

Collateral Visualization Canvas

Business Requirements:

1. Create a graphical summary view of all the applicable collateral information for a selected customer. This view should include shapes/objects that accurately visualizes a customer's collateral liability across all applicable loans. (NOTE: The customers "Collateral Web of Liability" Business Requirements are detailed further here: [Collateral Web of Liability Canvas Display](#))

Functional Requirements:

Must Have's:

1. Create shapes to be displayed on the collateral canvas that each represents a different collateral object containing different collateral information. This information will help to create an entire picture displaying the customers collateral structure for applicable loans.

The shapes created for the collateral objects should be unique and easily identifiable to the user. This way they don't have to click on multiple objects to find what they are looking for or get confused in anyway by similar looking shapes. They should be able to look at the collateral canvas and know that "This is the Loan Object", "This is the Security Document Object", etc. Unique shapes for each object will also help color blind users to be able to differentiate objects more easily.

2. Collateral shapes needing to be created for canvas display will be as follows: (NOTE: Specific Business Requirements for these objects creation and use is detailed further here: (Insert future hyperlink to Confluence Page)).)
 - a. Loan Object
 - b. Security Document Object
 - c. Collateral Object
 - d. Collateral Detail Object (Nice to Have?)
 - e. Collateral Owner Object (Nice to Have?)
 - f. Collateral Location Object (Needed for 1098 reporting?)
3. Collateral shapes colors will be as follows:
 - a. Loan Object (Green - TBD)
 - b. Security Document Object (Purple - TBD)
 - c. Collateral Object (Yellow - TBD)
 - d. Collateral Detail Object (Light Blue - TBD)
 - e. Collateral Owner Object (Orange - TBD)
 - f. Collateral Location Object (Red/Magenta - TBD)
4. Objects should display in the following order from top to bottom:
 - a. Loan
 - b. Security Documents
 - c. Collateral
 - d. Collateral Detail
 - e. Collateral Owner
 - f. Collateral Location

Please see the screenshot below for an OLD version of what the collateral canvas looked like. I have labeled and sectioned off what the different objects are for clarification.

Nice to Have's: [↗](#)

1. Collateral shapes needing to be created for canvas display will be as follows:
 - a. Collateral Detail Object (Nice to Have?)
 - b. Collateral Owner Object (Nice to Have?)

Non-Functional Requirements: [↗](#)

1. Need to determine scale of loan complexity that can realistically be displayed all on one screen. Depending on what web of liability scope that is chosen to display, this could impact system performance and usability for the user if they want all loans to display on one screen.

Screenshots of old Search functionality: (NOTE: These screenshots are of the older version. The new functionality may look similar to this, but will not be exact. This is just for example only.) [↗](#)

OLD Collateral Canvas view with labeled sections indicating which object contains what collateral information. These sections correspond to the alphabetical listing in Functional Requirement "2.a-f".

