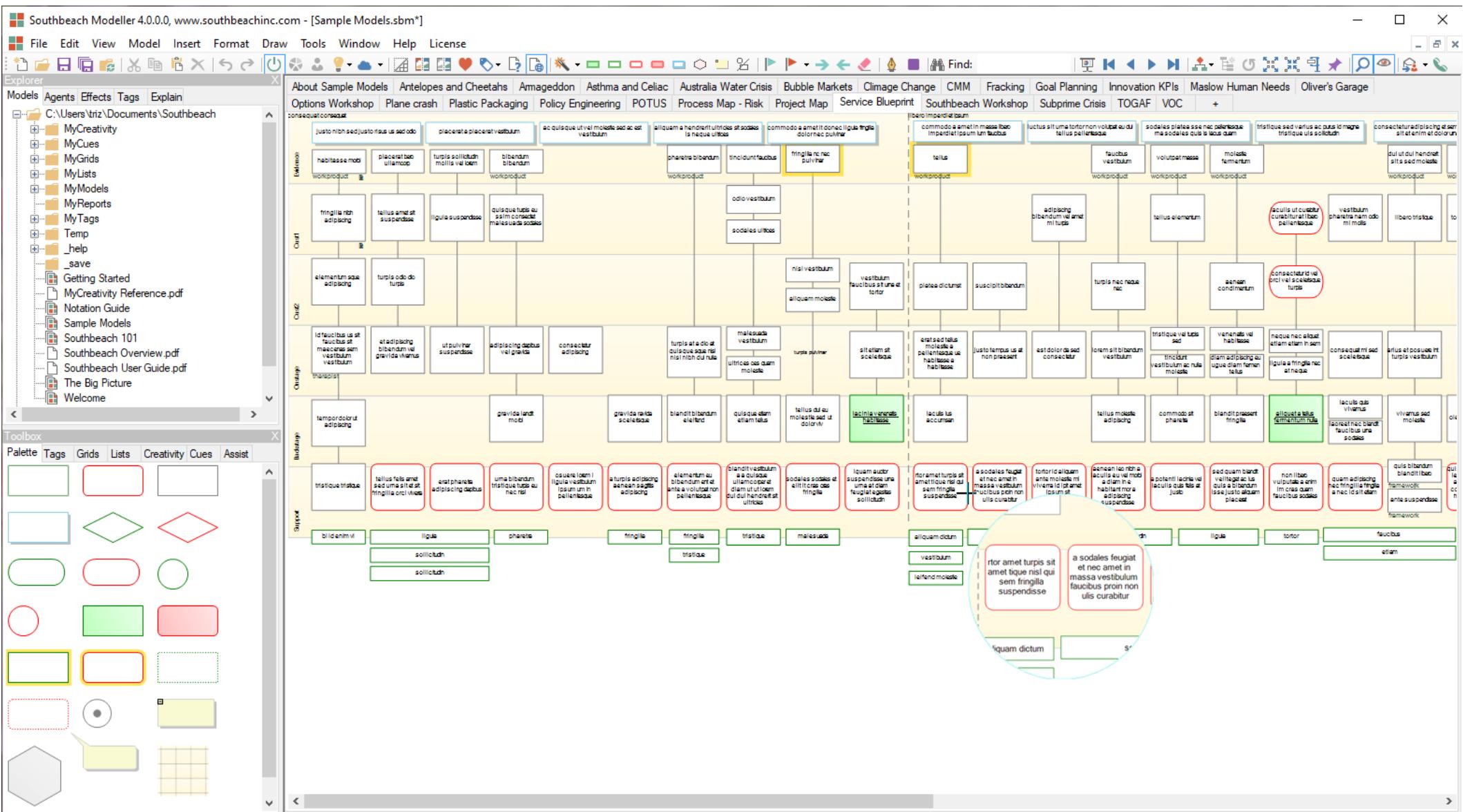
As with graphs, tree properties can be customized and stored with the model to which they apply. They can be applied immediately, after the model has changed, or continuously during editing of the model. For example, adding new nodes to a tree will automatically re-arrange all other nodes to create enough space and avoid overlaps. The options for many different kinds of trees are beyond the scope of this document. Experimentation is encouraged. For example, the auto-layout engine knows about disconnected trees in a single model, as in this example.



Southbeach Modeller is scalable, able to store and manipulate visual models containing 100s or 1000s of elements separated across multiple sub-models, all held in a single file (.sbm file, XML). Pan and Zoom (via tool bar or View menu) is sometimes required when navigating a large model, although use of the mouse wheel (Ctrl+wheel) and panning controls on the keyboard are often sufficient.



From the View menu or toolbar icon (Eye) a fisheye magnifier is provided. This has proved useful for scanning detailed models and small font text, as well as during presentations. Ctrl+mouse wheel changes the degree of magnification.



It is often convenient to capture information interactively during a working session. We call this ‘Live Capture’. The names of objects are simply typed into the dialog and can be added to the model at will. Two versions of ‘Live Capture’ is provided: useful/harmful/neutral and sufficient/insufficient/surplus/potential/dysfunctional. This has proved ‘good enough’ for most workshop practices. Once the information has been captured as objects, they can be moved around and effects or relationships added.

Southbeach Modeller 4.0.0.0, www.southbeachinc.com - [Sample Models.sbm*]

File Edit View Model Insert Format Draw Tools Window Help License

Web Browser Ctrl+B F8 mageddon Asthma and Celiac Australia Water Crisis Bubble Markets Climate Change CMM Fracking Goal Planning Innovation KPIs Maslow Human Needs Oliver's Garage Policy Engineering POTUS Process Map - Risk Project Map Service Blueprint Southbeach Workshop Subprime Crisis TOGAF VOC +

Models Agents Effects Tags Explain

type symbol number personality therapist role financelead executiveboard workproduct framework stakeholder

Toolbox

Tags Grids Lists Creativity Cues Assist

Enter search

Live Capture

Useful/Harmful ... Sufficient/Insufficient ...

Multi Edit Ctrl+Shift+E

Highlighter Ctrl+Shift+H

Highlight Pattern Ctrl+Shift+I

Pen Ctrl+Shift+P

Clear Ctrl+Shift+O

Laser Pointer Ctrl+Shift+L

Options

Live Capture

Useful Harmful Neutral

Name	G	P	R	P	G	P
a	<input type="checkbox"/>					
b	<input type="checkbox"/>					
c	<input type="checkbox"/>					
d	<input type="checkbox"/>					
e	<input type="checkbox"/>					
f	<input type="checkbox"/>					
*						

Add to Model Clear Cancel

The multi-edit dialog (Tools menu) is a convenient way to edit or clean up the names of selected objects in the model, in one operation. The dialog lists all objects in the model. Once edits are made, changes are applied to the visual model.

Southbeach Modeler 4.0.0.0, www.southbeachinc.com - [Sample Models.sbm*]

File Edit View Model Insert Format Draw Tools Window Help License

About Sample Models Antelopes and Cheetahs Amageddon Asthma and Celiac Australia Water Crisis Bubble Markets Climate Change CMM Fracking Goal Planning Innovation KPIs Maslow Human Needs Oliver's Garage Options Workshop Plane crash Plastic Packaging Policy Engineering POTUS Process Map - Risk Project Map Service Blueprint Southbeach Workshop Subprime Crisis TOGAF VOC +

Explorer
Models Agents Effects Tags Explain
useful
Additional content populating the Architecture F...
Approved Statement of Architecture Work
Architecture Principles
Capability Assessment
Communications Plan
Enterprise Continuum
Refined statements of

Toolbox
Palette Tags Grids Lists Cr...
Enter search
+ animals
+ business
+ consulting
+ culture
+ digital
EA
EA benefits
Ability to procure
Ability to secure
Better return on
Bringing all comp...
Business capabi...
Create tangible t...
Easier upgrade a...
Ensure complian...
Evaluate operati...
Extending effect
Faster and more
Faster, simpler, a...
Flexibility to mak...
Identification of i...
Improved ability
Improved alignm...
Improved busine...
Improved busine...
Improved busine...
Improved busine...
Improved collaboration between function...
Improved compliance & risk management

Multi Edit

Name	G
A. Architecture Vision	<input checked="" type="checkbox"/>
B. Business Architecture	<input checked="" type="checkbox"/>
C. Information Systems Architectures	<input checked="" type="checkbox"/>
D. Technology Architecture	<input checked="" type="checkbox"/>
E. Opportunities and Solutions	<input checked="" type="checkbox"/>
F. Migration Planning	<input checked="" type="checkbox"/>
G. Implementation Governance	<input checked="" type="checkbox"/>
H. Architecture Change Management	<input checked="" type="checkbox"/>
Requirements Management	<input checked="" type="checkbox"/>
* Scope of organizations impacted	<input type="checkbox"/>
* Maturity assessment, gaps, and resolution approach	<input type="checkbox"/>
* Roles and responsibilities for architecture team(s)	<input type="checkbox"/>
* Constraints on architecture work	<input type="checkbox"/>
* Re-use requirements	<input type="checkbox"/>
* Budget requirements	<input type="checkbox"/>
* Requests for change	<input type="checkbox"/>
* Governance and support strategy	<input type="checkbox"/>
* Establish the Architecture Project	<input type="checkbox"/>
* Identify Stakeholders, Concerns, and Business Requirements	<input type="checkbox"/>
* Confirm and Elaborate Business Goals, Business Drivers, and Constraints	<input type="checkbox"/>
* Evaluate Business Capabilities	<input type="checkbox"/>
* Assess Readiness for Business Transformation	<input type="checkbox"/>
* Confirm and Elaborate Architecture Principles, including Business Principles	<input type="checkbox"/>
* Develop Architecture Vision	<input type="checkbox"/>
* Define the Target Architecture Value Propositions and KPIs	<input type="checkbox"/>
* Identify the Business Transformation Risks and Mitigation Activities	<input type="checkbox"/>
* Develop Enterprise Architecture Plans and Statement of Architecture Work; Secure Approval	<input type="checkbox"/>
* Define Scope	<input type="checkbox"/>

Enterprise Architecture
Architecture Framework
Architecture Repository

Diagram

```

graph TD
    A[A. Architecture Vision] --> B[B. Business Architecture]
    A --> C[C. Information Systems Architectures]
    A --> D[D. Technology Architecture]
    A --> E[E. Opportunities and Solutions]
    A --> F[F. Migration Planning]
    A --> G[G. Implementation Governance]
    A --> H[H. Architecture Change Management]

    B --> C
    B --> D
    B --> E
    B --> F
    B --> G
    B --> H

    C --> D
    C --> E
    C --> F
    C --> G
    C --> H

    D --> E
    D --> F
    D --> G
    D --> H

    E --> F
    E --> G
    E --> H

    F --> G
    F --> H

    G --> H

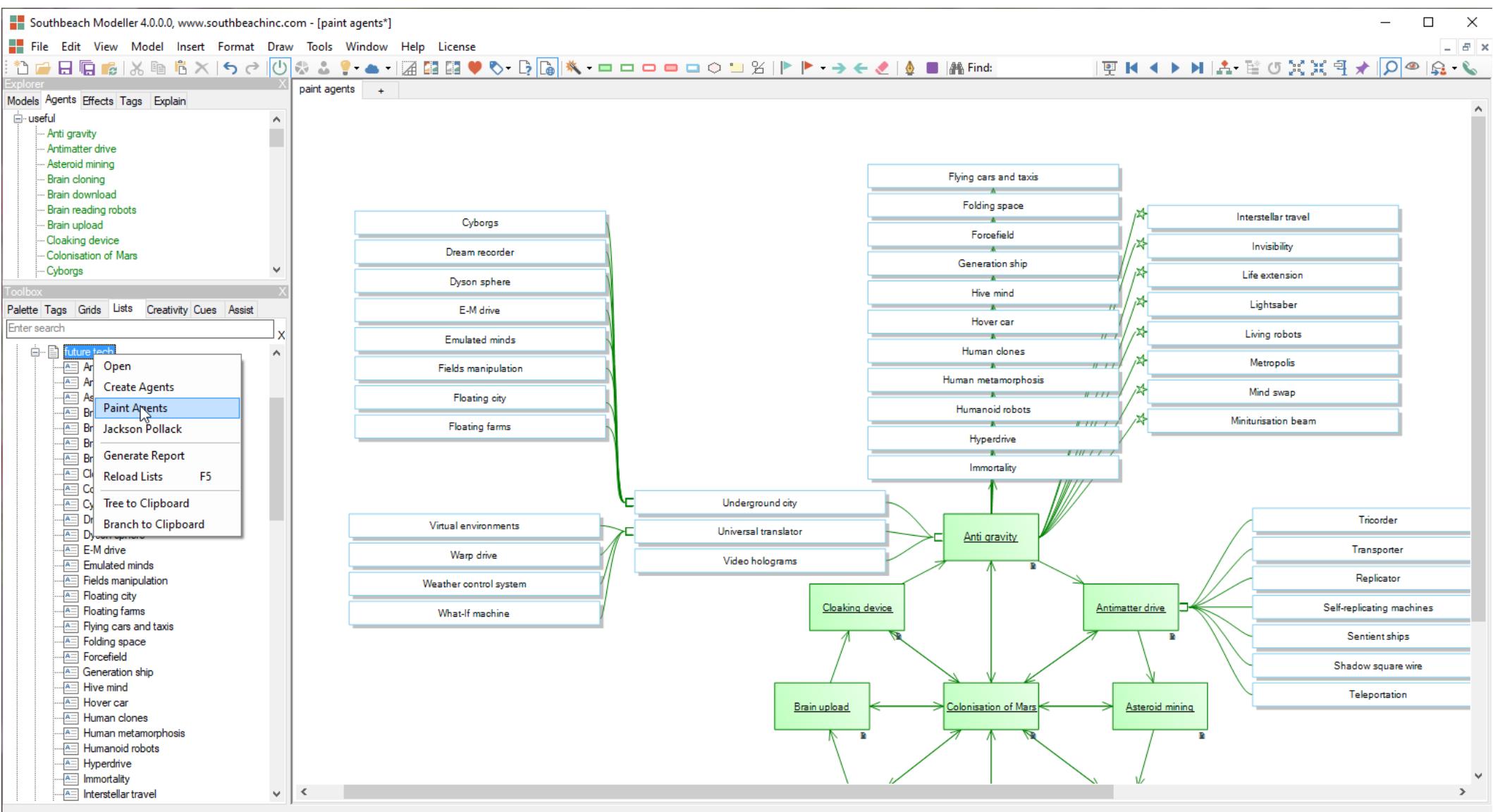
    H --> B
    H --> C
    H --> D
    H --> E
    H --> F
    H --> G
  
```

Approved Statement of Architecture Work
Refined statements of Business Principles, Business Goals, and Business Drivers
Architecture Principles
Capability Assessment
Tailored Architecture Framework (for the engagement)
Architecture Vision
Communications Plan
Additional content populating the Architecture Repository
Organizational Model for Enterprise Architecture
Tailored Architecture Framework
Approved Statement of Architecture Work
Architecture Principles, including business principles, when pre-existing
Enterprise Continuum
Architecture Repository
Architecture Vision

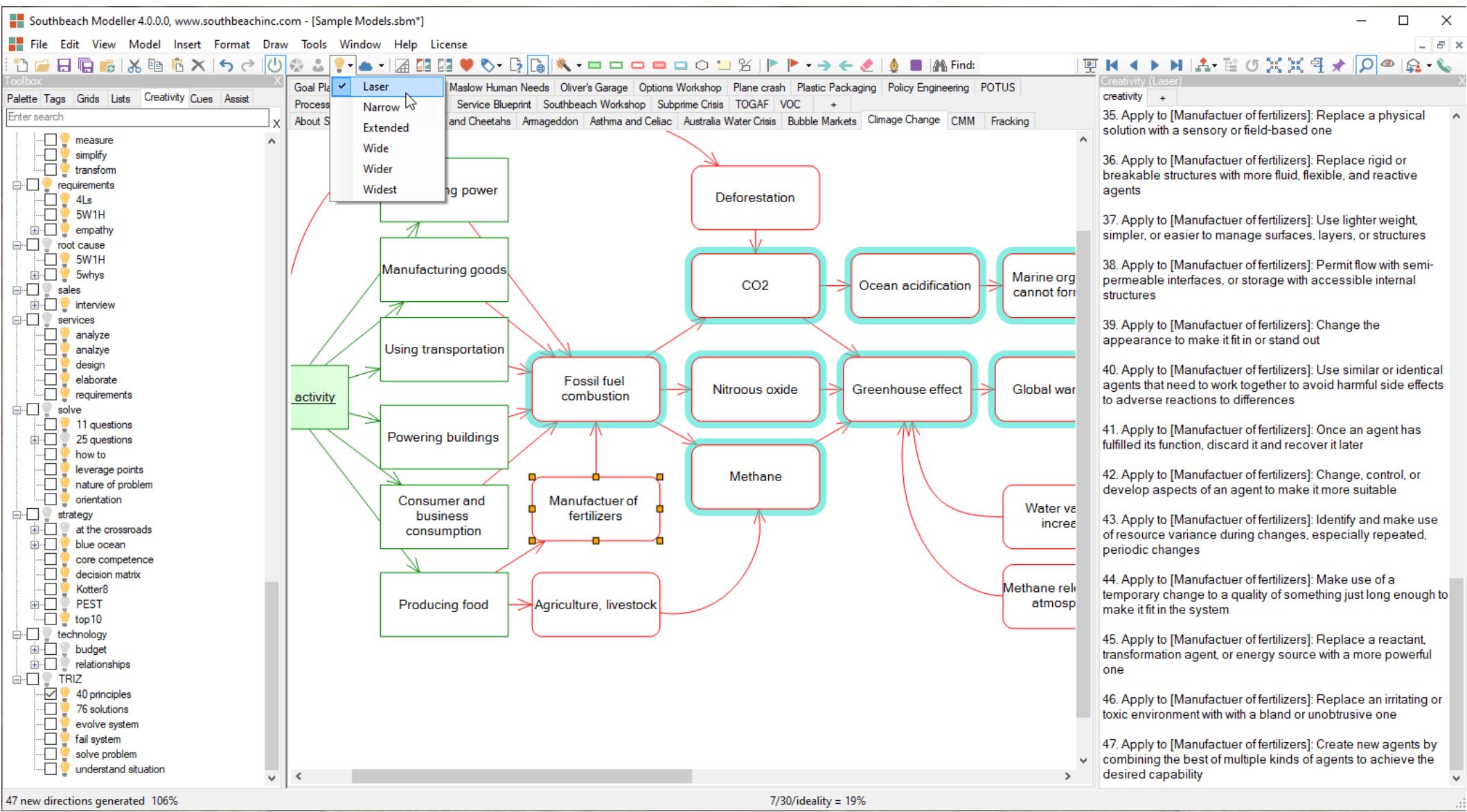
TOGAF (Freeform) 71%

72/0/ideality = 100%

Lists are a major new function in v4. Over 200 lists are provided, covering a wide range of topics, giving access to 10000s of modelling elements. The role of these lists is to inspire modelling and creativity. Elements can be reused in models individually (just drag to the canvas) or as complete lists. A list can be converted to objects or used to paint over the names of existing objects. Lists are held in .txt files and the user can add their own preferred lists of resources to Modeller. They will appear in the Lists panel tree according to the hierarchy of folders used.



As the user clicks around a model, and if the ideation engine is on (power icon in toolbar), ideas (sentences) are generated and displayed in the creativity panel (right). Sentences are output depending upon which rules match patterns in the model. The user has control of which parts of the model are used. This is called 'scope'. For example 'laser' instructs the engine only to fire on individual objects. 'Narrow' extends this to adjacent effects. 'Wide' includes adjacent objects, etc. 'Widest' applies the rules to the entire model.



As well as the extensive library of creativity rulesets provided in the Toolbox panel, Southbeach also provides the concept of 'model creativity'. These are rules held in the model itself. Look at the panel on the right. It is split in two. The upper part are the model rules and the lower part the output. If 'model creativity' is enabled (icon in Toolbar) these local rules are combined with any library rules enabled. Thus, it is possible to develop a model or template containing all the rules necessary for its operation. The person who has the model does not need a corresponding library. In this example, the model rules are simply a copy from the library. But there is nothing to stop users modifying these or adding rules of their own creativity. Note, the upper panel can be hidden when not needed, thereby hiding the rules. A full manual (Creativity Reference) describing the powerful rules language is available separately.

Southbeach Modeler 4.0.0.0, www.southbeachinc.com - [Sample Models.sbm*]

Toolbox

- *model
- *cues
- *experimental
- *legacy
- agile
- analyze
- business
- creativity
 - 100 ways
 - 15 techniques
 - forced conflict
 - inner vision
 - intuition
 - oblique
 - wack on the head
- elaborate
- governance
- innovate
- lateral thinking
- 6hats
 - black
 - blue
 - green
 - red
 - white
 - yellow
- thinkpak
- TOLOPOSOGO
- what if
- lean
- living
- marketing
- observe
- people
- process
- requirements
- root cause
- sales
- services
- solve
- strategy
- technology
- TRIZ

Creativity (Widest)

creativity lateral thinking.6hats.black from file mycreativity.txt

```

// #lateral thinking.6hats.black from file mycreativity.txt

* "Will {this} work for us?"
* "Why can't we do {this} now? What should we in preparation?"
* "What is wrong with {this}? What might cause this to break?"
* "What are the risks around {this}? Is this safe?"
* "What is {this} in conflict with? Think about ideals, standards and conventions"
* "How will {this} impact on other activities?"
* "What distractions does {this} create?"
* "Who will prevent, stop or derail {this}?"
*() "Will {this} work for us?"
*() "Why can't we do {this} now? What should we in preparation?"
*() "What is wrong with {this}? What might cause this to break?"
*() "What are the risks around {this}? Is this safe?"
*() "What is {this} in conflict with? Think about ideals, standards and conventions"
*() "How will {this} impact on other activities?"
*() "What distractions does {this} create?"
*() "Who will prevent, stop or derail {this}?"

```

Water Crisis in Australia

If its red, its harmful. If its green, its useful. The blue boxes are actions we could take to improve the situation. Each action also has useful and harmful side effects.

Goal Planning **Innovation KPIs** **Maslow Human Needs** **Oliver's Garage** **Options Workshop** **Plane crash** **Plastic Packaging** **Policy Engineering** **POTUS**

Process Map - Risk **Project Map** **Service Blueprint** **Southbeach Workshop** **Subprime Crisis** **TOGAF** **VOC**

About Sample Models **Antelopes and Cheetahs** **Amageddon** **Asthma and Celiac** **Australia Water Crisis** **Bubble Markets** **Climate Change** **CMM** **Fracking**

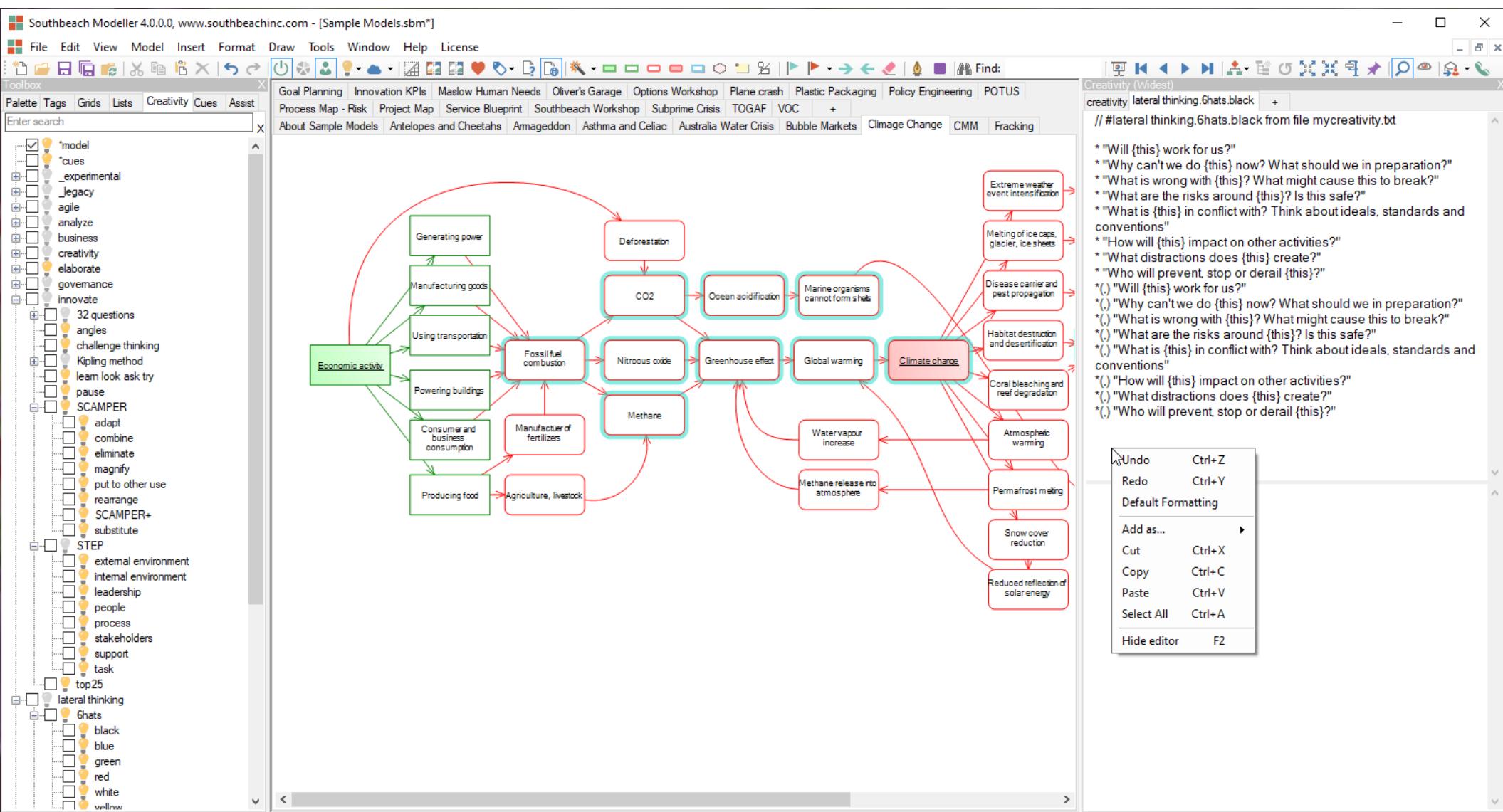
Enter search

Palette **Tags** **Grids** **Lists** **Creativity** **Cues** **Assist**

36/12/ideality = 75%

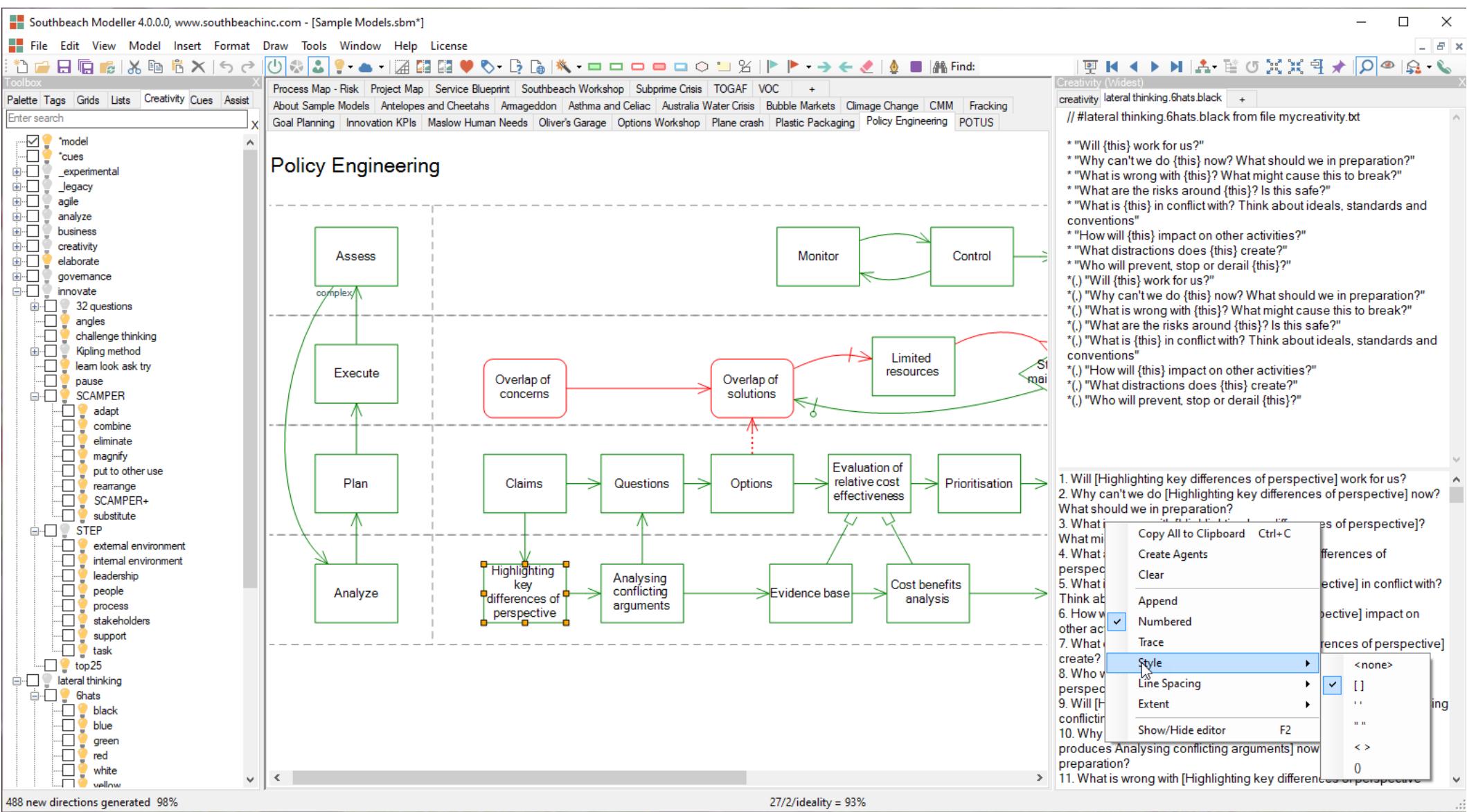
The upper and lower parts of the Creativity panel have right mouse (context) menus. The upper panel (rules editor) has a 'Hide editor' option and the lower panel (ideation output) has a 'Show editor' option. Note, function key F2 in either panel hides or shows the editor.

Note that the Creativity panel has a tab to add [+] more output tabs. Each maintains its content across sessions and each serves the purpose of collecting content for each sub-model in the model (if any). The relationship between sub-model and output panel is automatic. Just click on the sub-model and output panel to see the associated ideation content.

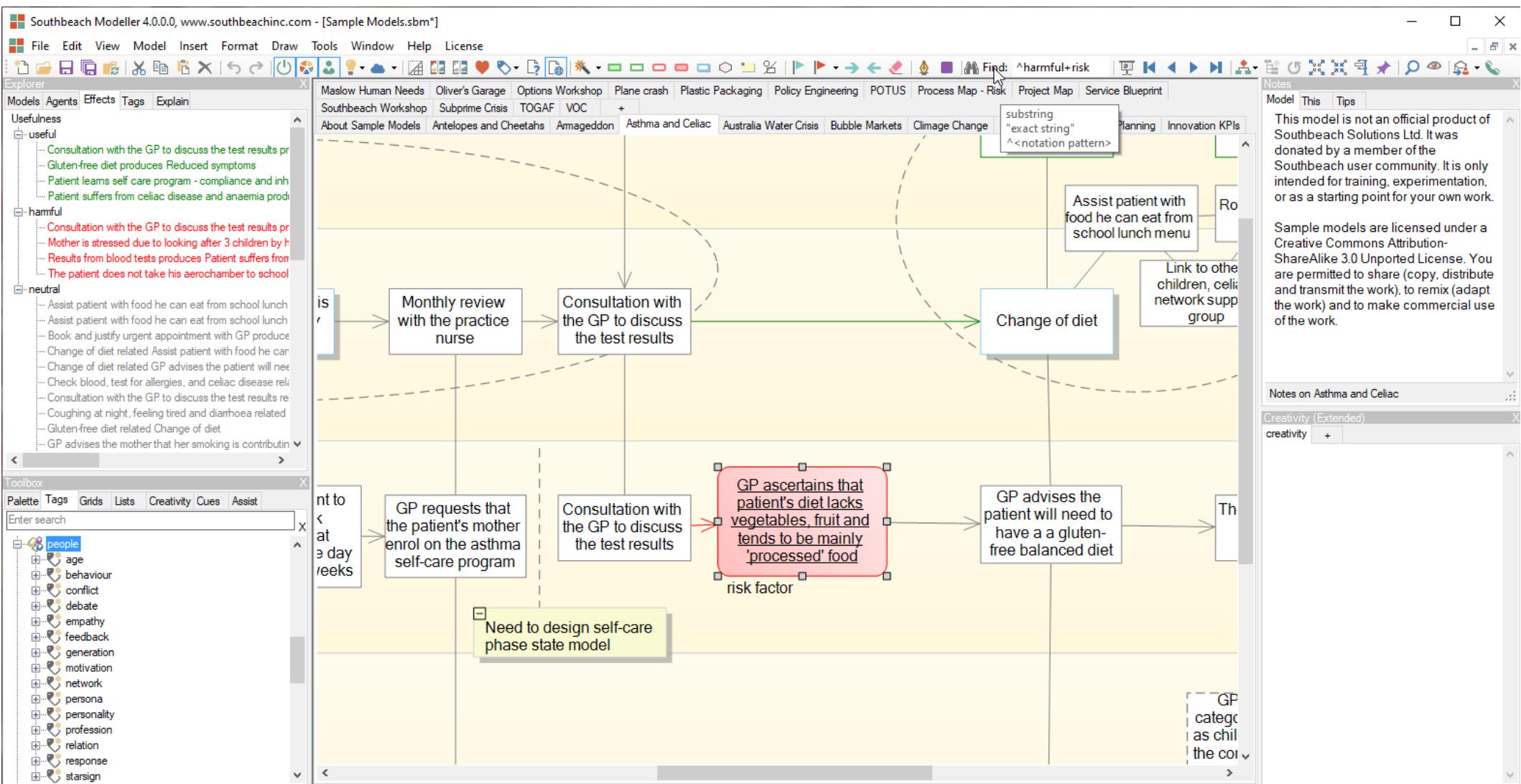


The lower (ideation output) part of the Creativity panel has a context menu for specifying the operation and format of generated ideation. The panel can be set to append or replace new content as the user clicks around the model and new ideas are generated. Numbering, line spacing and style can be set. Style refers to different types of quotes marks or brackets placed around the names of objects inserted into the generated sentences.

A ‘trace’ option appends the name of the ruleset that generated the sentence.



Southbeach v4 now provides a search box in the toolbar, also available in the Edit menu – Find. This allows for searching by substring, exact string or notation pattern. All objects matching the text or pattern are selected in the model. To specify a notation pattern start with the ^ character, e.g. ^harmful+risk+@priority, would select all harmful risks tagged as priority. Note that if the model has a grid, the pattern can include the values of the row and column or labelled boxes tags. In addition, all derived keywords in the creativity engine are supported. For example, the pattern ^contradiction+increasing would find all contradictions in the model (objects that are simultaneously improving and harming the system) and that are increasing in severity as a result of an increasing effect on them from another agent. (This new search functionality complements the existing (in v3) search by key letter. Type any key and the next object starting with that letter is selected on the canvas.)



Endorsement

<https://www.southbeachinc.com/customers.html>

- ✓ "I really like your software. It is an easy to use visual tool for working with all kinds of thinking methods." -- Creativity Consultant
- ✓ "A practical tool that guides where effort should be focused as problem-solving proceeds." -- Mind Mapping.Org
- ✓ "Southbeach has an important plus - the models are readily understood by non-technical employees" -- Business Manager
- ✓ "Southbeach is a superb notation for organizing your thoughts. An hour's Southbeach reduces task completion by days." -- Strategy Lead
- ✓ "A very neat tool for almost anything! I keep it open in the background all the time" -- Business Improvement Manager
- ✓ "The creativity manual is well written. The rules language is wonderfully simple yet powerful. It will be interesting to see what people do with this." -- Lead IT Strategy & Transformation
- ✓ "Remarkable. I learnt more from my models in ten minutes than weeks of previous looking." -- Innovation Consultant
- ✓ "I am very enamored with Southbeach. I use it in group situations. A telling indication (for me) is that most if not all of my "project" folders now contain a Southbeach sub-folder!" -- Business Analyst, ITIL and Six Sigma Black Belt

support@southbeachinc.com