Oracle Financial Service Stress Testing and Scenario Analytics

Administration Guide

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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

•

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

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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.
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 Dimensions for Results

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

> **Note**
>
> For this release, a maximum of ten dimensions are supported in the BI stress test reports—five simple and five level-based dimensions (up to 5 levels each).

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 **View**.

   The **Result Dimension Summary** page is displayed.
5. Click **Create New**.

   The **Result Dimension** page is displayed.

6. To select simple based dimensions, select **Simple Based** in the **Choose Dimension Type** field and select the following details and click **Add**.

   The **Dimension key** column is already populated. Ensure to fill the remaining columns.

   a. Select a table name from the **Dimension Table Name**.

      Based on this selection all the columns present in this table are listed for selection in the corresponding columns.

   b. Select the unique key column from the **Unique Key** drop-down menu.

   c. Select the name column from the **Name** drop-down menu.

   d. Select the code from the **Code** drop-down menu.

   e. Select the description from the **Description** drop-down menu.

   f. Select the record from the **Latest record** drop-down menu.

   g. Provide a dimension name for this row that you want to see on the reports in the **Logical Name** column.

7. Click **Save** to save your changes.

8. For level based dimensions, select **Level Based** in the **Choose Dimension Type** field and select the following details and click **Add**.

   a. Select a table name from the **Dimension Table Name**.

      Based on this selection all the columns present in this table are listed for selection in the corresponding columns.

   b. Select the unique key column from the **Unique Key** drop-down menu.

   c. Select the name column from the **Name** drop-down menu.

   d. Select the code from the **Code** drop-down menu.

   e. Select the description from the **Description** drop-down menu.

   f. Select the record from the **Latest record** drop-down menu.

   g. Provide a dimension name for this row that you want to see on the reports in the **Logical Name** column.

   h. Select Level 1 column name, code and display orders.

   i. (Optional) Based on the available hierarchies, provide level 2, level 3, level 4 and level 5 details.

   The dimensions to be displayed in the stress testing results are saved.

9. Click **Save** to save your changes.

2.1.1.1 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.

2.1.2 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.

2.1.3 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.
   e. To preview the data in the selected table, do the following:
      i. Once you select a table from the **Attribute Table Name** field, the **View Data Preview** button appears.
      ii. Click View Data Preview.
      A preview window opens displaying the first few records of the selected dimension table. You can scroll through the records to review the data residing in the table.

      > **Note**
      >
      > This is a read-only preview. No edits or changes can be made from this screen. The preview is provided to help users understand the data that will be used during hierarchy creation.

      iii. Click **Close** to return to the Hierarchy Details page.
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.

> **Note**
>
> The Expression Builder window consists of the following sections:
>
> – **Entities** -
>
> – consists of the list of attributes for the entity you selected from the **Attribute Table Name** field. Click on the attribute name you want to use for the expression
>
> – **Functions** – This is divided as Database Functions and User Defined Functions. Database Functions consists of functions that are specific to databases like Oracle and MS SQL Server. You can use these functions along with Operators to specify the join condition.
>
> – **Operators** - Consists of the function operators categorized into folders.

i. Select the attribute of the table to which you want join the dimension entities.

ii. Select a **Function** depending on the database type.

iii. Select the **Operator** you want to use for the join condition.

iv. 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. Select the attribute of the table to which you want join the dimension entities.

ii. Select a **Function** depending on the database type.

iii. Select the **Operator** you want to use for the join condition.

iv. 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. Select the attribute of the table to which you want join the dimension entities.
  ii. Select a **Function** depending on the database type.
  iii. Select the **Operator** you want to use for the join condition.
  iv. 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. Select the attribute of the table to which you want join the dimension entities.
  ii. Select a **Function** depending on the database type.
  iii. Select the **Operator** you want to use for the join condition.
  iv. 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. Select the attribute of the table to which you want join the dimension entities.
  ii. Select a **Function** depending on the database type.
  iii. Select the **Operator** you want to use for the join condition.
  iv. Click **Save**.

10. Click **Save** to apply the mapping.
11. To add audit information, click the **Audit Info** panel. The panel consists of the following three tabs:
    a. **Audit History** — In Create New mode, this tab is empty.
    b. **Comments** — Use this tab to add comments relevant to the hierarchy.
       - Click **Add** to enter a new comment.
       - After you add the comment, you can click **Edit** or **Delete** to edit/delete the existing comments.
    c. **Tags** — Use this tab to add tags to the hierarchy record.
       You can delete existing tags as needed.

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 Managing the Assumption Manager

The Assumption Manager allows you to create and maintain reusable business-controlled values that drive calculations, model inputs, and orchestration behavior.

The Summary screen acts as the main control center for managing these templates. From this screen, you can create, edit, review, and manage the full lifecycle of calculation templates. Since the interface is automatically generated from predefined components, it is flexible and easy to extend, allowing you to adapt quickly to changing business needs or regulatory requirements.

2.6.1 Managing Assumption Manager

To configure the test template:

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 **Manage** in the **Assumption Manager** section.

   The **Summary** page is displayed.

5. 5. Go to **Actions** and select the template to configure.
6. 6. In the page that opens, do the following:
   a. In the **Enter Name** field, enter a unique name for this instance.
   b. In the **Template Group**s field, select the required groups from the drop down.
   c. (Optional) If the required group is not listed, click **Manage Groups**. In the side panel that opens, do the following:
      i. Click **Add New Group**.
      ii. Enter a group name in the **Enter group name** field.
      iii. Click **Save**.
      The new group will now appear under **Existing Groups**.
   d. Based on the selected template, update the values in the corresponding fields within the template.
7. Click **Save** to complete the configuration.

2.7 Configuring the Application Settings

The Application Settings tile allows you to configure specific parameters to tailor the application's behavior to your business needs

To configure the application-specific parameters:

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 **Application Settings** section.

   The **Advanced Setup** page is displayed.

5. Under **Fetch pipeline metadata from DC / STSA**, in the **Select Data Source** field, select one of the following: from the drop down list:
   - **Stress Testing**
   - **Data catalogue**
6. Click **Update** to update the application settings configuration.

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 Source Data to Attribute Mapping

3.1.1.1 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.

3.1.1.2 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.

3.1.2 Managing Business Attribute & Hierarchy Setup

3.1.2.1 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. To preview the data in the selected dimension table, do the following:
   a. When an **Attribute Table Name** is selected, the **View Data Preview** button appears next to the field.
   b. Click **View Data Preview** to open a read-only preview of the selected dimension table.
   c. Scroll through the records to review the underlying data and confirm the correct table is selected.
   d. Click **Close** to return to the page.
9. To review or update audit information, click the Audit Info panel. The panel consists of the following three tabs:
   a. **Audit History** — Displays the definition's creation, modification, and authorization details including the user name and date/time for each action.
   b. **Comments** — Displays the comments which are added for the hierarchy definition. You may add new comments or edit the last comment.

c. **Tags** — Displays the tags which are added for the hierarchy definition. You may delete existing tags as needed.

10. Click **Save**.

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

3.1.2.2 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.
7. To preview the data in the selected dimension table, do the following:
   a. When an **Attribute Table Name** is selected, the **View Data Preview** button appears next to the field.
   b. Click **View Data Preview** to open a read-only preview of the selected dimension table.
   c. Scroll through the records to review the underlying data and confirm the correct table is selected.
   d. Click **Close** to return to the page.
8. To review audit information, click the **Audit Info** panel. The panel consists of the following three tabs:
   - **Audit History** — Displays the created by, modified by, and authorized by details including the user name and date/time for each action.
   - **Comments** — Displays any comments added to the hierarchy record.
   - **Tags** — Displays any tags associated with the hierarchy record.

> **Note**
>
> In View mode, all fields including the Audit Info panel are read-only. No edits can be made.

3.1.2.3 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. To preview the data in the selected dimension table, do the following:
   a. When an **Attribute Table Name** is selected, the **View Data Preview** button appears next to the field.
   b. Click **View Data Preview** to open a read-only preview of the selected dimension table.
   c. Scroll through the records to review the underlying data and confirm the correct table is selected.
   d. Click **Close** to return to the page.
9. If the Hierarchy Type is Business Intelligence, do the following:
   a. In the Business Hierarchy Nodes section, click **Edit** for the required node

      > **Note**
      >
      > You can also click **Add** to add the required node.

   b. Update the following fields as applicable:
      - **Hierarchy Level**
      - **Level Name**
   c. In the **Level Code** field, do either of the following:
      - Enter a value directly.
      - 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. Select the **Entity** of the fact table to which you want join the dimension entities.
        ii. Select a **Function** depending on the database type.
        iii. Select the **Operator** you want to use for the join condition.
        iv. Click **Save**.
   d. In the **Level Display Description** field, do either of the following:
      - Enter a description.
      - 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. Select the **Entity** of the fact table to which you want join the dimension entities.

ii. Select a **Function** depending on the database type.

iii. Select the **Operator** you want to use for the join condition.

iv. Click **Save**.

10. If the Hierarchy Type is Parent-Child, do the following:

a. In the Parent Child Mapping section, click **Edit** for the required node

> **Note**
>
> You can also click **Add** to add the required node.

b. In the **Parent Code** field, do either of the following:

- Enter a value directly.
- 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. Select the **Entity** of the fact table to which you want join the dimension entities.

  ii. Select a **Function** depending on the database type.

  iii. Select the **Operator** you want to use for the join condition.

  iv. Click **Save**.

c. In the **Child Code** field, do either of the following:

- Enter a value directly.
- 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. Select the **Entity** of the fact table to which you want join the dimension entities.

  ii. Select a **Function** depending on the database type.

  iii. Select the **Operator** you want to use for the join condition.

  iv. Click **Save**.

11. To review or update audit information, click the Audit Info panel. The panel consists of the following three tabs:

a. **Audit History** — Displays the definition's creation, modification, and authorization details including the user name and date/time for each action.

b. **Comments** — Displays the comments which are added for the hierarchy definition. You may add new comments or edit the last comment.

c. **Tags** — Displays the tags which are added for the hierarchy definition. You may delete existing tags as needed.

12. Click **Save**.

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

3.1.2.4 Viewing a Hierarchy Browser

To view a hierarchy browser:

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 Browser** to view the Hierarchy Setup details.
7. The Hierarchy Browser window opens, displaying the hierarchical structure. In this view, you can:
   - **Expand/Collapse**: Use the arrows next to each folder or node to navigate through the parent-child hierarchy. You can also use the dedicated **Expand** option available in the interface to expand nodes independently of the arrow controls..
   - **Focus**: Use the **Focus** option available against each parent node to isolate and view the selected node along with its related child elements. This helps streamline navigation and concentrate on a specific branch of the hierarchy.
   - **Search View**: Switch to the Search tab to find specific nodes within the hierarchy.
   - **Sort**: Use the Sort option to organize the display of members.
8. Click **Close** to return to the 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

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.
2.
3. Click **Configure** in the **Analysis Purpose** tile.

   The **Analysis Purpose Summary** page is displayed.
4. Click **Create New**.

   The **Map Jurisdiction** page is displayed.
5. 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.
6. 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.
7. 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.
8. 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 Managing an Assumption Manager Template

This section provides information about managing an existing Scenario Weightage calculation.

3.6.1 Viewing an Existing Assumption Manager Template

To view an existing Assumption Manager template

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 **Manage** in the **Assumption Manager** section.

   The **Summary** page is displayed.
5. Locate the specific Scenario Weightage instance you want to view in the summary table.
6. Click the **Actions** button at the end of the corresponding row and click **View**.

   The system will open the page in read-only mode. You can review the configuration details added without making modifications.

> **Note**
>
> In View mode, you can view the details of previously physicalized tables.

3.6.2 Editing an Existing Assumption Manager Template

To edit an existing Assumption Manager Template

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 **Manage** in the **Assumption Manager** section.

   The **Summary** page is displayed.
5. Locate the specific Assumption Manager template instance you want to edit in the summary table.
6. Click the **Actions** button at the end of the corresponding row and click **Edit**.

   The system will open the template page with current data populated.
7. Modify values in the fields as required.
8. Click **Update** to save the changes.

> **Note**
>
> In Edit mode, you can view the details of previously physicalized tables.

3.6.3 Copying an Existing Assumption Manager Template

To copy an existing Assumption Manager Template:

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 **Manage** in the **Assumption Manager** section.

   The **Summary** page is displayed.
5. Locate the specific Assumption Manager Template instance you want to copy in the summary table.
6. Click the **Actions** button at the end of the corresponding row and click **Copy**.
7. In the **Enter Name** field, provide a new name for the copied instance (this field is Required).
8. Make any required adjustments to the required fields.
9. Click **Save** to apply the changes.

3.6.4 Deleting an Existing Assumption Manager Template

To delete an existing Assumption Manager Template:

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 **Manage** in the **Assumption Manager** section.

   The **Summary** page is displayed.
5. Locate the specific Assumption Manager Template instance you want to delete in the summary table.
6. Click the **Actions** button at the end of the corresponding row and click **Delete** to delete the Assumption Manager template.

> **Note**
>
> During template creation, if a Cartesian table has been physicalized, it will be automatically deleted from the sandbox schema when you click **Delete** under the **Actions** menu.

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

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