Columbia University Open-Source Risk Engine

RISK DASHBOARD USER GUIDE

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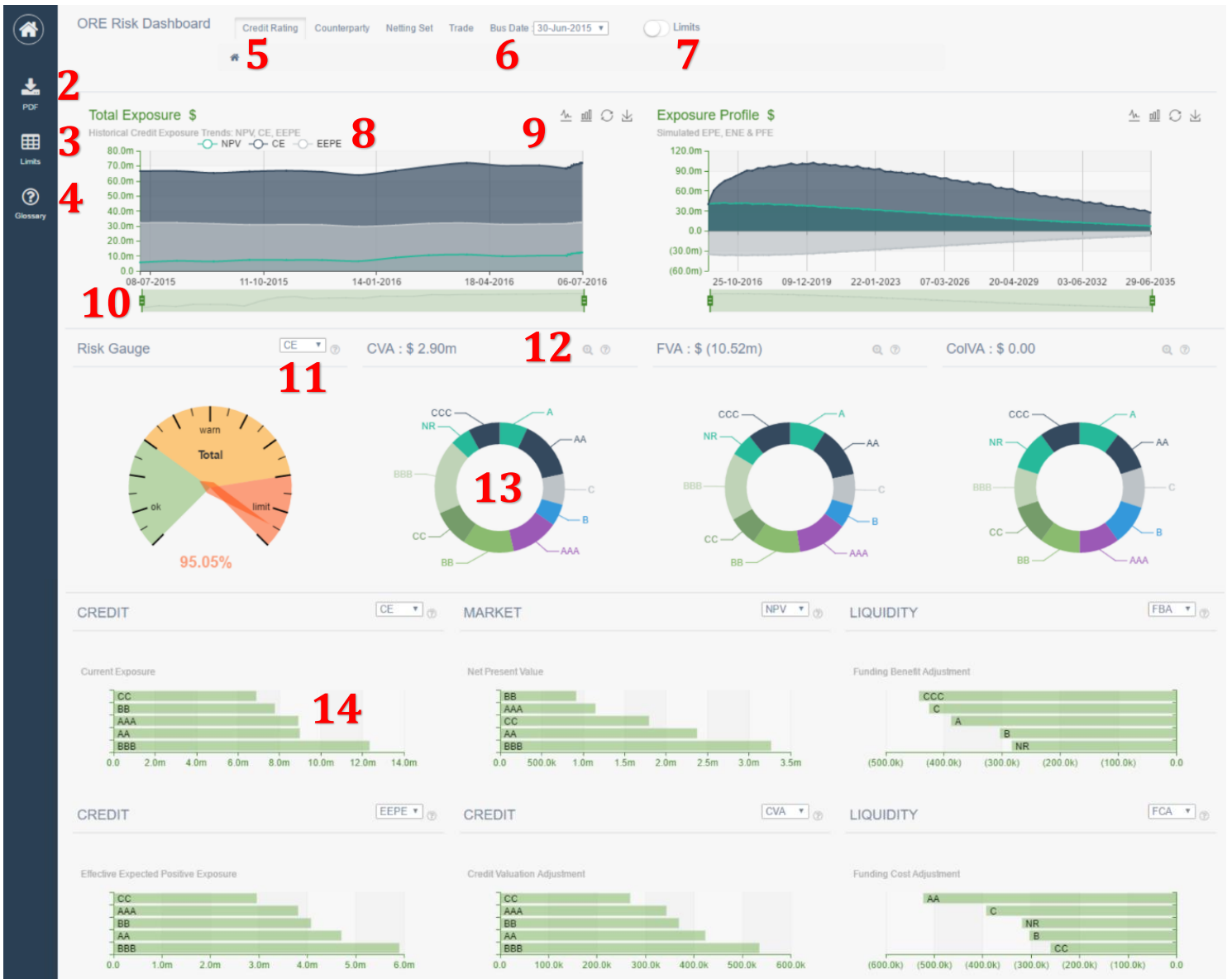
Functionality

1. Home

Button will bring you back to the original home screen. Note that browser navigation buttons, such as the "Back" or "Home" buttons within your browser window will not change the navigation within the Risk Dashboard itself.

2. PDF Download

Save a PDF version of the current Risk Dashboard display.

3. Limits Table

Button will bring up a new window that displays individual hierarchy records color-coded to identify whether each is close to breaching a limit (yellow) or has already breached a limit (red). Left-most columns for Credit Rating, Counterparty, Netting Set, and Trade identify at which hierarchy each record is displayed. If a cell is blank, that indicates that the record is at a level just above that specific hierarchy (as in the case below, when all four columns are blank, the record is for the aggregate "total" portfolio).

Change the business date and risk metric via the drop-down menus at the upper right, or use the search bar to scan for specific records (if attempting to identify multiple records across hierarchies and risk metrics, separate the search terms with a space). Clicking the "Breaches" tab at the top left of the table filters down to display only those records that have breached a specific limit (red). Copy and save the table using the buttons at left in user-specified formats. To exit the Limits Table, click the Home button at the upper left.

4. Glossary

Definitions for all acronyms and risk metrics displayed within the Risk Dashboard.

5. Changing the Granularity

Change the level of granularity at which the donut charts and bar charts are displayed. Just beneath the Credit Rating / Counterparty / Netting Set / Trade buttons, keep track of which portfolio you're analyzing with the "breadcrumb" tracker tool.

6. Changing the Business Date

Drop-down menu that changes the "as-of" date for all charts except the Total Exposure line chart, which shows a historical trend across all business dates.

7. Global Limit Toggle

Turn on/off the limit displays for all line charts and bar charts. Note that individual bar charts have their own limit toggle, in addition to the global limit toggle at top.

8. Line Chart Toggle

Turn on/off various risk metrics displayed on the Total Exposure chart. Note that the chart will re-size automatically.

9. Line Chart Tools

Change the shape of each risk metric on the bar chart, as well as save the individual chart in image format (.png).

10. Line Chart Date Slider

Change the date range displayed with the line chart.

11. Select Risk Metrics

Drop-down menu to display various risk metrics within each chart.

12. Donut Chart Zoom

For charts with enhanced levels of granularity, the Zoom function allows the user to enlarge each individual donut chart.

13. Donut Chart Drill Down

Click individual hierarchies to "drill-down" into that specific portion of the portfolio. Note that all other charts will automatically refresh to display only the selected portfolio. Keep track of which portfolio you're analyzing with the "breadcrumb" tracker tool at the top of the Risk Dashboard.

14. Bar Chart Drill Down

Click individual hierarchies to "drill-down" into that specific portion of the portfolio. Note that all other charts will automatically refresh to display only the selected portfolio. Keep track of which portfolio you're analyzing with the "breadcrumb" tracker tool at the top of the Risk Dashboard.

Troubleshooting

1. **Lack of browser support for HTML5 (Canvas)**

    The Risk Dashboard requires browser support for HTML5 (Canvas).

    This issue occurs most often with older versions of Internet Explorer, although the Risk Dashboard has been tested and supported for Internet Explorer 10 and above. Please upgrade your browser to its most recent version to enjoy full functionality of the Risk Dashboard.

2. **Stylesheet and/or JavaScript resources not downloading properly to the browser**

    This can be diagnosed as a mostly blank screen without the presence of any charts. Generally, a forced cache clear and refresh will solve this issue unless the resources are being blocked (e.g. by firewall or other corporate reasons).

    In Chrome,

    I.   On your browser toolbar, tap More .
    II. Click History, and then click Clear browsing data.
    III. Under "Clear browsing data," select the checkboxes for Cookies and site data and Cached images and files.
    IV. Click Clear browsing data.

    In Internet Explorer,

    I.   From the Tools menu choose Internet Options. ...
    II. On the General tab, under Browsing history, click Delete.
    III. Un-check the Preserve Favorites website data box.
    IV. Check the Temporary Internet files, Cookies, and History boxes.

    In FireFox,

    I.   Click the menu button ≡ and choose Options.
    II. Select the Advanced panel.
    III. Click on the Network tab.
    IV. In the Cached Web Content section, click Clear Now.

3. **Problems with Stylesheet and/or JavaScript**

    This can be diagnosed as non-functioning but otherwise correctly rendered charts. Launch the Developer Console (F12) to identify the specific errors that may have arisen during the page load.