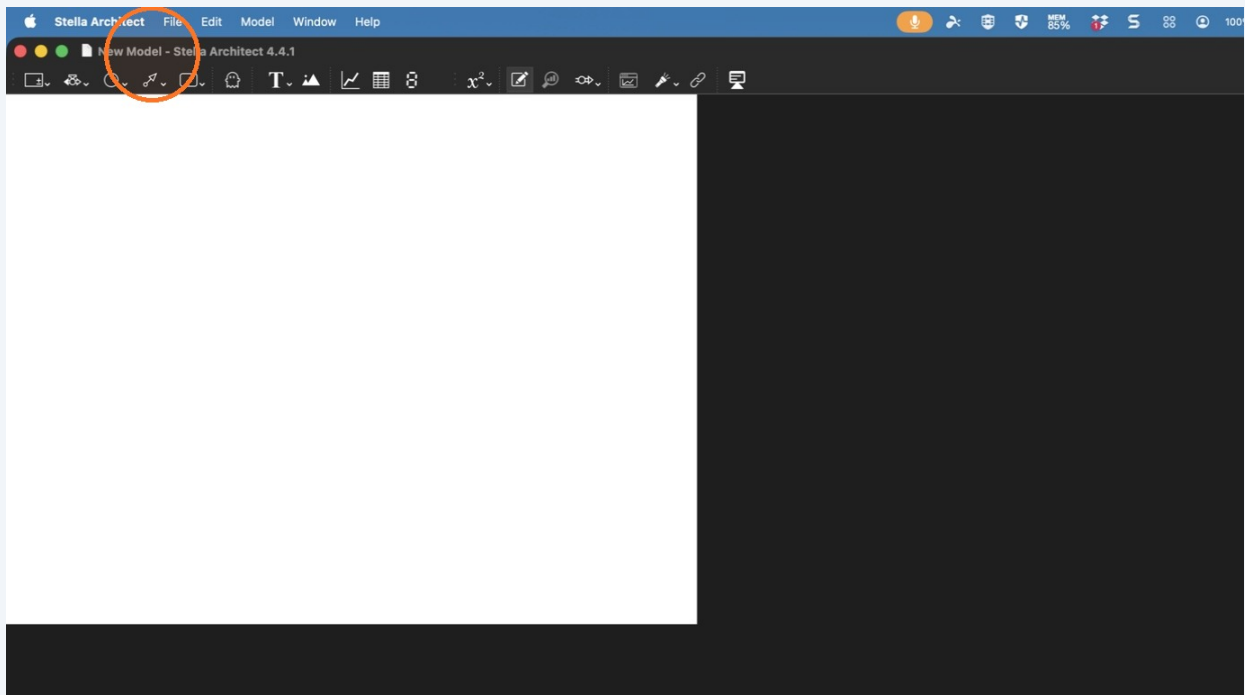


How to Integrate Socrates Coach into Stella Architect Models



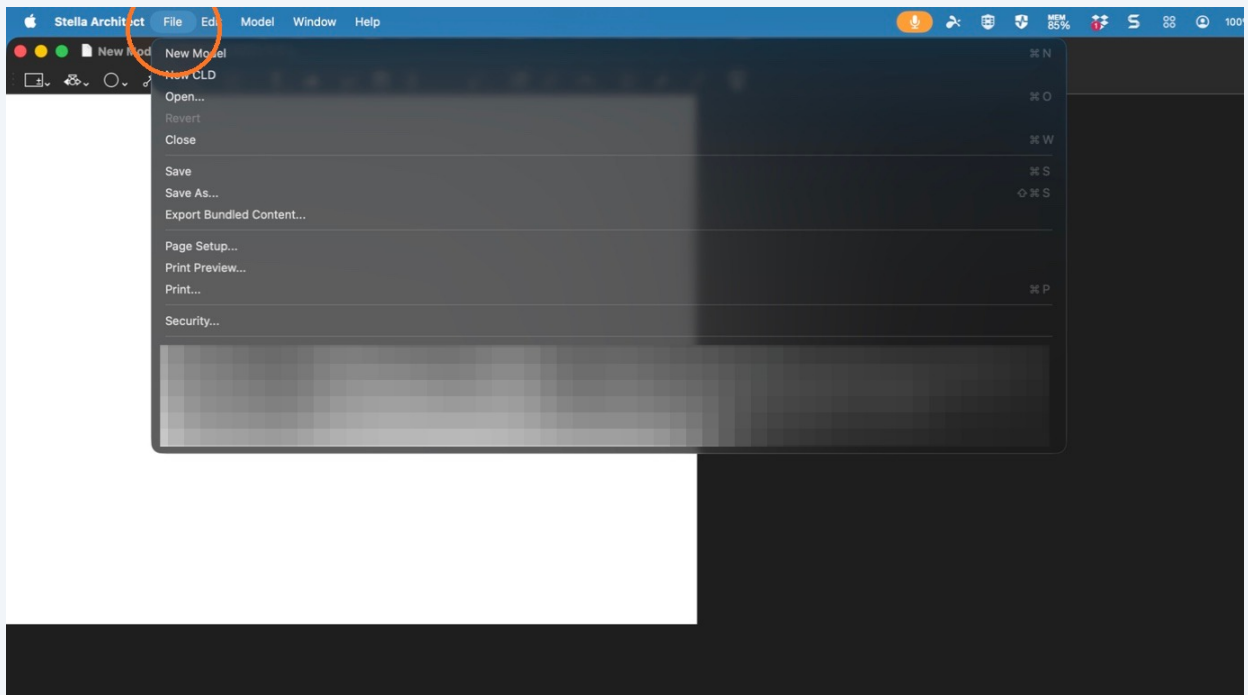
Learn how to efficiently navigate the Stella Architect interface to open a model stmx file and configure the AI Assistant panel within your Stella Architect interface to use Socrates-Coach.

1 Click "New Model - Stella Architect 4.4.1"

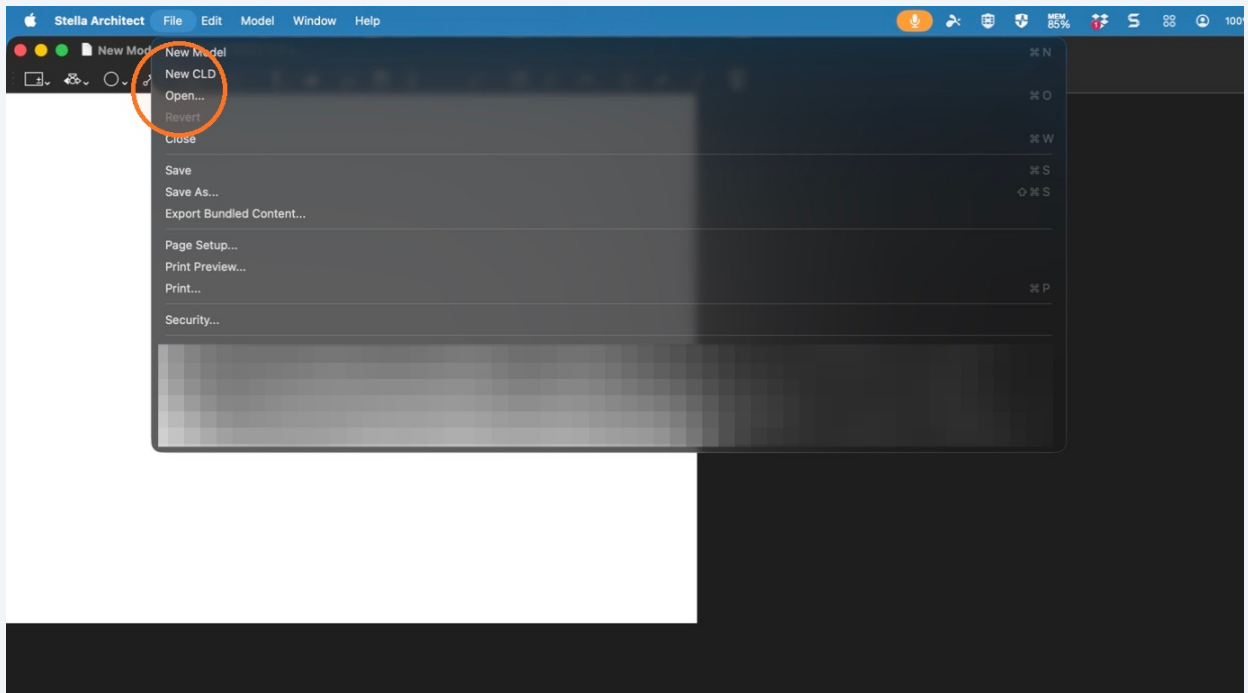


Open Model

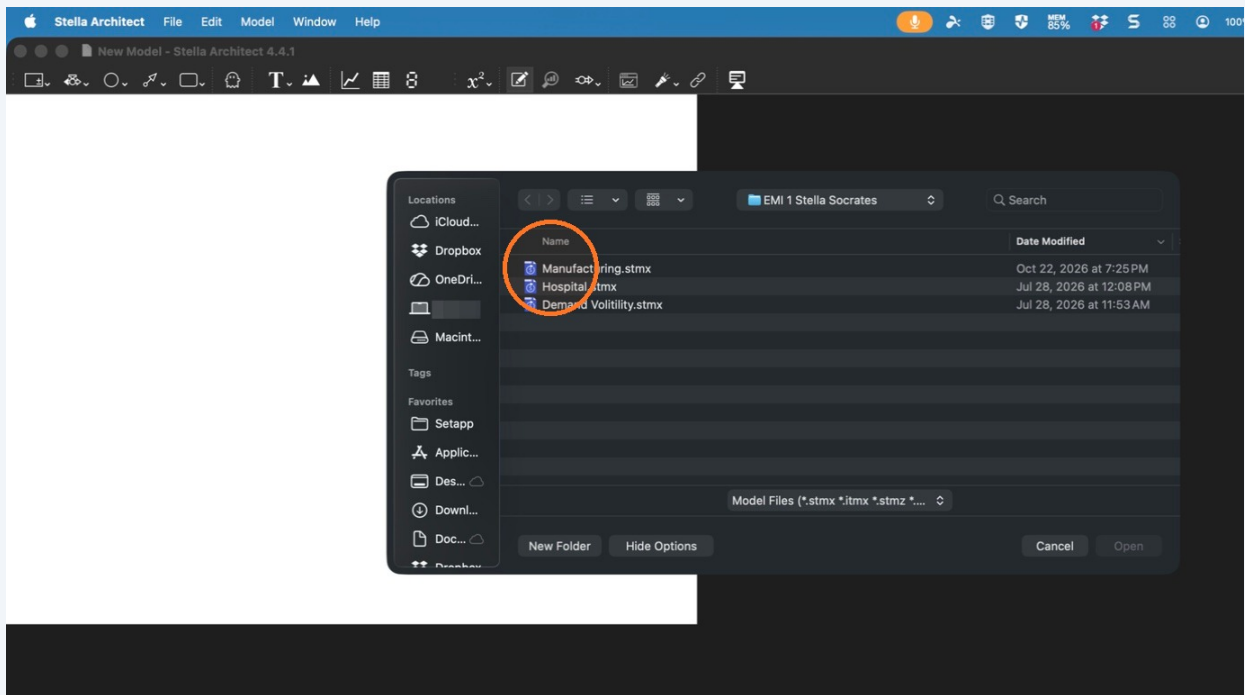
2 Click "File"



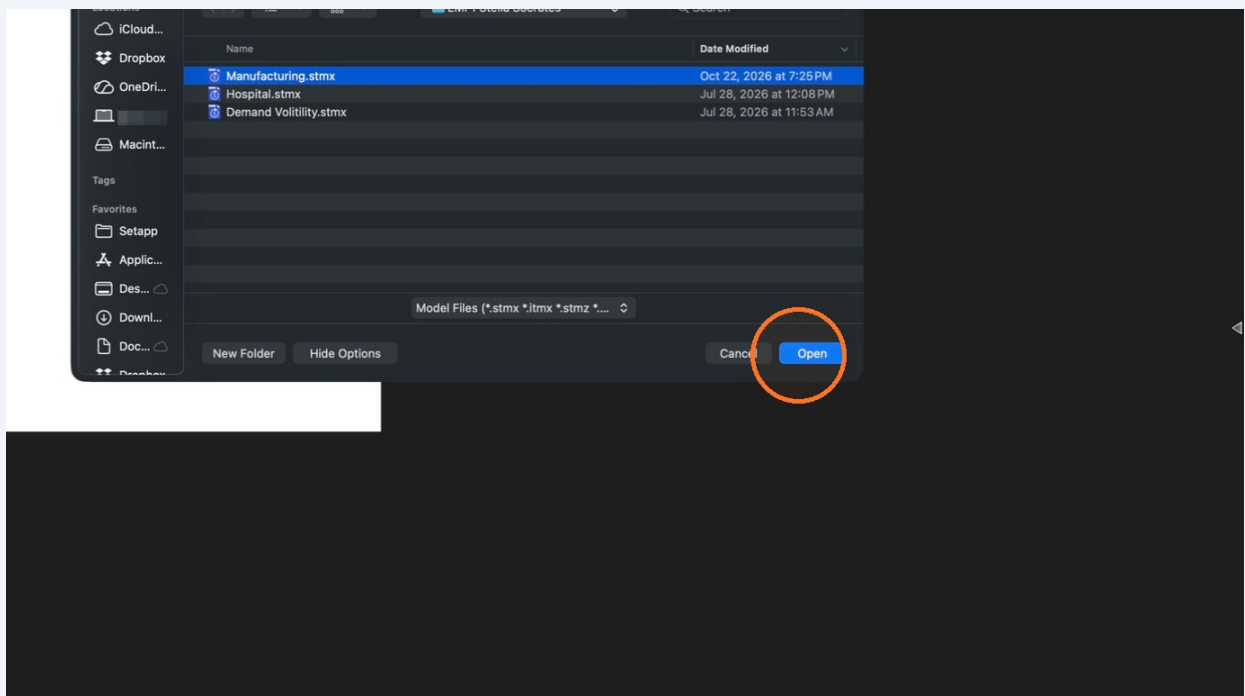
3 Click "Open"



4 Select the Manufacturing model file

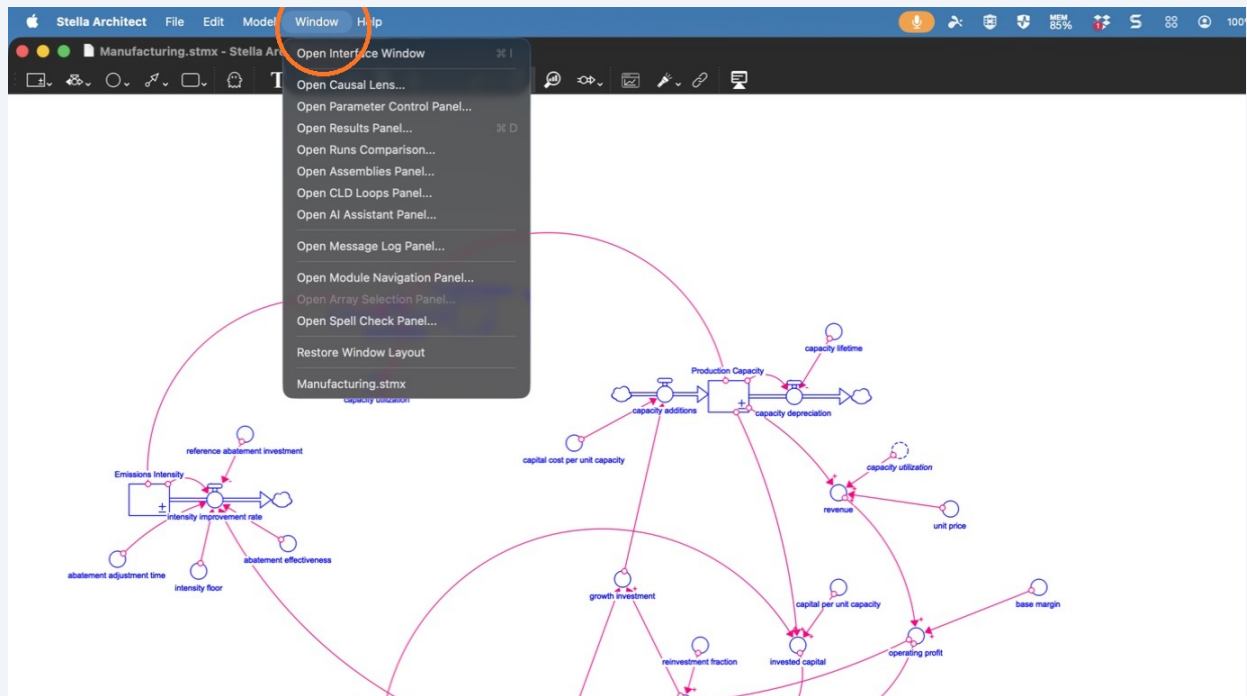


5 Click "Open"

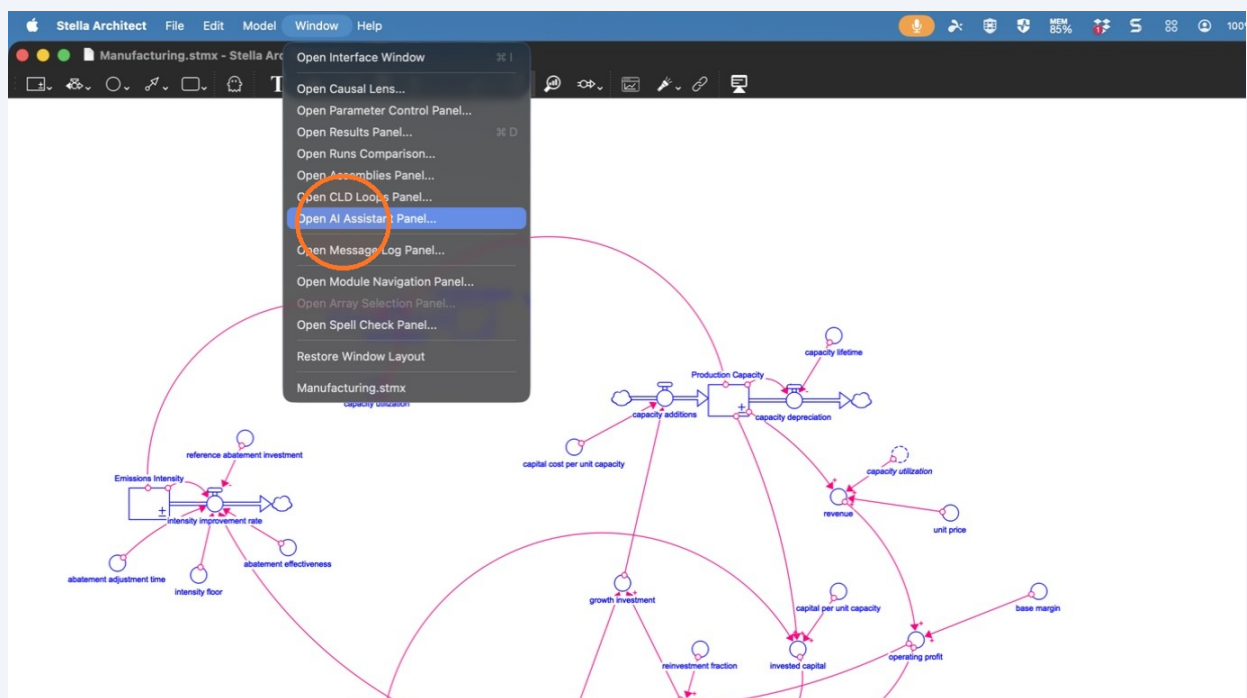


Open AI Assistant

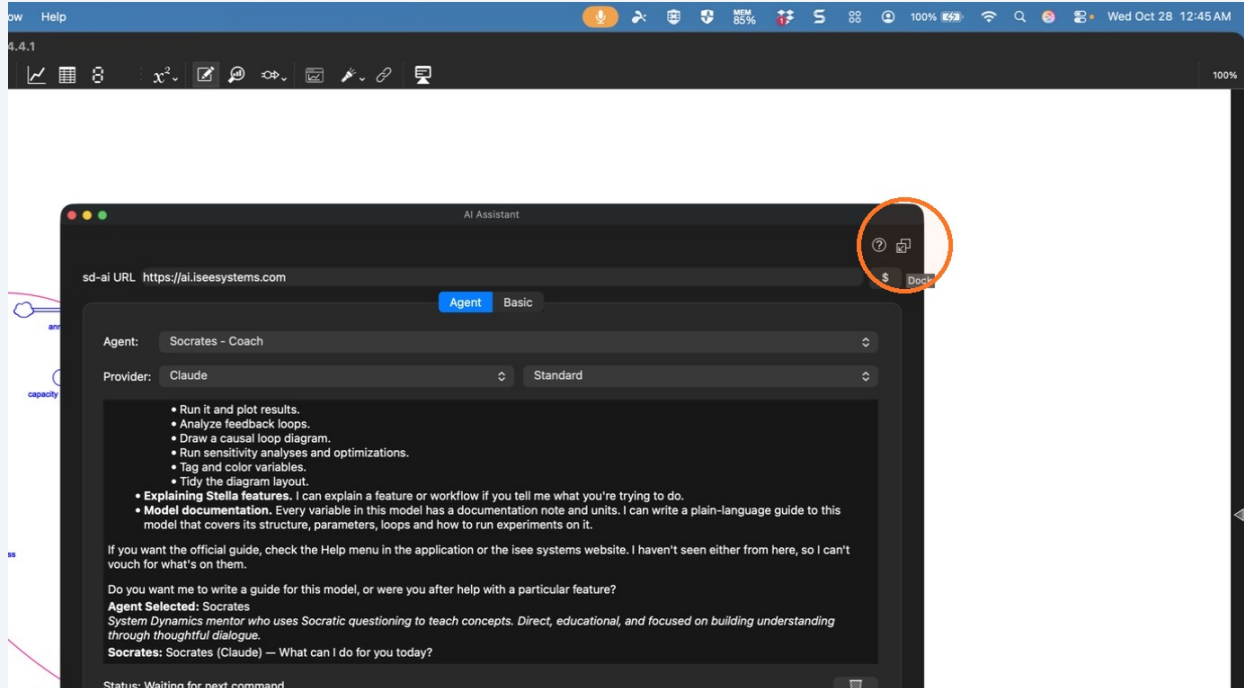
6 Open the Window menu



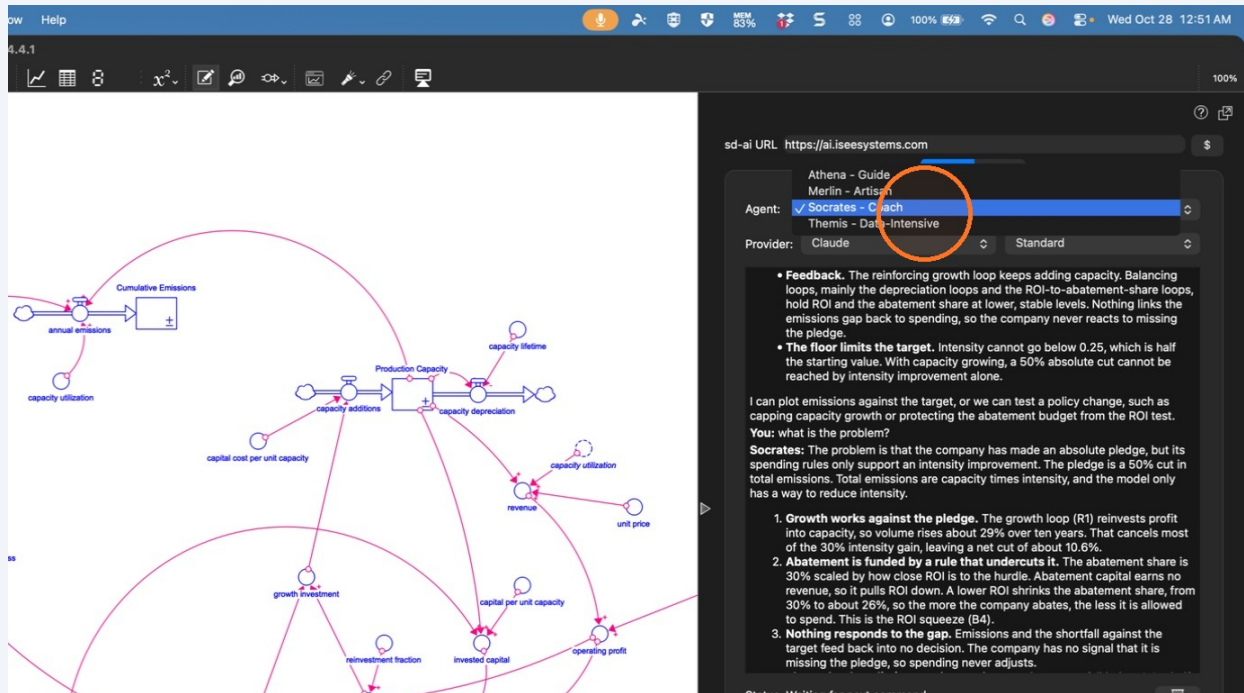
7 Click "Open AI Assistant Panel..."



8 Click the Dock icon in the upper right-hand corner to dock the AI Assistant panel



9 Under "Agent", click "Socrates - Coach"



10 Enter or confirm the sd-ai URL which should be <https://ai.iseesystems.com>

The screenshot shows the Stella software interface. On the left is a complex system dynamics model with various stocks, flows, and feedback loops. On the right is the 'sd-ai' panel. At the top of this panel, the URL 'https://ai.iseesystems.com' is entered in a text field, which is circled in orange. Below the URL field are buttons for 'Agent' and 'Basic'. The 'Agent' dropdown is set to 'Socrates - Coach'. The 'Provider' dropdown is set to 'Claude', and the 'Standard' dropdown is set to 'Standard'. Below these are instructions and a list of capabilities:

- What I can do in this session.**
 - Build and edit the model.
 - Run it and plot results.
 - Analyze feedback loops.
 - Draw a causal loop diagram.
 - Run sensitivity analyses and optimizations.
 - Tag and color variables.
 - Tidy the diagram layout.
- Explaining Stella features.** I can explain a feature or workflow if you tell me what you're trying to do.
- Model documentation.** Every variable in this model has a documentation note and units. I can write a plain-language guide to this model that covers its structure, parameters, loops and how to run experiments on it.

Below this is a status bar that says 'Status: Waiting for next command'.

11 Return to the Manufacturing model and adjust the AI panel for readability

The screenshot shows the Stella software interface with a different system dynamics model. On the right is the 'sd-ai' panel. The 'Agent' dropdown is set to 'Socrates - Coach', the 'Provider' dropdown is set to 'Claude', and the 'Standard' dropdown is set to 'Standard'. Below these is a table of model variables:

Variable	Value	Unit
Production capacity (units/year)	100,000	128,635
Achieved ROI	0.100	0.086
Abatement share of budget	0.300	0.259
Abatement capital (\$)	0	about 4.1M

Below the table is a text box that says 'Emissions are capacity times intensity. Intensity falls about 30%, but capacity grows about 29%, so most of the gain is cancelled. Emissions are still drifting down at year 10, but very slowly.'

Below this is a section titled 'The feedback structure' with the text 'The analysis found seven loops.'

- R1, the growth engine.** Growth investment adds capacity. Capacity raises revenue and operating profit. Profit raises the investment budget, which raises growth investment. This is what keeps volume rising.
- B2 and B1, depreciation.** B2 retires production capacity and B1 retires abatement capital. Each is a simple

Below this is a status bar that says 'Status: Waiting for next command...'. At the bottom of the panel is a 'Prompt:' section with a text input field and a 'Send' button, which is circled in orange.

Interact with Socrates-Coach

12 Click "text entry area"

The screenshot displays the Socrates-Coach application interface. On the left, a complex system dynamics model diagram is visible, featuring various stocks (circles), flows (arrows), and control loops. Key variables include 'Production Capacity', 'capacity additions', 'capacity depreciation', 'revenue', 'unit price', 'operating profit', 'invested capital', 'return adequacy', 'abatement investment', and 'abatement share of budget'. The diagram uses color-coded lines to represent different types of relationships or feedback loops.

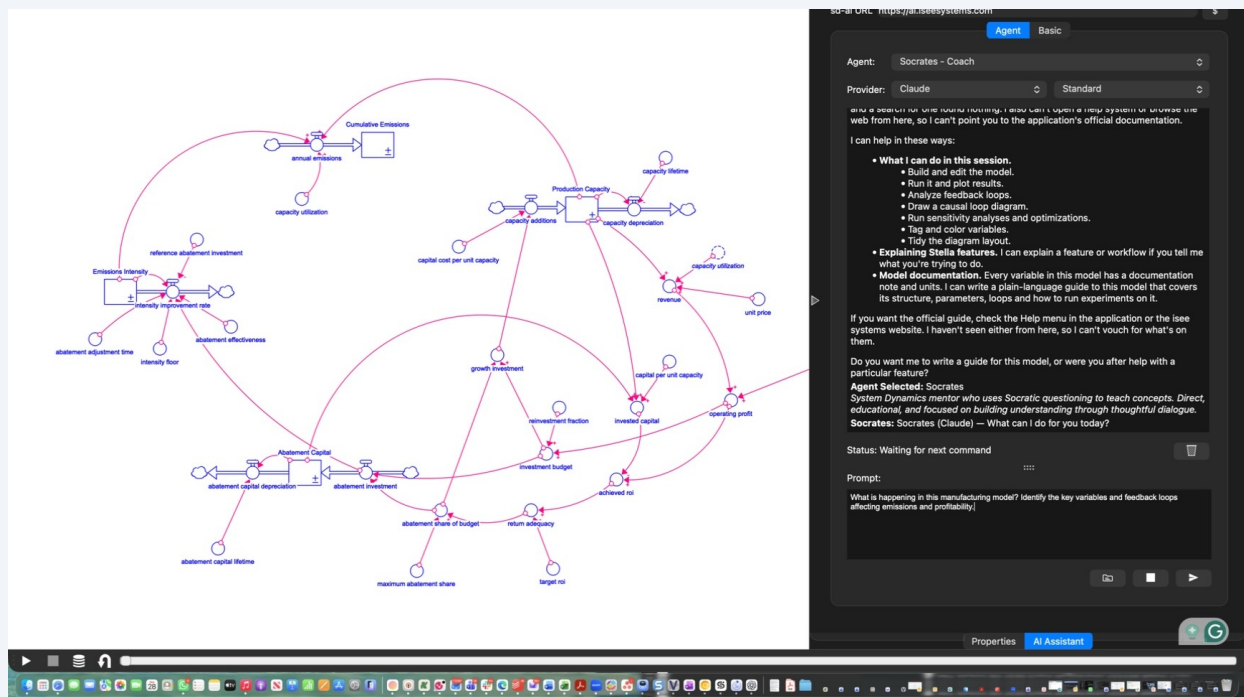
On the right, a chat window is open, showing a conversation with the 'Socrates' AI assistant. The chat history includes:

- System:** Tag and color variables.
- System:** Tidy the diagram layout.
- Explaining Stella features:** I can explain a feature or workflow if you tell me what you're trying to do.
- Model documentation:** Every variable in this model has a documentation note and units. I can write a plain-language guide to this model that covers its structure, parameters, loops and how to run experiments on it.

Below the chat history, a status bar indicates 'Status: Waiting for next command'. The 'Prompt:' section shows a text entry area with the placeholder text 'Enter your prompt here...'. An orange circle highlights this text entry area, indicating where the user should click to interact with the AI assistant.

At the bottom of the interface, there are buttons for 'Properties' and 'AI Assistant', and a macOS taskbar is visible at the very bottom.

13 Type or paste your question in the prompt window.



14 Click "Send"

