Oracle Financial Service Stress Testing and Scenario Analytics

Administration Guide

Release 8.1.2.5.0
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Oracle Financial Service Stress Testing and Scenario Analytics Administration Guide, Release 8.1.2.5.0

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Contents

Index

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.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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.
italic	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 Business Attribute Configuration

Use this configuration to provide a unified framework for defining, organizing, and managing business attributes and their hierarchies.It supports the end-to-end setup and mapping process, including hierarchy configuration, attribute activation, and linking source data to analytical results.

2.1.1 Adding Attribute Activation and Hierarchy Selection

Use this configuration to configure attribute activation and hierarchy selection 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** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.

5. Click **Configure** in the **Attribute Activation Selection** section.

   The **Attribute Activation & Hierarchy Selection** summary page is displayed.

6. Click **Create New**.
7. In the page that opens, select the required dimensions and click **Save**.

   Only dimensions that contain at least one hierarchy are displayed in the list.
8. On the Dimension Configuration Summary page, click a dimension hyperlink in the **Dimension Name** 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 unmapped.

2.1.2 Adding Attribute Naming

Use this configuration to configure attribute naming and labels.

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** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Attribute Naming** section.

   The **Attribute Naming** summary page is displayed.
6. Provide the new name in the **Alias Name** column.
7. Click **Save** to save the changes.

   The dimension names are updated.

2.1.3 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** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Rating Details** tile.

   The **Rating Details** page is displayed.
6. In the **Table Name** field, select the rating details name from the drop-down menu.

7. In the **Rating Source Code** field, select the rating source code from the drop-down menu.
8. In the **Short/Term Long Term** field, select the desired value from the drop-down menu.
9. In the **Rating Rank** field, select the rating rank from the drop-down menu.
10. Click the **Add** icon to add a row.
11. Select the required details and click **Save**.
12. Repeat the above steps to add multiple rating entries.

2.1.4 Adding Attribute to Results Mapping for Analytics

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** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Attribute to Results Mapping for Analytics** section.

   The **Attribute to Results Mapping for Analytics** summary page is displayed.
6. Click **Create New**.

   The **Result Dimension** page is displayed.
7. Do the following:
   a. In the **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.

> **Note**
>
> In the Result Dimension screen, after you select the desired values for **Level 1 Name**, **Level 1 Code**, and **Level 1 Display Order**, and then click **Save**, the remaining levels are automatically populated with the same values provided in the Level 1 fields.

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.

8. Click **Save and Close** to save your changes.
9. Click **Save And Create New** to save your changes and create a new dimension

2.1.4.1 Adding Default Map Dimension

To add default map dimensions:

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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Attribute to Results Mapping for Analytics** section.

   The **Attribute to Results Mapping for Analytics** summary page is displayed.
6. Click **Map Default Dimension**.

   The **Result Dimension** page is displayed.
7. In the **Dimension Name** column, select the required dimension names from the drop-down list.
8. Click **Save** to save your changes and map the default dimensions.

2.1.5 Adding a Source Data to Attribute Mapping

Use this configuration to manage the mapping between source and attribute dimensions

1. Login to STSA.

   The **Workspace Summary** page is displayed.
2. In the **Workspace Summary** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Source Data to Attribute Mapping** section.

   The **Source Data to Attribute Mapping** page is displayed.
6. Click **Create New**.

   The **Source to Attribute Mapping Definition** page is displayed.
7. In the **Source Table** section, click the drop-down menu for **Source Table Name** and select the required Source Table.
8. Click **Auto Generate Mapping for <Table Name**>.

   The **Auto-Generated Source to Target Mappings for <Table Name>** page is displayed.
9. Select the required **MIS Date Mapping**.
10. Select the required **Field Mappings**.
11. Click **Apply**.

    The selected mappings are saved and displayed on the Source to Attribute Mapping Definition page.
12. If there are no auto-generated mappings found for the table source you selected, follow these steps:
    a. Under the **Reporting Date Mapping** section, do the following:
       i. Click the drop-down menu for **Source Column Name** and select the relevant mis date column.

   ii. Click the drop-down menu for **Attribute Table Name** and select the desired attribute table.
   iii. Click the drop-down menu for **Attribute Column Name** and select the attribute column.
   iv. Click the drop-down menu for **Attribute Name** and select the attribute name.
   v. Click the **Done** icon to add the Mis Date Mapping.

   b. Under the **Source to Attribute Mapping** section, do the following:
   i. Click the drop-down menu for **Source Column Name** and select the relevant source data column.
   ii. Click the drop-down menu for **Attribute Table Name** and select the desired attribute table.
   iii. Click the drop-down menu for **Attribute Column Name** and select the attribute column.
   iv. Click the drop-down menu for **Attribute Name** and select the attribute name.
   v. Click the **Add Row** icon to add the field mappings.
   vi. Repeat steps a through d for each new mapping. Ensure that the attribute name, glossary term, or logical reference selected for the mapping exists on the OM side so that synchronization occurs correctly.

13. Save the Mapping. Do either of the following:
   - Click **Save** to save the new source data to attribute mapping and exit.
   - Click **Save And Create New** to save the current mapping and immediately open a new blank screen to define another mapping.

2.1.6 Adding Business Attribute & Hierarchy Setup

The **Business Attribute & Hierarchy Setup** enables users to create, manage, and browse hierarchical structures such as **Business Intelligence** or **Parent Child** hierarchies within the STSA workspace.

Hierarchies define relationships among business entities and are essential when creating portfolios or configuring analytical rules. The integrated Business Attribute Configuration browser provides a visual interface to explore, search, and select hierarchies, ensuring consistency across Portfolio, Scenario, and Variable modules.

To create Business Attribute and Hierarchy:

1. Login to STSA.

   The **Workspace Summary** page is displayed.

2. In the **Workspace Summary** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.

5. Click **Configure** in the **Business Attribute & Hierarchy Setup** section.

   The **Business Attribute & Hierarchy Setup Summary** page is displayed.

> **Note**
>
> - This page displays business attributes and hierarchies created through the **Create New** option and the hierarchies created in the OFSAA Setup.
> - For hierarchies created through OFSAA Setup, you can only view them; you cannot copy, edit, or delete these hierarchies.

6. Click **Create New**.
7. In the **Hierarchy Details** page that opens, do the following:
   a. In the **Name** field, enter a clear and descriptive name for the hierarchy.
   b. In the **Description** field, enter a brief summary describing the purpose or use of the hierarchy.
   c. In the **Hierarchy Type** field, select one of the following options from the drop-down list:
      - **Business Intelligence**
      - **Parent-child**
   d. In the **Attribute Table Name** field, select the required table from the drop-down list.
8. If you select type as **Business Intelligence**, do the following
   a. In the **Business Hierarchy Nodes** field, click **Add**.
   b. In the page that opens, For each hierarchy level, provide the following details:
      i. In the **Hierarchy Level** field, enter the unique identifier for the level.
      ii. In the **Level Name** field, enter the display name for a given hierarchy level.
      iii. In the **Level Code** field, do either of the following:
         - Enter the a value that determines how the system identifies members of this level.
         - Click the **Open Expression Editor** icon and do the following:
           When the Expression Editor is opened, the system displays the selected Attribute Table Name by default along with all columns available in that table.
           i. In the **Expression Input** field, enter an expression that determines the Level Code.
              Expressions to define the column name should be represented in *<table_name>.<column_name>* format.
           ii. Click **Save**.
      iv. In the **Level Display Description** field, do either of the following:
         - Enter a description for the members belonging to this level.
         - Click the **Open Expression Editor** icon and do the following:
           When the Expression Editor is opened, the system displays the selected Attribute Table Name by default along with all columns available in that table.
           i. In the **Expression Input** field, enter an expression that determines the Level display description.
              Expressions to define the column name should be represented in *<table_name>.<column_name>* format.
           ii. Click **Save**.
   c. Click **Save** to add the new node to the hierarchy.

> **Note**
>
> - You can add multiple nodes.
> - You may also insert nodes at any position as needed to match the hierarchy structure.

9. If you select **Parent Child**, do the following
    a. In the **Parent Child Mapping** section, click **Edit**.
    b. In the page that opens, enter or update the required mapping details:
        i. In the **Parent Code** field, do either of the following:
            - Enter a expression representing the parent.
            - Click the **Open Expression Editor** icon and do the following:
              When the Expression Editor is opened, the system displays the selected Attribute Table Name by default along with all columns available in that table.
                i. In the **Expression Input** field, enter an expression that determines the Parent Code.
                   Expressions to define the column name should be represented in *<table_name>.<column_name>* format.
                ii. Click **Save**.
        ii. In the **Child Code** field, do either of the following:
            - Enter a expression representing the child.
            - Click the **Open Expression Editor** icon and do the following:
              When the Expression Editor is opened, the system displays the selected Attribute Table Name by default along with all columns available in that table.
                i. In the **Expression Input** field, enter an expression that determines the Child code.
                   Expressions to define the column name should be represented in *<table_name>.<column_name>* format.
                ii. Click **Save**.
        iii. In the **Description** field, do either of the following:
            - Enter the description expression/column for the Parent Child.
            - Click the **Open Expression Editor** icon and do the following:
              When the Expression Editor is opened, the system displays the selected Attribute Table Name by default along with all columns available in that table.
                i. In the **Expression Input** field, enter an expression that determines the Description.
                   Expressions to define the column name should be represented in *<table_name>.<column_name>* format.
                ii. Click **Save**.
10. Click **Save** to apply the mapping.

> **Note**
>
> After you create a hierarchy—either in this page or in OFSAA Setup—you must activate it before it can be used in other STSA components. To activate the hierarchy:
>
> a. Navigate to **Business Attribute Configuration** > **Attribute Activation & Hierarchy Selection**, and click **Create New**.
> b. In the Dimension Configuration section, expand the required DIM table to view the newly created hierarchy.
> c. Select the hierarchy and click **Save** to complete the activation.
> The hierarchy becomes available for selection across dependent objects such as variables, portfolios, pathways, and other dimension-based configurations.

2.2 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 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.

2.3 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.

2.4 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.

2.5 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.

2.6 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 Managing Business Attribute Configuration

3.1.1 Managing Rating Details

3.1.1.1 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 **Configure** in the **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Rating Details** tile.

   The **Rating Details** page is displayed.
6. Select the rating details, select **Actions** and then click **Edit** to edit the rating details.
7. Click **Save** to save the updates.

3.1.1.2 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 **Configure** in the **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Rating Details** tile.

   The **Rating Details** page is displayed.

6. In the desired Rating Details row, select **Actions** and then click **Delete** icon against the row you want to delete.

3.1.2 Deleting the Existing Attribute to Results Mapping for Analytics

To delete an existing attribute to results Mapping for Analytics

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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Select the attribute-to-results mappings for analytics and click **Delete** to delete the selection.

3.1.3 Managing Source Data to Attribute Mapping

3.1.3.1 Viewing Source Data to Attribute Mapping

To view the source data mapped to the attributes:

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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Source Data to Attribute Mapping** section.

   The **Source Data to Attribute Mapping** page is displayed.
6. In the desired Source Data Table row, select **Actions** and then click **View** to view the source data mapped to the attributes.

3.1.3.2 Editing Source Data to Attribute Mapping

To edit the source data mapped to the attributes:

> **Note**
>
> When you delete a mapping from the Summary page, the system does not delete the mapping if the table name or column is referenced in any scenario.

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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Source Data to Attribute Mapping** section.

   The **Source Data to Attribute Mapping** page is displayed.
6. Click **Create New**.

   The **Source to Attribute Mapping Definition** page is displayed.
7. In the desired Source Data Table row, select **Actions** and then click **Edit**.
8. In the page that opens, make the required updates.
9. Click **Update** to save the mapping.

3.1.4 Managing Business Attribute & Hierarchy Setup

3.1.4.1 Cloning or Creating Business Attribute and Hierarchy Setup from Existing Hierarchy Setup

To clone or create a Hierarchy Setup from an Existing Hierarchy Setup:

1. Login to STSA.

   The **Workspace Summary** page is displayed.
2. In the **Workspace Summary** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Business Attribute & Hierarchy Setup** section.

   The **Business Attribute & Hierarchy Setup Summary** page is displayed.
6. To replicate and modify an existing Hierarchy Setup, select an existing Hierarchy Setup, under **Actions**, click **Copy**.
7. In the page that opens, modify the Hierarchy definition as applicable.
8. Click **Save**.

   The hierarchy is created and displayed in the **Business Attribute & Hierarchy Setup Summary** page.

3.1.4.2 Viewing Business Attribute Setup

Use this procedure to view the Hierarchy Setup. To view the Hierarchy Setup:

1. Login to STSA.

   The **Workspace Summary** page is displayed.
2. In the **Workspace Summary** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Business Attribute & Hierarchy Setup** section.

   The **Business Attribute & Hierarchy Setup Summary** page is displayed.
6. To view details about a Hierarchy Setup, under **Actions**, click **View** to view the Hierarchy Setup details.

3.1.4.3 Editing Business Attribute Setup

Use this procedure to edit the Hierarchy Setup. To edit the Hierarchy Setup:

1. Login to STSA.

   The **Workspace Summary** page is displayed.
2. In the **Workspace Summary** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Business Attribute & Hierarchy Setup** section.

   The **Business Attribute Setup Summary** page is displayed.
6. To view details about a Hierarchy Setup, under **Actions**, click **Edit** to edit the Hierarchy Setup details.
7. In the page that opens, update the hierarchy details as applicable.
8. Click **Save**.

   The hierarchy is created and displayed in the **Business Attribute & Hierarchy Setup Summary** page.

3.1.4.4 Deleting Business Attribute and Hierarchy Setup

Use this procedure to delete the Hierarchy Setup. To delete the Hierarchy Setup:

1. Login to STSA.

   The **Workspace Summary** page is displayed.
2. In the **Workspace Summary** page, click the **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 **Business Attribute Configuration** section.

   The **Business Attribute Configuration** page is displayed.
5. Click **Configure** in the **Business Attribute Setup** section.

   The **Business Attribute & Hierarchy Setup Summary** page is displayed.
6. Select the Hierarchy definitions you want to delete and then click **Delete**.
7. Click **OK** in the confirmation page.

The Hierarchy definitions are deleted and a summary of deletion action is displayed in the **Bulk Delete Summary** page.

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

> **Note**
>
> If the *pmf* or *rrf* process names are included in the project, they will not be removed from the Base Reference Date Summary.

3.3 Managing Dimension for Results

3.3.1 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.

3.3.2 Deleting Dimensions for Results

To delete the dimension for results entries:

> **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.

3.4 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.

3.5 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.

3.6 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.

3.7 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.

3.7.1 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.

3.7.2 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 dailog box that opens, click **OK** to confirm the updates.

3.7.3 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