RMA/AFS Risk Analysis Service (RAS)

New User Interface

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# Table of Contents

Introduction .................................................................................................................................................. 4  
Dimension Member Selection .................................................................................................................. 4  
Swapping and Nesting Dimensions ...................................................................................................... 6  
Report Toolbar .............................................................................................................................................. 6  
Right-Click Functionality ........................................................................................................................ 7  
Saving/Recalling Private Views .................................................................................................................. 7
Introduction

RMA and AFS are pleased to introduce a new User Interface (UI) for the Risk Analysis Service (RAS) Workstation. The RAS Workstation is the online, web-based analytical tool through which clients access the Risk Analysis Service, our industry-leading credit risk data consortium. RAS members contribute wholesale lending (Commercial & Industrial (C&I) and Commercial Real Estate (CRE)) data quarterly to AFS, the Service’s data custodian. The RAS Workstation provides members the ability to benchmark exposure, risk, and performance in an anonymous way across peer banks, and the market as a whole across a variety of dimensions, including industry, collateral type, geographic location, product type, vintage, and many other segmentations.

Through this new Workstation UI, RAS clients will notice a contemporary, more intuitive look and feel to the Workstation. The new UI will also streamline and accelerate the initial setup process for new Workstation clients as well as for existing clients who request new seat licenses for their User community.

While the new UI maintains the basic pivot table mechanics of the original RAS Workstation, several exciting improvements have been made with this new interface and are described throughout the remainder of this document. In several areas, we’ve taken RAS client feedback and incorporated enhancements in response to your comments—for example, the new UI now allows the sharing of “private views” across and within each organization.

RMA and AFS are excited to announce and roll out this important investment in the Risk Analysis Service, and as always, welcome your continued feedback. If your organization would like to receive refresher training on the Workstation, or would like to expand the User access within your organization, please contact your RMA or AFS Relationship Manager.

Dimension Member Selection

Changing an Off-Grid Filter via the Scrollable Panel

While the member selection menu displays a new layout, this process is essentially unchanged from the old UI. Click the dimension of interest on the off-grid scrollable panel. Click the member for which the User wishes to filter the data. A check mark will appear next to that member to indicate the selection. Click the “OK” button to register the selection.

An enhanced feature in the new UI is that the User can toggle between dimensions in the same window. Suppose the User wants to change the off-grid filters for the Deal Size and Geography dimensions. In the old UI, the User would have to click on the off-grid Deal Size dimension, select the desired member, and then close the selection window. Next, the User would have to click on the off-grid Geography dimension and then repeat this same process. By contrast, in the new UI, the User can change the off-grid member selection of both the Deal Size and Geography dimensions by toggling the “Dimension” box at the top of the selection screen.
**Changing an Off-Grid Filter via the Dimension Configuration Menu**
Alternatively, the User can change an off-grid filter via the Dimension Configuration, which is accessed by clicking the same \( \leaves \) button available in the old UI.

As with the old UI, the off-grid dimensions are listed in white in the Dimension Configuration menu, whereas the on-grid dimensions are represented by the green rectangles. To change an off-grid selection, simply click the desired dimension listed in white to open the selection screen. Next, click the member for which the User wishes to filter the data. A check mark will appear next to that member to indicate the selection.

**Changing an On-Grid Filter via the Dimension Configuration Menu**
As with the old UI, changing the member selection of an on-grid dimension is generally accomplished via the Dimension Configuration. Click the green on-grid dimension to open the selection menu. Compared with the off-grid selection menu, the on-grid selection menu will have an expanded layout that allows the User to select multiple members. A key difference between the old UI and new UI is the names of the member selection shortcuts. For example, the old UI command called “Siblings”—by which the User selects all of the members at the same level of a dimension hierarchy—has been replaced with a command called “All members at same level.” An advantage of the new UI is that these member selection shortcuts generally have more intuitive naming conventions.

The full list of member selections in the new UI are described below.

**Select Members**
- “Self” – indicates that an individual member is selected.

**Select Related Members**
- “None” – the default selection. Indicates that no other related members are selected.
- “All members at the same level” – selects all of the members at the same hierarchical level of the given member. This shortcut is equivalent to the “Siblings” shortcut in the old UI.
- “All members below” – selects all of the members at every level beneath a given member. This shortcut is equivalent to the “Descendants” shortcut in the old UI.
- “Leaf members below” – selects all of the members at the bottom-most level beneath a given member. This shortcut is equivalent to the “Leaf Nodes” shortcut in the old UI.
- “Next # level(s) below” – selects all of the members at a fixed number of levels beneath a given member. This shortcut enables Users to “skip” a level in the dimension hierarchy if so desired. For example, at the top of the Industry dimension, the criteria of “Next [2] level(s) below after skipping [1] level(s)” results in selecting every 3- and 4-digit member of the Industry hierarchy. This shortcut is essentially a modified version of the “Children” shortcut in the old UI.

After making the selection, the User must click the “Add” button to register the selection.

As with the old UI, the User retains the option to deselect every member at once via a “Clear All” button. In the new UI, the “Clear All” button is represented by a Trash Can icon in the bottom-left corner of the menu.
Swapping and Nesting Dimensions

The process of swapping and nesting dimensions is essentially the same between the new UI and the old UI.

Swapping Dimensions from the Off-Grid Scrollable Panel
To swap an off-grid dimension with an on-grid one, click and hold the desired off-grid dimension, located along the scrollable panel above the report. While holding, drag the off-grid dimension over top the on-grid one that the User wants to replace. A lighter color shade will appear where the dimensions overlap. Release the mouse button. The report is recast to display the new dimension as either the report’s rows or columns.

Swapping Dimensions in the Dimension Configuration
Alternatively, the User can swap dimensions via the Dimension Configuration. Click the button to open the Dimension Configuration. Click and hold the desired off-grid dimension, located in white at the bottom of the menu. While holding, drag the off-grid dimension over top one of the on-grid ones, indicated by the green rectangles. A second shade of green and a circular cursor will appear where the dimensions overlap. Release the mouse button. The report is recast to display the new dimension as either the report’s rows or columns.

Nesting Dimensions in the Dimension Configuration
Oftentimes, Users will need to add an off-grid dimension, but keep the current on-grid dimension(s). The process for adding other dimensions to existing on-grid dimensions is called “nesting.” To nest dimensions, open the Dimension Configuration by clicking the icon on the far left of the off-grid scrollable panel. In the Dimension Configuration window, the on-grid dimensions appear as green rectangles, whereas the off-grid dimensions are listed below in white. Click and hold the desired off-grid dimension. While holding, drag the off-grid dimension up to the on-grid area and place it either underneath, above, or to the side of one of the on-grid dimensions. Either an ➔ arrow or an ➞ arrow will appear where the two dimensions overlap. Release the mouse button, and the new dimension now appears on-grid.

To remove a nested dimension from the on-grid position, click and hold the desired dimension (for reference, the on-grid dimensions appear as green rectangles in the Dimension Configuration). While holding, drag the dimension over top of the white box bearing the same name at the bottom of the report. A white eraser icon will appear, indicating that the dimension will be removed from the on-grid position. Release the mouse to complete the removal process.

Report Toolbar
The new UI retains all of the toolbar buttons available in the old UI and preserves their functionality.

The “Calculator” app in the new UI provides the same layout and functionality as the old UI.
Right-Click Functionality

As with the old UI, several functional shortcuts are available via the right-click menu in the new UI, as described below:

- “Exceptions” – exceptions allow the User to highlight cells based upon quantitative criteria. This functionally is similar in nature to the old UI.
- “Enable Member Format” – the User can format a number to a percent or other formats.
- “Zoom” – the User can enlarge or shrink the data grid.
- “Sort on Member” – the User can sort the data in an ascending or descending order and choose to sort various hierarchical levels separately (i.e., “preserve hierarchy”). The User can also remove the sorting.
- “Reset Member Order” – the User can reset the custom member order for all on-grid dimensions.
- “Views” – saving and recalling private views (see the section below for more details).
- “Omit Missing” – enables the User to hide rows or columns containing all NULL or n/a cells. An enhanced feature in the new UI is that the User can simultaneously filter both rows and columns containing all NULL or n/a cells.
- “Hide/Show” – this allows the User to see or hide certain dimensions.
- “Edit Tools” – allows the User to copy the data grid as an alternative to using the “Export to Excel” toolbar button.

Note: Unlike the old UI, neither the “Calculator” app nor the “Print” commands are available via the right-click menu.

The charting options available via the “Chart” selection in the right-click menu are similar to the old UI, although the new UI introduces a more streamlined selection menu. The User selects the chart type (the same list present in the old UI), the series direction (creating the series based on either the rows or columns), the bar style, and then whether stacking the series is desired.

Saving/Recalling Private Views

The layout of any pre-defined report can be altered to show the data in a way that is more useful to the unique User of the RAS Workstation. The User can then save this orientation as a “private view” that can be recalled at a later point in time. A major enhancement introduced with the new UI is that Users can now share views with another designated User at the bank by checking the “share” box.

As with the old UI, the process of saving and recalling private views in the new UI is accomplished via the right-click menu using the selection command “Views.” In the new UI, there are three options available in the “Views” command, as described below:

- “Save Private View” – the User can save the orientation as a custom view that can be recalled at a later time. In this menu, the User also has the option to set the view as the default orientation of the report or share the view with another designated User at the bank.
- “Manage Private Views” – the User can access the full list of private views, recall any one of the private or shared views, and delete views as needed.
- “Recall Original View” – the User can recall the default orientation of the report.