

Oracle Financial Service Stress Testing and Scenario Analytics

Administration Guide



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Contents

1 Preface

2 Configuration Manager

2.1	Adding Dimensions	1
2.2	Adding Dimension Alias Name	2
2.3	Adding Base Reference Execution ID	2
2.4	Adding Rating Details	3
2.5	Adding Dimensions for Results	3
2.6	Adding Process Pipeline Dependencies	5
2.7	Publishing Process Pipelines to Data Catalog	5
2.8	Creating Analysis Purpose	5
2.9	Adding Date Management	6

3 Managing Configurations

3.1	Deleting the Existing Dimensions	1
3.2	Deleting Base Reference Date	1
3.3	Managing Rating Details	2
3.3.1	Editing Rating Details	2
3.3.2	Deleting Rating Details	2
3.4	Managing Dimension for Results	2
3.4.1	Editing Dimension for Results	2
3.4.2	Deleting Dimensions for Results	3
3.5	Viewing Process Pipeline Dependencies	3
3.6	Deleting Analysis Purpose Details	3
3.7	Deleting Date Management Details	4
3.8	Managing Market Variable Data Mapping	5
3.8.1	Viewing Market Variable Data Mapping	6
3.8.2	Editing Market Variable Data Mapping	6
3.8.3	Deleting Market Variable Data Mapping	6

1

Preface

This Preface provides supporting information for the Oracle Financial Services Stress Testing Analytics (OFS STSA) Administration Guide and includes the following topics:

Key Capabilities

- **Centralized Repository:** A centralized repository facilitates the definition and management of various objects such as variables, models, metrics, datasets, orchestration process flows, and business-relevant scenarios. This repository allows users across the organization to refer to, share, compare, and utilize essential resources effectively.
- **Model Management and Governance:** The platform is embedded with robust model management and governance capabilities, enabling the creation, upload, execution, and management of a suite of in-house, Oracle, and third-party models with ease.
- **Extensible Data Catalog:** Equipped with a versatile data catalog, the system can seamlessly incorporate various datasets, including in-house, Oracle, third-party, or external data. The data catalog ensures logical linking of data elements to data structures, promoting data harmonization and synchronous perturbation of data elements across the enterprise.
- **Intelligent Process Modeling Engine:** The platform features an intelligent process modeling engine that facilitates the sequential scheduling of all processes across the enterprise. This enables seamless orchestration based on a harmonized set of scenarios, data, and methodologies, empowering users to run multiple complex scenarios simultaneously and develop actionable solutions.
- **Intuitive Stress Testing and Scenario Analysis:** A user-friendly interface guides business users through an intuitive step-by-step process for stress testing and scenario analysis. Validation routines and auto-recommendations minimize errors, reduce runtime, and expedite decision-making.
- **Vendor Agnostic Framework:** The product offers a vendor-agnostic framework supporting the registration, scheduling, and usage of existing business-as-usual (BAU) models and engines, whether from Oracle or otherwise, thereby leveraging the existing digital assets for stress testing and scenario analytics.
- **Seamless BAU Integration:** With its intuitive and robust capabilities, coupled with the ability to analyze a holistic view of scenario impacts across various risk domains, the platform enables seamless integration of stress testing and scenario analytics into day-to-day operations. This facilitates ad-hoc, frequent, and routine use of stress testing and scenario analytics, empowering organizations to make informed decisions promptly.
- **Analytical Dashboards:** The product features out of box analytical dashboards across four key reporting areas. These dashboards provide actionable insights based on results, enabling data-driven, informed, and timely decision-making by stakeholders across the enterprise. They integrate stress testing, financial planning, capital planning, liquidity planning, risk appetite planning, strategic business planning and other measures that positively impact business, profitability and return metrics.

Audience

This guide is for Administrators who maintain user accounts and roles, loads data and so on. The administrator controls the access rights of users.

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Related Resources

See these Oracle resources:

- Oracle Financial Services Stress Testing Analytics Guides
 - Installation Guide
 - User Guide
- [Oracle Financial Services Advanced Analytical Applications Infrastructure Guides](#)
- [Oracle Financial Services Model Management and Governance Application Guides](#)

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

2

Configuration Manager

This section lists all the configurations that are available in STSA.

Note

Configuration Manager is primarily used by administrators and should be accessed before creating key objects such as Analysis Configurations, Projects, Portfolios, and Variables. These configurations form the foundation for data mapping, modeling, and execution throughout the STSA application.

2.1 Adding Dimensions

Use this configuration to add the required business dimensions from production to the STSA workspace. These dimensions are consumed from the Advanced Analytical Infrastructure (AAI) and must contain at least one associated hierarchy to be visible in the list. The added dimensions are used in lower-level configurations such as Portfolio and Variable definitions. This metadata is exported while creating the sandbox.

Prerequisites

- Ensure that you configure other OFSAA products on the same information domain (or workspace).
- Ensure that you have replicated and migrated the hierarchy metadata from production to sandbox. For more information, see the *Creating Sandbox* section in the *Oracle Financial Service Stress Testing and Scenario Analytics User Guide*.

1. Login to STSA.

The **Workspace Summary** page is displayed.

2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.

3. Click the Context Menu representing the user name and then click **Configuration Manager**.

4. Click **Configure** in the **Dimension Configuration** section.

The **Dimension Configuration Summary** page is displayed.

5. Click **Create New**.

6. Select the required dimensions and click **Save**.

Only dimensions that contain at least one hierarchy are displayed in the list.

7. On the Dimension Configuration Summary page, click a dimension hyperlink in the **Edit** column to view or modify the configuration details of that dimension.

In **Edit** mode, you cannot completely unmap or remove a hierarchy that is already associated with a dimension. For example, if Dimension A is mapped to Hierarchy H1, H1 cannot be unmaped.

2.2 Adding Dimension Alias Name

Use this configuration to change the dimension names as per your preference.

Prerequisite:

Ensure that dimensions are added to the information domain or workspace.

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. In the **Dimension Alias Name** tile, click **Configure**.
The **Dimension Alias Name** page is displayed.
5. Search the alias name you want to change using the search bar and select from the options listed.
6. Provide the new name in the **Alias Name** column.
7. Click **Save** to save the changes.
The dimension names are updated.

2.3 Adding Base Reference Execution ID

Use this configuration to assign an execution ID for a process, model, or RRF run that was executed on the selected reference date in production.

Note

Execution IDs are generated for models; however, Run ID (RunSkey) is not generated. Therefore, when mapping models, the Run ID is set to 0.

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Base Reference Execution ID** tile.
The **Base Reference Execution ID** page is displayed.
5. Select **Create New**.
The **Execution details** page is displayed.
6. Select a base production run date from the **Reference Date** field.
Reference date is the date corresponding to the process executed date in the production.
7. Select a process, model, or RRF run from the **Name** drop-down list.

The **Process ID** and **Type** fields are auto-populated.

8. For models, leave the Execution ID as 0. For processes and RRF runs, select the appropriate **Execution ID** from the list.
9. Click **Add** against the row to save this entry.
10. Click **Save** to save your changes.

2.4 Adding Rating Details

Use this configuration to import the rating details from data catalog which is used while creating scenarios (adding variable values).

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Rating Details** tile.
The **Rating Details** page is displayed.
5. In the **Name** field, select the rating details name from the drop-down menu.
6. In the **Rating Source Code** field, select the rating source code from the drop-down menu.
7. In the **Short/Term Long Term** field, select the desired value from the drop-down menu.
8. In the **Rating Rank** field, select the rating rank from the drop-down menu.
9. Click the **Add** icon to add a row.
10. Select the required details and click **Save**.
11. Repeat the above steps to add multiple rating entries.

2.5 Adding Dimensions for Results

Use this configuration to select the dimensions by which you want to analyze the stress testing results.

To add results dimensions:

After creating result dimensions, these are used in Project configuration for selecting output formats and visualizing results.

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. In the **Dimensions for Results** tile, click **Configure**.
The **Result Dimension Summary** page is displayed.
5. Click **Create New**.

The **Result Dimension** page is displayed.

6. Do the following:
 - a. In the **Dimension Table Name** field, select the required table from the drop-down list.
Based on this selection all the columns present in this table are listed for selection in the corresponding columns.
 - b. In the **Unique Key** field, select the unique key from the drop-down list.
 - c. In the **Name** field, select the display name from the drop-down list.
 - d. In the **Code** field, select the code from the drop-down list.
 - e. In the **Description** field, select the description from the drop-down list.
 - f. In the **Latest record** field, select the record from the drop-down list.
 - g. In the **Logical Name** field, provide a dimension name for this row that you want to see on the reports in the column.
 - h. In the **Level 1 Name** field, select the column from the drop-down list that represents the display name:
 - For hierarchical dimensions, select the column for the topmost level of the dimension hierarchy.
 - For simple dimensions, select the leaf-level column.
 - i. In the **Level 1 Code** field, select the column that provides a unique code for each Level 1 entry.
 - j. In the **Level 1 Display Order** field, select the column that determines the display sequence of Level 1 items.
 - k. In the **Level 2 Name** field, select the column that represents the display name for the second level of the dimension hierarchy.
 - l. In the **Level 2 Code** field, select the column that provides a unique code for each Level 2 entry.
 - m. In the **Level 2 Display Order** field, select the column that determines the display order of Level 2 items within each Level 1 group.
 - n. In the **Level 3 Name** field, select the column that represents the display name for the third level of the hierarchy.
 - o. In the **Level 3 Code** field, select the column that provides a unique code for each Level 3 entry.
 - p. In the **Level 3 Display Order** field, select the column that determines the display order of Level 3 entries.
 - q. In the **Level 4 Name** field, select the column that represents the display name for the fourth level of the hierarchy.
 - r. In the **Level 4 Code** field, select the column that provides a unique code for each Level 4 entry.
 - s. In the **Level 4 Display Order** field, select the column that determines the display order of Level 4 entries.
 - t. In the **Level 5 Name** field, select the column that represents the display name for the fifth level of the hierarchy.
 - u. In the **Level 5 Code** field, select the column that provides a unique code for each Level 5 entry.

- v. In the **Level 5 Display Order** field, select the column that determines the display order of Level 5 entries.
7. Click **Save and Close** to save your changes.
8. Click **Save And Create New** to save your changes and create a new dimension

2.6 Adding Process Pipeline Dependencies

A process or a model can have any number of prerequisite operations to run before running the actual process or model and any number of post-requisites after running the process or model. Hence, STSA provides a configuration where you can maintain this list of prerequisites and post-requisites of all the selected processes and models for the composite pipeline that gets created while creating the analysis configuration and project.

To add process or model requisites:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Define Process Pipeline Dependencies** tile.
The **Requisite Management** page is displayed.
5. Select the process or model requisites, select **Actions** and then click **Add** and position the object.
6. Click **Save** to save your changes.

2.7 Publishing Process Pipelines to Data Catalog

Publish or include process IDs (run processes like PMF and RRF process) generated in PMF to Data Catalog or OpenMetadata for mapping glossary terms to variables.

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. To push the process IDs generated in PMF, click **Publish** in the **Publish Process Pipelines to Data Catalog** tile.

The Last Published on date gets updated and the count of number of processes created and number of processes pushed to OpenMetadata are listed along with the status of the run.

2.8 Creating Analysis Purpose

You can add jurisdictions, regulators, regulation names and map each jurisdiction to a regulator and regulation using this tile.

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary, Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Analysis Purpose** tile.
The **Analysis Purpose Summary** page is displayed.
5. Click **Create New**.
The **Map Jurisdiction** page is displayed.
6. Click the **Jurisdiction** tab, do the following and click **Add**:
 - a. In the **Jurisdiction Code** field, enter the jurisdiction code.
 - b. In the **Jurisdiction Name** field, enter the jurisdiction name.
7. Click the **Regulators** tab, do the following and click **Add**:
 - a. In the **Regulator Code** field, enter the regulator code.
 - b. In the **Regulator Name** field, enter the regulator name.
8. Click the **Regulations** tab, do the following and click **Add**:
 - a. In the **Regulation Code** field, enter the regulation code.
 - b. In the **Regulation Name** field, enter the regulation name.
9. Click the **Map Jurisdiction** tab, do the following and click **Add**:
 - a. In the **Jurisdiction Name** field, select the jurisdiction name from the drop-down menu.
 - b. In the **Regulator Name** field, select the regulator name from the drop-down menu.
 - c. In the **Regulation Name** field, select the regulation name from the drop-down menu.
10. Click **Save** to save your changes.

Note

The jurisdictions, regulators, and regulations configured in this section must be used in the Analysis Configuration page when defining Regulatory Type mappings.

2.9 Adding Date Management

Use this configuration to define your own rules for date
To add a date management

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary, Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. In the **Date Management** tile, click **Configure**.
The **Date Management Summary** page is displayed.

5. Click **Create New**.
The **Date Management** page is displayed.
6. In the **Glossary Term** field, select the glossary name from the drop-down menu.
7. In the **Glossary Column** field, select the glossary column from the drop-downmenu.
8. Click **Add**.
9. Click **Submit** to add your own rules for date
10. On the **Date Management Summary** page, click a glossary term hyperlink to open the existing entry in **Edit** mode.

When editing an existing entry, you can update the glossary term mappings but cannot remove the entry completely from this page. To delete an entry, use the procedure in [Deleting Date Management Details](#).

3

Managing Configurations

This section details how to modify or update certain configurations and delete the configurations that are not required.

3.1 Deleting the Existing Dimensions

To delete an existing dimension:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Dimension Configuration** section.
The **Dimension Configuration Summary** page is displayed.
5. Click **Create New**.
6. Unselect the required dimensions you want to remove and click **Save**.

Note

Before deletion, the system performs a dependency check. If the dimension is already used in a Variable or Portfolio, it cannot be removed.

You can search for any dimension or hierarchy level using the search option.

The **Dimension Configuration** section shows how many dimensions are selected in STSA out of the total number of dimensions available from production schema.

3.2 Deleting Base Reference Date

To delete the base reference date details:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Base Reference Execution ID** tile.
The **Base Reference Date Summary** page is displayed.
5. Select the Reference Execution ID you want to delete.

6. Click **Delete** to delete the Reference Execution ID

3.3 Managing Rating Details

3.3.1 Editing Rating Details

To modify an existing rating entry:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary, Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click the **Rating Details** tile.
The **Rating Details** page is displayed.
5. Click the **Edit** icon against a row and modify the required selections.
6. Click **Save** to save the updates.

3.3.2 Deleting Rating Details

To delete the rating details entries:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary, Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click the **Rating Details** tile.
The **Rating Details** page is displayed.
5. Click the **Delete** icon against the row you want to delete.

3.4 Managing Dimension for Results

3.4.1 Editing Dimension for Results

To edit the Dimension for Results:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary, Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. In the **Dimensions for Results** tile, click **Configure**.
The **Result Dimension Summary** page is displayed.

5. Click the **Edit** icon against a row and modify the required selections.
6. Do either one of the following:
 - Click **Save and Close** to save the updates and return to the summary page.
 - Click **Save and Create New** to save the updates and immediately create a new entry. The page refreshes once the save is successful.

3.4.2 Deleting Dimensions for Results

To delete the dimension for results entries:

① Note

If the Results Dimensions are mapped in the project, they will not be deleted.

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. In the **Dimensions for Results** tile, click **Configure**.
The **Result Dimension Summary** page is displayed.
5. Select the dimensions you want to delete and click **Delete**.
6. In the **Confirm Delete** dialog box that opens, select **Yes** to confirm the deletion.

3.5 Viewing Process Pipeline Dependencies

To view process or model requisites:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Define Process Pipeline Dependencies** tile.
The **Requisite Management** page is displayed.
5. Select the process or model requisites, select **Actions** and then click **View** to view the process or model requisites.

3.6 Deleting Analysis Purpose Details

To delete the existing analysis purpose details:

1. Login to STSA.
The **Workspace Summary** page is displayed.

2. In the **Workspace Summary, Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Analysis Purpose** tile.
The **Analysis Purpose Summary** page is displayed.
5. Click **Create New**.
The **Map Jurisdiction** page is displayed.
6. Click the **Jurisdiction** tab, do the following:
 - a. Select the entry you want to delete
 - b. Click **Delete** to delete the analysis purpose details.
 - c. In the confirmation screen that opens, click **OK** to confirm the deletion.
7. Click the **Regulators** tab, do the following and click **Add**:
 - a. Select the entry you want to delete
 - b. Click **Delete** to delete the analysis purpose details.
 - c. In the confirmation screen that opens, click **OK** to confirm the deletion.
8. Click the **Regulations** tab, do the following and click **Add**:
 - a. Select the entry you want to delete
 - b. Click **Delete** to delete the analysis purpose details.
 - c. In the confirmation screen that opens, click **OK** to confirm the deletion.
9. Click the **Map Jurisdiction** tab, do the following and click **Add**:
 - a. Select the entry you want to delete
 - b. Click **Delete** to delete the analysis purpose details.
 - c. In the confirmation screen that opens, click **OK** to confirm the deletion.

 Note

When you delete **Analysis Purpose Details** from a project, such as **Jurisdiction**, **Regulators**, and **Regulations**, the associated entries are not removed from the **Map Jurisdiction** tab. These elements remain visible in the mapping interface and must be manually removed if no longer required.

3.7 Deleting Date Management Details

To delete the date management details:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary, Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. In the **Date Management** tile, click **Configure**.
The **Date Management Summary** page is displayed.

5. Select the glossary term entries you want to delete and click **Delete**.
6. In the **Confirm Delete** dialog box that opens, select **Yes** to confirm the deletion.

3.8 Managing Market Variable Data Mapping

The Market Variable Data Mapping feature allows users to define and manage how market variables are mapped to STSA variables. Use this configuration to define and manage how market variables are mapped to STSA variables.

Market Variable Data Mapping Interface Overview

The Market Variable Data Mapping page provides a structured layout for defining and maintaining variable mappings. It includes:

- Summary Screen Displays all available variables, grouped by their logical reference and variable name.
Status color indicators help users identify mapping completion status:
 - **Red**: No tables mapped to the logical reference
 - **Orange**: Some tables mapped
 - **Green**: All tables mapped
 - **Neutral Gray**: No tables mapped (but optional)

Mapping Screen – Guided Process

Follow these steps to complete the market variable data mapping using the guided screen:

1. On the Mapping Screen, locate the two sections:
 - **Primary Section**
 - **Non-Primary Section**

Each section lists the Column Name, Column Type, and a Value field where you must enter or select valid values. Enter all required values in the Primary Columns section, and provide values in the Non-Primary Columns section only if applicable.
2. In the **Primary Section**, enter valid values in all required fields.
3. In the **Non-Primary Section**, enter values only if applicable for your configuration.
4. Use the **Data Catalog** screen to perform dimension mapping and retrieve the appropriate drop-down values. If a foreign key relationship exists, the drop-down values will appear automatically. If there is no foreign key relationship, you must configure the dimension mapping in the Data Catalog to populate the drop-down options. Alternatively, you can enter the value manually.

Note

- When entering a value manually, ensure it is a valid raw value that precisely matches the required format.
- If a mandatory glossary term is not mapped, the system displays an error. For example, the DIMENSION.DATE glossary term must be mapped to a valid FIC MIS Date column in the Data Catalog. The mapping cannot be saved until the error is resolved.

5. After entering the values, click **Save** at the bottom of the page to confirm your mappings.

Note

Saving is enabled at each step; however, you must resolve any validation errors (if displayed) before proceeding.

3.8.1 Viewing Market Variable Data Mapping

The Market Variable Data Mapping feature allows users to define and manage how market variables are mapped to STSA variables. Use this configuration to define and manage how market variables are mapped to STSA variables.

To view the market variables are mapped to STSA:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Market Variable Data Mappings** tile.
The **Market Variable Data Mapping** page is displayed.
5. In the desired **Variable Name** row, select **Actions** and then click **View Mapping** to view the market variables are mapped to STSA.

3.8.2 Editing Market Variable Data Mapping

To edit the market variables that are mapped to STSA:

1. Login to STSA.
The **Workspace Summary** page is displayed.
2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Market Variable Data Mappings** tile.
The **Market Variable Data Mapping** page is displayed.
5. In the desired **Variable Name** row, select **Actions** and then click **Edit Mapping**.
6. In the page that opens, make the required updates and click **Continue**.
7. Update the details as required and click **Save** to save your changes.
8. In the confirmation dialog box that opens, click **OK** to confirm the updates.

3.8.3 Deleting Market Variable Data Mapping

To delete the market variables that are mapped to STSA:

1. Login to STSA.
The **Workspace Summary** page is displayed.

2. In the **Workspace Summary**, **Sandbox** tab, launch the required workspace.
3. Click the Context Menu representing the user name and then click **Configuration Manager**.
4. Click **Configure** in the **Market Variable Data Mappings** tile.
The **Market Variable Data Mapping** page is displayed.
5. In the desired **Variable Name** row, select **Actions** and then click **Delete Mapping**.
6. 2. In the **Confirm Delete Mapping** dialog box that opens, select **Yes, Delete** to delete the market variable data mapping.

Glossary

Index