



SCORTO PATRON USER MANUAL

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CONTENTS

1 INTRODUCTION	1
Audience	1
Manual Conventions.....	2
2 BEFORE YOU BEGIN	3
Overview	3
User Session Timeout.....	3
Forced Log-Out	3
Logging On To Application	3
Multiple Login	5
"Force login" feature	5
3 STRATEGY MANAGEMENT	7
Overview	7
States of Strategies	7
Strategy-Related Actions.....	8
Deleting Strategies	8
Strategy Publication.....	10
Strategy Execution Time Limitation	17
Strategy Version Control Mechanism.....	19
4 NODE MANAGEMENT	23
Overview	23
Basic Actions on Nodes	23
Refreshing List of Nodes	23
Adding Nodes	24
Deleting Nodes	27

Saving Nodes	29
Node Parameter Definition	30
Defining Node Execution Time	31
Changing Processing Application	32
Linking Nodes to Export Templates	34
Node Version Control Mechanism	37
5 CREDIT PRODUCT MANAGEMENT	39
Overview	39
Refreshing Credit Product List	39
Adding New Credit Products	40
Editing Credit Products	45
Deleting Credit Products	46
Uploading Credit Products	48
Saving Credit Products	51
6 EXPORT TEMPLATE MANAGEMENT	55
Overview	55
Refreshing Export Template List	56
Adding New Export Templates	57
Viewing of Export Template Details	59
Saving Export Template Locally	61
Deletion of Export Templates	63
Export Template Version Control Mechanism	65
7 MANAGEMENT OF BEHAVIORAL STRATEGIES	67
Overview	67
Manual Start of Behavioral Strategies	67
Deleting Behavioral Strategies	69
Behavioral Strategy Version Control Mechanism	70

8	REPORTS ON BEHAVIORAL STRATEGIES PERFORMANCE.....	73
	Overview	73
	Viewing the List of Reports.....	73
	Setting Filters.....	75
	Searching for Reports	76
	Downloading Reports to Local Machine.....	76
9	DATA SOURCE MANAGEMENT	79
	Overview	79
	Refreshing Data Source List	79
	Adding New Data Sources	80
	Viewing Details of Data Sources	84
	Changing Parameters of Data Sources.....	86
	Deleting Data Sources	89
10	DECISION AREA CONFIGURATION	93
	Overview	93
	List of Decision Areas Management.....	93
	View and Refresh	94
	Adding New Decision Areas	95
	Deleting Decision Areas	96
	Management of List of Tasks for Decision Areas.....	98
	Viewing and Refreshing List of Tasks.....	98
	Adding a New Task.....	100
	Deleting Tasks	103
	Management of Strategy Set for Tasks.....	105
	Viewing and Refreshing a Set of Strategies	105
	Adding New Strategies	108
	Deleting Strategies	112
	Viewing Strategy Parameters	116

Changing Strategy Parameters	119
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1 INTRODUCTION

This manual provides detailed instructions on how to use the Scorto Patron application and contains the following chapters:

Chapter 2, Before You Begin, describes procedures for strategy management in Scorto Patron.

Chapter 3, Strategy Management, contains reference information on basic entities of Scorto Patron.

Chapter 4, Node Management, contains information on the management of nodes in Scorto Patron.

Chapter 5, Credit Product Management, contains information on the management of credit products in Scorto Patron.

Chapter 6, Export Template Management, contains information on the management of export templates in Scorto Patron.

Chapter 7, Management of Behavioral Strategies, describes the procedure for starting behavioral strategies in the Scorto Patron application.

Chapter 8, Reports On Behavioral Strategies Performance, contains information on the work of behavioral strategies in the Scorto Patron application.

Chapter 9, Data Source Management, contains information on how to work with data sources of behavioral strategies in the Scorto Patron application.

Chapter 10, Decision Area Configuration, contains information on procedures for configuring decision areas of behavioral strategies in the Scorto Patron application.

Audience

This manual is intended for those using Scorto Patron.

Manual Conventions

This manual uses the following conventions:

- Dialog boxes and windows are displayed in italics, for example, "*Packages Installer* window".
- Buttons, tabs, check boxes, and other dialog box elements are displayed in bold, for example, "click **Next**" or "enter **Destination**".
- Cross-references are displayed in italics, for example, "see Chapter 2, *Before you begin*".
- Notes contain additional information related to the previous topic and are displayed in italics.

2 BEFORE YOU BEGIN

This chapter contains basic information on how to work with the Scorto Patron application.

Overview

This chapter comprises the following sections:

User Session Timeout, page 3, contains information on the period, after which the user session times out.

Forced Log-Out, page 3, contains information on the forced logout procedure for user sessions.

Logging On To Application, page 3, describes the login procedure, impossibility of simultaneous logins from different workstations and the "Force login" feature.

User Session Timeout

The user session that requires a connection to the server is forcibly closed after an administrator-defined period of inactivity. To continue working with the application in the online (connected) mode, the user must log on to the system again.

Forced Log-Out

The administrator of the system can forcibly close a user session. In this case the user cannot go on working with the application. To continue working with the application, the user must log on to the system again.

Logging On To Application

To use the application, the user must be registered in the system (his or her account must be registered by the system administrator) and must perform the login procedure at the application start. To log on to the system, the user must enter his/her correct username and password.

To log on to the system:

1. Start the Scorto Patron application.

The *Available connections* dialog box is displayed:

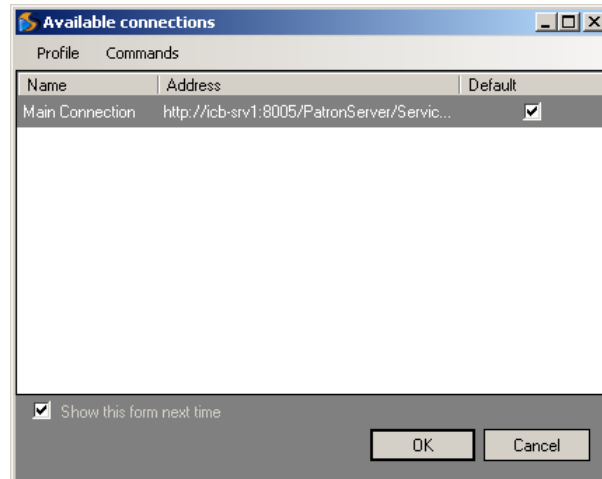


Figure 2-1: *Available connections* dialog box

2. Click **OK**.

The **Login** dialog box is displayed:

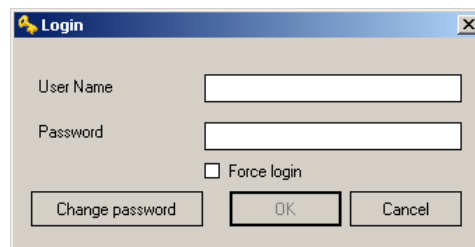


Figure 2-2: *Login* dialog box

3. In the **User Name** box, enter the username.
4. In the **Password** box, enter the password.
5. (Optional) If necessary, select the **Force login** checkbox. For more information on the "Force login" feature, refer to Section "Force login", page 5.
6. (Optional) If you need to change your password, click **Change password** and follow on-screen instructions.

7. Click **OK**.

The Scorto Patron application is starting:

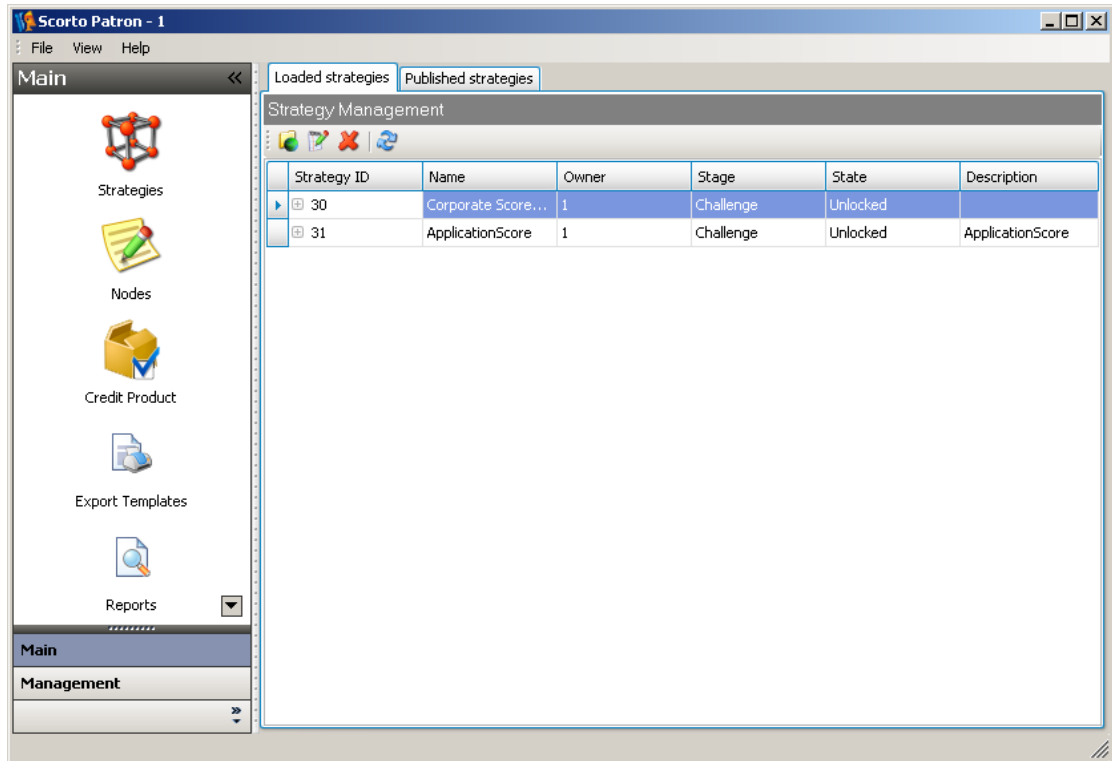


Figure 2-3: Scorto Patron application

The login procedure is successfully completed.

Multiple Login

The application prevents the user from making multiple logins from different workstations.

"Force login" feature

The "Force login" feature allows the user who has an active session in this application to log on to the system. The application closes the existing connection and creates a new one.

3 STRATEGY MANAGEMENT

This chapter describes procedures for strategy management in the Scorto Patron application.

Overview

This chapter comprises the following sections:

States of Strategies, page 7, provides information of states of strategies in the Scorto Patron application.

Strategy-Related Actions, page 8, describes procedures for strategy management in Scorto Patron.

Strategy Version Control Mechanism, page 19, provides the description of the strategy version control mechanism in the Scorto Patron application.

States of Strategies

The Scorto Patron application distinguishes the following states of credit strategies:

- **Unlocked** — means that the strategy is not being edited by users and can be published;
- **Locked** — means that the strategy is being edited in the Strategy Maven application. The user of Scorto Patron cannot perform any actions on the strategy that is in this state.
- **Published** — means that loan application can be created using this strategy. Loan applications are created in the Scorto Inspector application. When the strategy is published, it is assigned a public name that identifies the strategy in the Scorto Inspector application. One or more strategies can be published using the same public name.

Strategy-Related Actions

The Scorto Patron application enables the user to perform the following actions on strategies:

- **Deletion** — this action can be performed only on unpublished strategies and strategies that are not embedded.
- **Stop** — this action can be performed on strategies that are in the "Published" state. After the action is performed, the state of the strategy is changed to "Stopped". This action does not effect applications that were created using the corresponding strategy.
- **Start** — this action can be performed on strategies in the "Stopped" state. After the strategy is restarted, its state changes to "Published" and the strategy becomes available to the Scorto Inspector users for the creation of new loan applications.
- **Publish** — this action can be performed on strategies that are in the "Unlocked" state. After the strategy is published, its state changes to "Published" and the strategy becomes available to the Scorto Inspector users for the creation of new loan applications.
- **Strategy Execution Time Limitation** – this action can be performed on strategies that are in the "Published" state.

Deleting Strategies

To delete a strategy:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Strategies**.

The *Strategy Management* table is displayed:

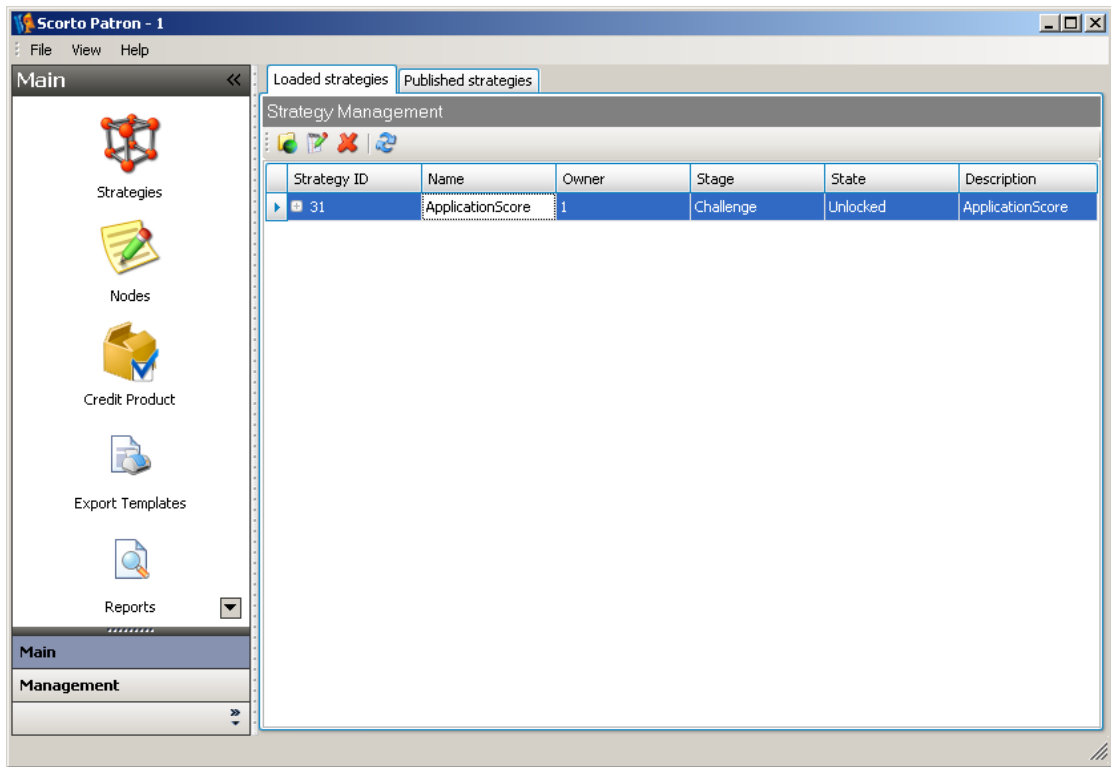



Figure 3-1: Table *Strategy Management*

3. In the *Strategy Management* table, select the required strategy.
4. On the toolbar, click .

The following confirmation request is displayed:

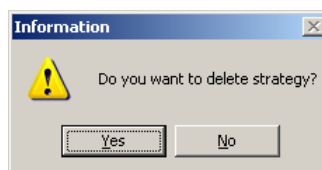


Figure 3-2: Deletion confirmation

5. Click **Yes**.

The following confirmation that the strategy is deleted is displayed:

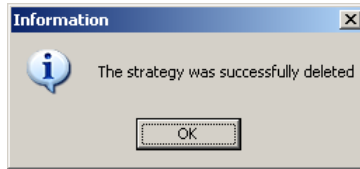


Figure 3-3: Deletion confirmation

The strategy is successfully deleted.

Strategy Publication

The Scorto Patron application allows publishing strategies in the following two ways:

- Publication of a new independent strategy;
- Publication of a new strategy that is linked to an already published strategy (the usage percent value must be defined).

The publishing procedures for these two ways are described in the sections that follow.

Strategy Publication

This section contains a description of the procedure for publishing a strategy.

To publish a strategy with a new public name:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Strategies**.

The *Strategy Management* table is displayed:

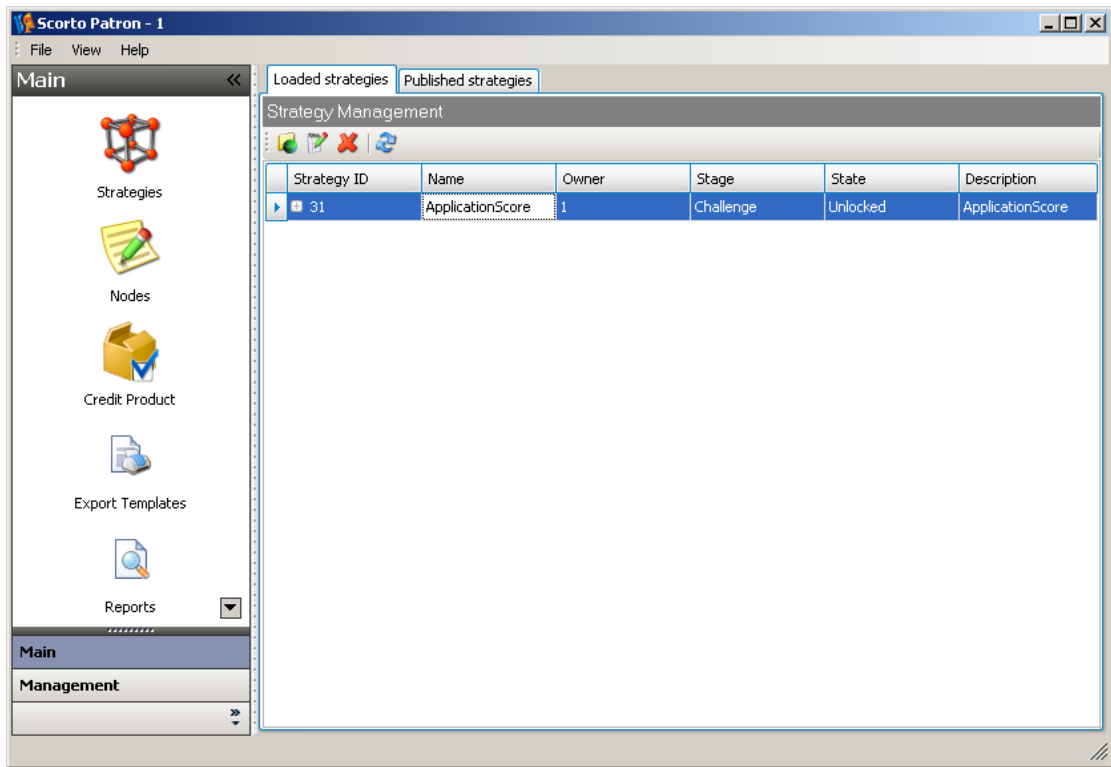



Figure 3-4: Table *Strategy Management*

3. In the *Strategy Management* table, select the required strategy.
4. On the toolbar, click .

The *Strategy Publication* dialog box is displayed:

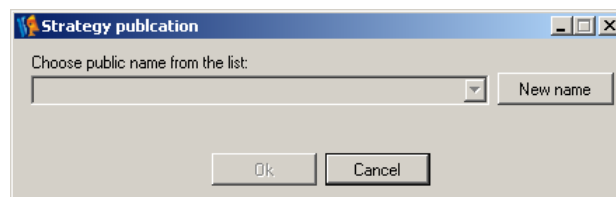


Figure 3-5: *Strategy Publication* dialog box

5. Click .

The following dialog box is displayed that enables the user to enter a new public name:

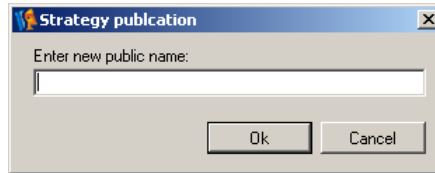


Figure 3-6: Dialog box that enables the user to enter a new public name

6. Enter the public name and click **OK**.

When the strategy is published, the following confirmation is displayed:

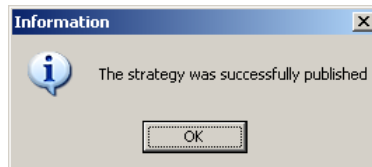


Figure 3-7: Publication of strategy is displayed

Note:

The name of the strategy being published can contain letter, numbers, the underline sign, slash, double quotes, parentheses, full stop, comma, space and must start with a letter.

If the name of the strategy does not meet the above requirements, the following error message is displayed:

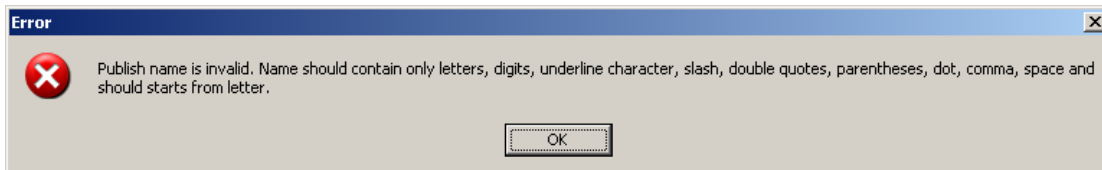


Figure 3-8: Name-related error notification

7. Click **OK**.

8. Re-enter the name of the strategy being published in accordance with the rules specified in this procedure.

If the name of the strategy being published has been entered correctly, the strategy is published. The message informing the user on the successful publication of the strategy is displayed:

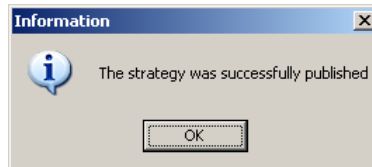


Figure 3-9: Confirmation that strategy is published

The published strategy is displayed on the **Published Strategies** tab:

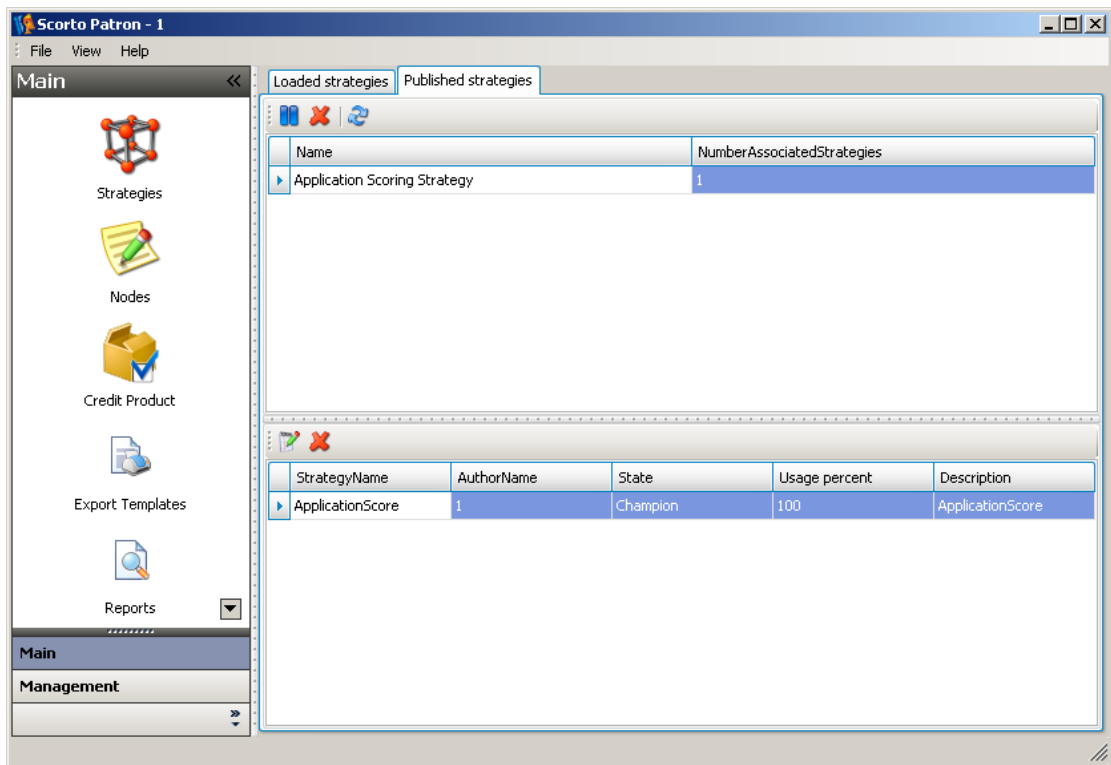


Figure 3-10: Published Strategies tab

The published strategy has the **Champion** status.

To publish a strategy with an existing public name:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Strategies**.

The *Strategy Management* table is displayed:

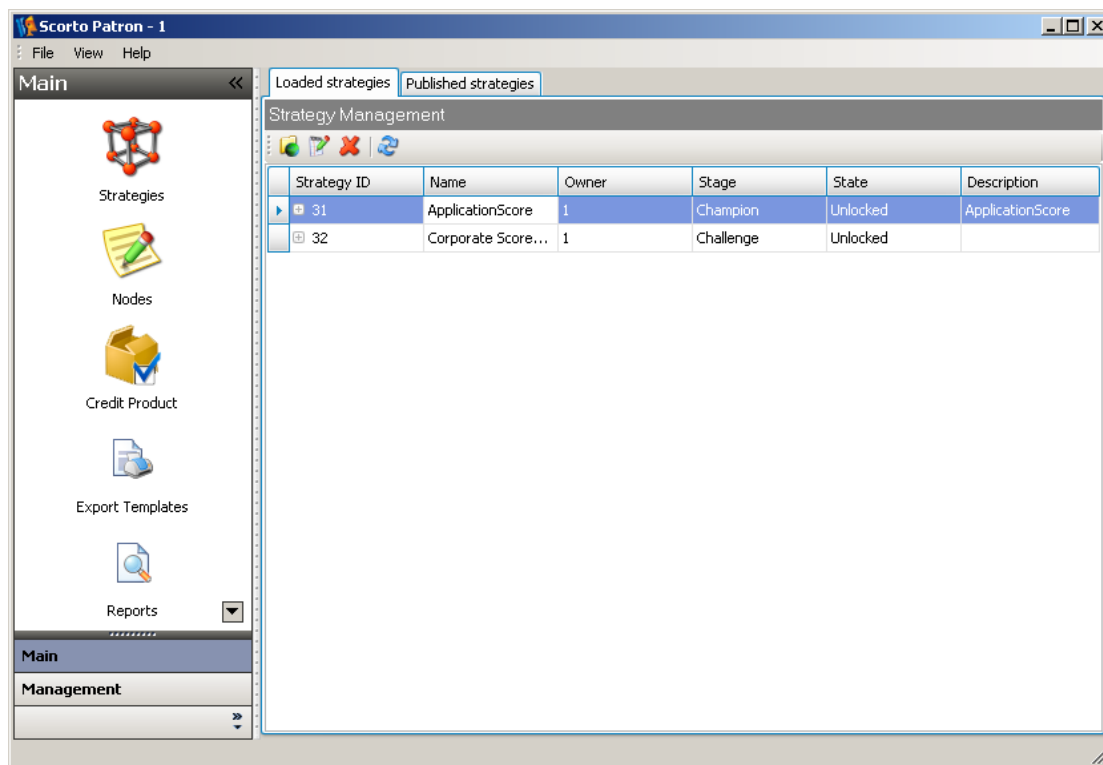



Figure 3-11: Table *Strategy Management*

3. In the *Strategy Management* table, select the required strategy.
4. On the toolbar, click .

The *Strategy Publication* dialog box is displayed:

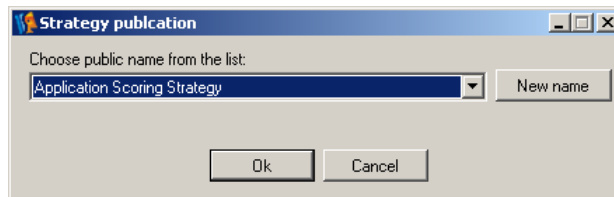


Figure 3-12: *Strategy Publication* dialog box

5. Select the required public name and click **OK**.

The usage percent redistribution dialog box is displayed:

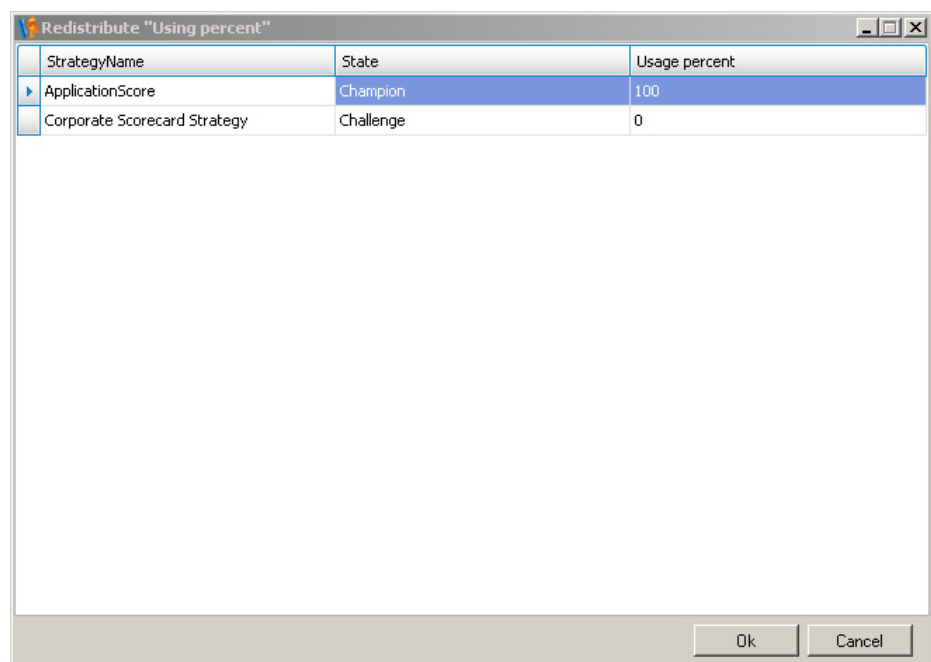


Figure 3-13: Usage percent redistribution dialog box

6. Set an application processing percentage value for each strategy.

Note: *The total percentage value of application processing for all strategies published with the same public name must be 100%.*

Additionally, the percentage value of application processing for any two strategies published with the same public name must be different.

If the percentage value of application processing is set incorrectly, the following message is displayed:

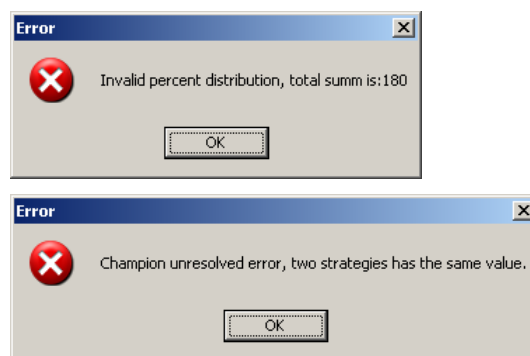


Figure 3-14: Incorrect percentage value error message

7. Click **OK**.
8. Re-enter the usage percentage value of application processing through strategies.

When the strategy is published, the following confirmation is displayed:

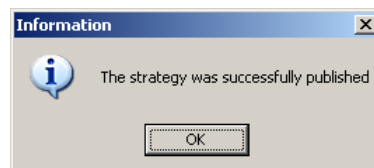


Figure 3-15: Publication of strategy is displayed

The published strategy is displayed on the **Published Strategies** tab:

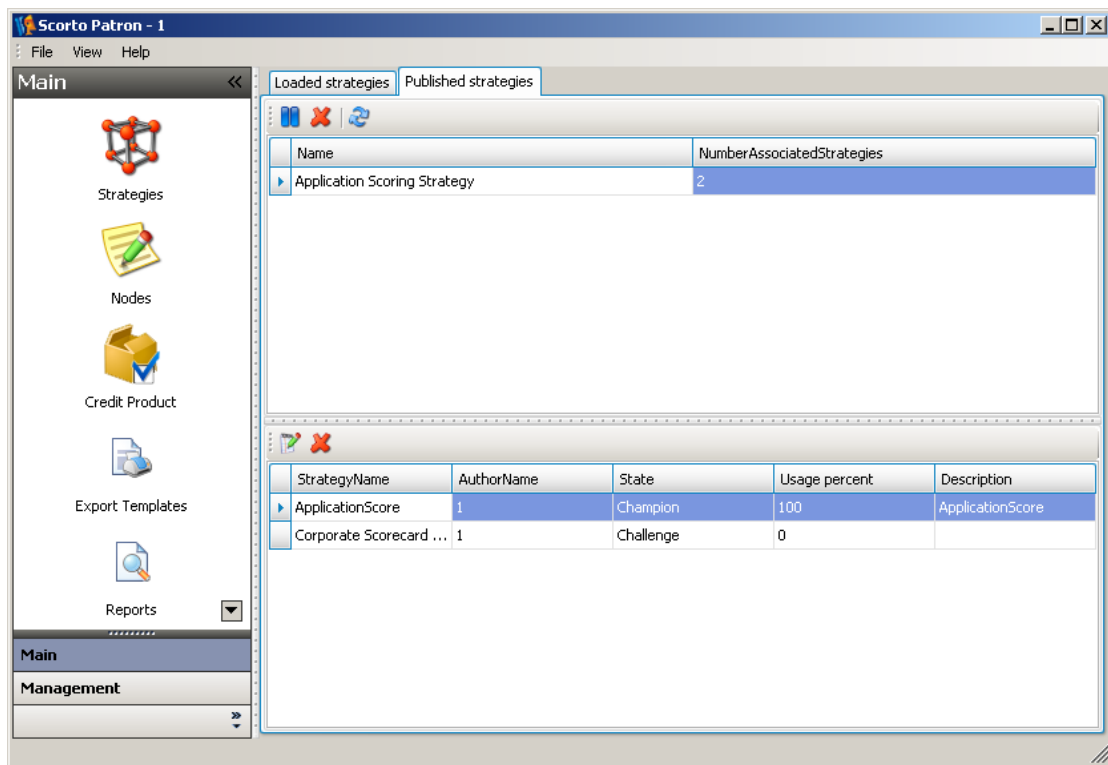


Figure 3-16: Published Strategies tab

The strategy with a higher application processing percentage value has the **Champion** status, while all the other strategies have the **Challenger** status.

Strategy Execution Time Limitation

The Scorto Patron application enables the user to limit the time of strategy execution.

This procedure is applicable to strategies in the "Challenge/Unlocked" state.

To limit the time of strategy execution:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Strategies**.

The *Strategy Management* table is displayed:

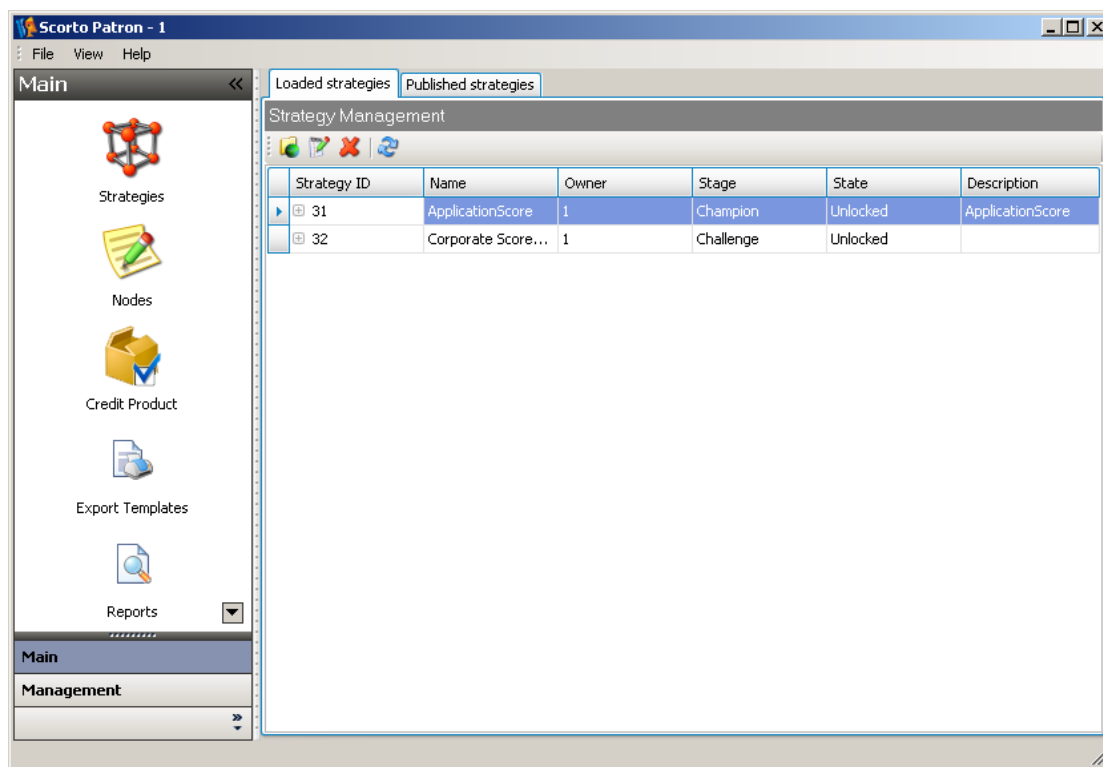



Figure 3-17: Table *Strategy Management*

3. In the *Strategy Management* table, select the required strategy in the "Challenge / Unlocked".
4. On the toolbar, click .

The *Strategy Settings* window is displayed:

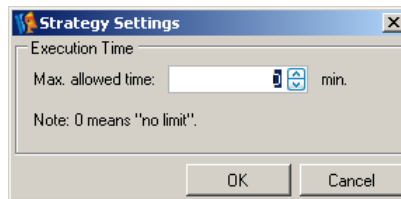


Figure 3-18: Strategy settings

5. Set the limit for strategy execution time (in minutes).

The default value is "0", which means that the time of strategy execution is not limited.

6. Click **OK**.

The limitation of the strategy execution time is successfully set.

Strategy Version Control Mechanism

The Scorto Patron application has a mechanism for strategy version control.

If one of the strategies displayed in the "Strategy Management" table was changed, the application displays the history of its changes.

To view the changes history:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Strategies**.

The *Strategy Management* table is displayed:

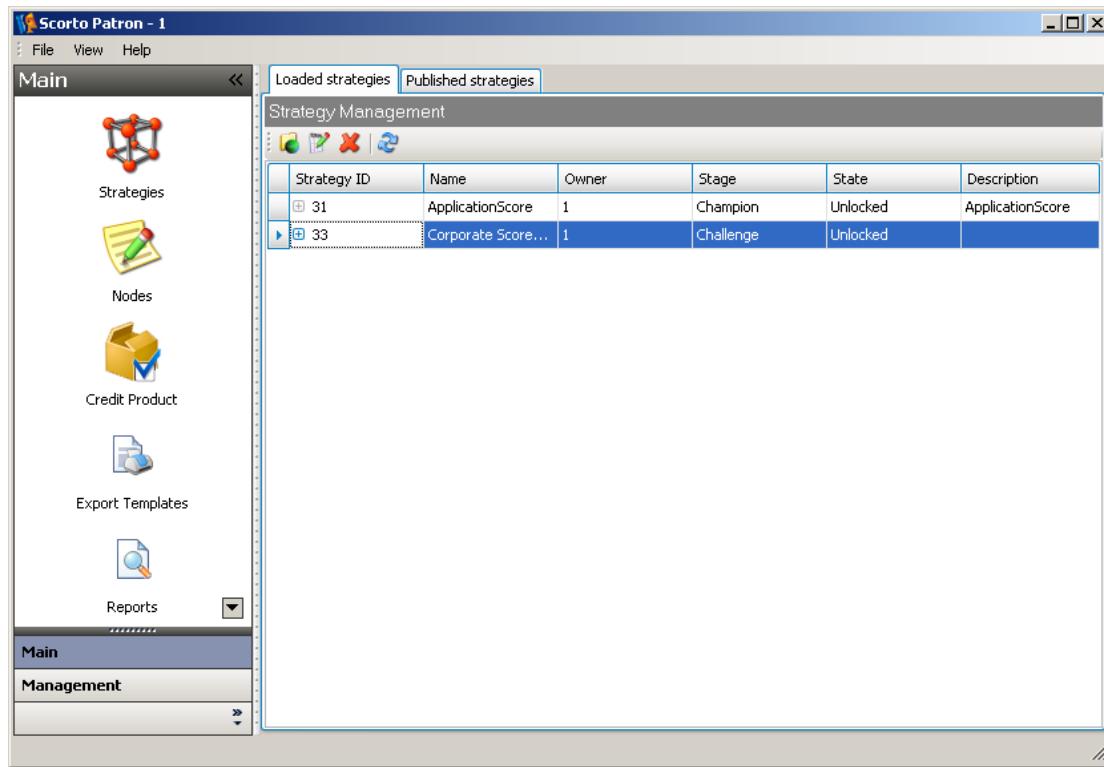



Figure 3-19: Table *Strategy Management*

3. In the *Strategy Management* table, select the required strategy.
4. In the *Strategy ID* column of the *Strategy Management* table, click .

The history of changes is displayed:

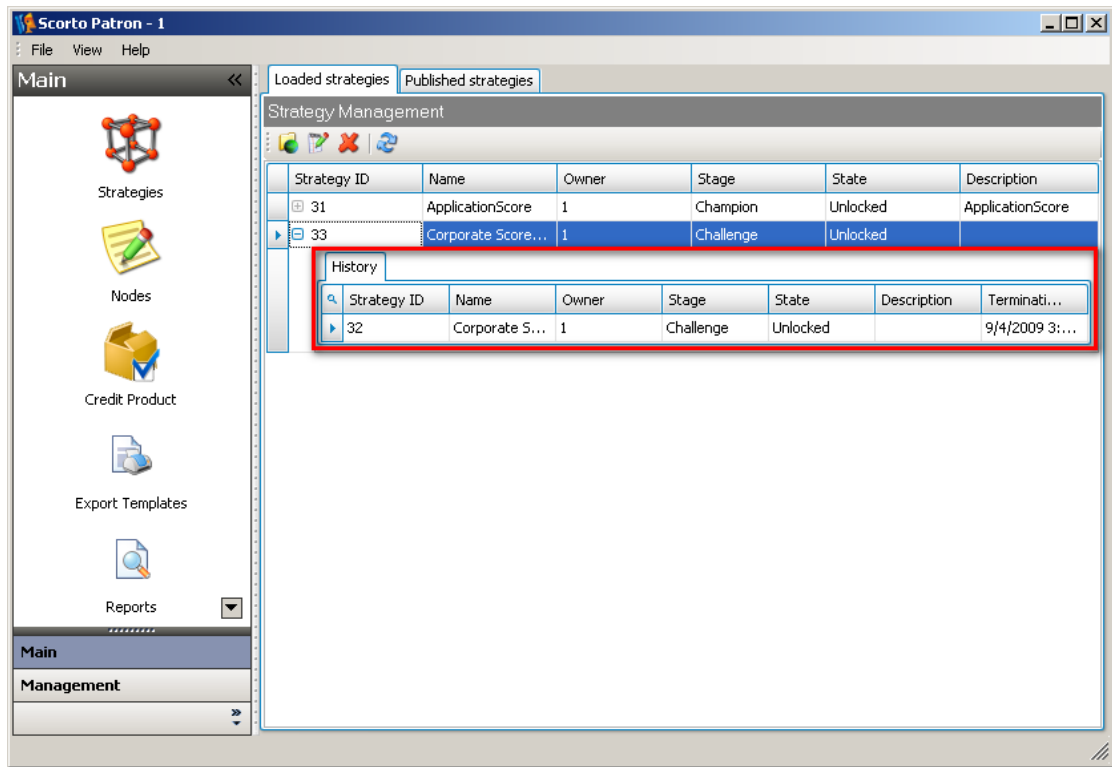


Figure 3-20: History of changes in strategy

4 NODE MANAGEMENT

This chapter contains information on the procedures for node management.

Overview

Basic Actions on Nodes, page 23, describes procedures for performing basic actions on nodes.

Node Parameter Definition, page 30, describes procedures for performing additional actions on nodes.

Node Version Control Mechanism, page 37, describes the node version control mechanism.

Basic Actions on Nodes

The Scorto Patron application enables the user to perform the following basic actions on nodes:

- refresh the list of nodes;
- add a node;
- delete a node.

The procedures described in the sections below explain how to perform each of these actions.

Refreshing List of Nodes

To refresh the list of nodes:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Nodes**.

The *Node Management* table is displayed:

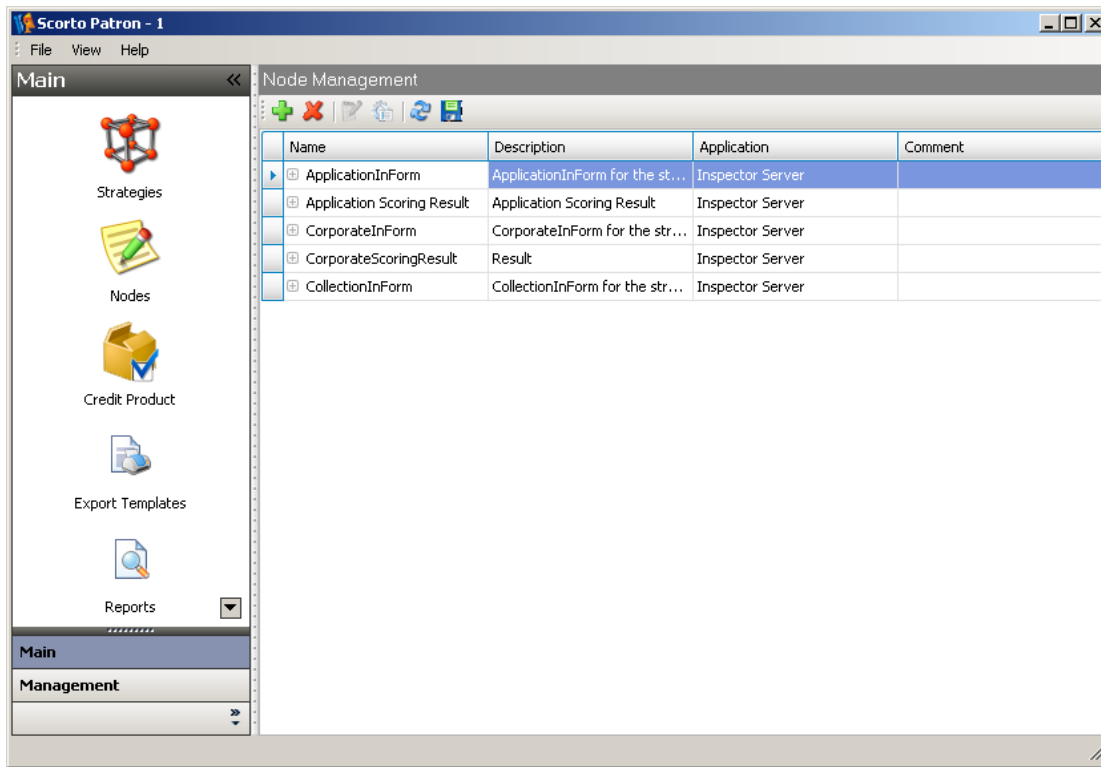


Figure 4-1: Table *Node Management*

3. On the toolbar, click .

The list of nodes is successfully refreshed.

Adding Nodes

To add a node:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Nodes**.

The *Node Management* table is displayed:

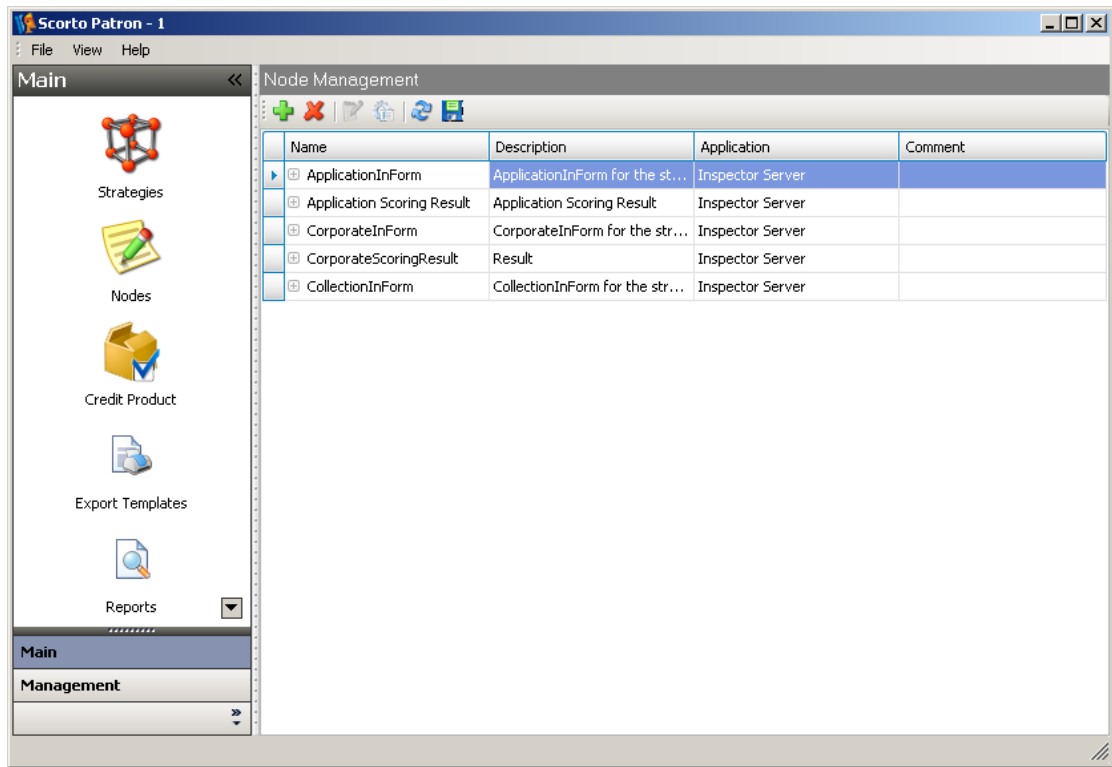


Figure 4-2: Table *Node Management*

3. On the toolbar, click .

The *Open* dialog box is displayed:

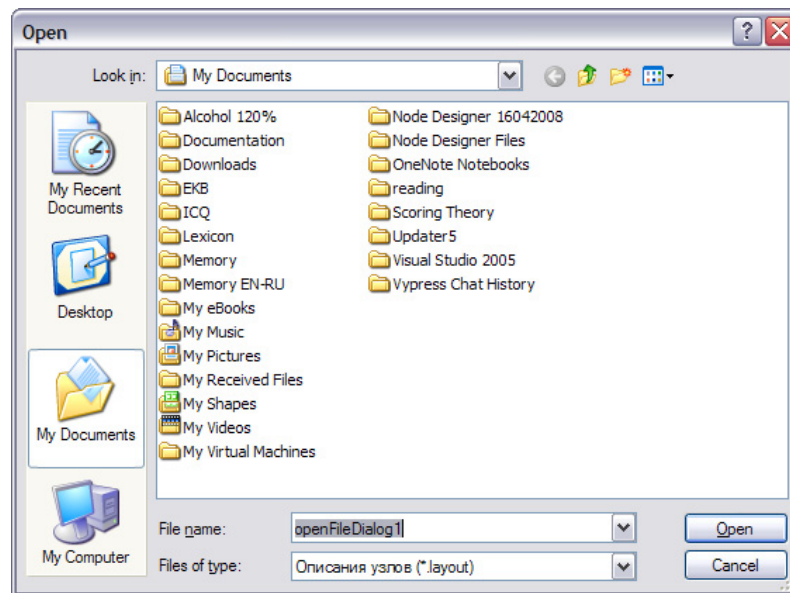


Figure 4-3: *Open* dialog box

4. Select the required file and click **Open**.

The *Node parameters select* dialog box is displayed:

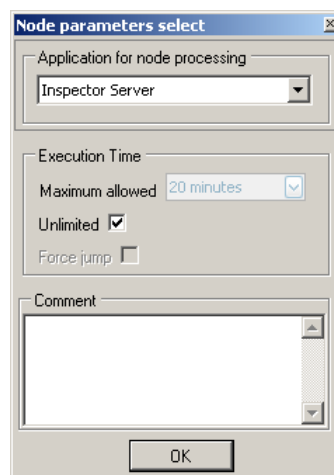


Figure 4-4: Dialog box *Node parameters select*

5. From the **Application for node processing** drop-down list, select the required application.

6. Set the time limit for node execution, as described in Steps 4-5 of the procedure specified in Section *Defining Node Execution Time*, page 31.
7. Click **OK**.

The confirmation that the node is successfully added is displayed:

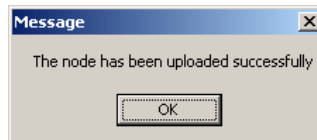


Figure 4-5: Node Added confirmation

8. Click **OK**.

The node is successfully added.

Deleting Nodes

To delete a node:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Nodes**.

The *Node Management* table is displayed:

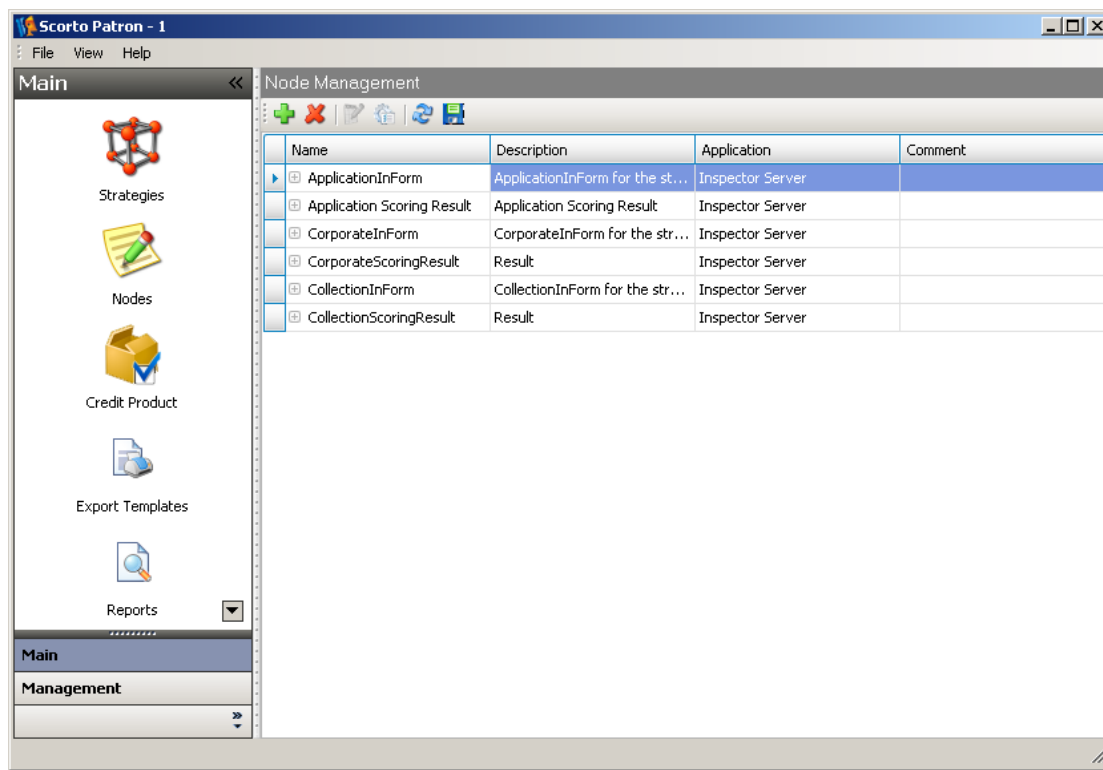


Figure 4-6: Table *Node Management*

3. In the *Node Management* table, select the node to be deleted.
4. On the toolbar, click

The following confirmation is displayed:

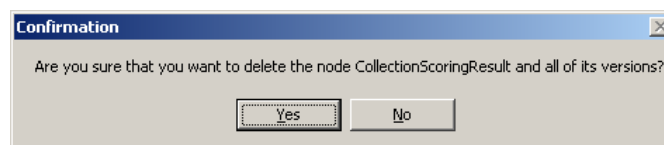


Figure 4-7: Deletion operation confirmation

5. Click **Yes**.

The selected node is successfully deleted.

Saving Nodes

To save a node:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Nodes**.

The *Node Management* table is displayed:

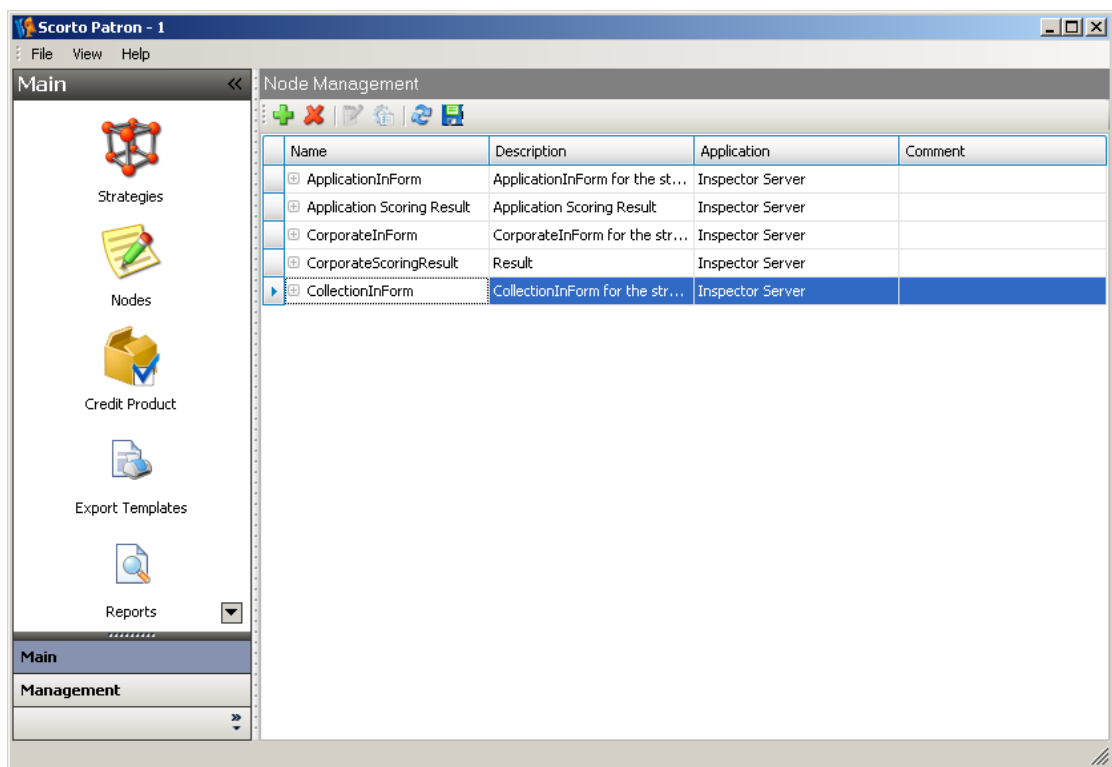



Figure 4-8: Table *Node Management*

6. In the *Node Management* table, select the node to be saved.
7. On the toolbar, click .

The *Save as* dialog box is displayed:

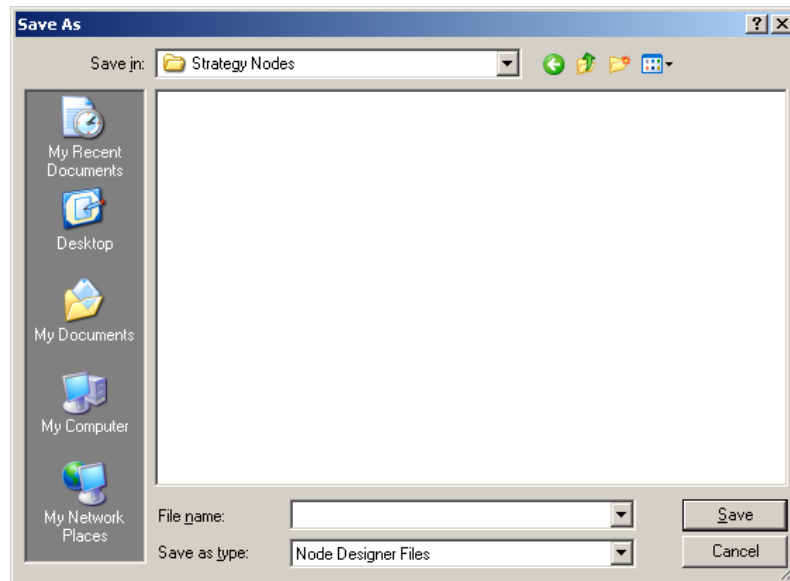


Figure 4-9: Dialog box *Save as*

8. Select the name and the path to save the node.
9. Click **Save**.

The node is successfully saved.

Node Parameter Definition

The Scorto Patron application enables the user to define the following node parameters:

- node execution time;
- application that is responsible for processing a particular node.

The procedures described in the sections below explain how to perform each of these actions.

Defining Node Execution Time

To define node execution time:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Nodes**.

The *Node Management* table is displayed:

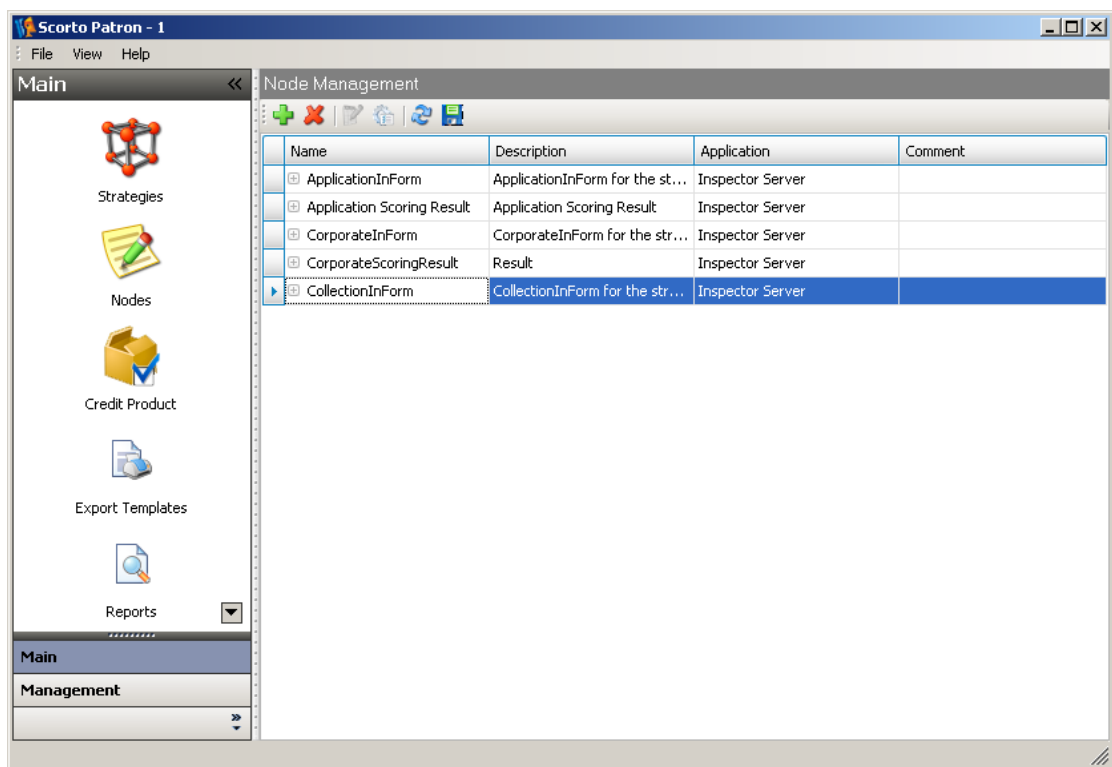



Figure 4-10: Table *Node Management*

3. In the Node Management table, select the node, whose execution time needs defining.
4. Click .

The *Nodes Parameters select* window is displayed:

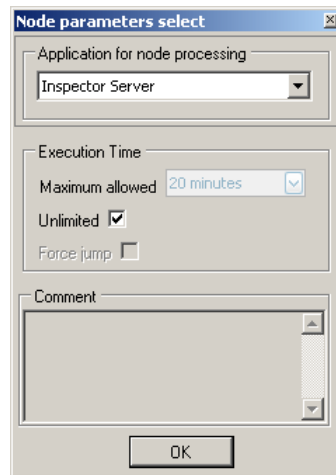


Figure 4-11: Node Parameters select

3. Set the maximum time for node execution.

- OR -

Select the **Unlimited** checkbox, if setting node execution time is not required.

5. (*Optional*) If the execution time is set, to forcibly move the application from the node when the execution time is over, select the **Force jump** checkbox.

6. Click **OK**.

Node execution time is successfully defined.

Changing Processing Application

To change the application that processes the node:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Nodes**.

The *Node Management* table is displayed:

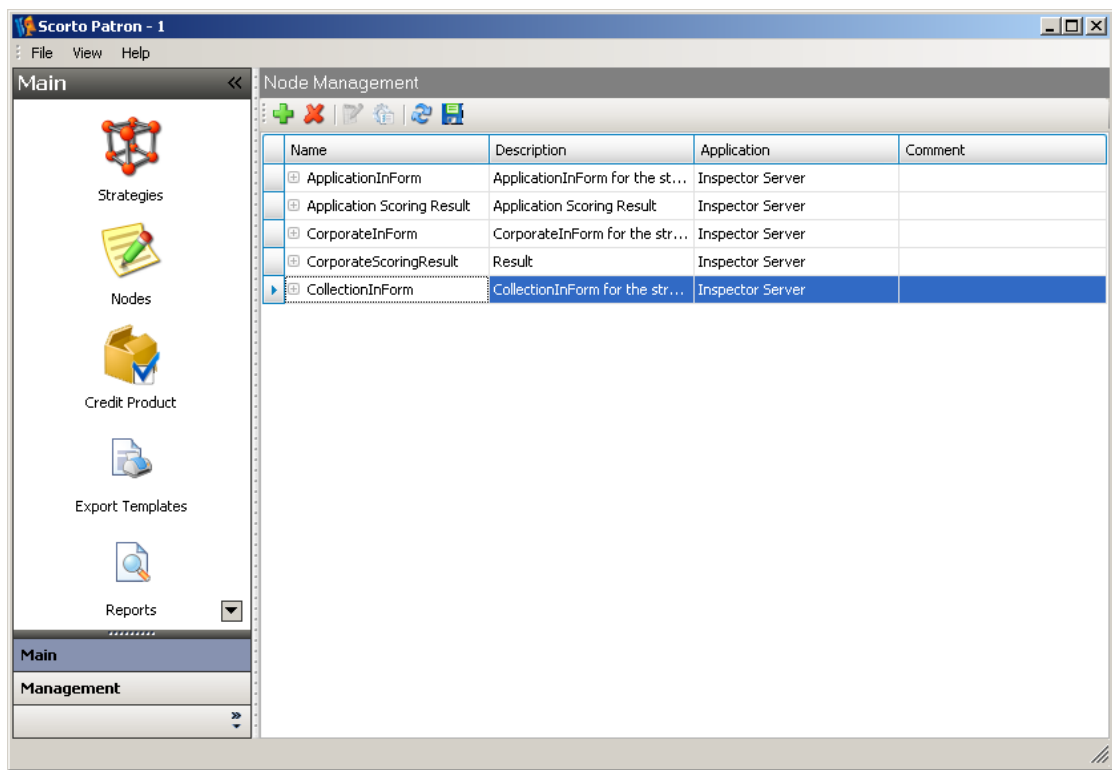


Figure 4-12: Table *Node Management*

3. In the *Node Management* table, select the node, whose processing application must be changed.

4. Click  .

The *Nodes Parameters select* window is displayed:

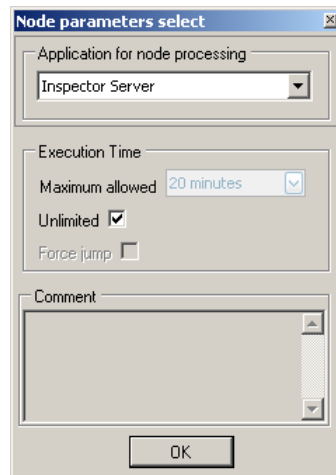


Figure 4-13: Node Parameters select

5. Select the application that is responsible for processing the node.
6. Click **OK**.

The software application that will process the node is successfully changed.

Linking Nodes to Export Templates

For the correct performance of nodes that have a print outlet, it is required that such nodes be linked to export templates.

For more information on export templates, see Chapter *Export Template Management*, page 55.

To link a node to an export template:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Nodes**.

The *Node Management* table is displayed:

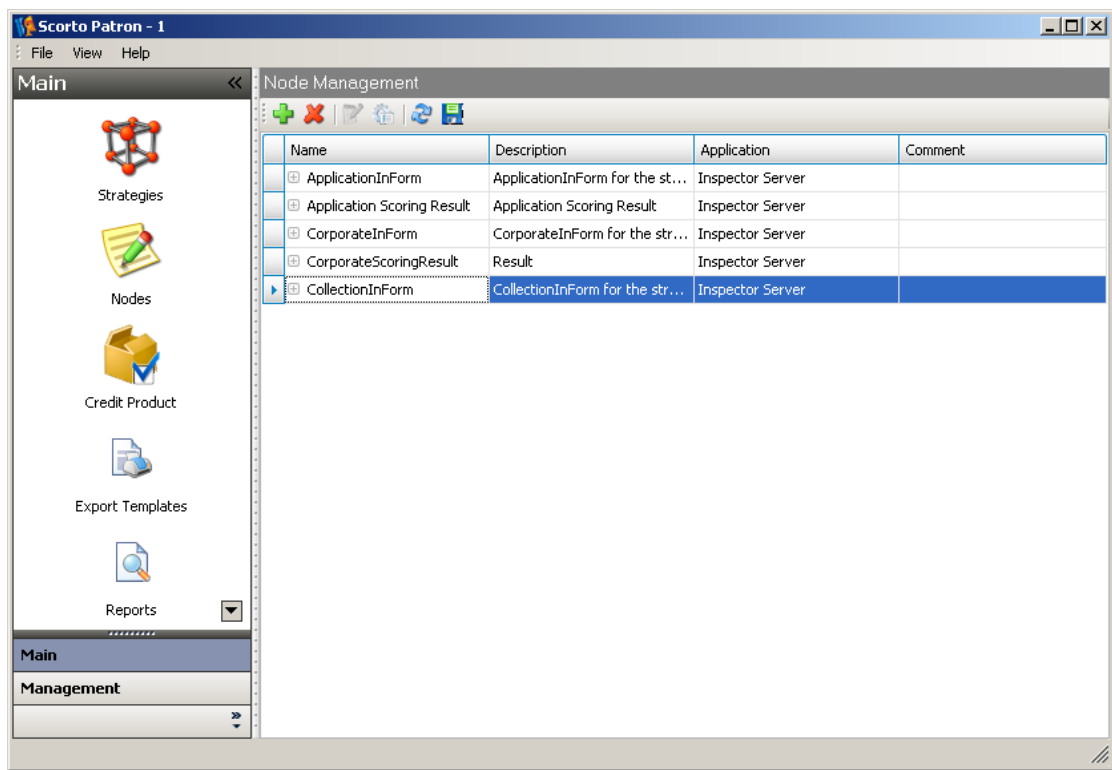



Figure 4-14: Table *Node Management*

3. In the *Node Management* table, select the required node that has a printing outlet.

Note:

When a node that has a printing outlet, the  button becomes active.

4. Click .

The *Template Link* dialog box is displayed:

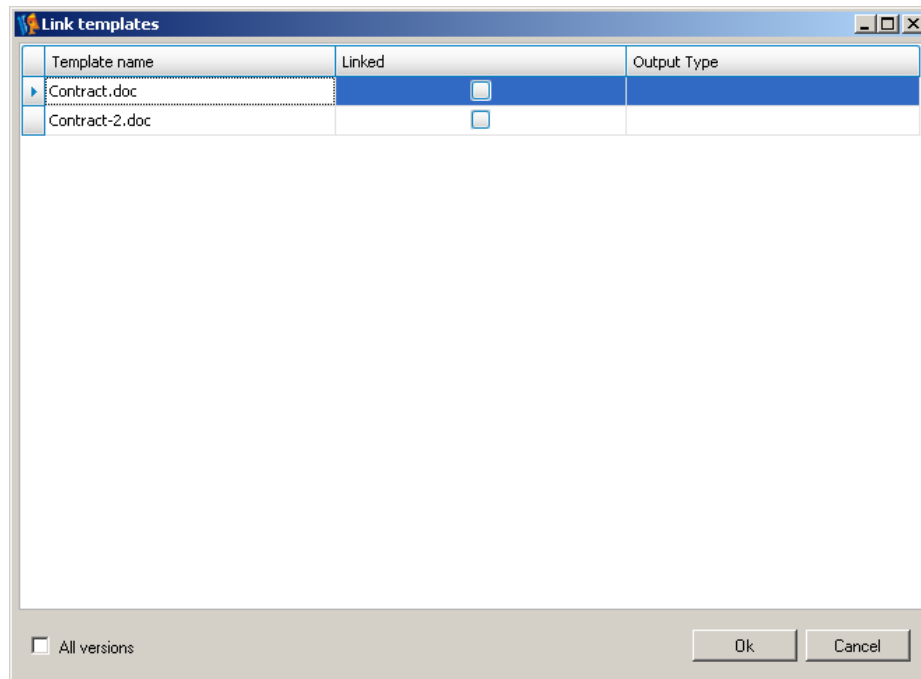


Figure 4-15: Dialog box *Template Link*

5. In the **Linked** column, select the checkbox opposite the template that must be linked to this node.
6. From the **Output type** drop-down menu, select the required type (available values: **Template format (as is)** or **Read only (PDF)**).
7. (Optional) Repeat Steps 5-6 of this procedure to link other required templates and select appropriate output types for them.
8. Click **OK**.

All required export templates are successfully linked to the selected node.

Note:

*To unlink a template from the node that has a printing outlet, perform Steps 1-4 of the above procedure and clear the checkbox in the **Linked** column in the row of the appropriate export template.*

Node Version Control Mechanism

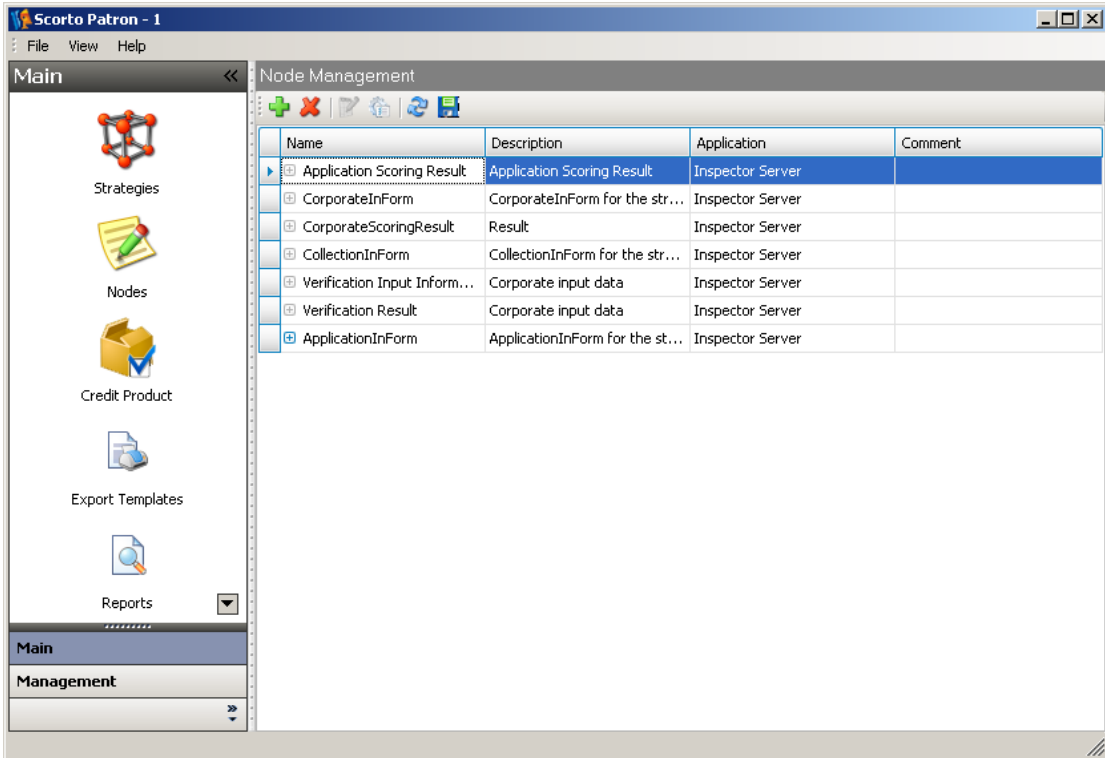
The Scorto Patron application has a mechanism for node version control.

The process of editing and repeat adding nodes is logged for each modified node.

To view the changes history:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Nodes**.

The **Node Management** table is displayed:



The screenshot shows the Scorto Patron application window. On the left is a 'Main' sidebar with icons for Strategies, Nodes, Credit Product, Export Templates, and Reports. The 'Nodes' icon is selected. The main area is titled 'Node Management' and contains a table with the following data:

Name	Description	Application	Comment
Application Scoring Result	Application Scoring Result	Inspector Server	
CorporateInForm	CorporateInForm for the str...	Inspector Server	
CorporateScoringResult	Result	Inspector Server	
CollectionInForm	CollectionInForm for the str...	Inspector Server	
Verification Input Inform...	Corporate input data	Inspector Server	
Verification Result	Corporate input data	Inspector Server	
ApplicationInForm	ApplicationInForm for the st...	Inspector Server	

Figure 4-16: Table Node Management

3. In the **Node Management** table, select the required node.

4. Click .

The history of changes for the selected node is displayed:

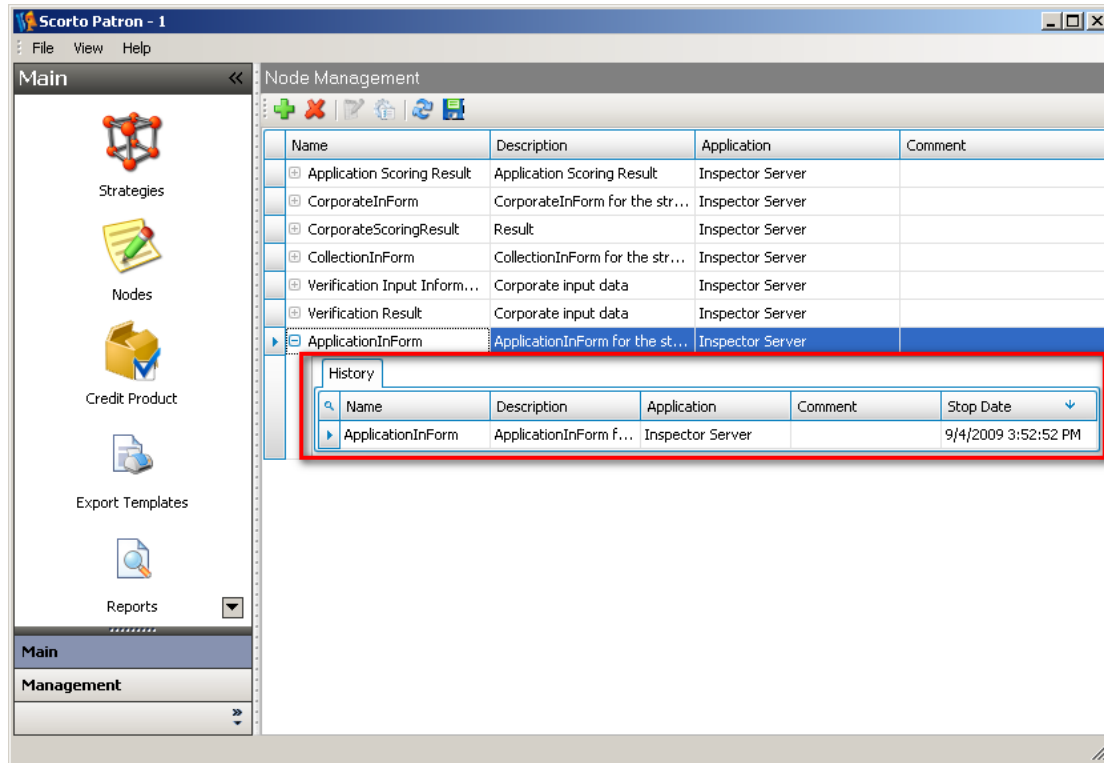


Figure 4-17: History of changes in node

The previous versions of the node can be saved, see *Saving Nodes*, page 29.

5 CREDIT PRODUCT MANAGEMENT

This chapter contains information on the management of credit products in Scorto Patron.

The Scorto Patron application enables the user to perform the following actions to manage credit products:

- refresh the list of existing credit products;
- add new credit products;
- edit existing credit products;
- delete credit products.

The procedures for performing the above-listed actions are described in the sections that follow.

Overview

This chapter comprises the following sections:

Refreshing Credit Product List, page 39, contains a description of the procedure for refreshing the list of existing credit products.

Adding New Credit Products, page 40, contains a description of the procedure for adding new credit products.

Editing Credit Products, page 45, contains a description of the procedure for editing credit products.

Deleting Credit Products, page 46, contains a description of the procedure for deleting credit products.

Refreshing Credit Product List

This section describes the procedure for refreshing the list of available credit products.

To refresh the list of credit products:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.

2. In the **Main** area, select **Credit Products**.

The *Credit Product Management* table is displayed:

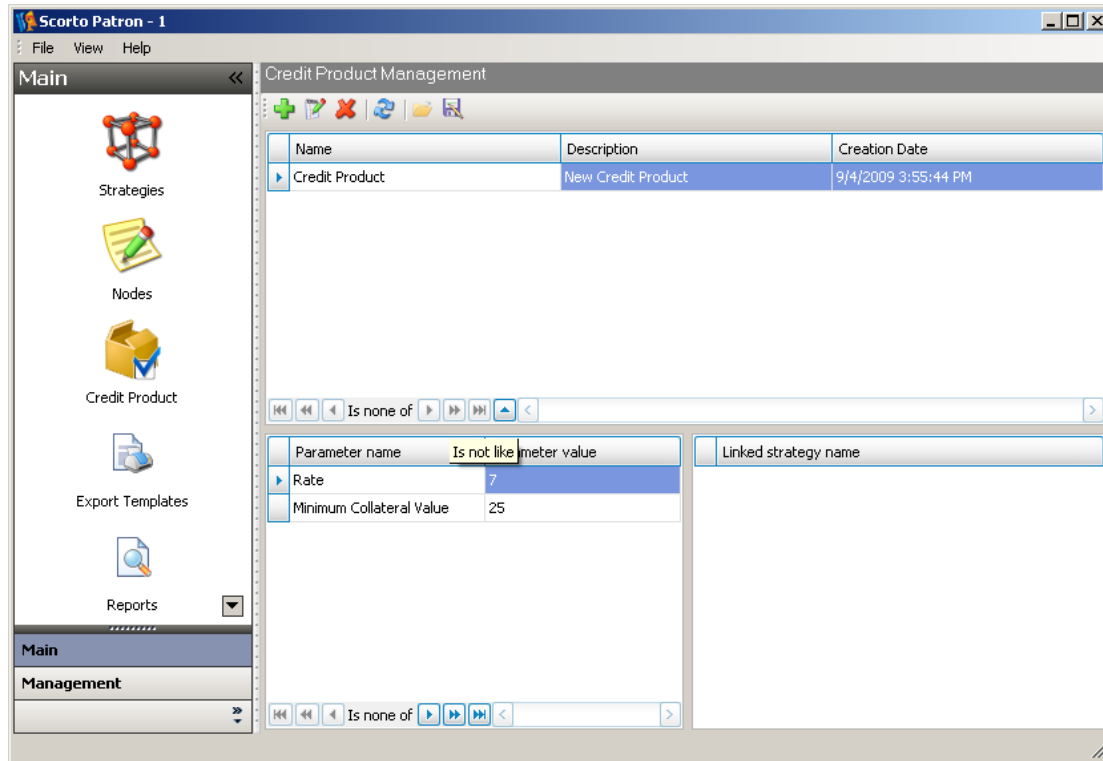



Figure 5-1: Table *Credit Product Management*

3. On the toolbar above the *Credit Product Management* table, click .

The list of existing credit products is successfully refreshed.

Adding New Credit Products

This section contains a description of the procedure for adding new credit products.

To add a new credit product:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.

2. In the **Main** area, select **Credit Products**.

The **Credit Product Management** table is displayed:

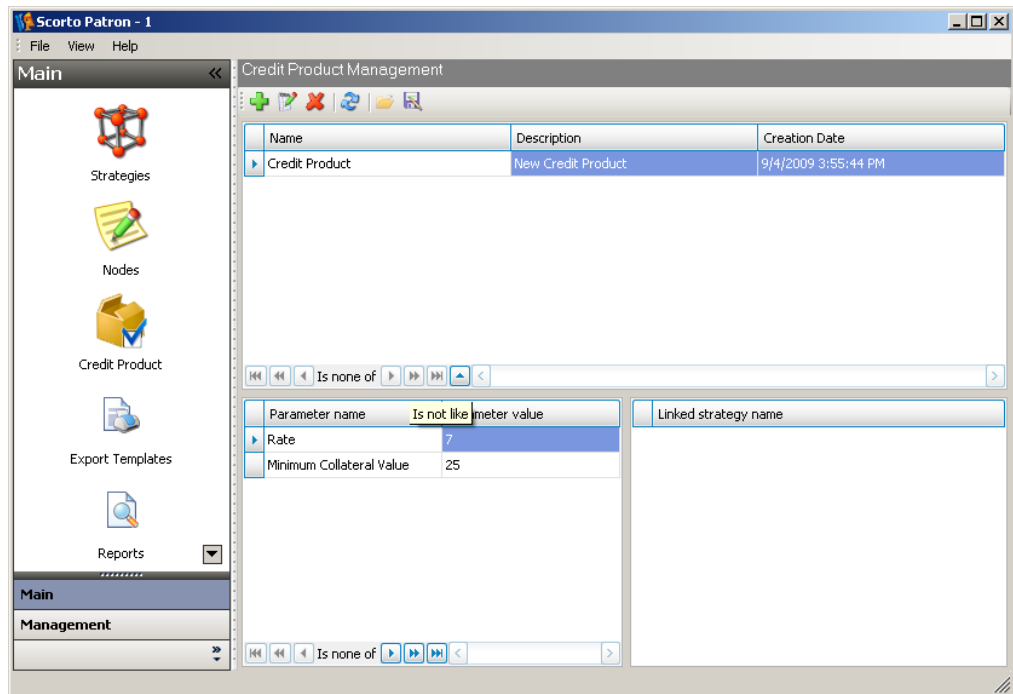



Figure 5-2: Table Credit Product Management

3. On the toolbar above the **Credit Product Management** table, click .

The *Add / Edit Credit Product* dialog box is displayed:


Name	Description	Value	Type
------	-------------	-------	------

Figure 5-3: Dialog box *Add / Edit Credit Product*

4. In the **Credit Product Name** box, enter the name of the credit product. Filling this box is mandatory.

Note:

The name of the credit product must be unique within the system and contain up to 128 Latin or Cyrillic characters and/or numbers (no special symbols can be used). The name of the credit product is not case-sensitive.

5. In the **Credit Product Description** box, enter a description of the credit product (up to 256 characters). Filling this box is optional.
6. In the **Credit Product Parameters** table, specify the parameters of the new credit product by clicking the  button.

The **Credit Product Parameters** table displays corresponding fields to be filled:

Name	Description	Value	Type
Rate		7	Numeric
Minimum Collateral Value		25	Numeric



Figure 5-4: Defining parameters for new credit product

7. In the **Name** box, enter the name of the parameter. Filling this box is mandatory.

Note:

The name of the credit product must be unique within the system and contain up to 256 Latin or Cyrillic characters and/or numbers and the space and underline symbols. The name of the parameter is not case-sensitive and must start with a letter.

8. In the **Description** box, enter a description of the parameter (up to 256 characters).
9. In the **Type** drop-down menu, select the type of the parameter (string/number).
10. In the **Value** box, enter the value of the parameter.
11. (Optional) If more than one parameter must be defined, repeat Steps 6-10 of this procedure.

12. (*Optional*) If it is necessary to delete the created parameter, click  on the left of the parameter that is to be deleted, and click the  button.

Before the parameter is deleted, the following confirmation is displayed:

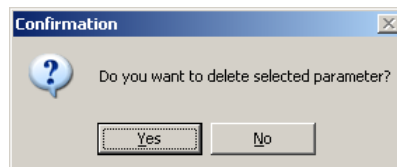


Figure 5-5: Confirmation of parameter deletion

13. (*Optional*) To delete the selected parameter, click **Yes**, or click **No**, in order not to delete the selected parameter.

The new credit product is successfully added:

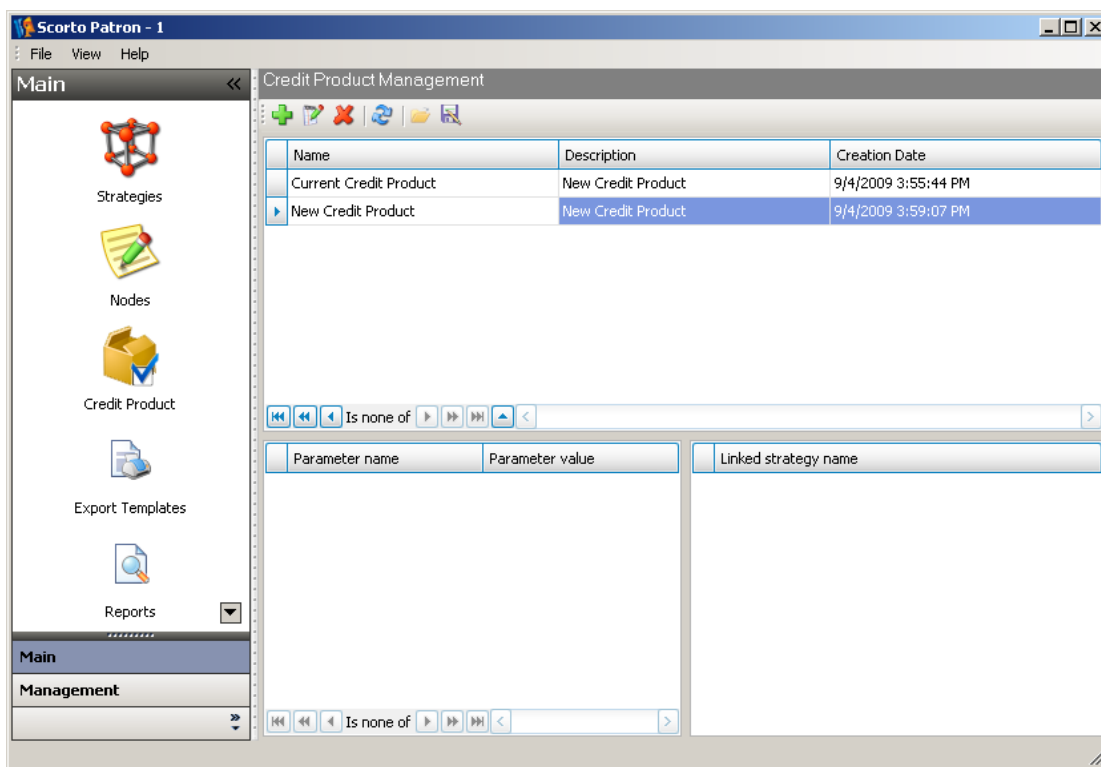


Figure 5-6: Credit product is added

Editing Credit Products

This section describes the procedure for editing credit products in the Scorto Patron application.

Note: *Credit products that are used in strategies cannot be edited. For such credit products, only their parameter values can be changed.*

To edit a credit product:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Credit Products**.

The **Credit Product Management** table is displayed:

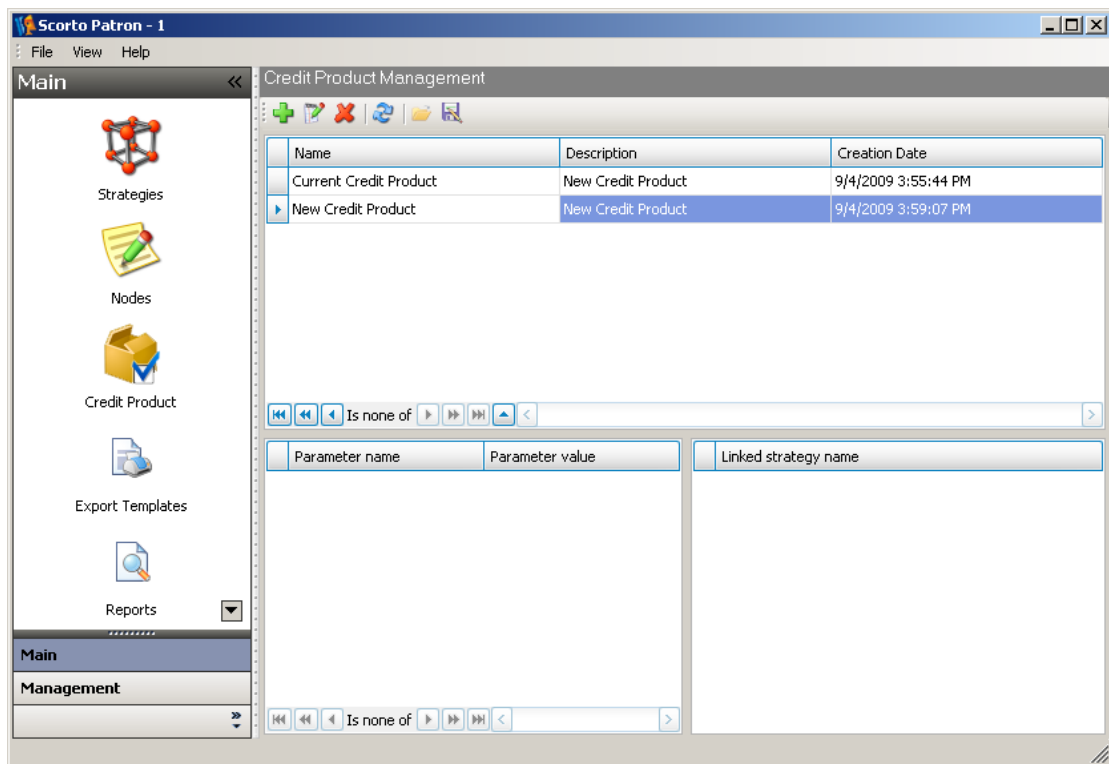


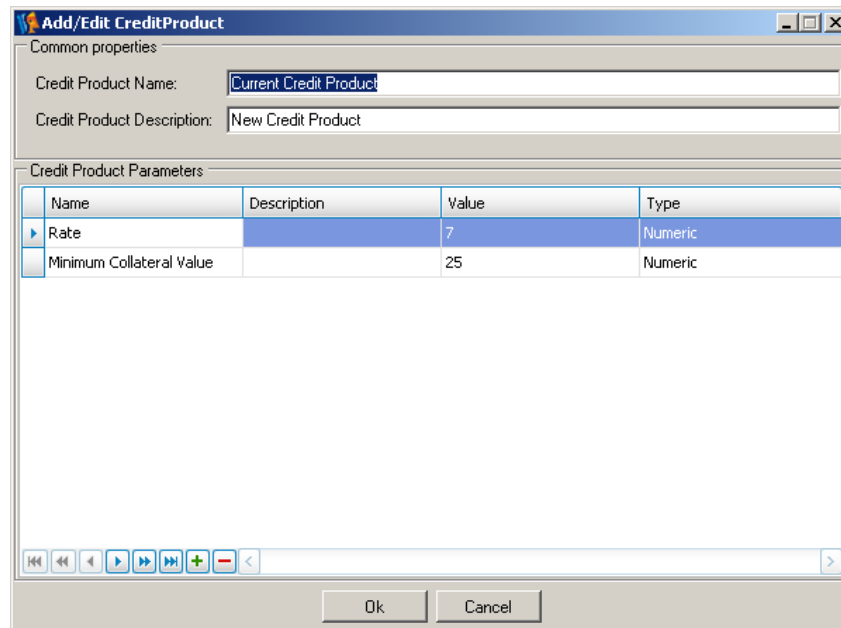


Figure 5-7: Table Credit Product Management

3. In the **Credit Product Management** table, using the  button, select the credit product that is to be edited.
4. On the toolbar above the **Credit Product Management** table, click .

The *Add / Edit Credit Product* dialog box is displayed:



Name	Description	Value	Type
Rate		7	Numeric
Minimum Collateral Value		25	Numeric

Figure 5-8: Dialog box *Add / Edit Credit Product*

5. Enter required changes, as described in Steps 4-13 of the procedure specified in Section *Adding New Credit Products*, page 40.
6. Click **OK**.

The selected credit product is successfully edited.

Deleting Credit Products

This section describes the procedure for deleting credit products in the Scorto Patron application.

Note: *Credit products that are used in strategies cannot be deleted.*

To delete a credit product:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Credit Products**.

The **Credit Product Management** table is displayed:

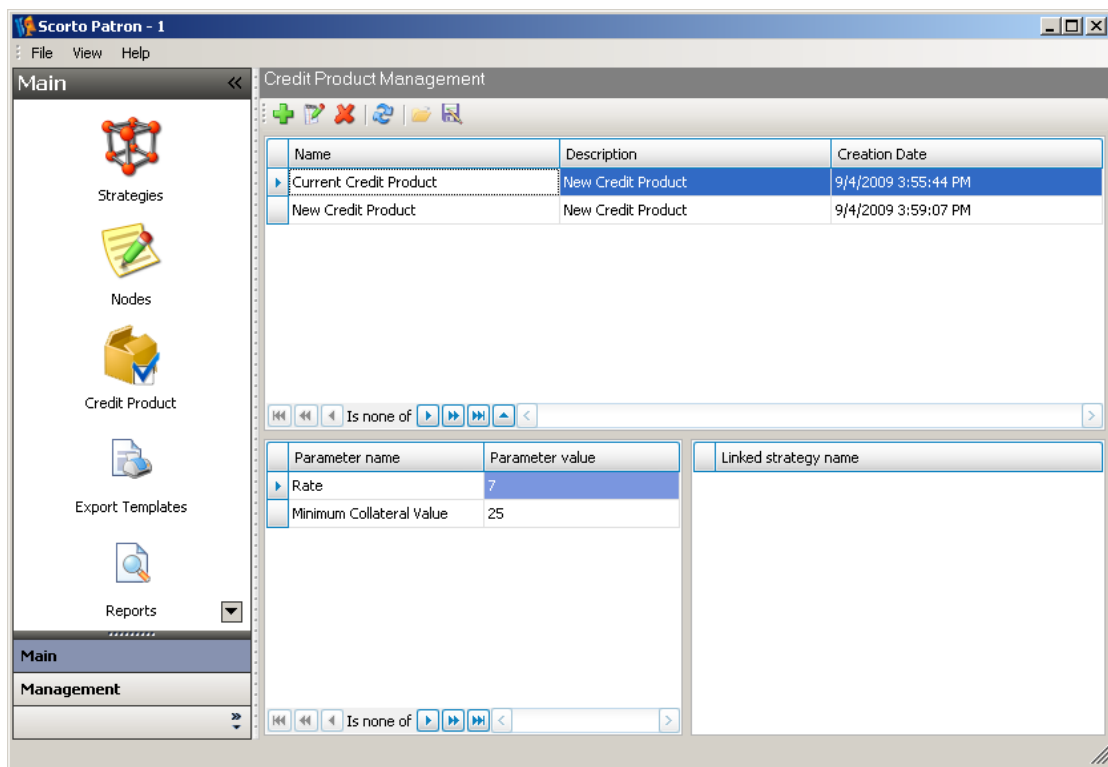




Figure 5-9: Table Credit Product Management

3. In the **Credit Product Management** table, using the  button, select the credit product that is to be deleted.

4. On the toolbar above the **Credit Product Management** table, click .

The following confirmation is displayed:

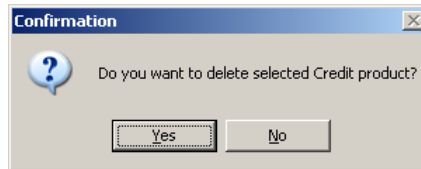


Figure 5-10: Confirmation of credit product deletion

5. Click **Yes** to delete the selected credit product, or click **No** in order not to delete the selected credit product.

The selected credit product is successfully deleted.

Uploading Credit Products

This section describes the procedure for uploading credit products in the Scorto Patron application.

To upload a credit product:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Credit Products**.

The **Credit Product Management** table is displayed:

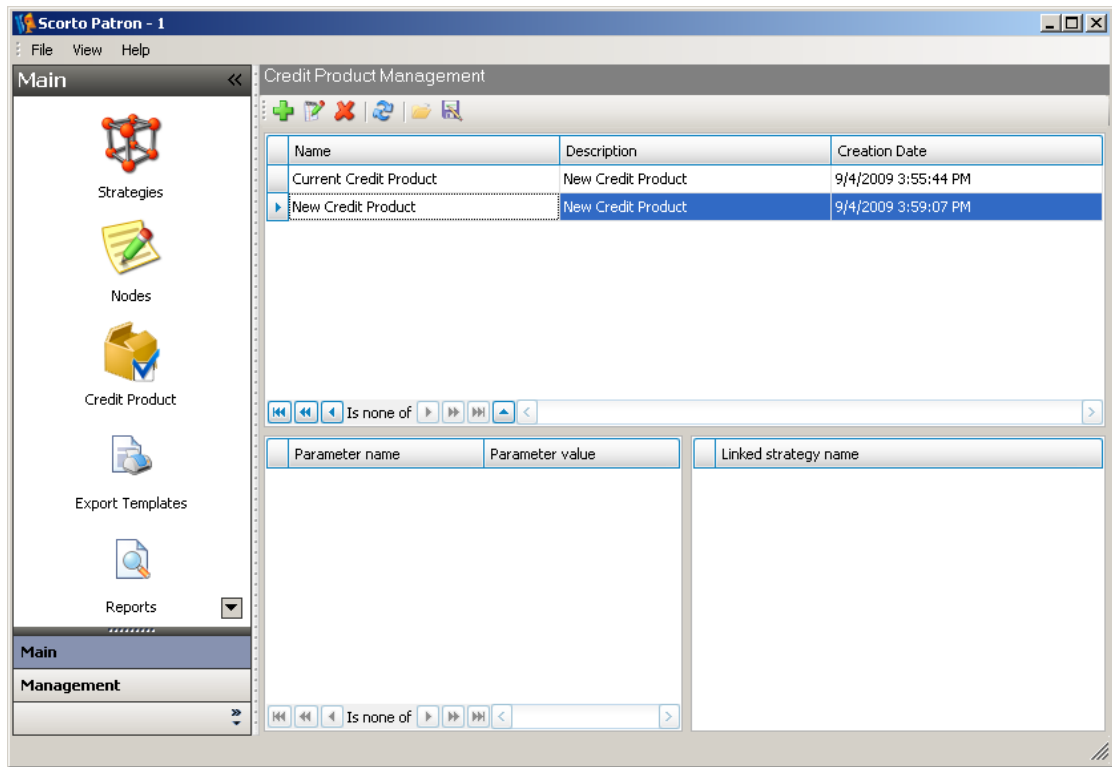



Figure 5-11: Table Credit Product Management

- On the toolbar above the **Credit Product Management** table, click .

The *Open* dialog box is displayed:

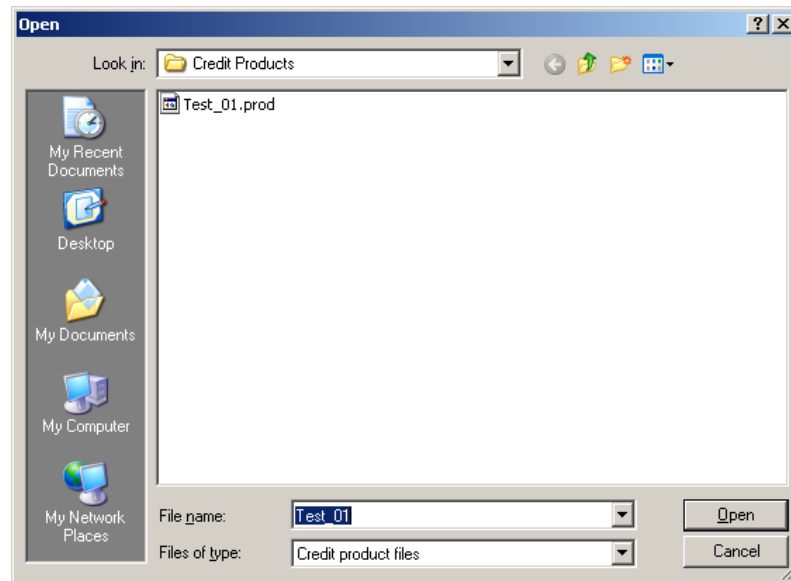


Figure 5-12: *Open* dialog box

4. Select the required credit product file and click **Open**.

The dialog box for creating/editing credit products is displayed:

Name	Description	Value	Type
p1	dscr_p1	23	String
p2	dscr_p2	234	String

Figure 5-13: Dialog box *Add / Edit Credit Product*

7. Enter required changes, as described in Steps 4-13 of the procedure specified in Section *Adding New Credit Products*, page 40.
8. Click **OK**.

The selected credit product is successfully uploaded.

Saving Credit Products

This section describes the procedure for saving credit products in the Scorto Patron application.

To save a credit product:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Credit Products**.

The **Credit Product Management** table is displayed:

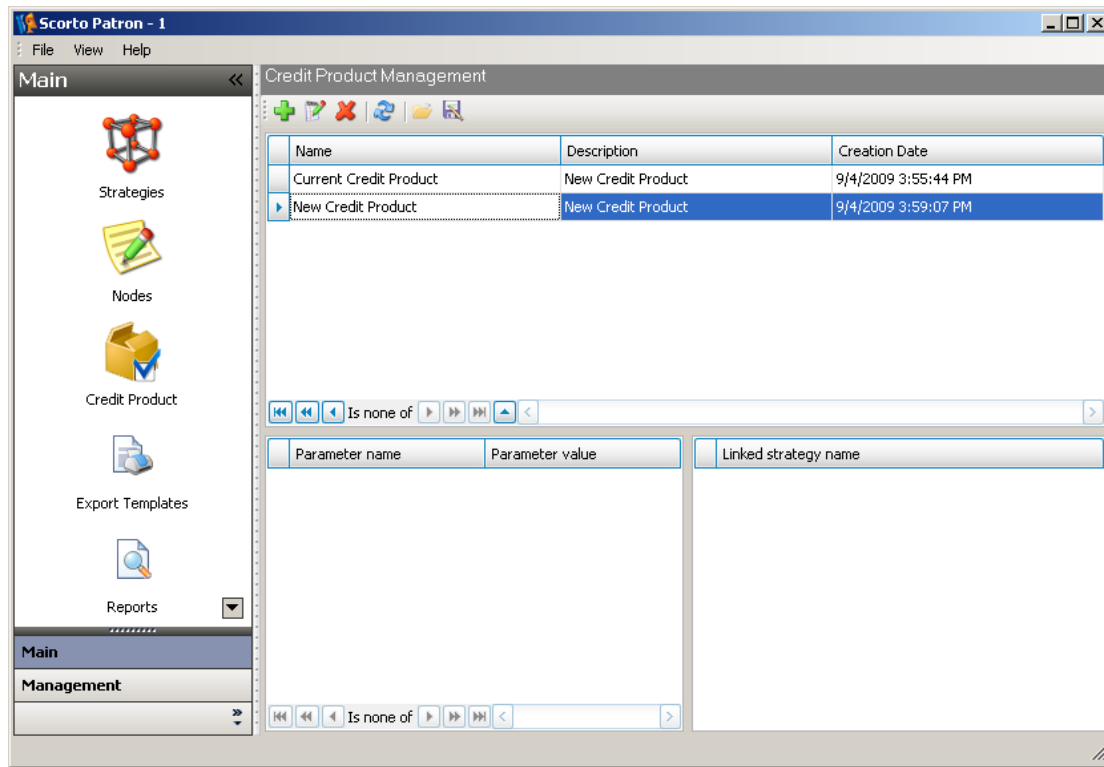



Figure 5-14: Table Credit Product Management

3. On the toolbar above the **Credit Product Management** table, click .

The *Save as* dialog box is displayed:

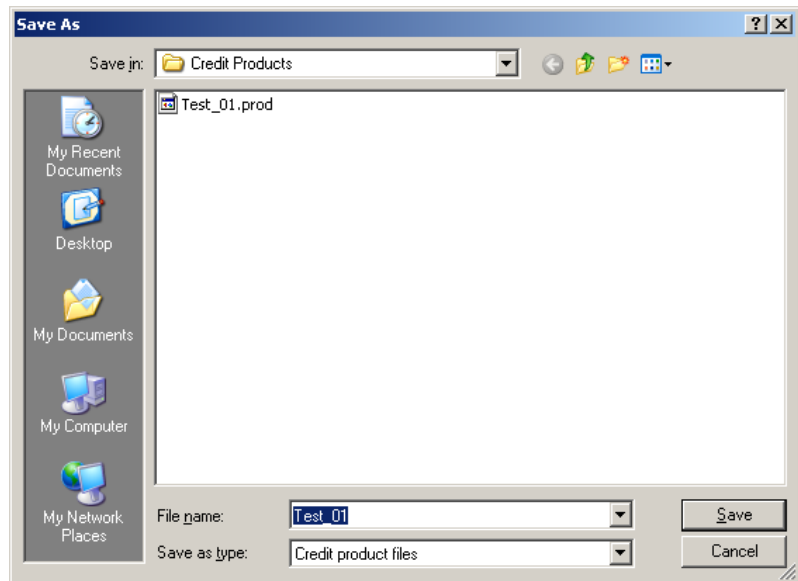


Figure 5-15: *Save as* dialog box

4. Enter the filename and the path where the credit product file must be saved.
5. Click **Save**.

The credit product is successfully saved.

6 EXPORT TEMPLATE MANAGEMENT

This chapter contains information on the management of export templates in Scorto Patron.

The Scorto Patron application enables the user to perform the following actions to manage export templates:

- refresh of the list of existing export templates;
- addition of new export templates;
- viewing of export template details;
- saving of templates locally;
- deletion of export templates.

The procedures for performing the above-listed actions are described in the sections that follow.

Overview

This chapter comprises the following sections:

Refreshing Export Template List, page 56, contains a description of the procedure for refreshing the list of existing export templates.

Adding New Export Templates, page 57, contains a description of the procedure for adding new export templates.

Viewing of Export Template Details, page 59, contains a description of the procedure for viewing the details of export templates.

Saving Export Template Locally, page 61, contains a description of the procedure for saving export templates locally.

Deletion of Export Templates, page 63, contains a description of the procedure for deleting export templates.

Refreshing Export Template List

This section describes the procedure for refreshing the list of available export templates.

To refresh the list of export templates:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Export Templates**.

The **Export Templates** table is displayed:

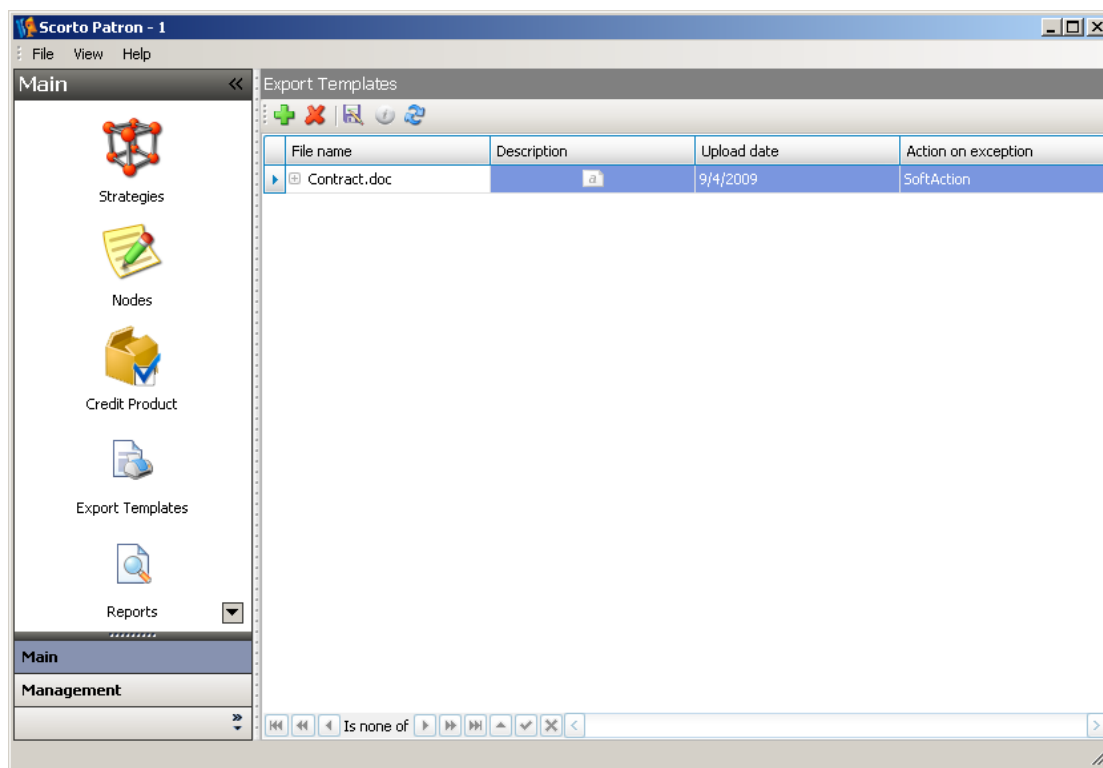


Figure 6-1: Table Export templates

3. Click .

The list of available export templates is successfully refreshed.

Adding New Export Templates

This section contains a description of the procedure for adding new export templates.

To add a new export template:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Export Templates**.

The **Export Templates** table is displayed:

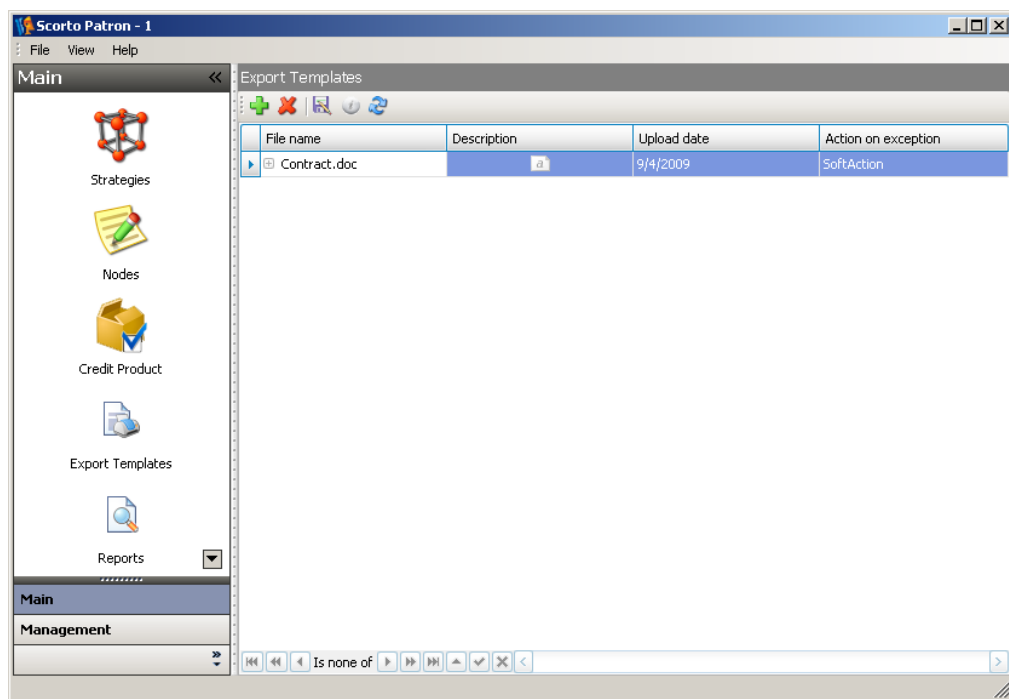


Figure 6-2: Table Export templates

3. Click .

The *Open* dialog box is displayed:

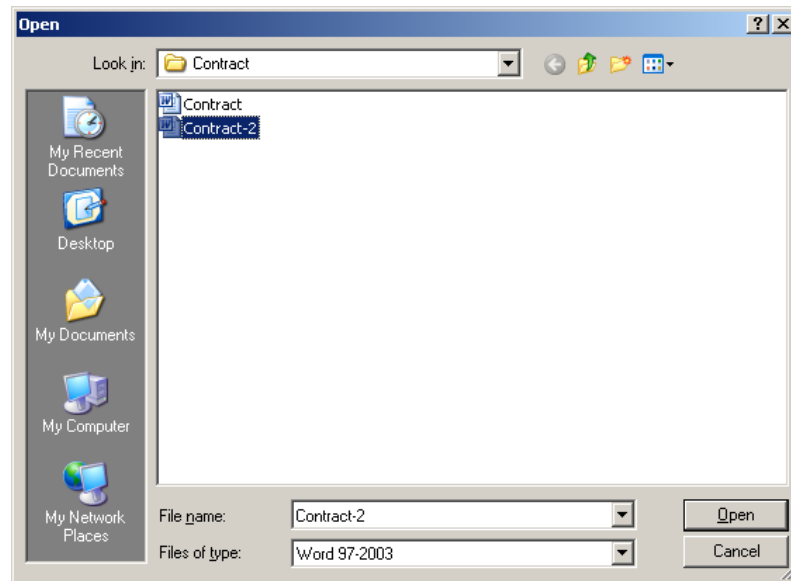


Figure 6-3: Dialog box *Open*

4. In the *Open* dialog box, select the export template file and click **Open**.

The selected export template is displayed in the **Export Templates** table:

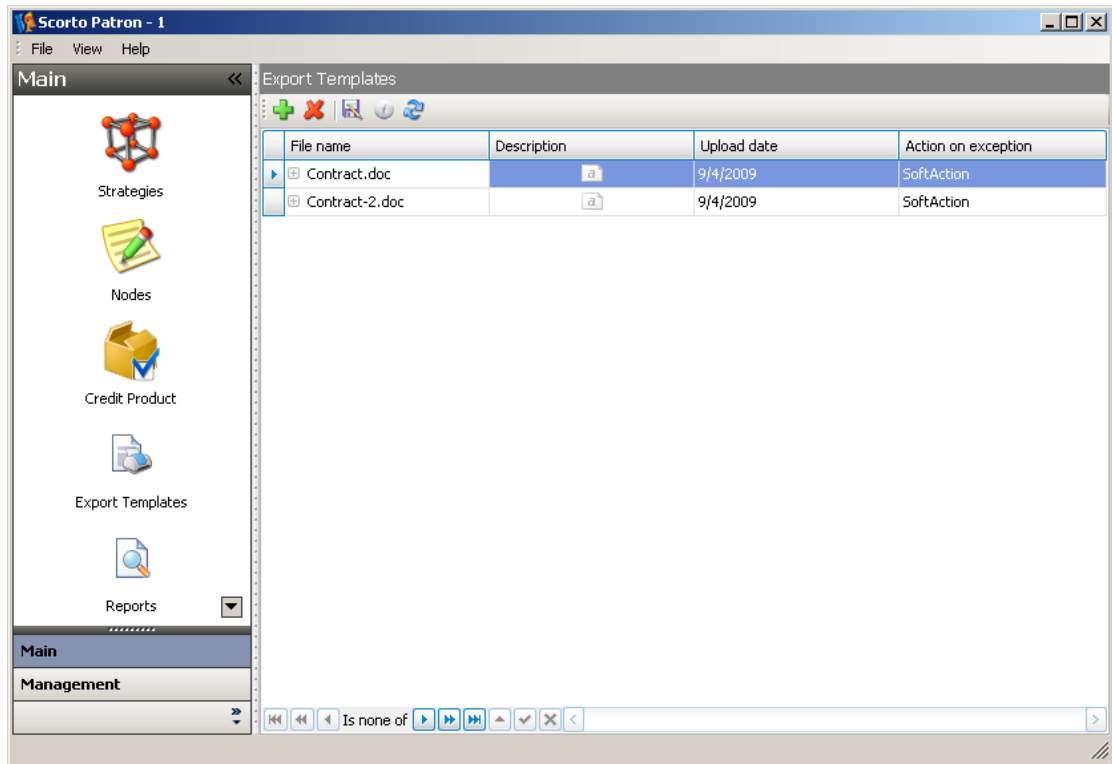


Figure 6-4: Export template added

5. (*Optional*) In the **Description** column, enter a description of the export template.
6. (*Optional*) In the **Action on exception** column, select the required action if a printing error occurs.

The new export template is successfully added and uploaded to the system's database.

Viewing of Export Template Details

This section contains a description of the procedure for viewing the details of export templates.

To view the details of an export template:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Export Templates**.

The **Export Templates** table is displayed:

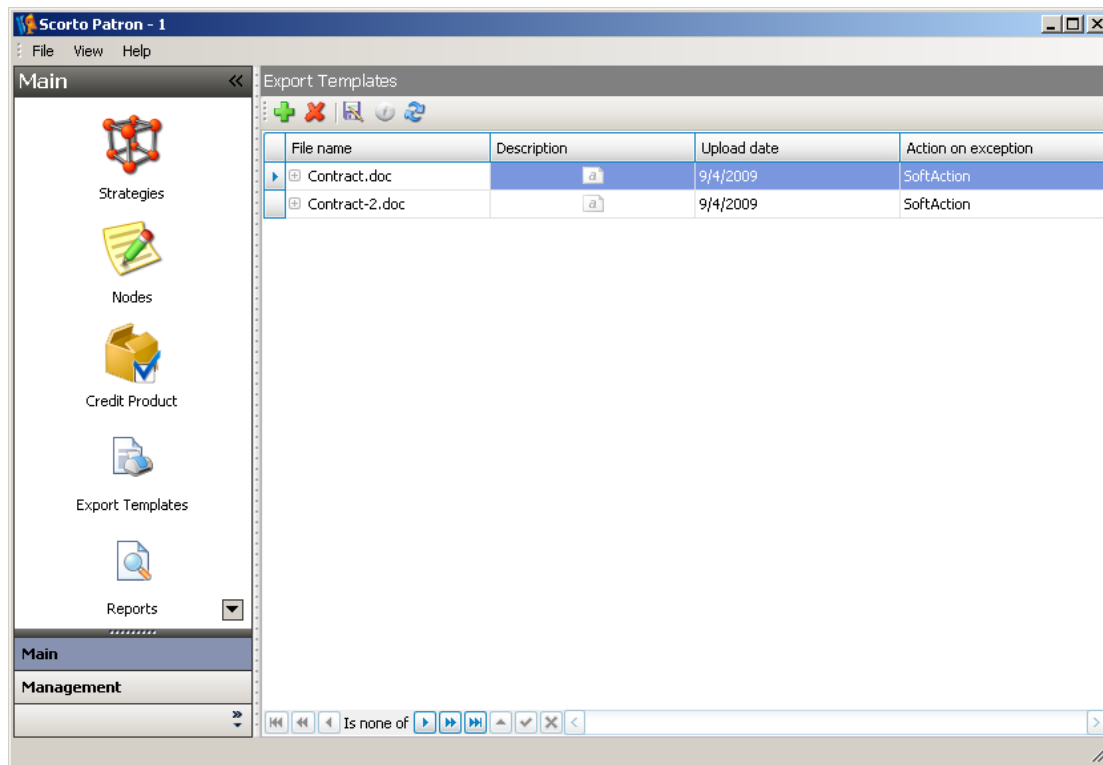


Figure 6-5: Table Export templates

3. Select the export template, whose details it is necessary to view.
4. Click

The *Detailed template information* dialog box is displayed:

Detailed template information

Common information

File name: Contract.doc

Description:

Upload date: 9/4/2009 3:45 PM

User: 1

Action on exception: SoftAction

Used in nodes

Used in strategies

Close

Figure 6-6: Dialog box *Detailed template information*

5. After the information has been viewed, click **Close**.

Saving Export Template Locally

This section contains a description of the procedure for viewing the details of export templates.

To view the details of an export template:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Export Templates**.

The **Export Templates** table is displayed:

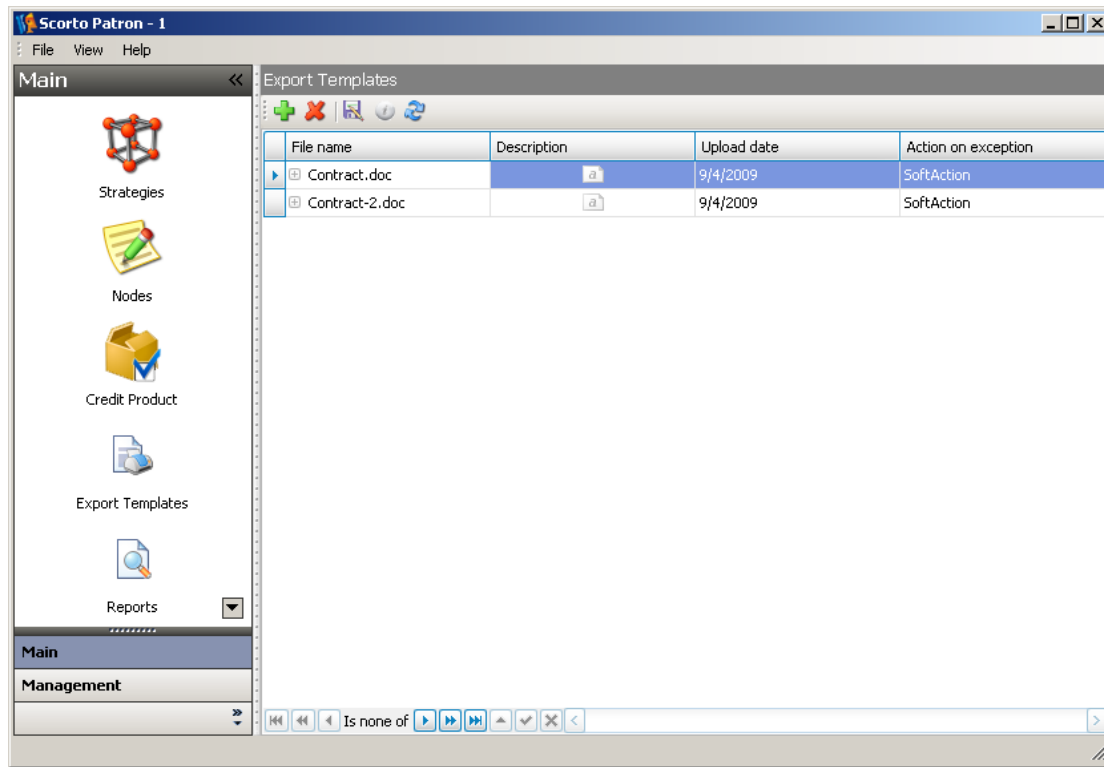



Figure 6-7: Table Export templates

3. Select the export template, whose details it is necessary to view.
4. Click .

The *Save as* dialog box is displayed:

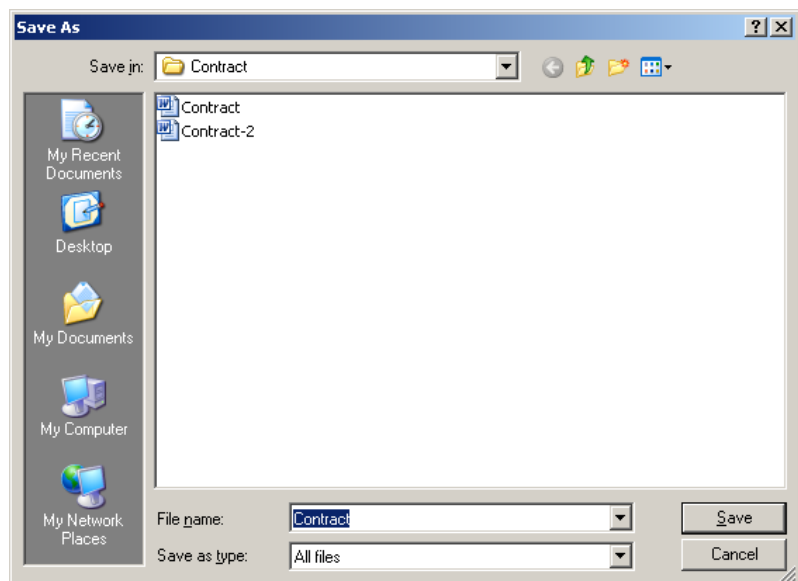


Figure 6-8: Dialog box *Save as*

5. Enter the filename and the path where the export template file must be saved and click **Save**.

The export template is successfully saved locally.

Deletion of Export Templates

This section contains a description of the procedure for deleting export templates.

To delete an export template:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Export Templates**.

The **Export Templates** table is displayed:

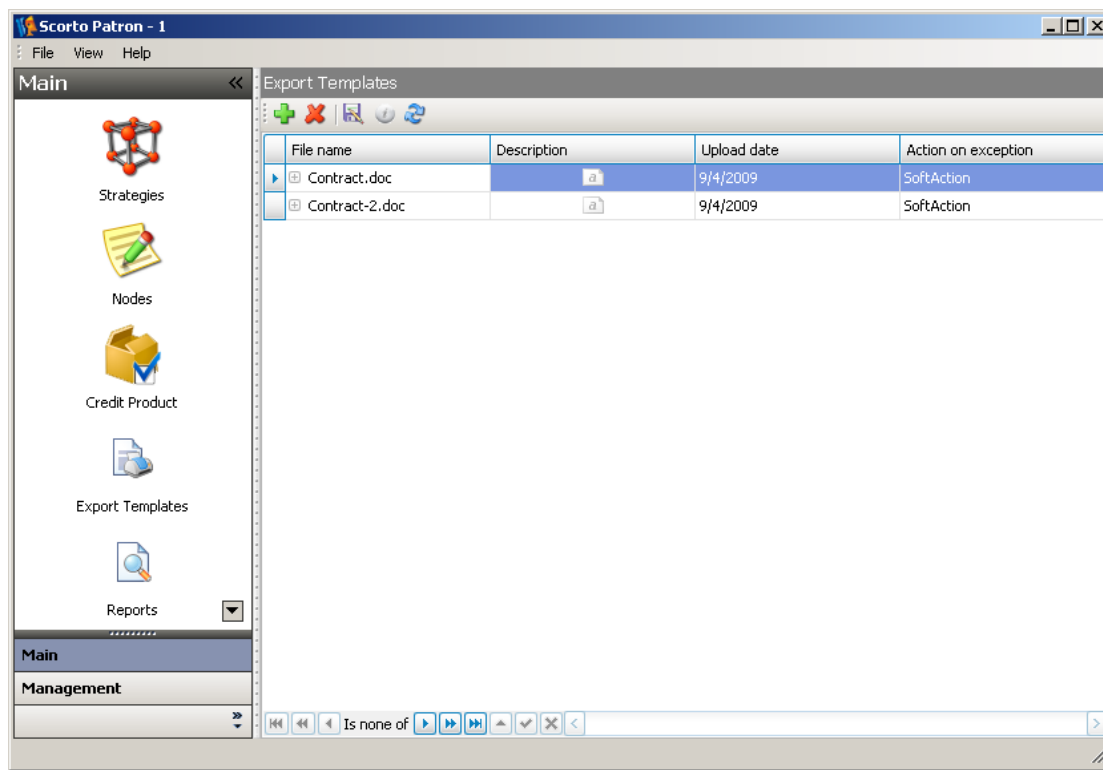


Figure 6-9: Table Export templates

3. Select the export template to be deleted.

4. Click

The following confirmation request is displayed:

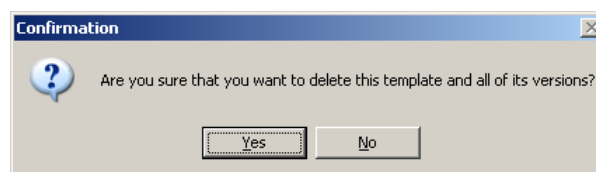


Figure 6-10: Confirmation request

5. Click **Yes**.

The selected export template is successfully deleted.

Export Template Version Control Mechanism

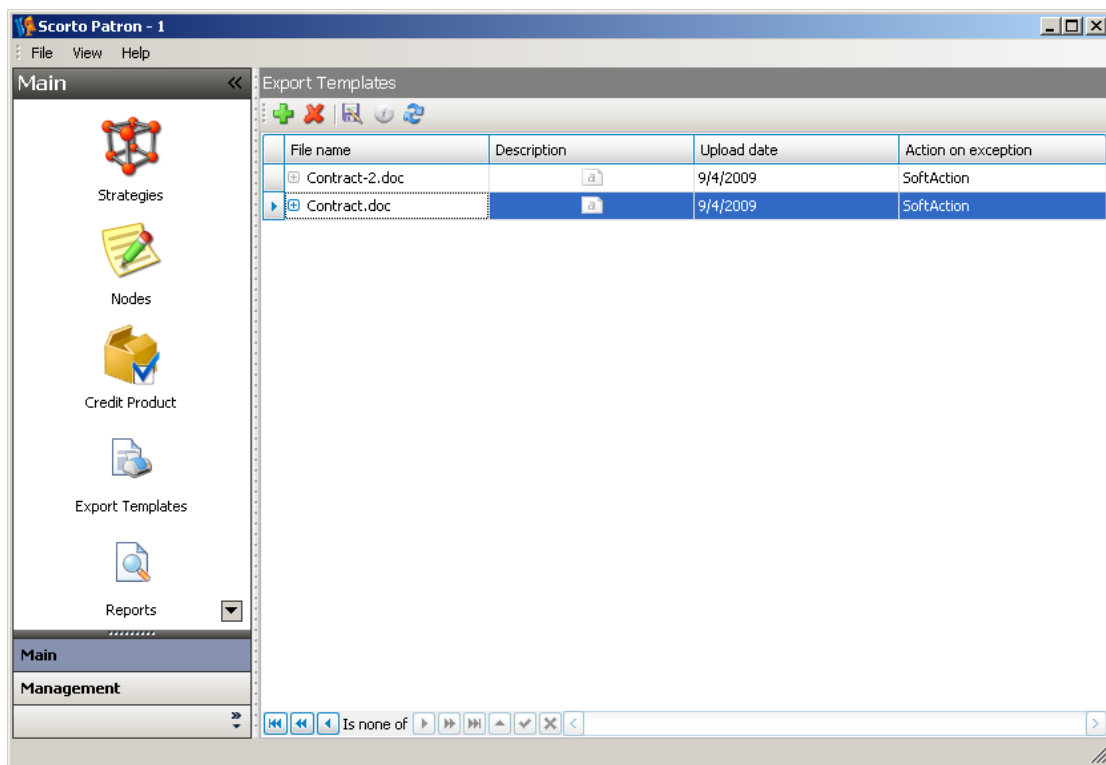
The Scorto Patron application has a mechanism for export template version control.

The process of editing and repeat adding of export templates is logged for each modified template.

To view the changes history:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Export Templates**.

The **Export Templates** table is displayed:




The screenshot shows the Scorto Patron application window. On the left is a 'Main' sidebar with icons for Strategies, Nodes, Credit Product, Export Templates, and Reports. The 'Export Templates' icon is selected. The main area displays a table with the following data:

File name	Description	Upload date	Action on exception
Contract-2.doc		9/4/2009	SoftAction
Contract.doc		9/4/2009	SoftAction

At the bottom of the window, there is a status bar with navigation controls and the text 'Is none of'.

Figure 6-11: Table Export templates

6. Select the export template.
7. Click .

The history of changes of the select export template is displayed:

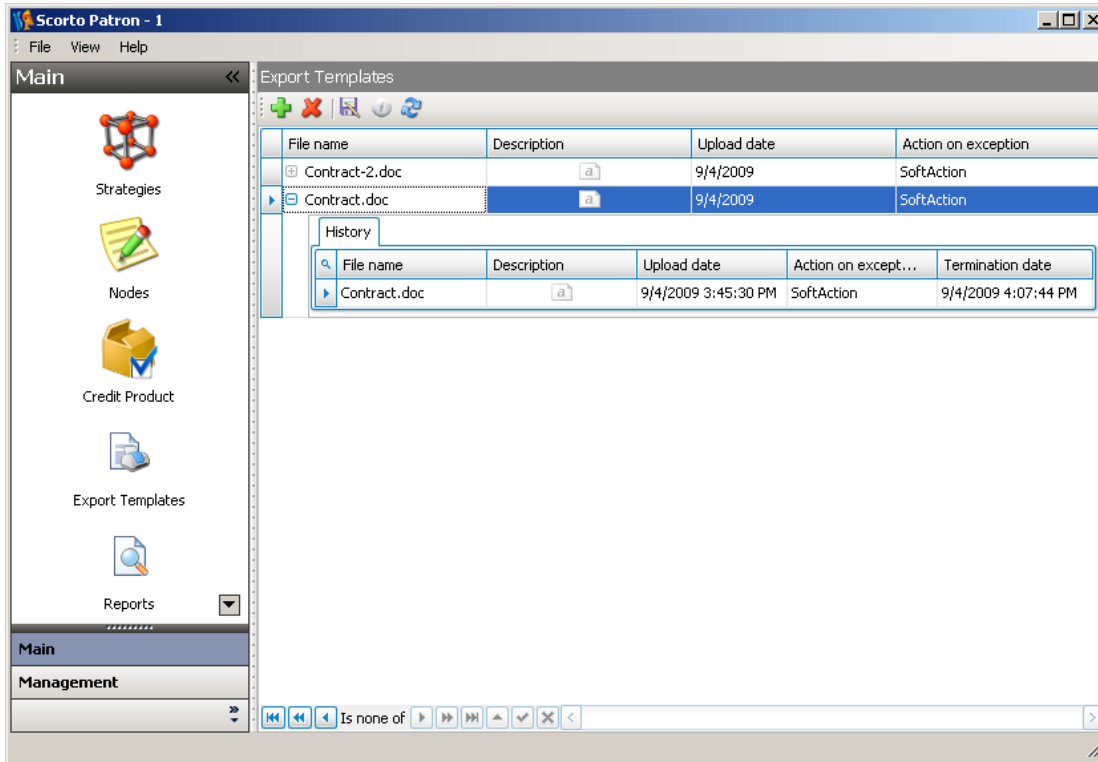


Figure 6-12: History of changes in export template

The previous versions of the export template can be saved, see *Saving Export Template Locally*, page 61.

7 MANAGEMENT OF BEHAVIORAL STRATEGIES

This chapter describes the procedure for starting and deleting behavioral strategies manually as well as using the version control mechanism.

Overview

This chapter contains the following sections:

Manual Start of Behavioral Strategies, page 67, explains how to perform the manual start of behavioral strategies.

Deleting Behavioral Strategies, page 69, explains how to delete behavioral strategies

Behavioral Strategy Version Control Mechanism, page 70, explains how to use the mechanism of version control for behavioral strategies.

Manual Start of Behavioral Strategies

To start a behavioral strategy manually:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Behavioral Strategies**.

The **Behavioral Strategies** table is displayed:

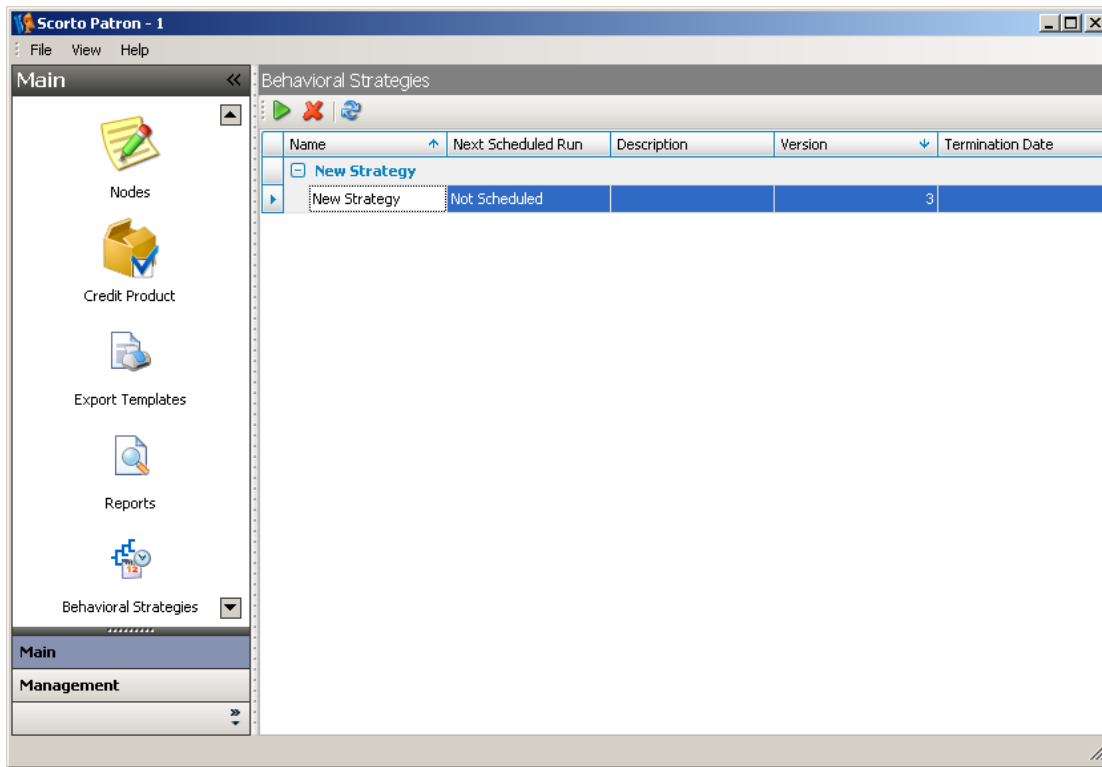


Figure 7-1: Behavioral Strategies

To refresh the list of available behavioral strategies, click Refresh.

3. In the **Behavioral strategies** area, select the strategy to be started.
4. Click Run Strategy.

The information box for starting the strategy is displayed:

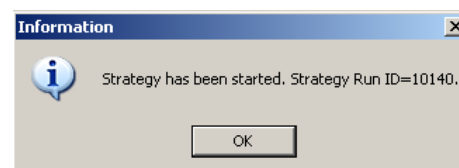


Figure 7-2: Information box for starting strategies

5. Click **OK**.

The behavioral strategy is successfully started.

Deleting Behavioral Strategies

This section contains a description of the procedure for deleting behavioral strategies.

To delete a behavioral strategy:

1. Log on to Scorto Patron. For more information on how to log on to the application, see Section *Logging On to Application*, page 4.
2. In the **Main** area, select **Behavioral Strategies**.

The **Behavioral Strategies** table is displayed:

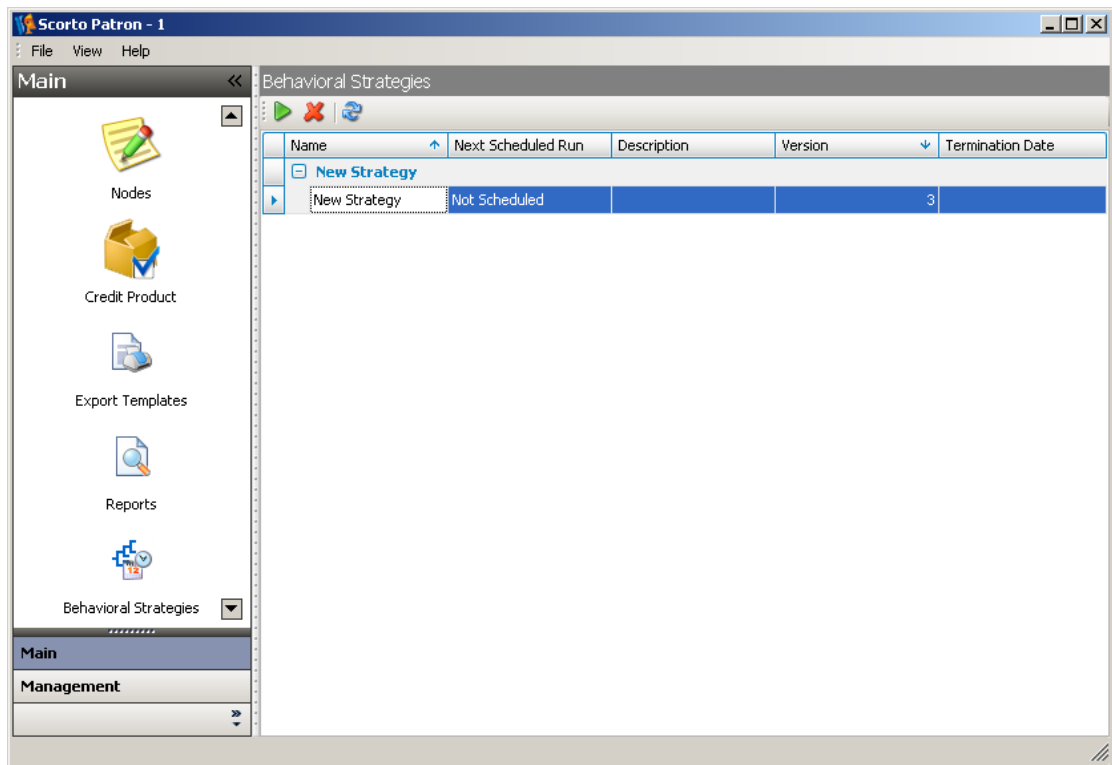


Figure 7-3: Behavioral Strategies

3. In the **Behavioral Strategies** area, select the strategy that needs deleting.

4. Click .

The following confirmation request is displayed:

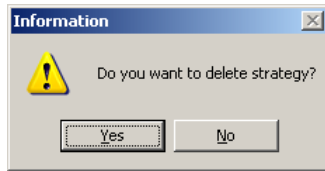


Figure 7-4: Confirmation request

5. Click **Yes**.

The selected strategy is successfully deleted.

Behavioral Strategy Version Control Mechanism

The Scorto Patron application has a mechanism for behavioral strategy version control.

If one of the strategies displayed in the **Behavioral Strategies** table was changed, the application displays the history of its changes.

To view the changes history:

1. Log on to Scorto Patron. For more information on how to log on the application, see Section *Logging On to Application*, page 4.
2. In the **Main** area, select **Behavioral Strategies**.

The **Behavioral Strategies** table is displayed:

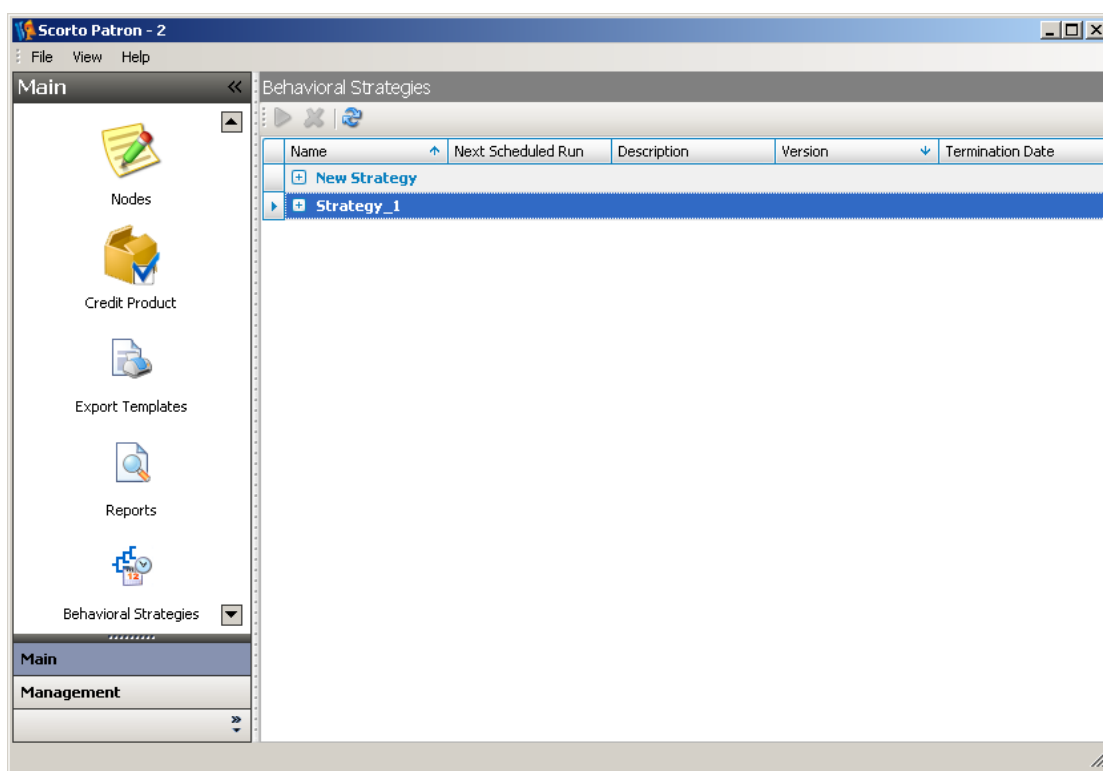



Figure 7-5: Behavioral Strategies

3. In the **Behavioral Strategies** table, select the required strategy.
4. In the **Name** column of the **Behavioral Strategies** table, click .

The history of changes in the strategy is displayed:

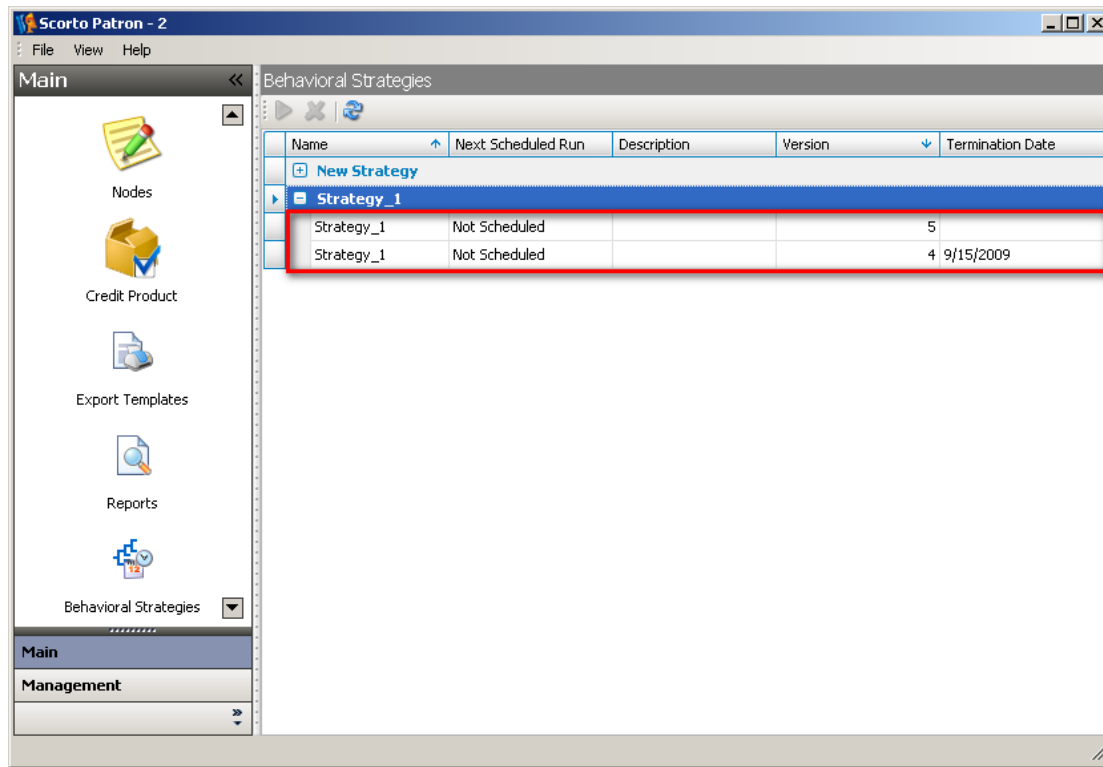


Figure 7-6: History of changes in strategy

8 REPORTS ON BEHAVIORAL STRATEGIES PERFORMANCE

This chapter describes the procedure for viewing the results of behavioral strategies performance, that is, reports.

Overview

This chapter comprises the following sections:

Viewing the List of Reports, page 73, contains a description of the procedure for viewing the list of reports.

Searching for Reports, page 76, contains a description of the procedure for searching for reports.

Downloading Reports to Local Machine, page 76, contains a description of the procedure for downloading reports to the local machine.

Viewing the List of Reports

To view the list of reports:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Reports**.

The **Behavioral Reports** table is displayed:

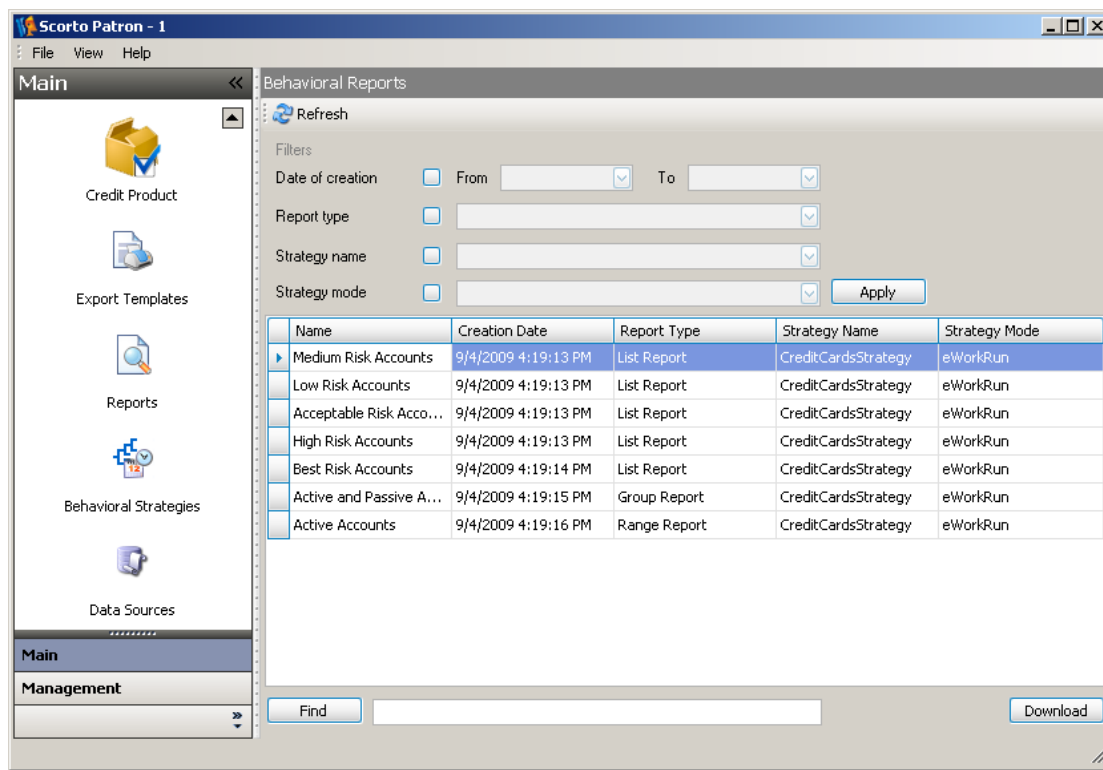


Figure 8-1: Behavioral Reports

To display a list of reports selected by set parameters, use **Filters**.

The following parameters are available for filtering the list of displayed reports:

- Report creation date;
- Report type;
- Behavioral strategy name;
- Behavioral strategy execution mode.

Filters

Date of creation ☐ From To

Report type ☐

Strategy name ☐

Strategy mode ☐

Figure 8-2: Filters

Setting Filters

To set a filter:

1. Activate the filtering mode for one or more filters using ☒.
2. Set filtering parameters.
3. Click .

The filtered list of reports is displayed:

Scortto Patron - 1

File View Help

Main

Behavioral Reports

Refresh

Filters

Date of creation ☐ From To

Report type ☒ List Report

Strategy name ☐

Strategy mode ☐

Name	Creation Date	Report Type	Strategy Name	Strategy Mode
Medium Risk Accounts	9/4/2009 4:19:13 PM	List Report	CreditCardsStrategy	eWorkRun
Low Risk Accounts	9/4/2009 4:19:13 PM	List Report	CreditCardsStrategy	eWorkRun
Acceptable Risk Acco...	9/4/2009 4:19:13 PM	List Report	CreditCardsStrategy	eWorkRun
High Risk Accounts	9/4/2009 4:19:13 PM	List Report	CreditCardsStrategy	eWorkRun
Best Risk Accounts	9/4/2009 4:19:14 PM	List Report	CreditCardsStrategy	eWorkRun

Find

Figure 8-3: Filtered list of reports

Searching for Reports

This section contains a description of the procedure for searching for the required report.

To search for a report:

1. Enter the name of the report.
2. Click .

The found report is displayed in the **Behavioral Reports** table:

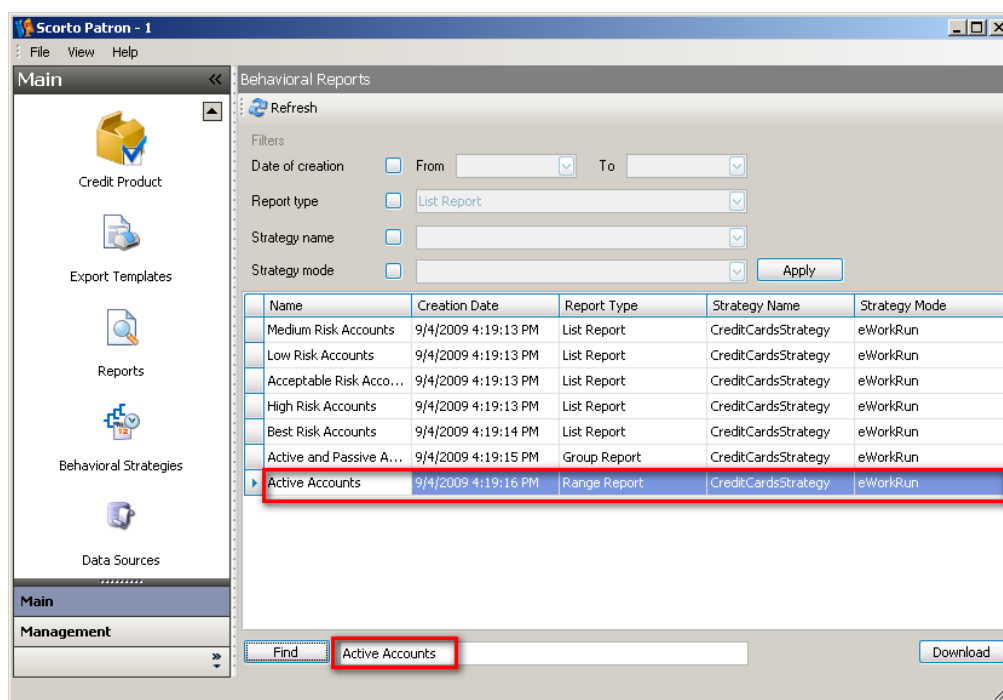


Figure 8-4: Found report

Downloading Reports to Local Machine

This section contains a description of the procedure for downloading the required report on the local machine.

The reports listed in the table of behavioral reports can be downloaded and saved locally in the CSV format.

To download a report:

1. In the **Behavioral Reports** table, click in the row that contains information on the required report.
2. Click [Download](#).

The following download confirmation is displayed:

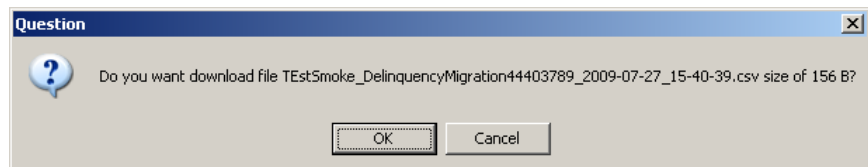


Figure 8-5: Download confirmation

3. Click **OK**.

The *Save as* dialog box is displayed:

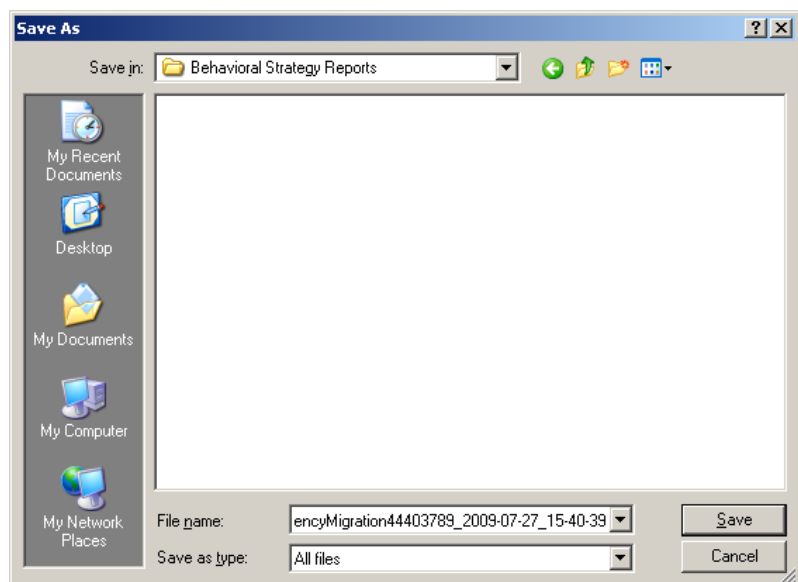


Figure 8-6: Save as dialog box

4. Specify where the report file is to be saved.
5. Click **Save**.

The report file is downloaded successfully.

9 DATA SOURCE MANAGEMENT

This chapter contains information on the procedures for managing data sources of behavioral strategies in the Scorto Patron application.

The Scorto Patron application enables the user to perform the following actions to manage data sources:

- refresh the list of available data sources;
- add new data sources;
- view details of data sources;
- delete data sources.

The procedures for performing the above-listed actions are described in the sections that follow.

Overview

This chapter comprises the following sections:

Refreshing Data Source List, page 79, contains a description of the procedure for updating the list of data sources.

Adding New Data Sources, page 80, contains a description of the procedure for adding new data sources.

Viewing Details of Data Sources, page 84, contains a description of the procedure for viewing the details of data sources.

Changing Parameters of Data Sources, page 86, contains a description of the procedure for changing the parameters of a data source.

Deleting Data Sources, page 89, contains a description of the procedure for deleting data sources.

Refreshing Data Source List

This section describes the procedure for refreshing the list of available data sources.

To refresh the list of data sources:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Data Sources**.

The **Data Sources** table is displayed:

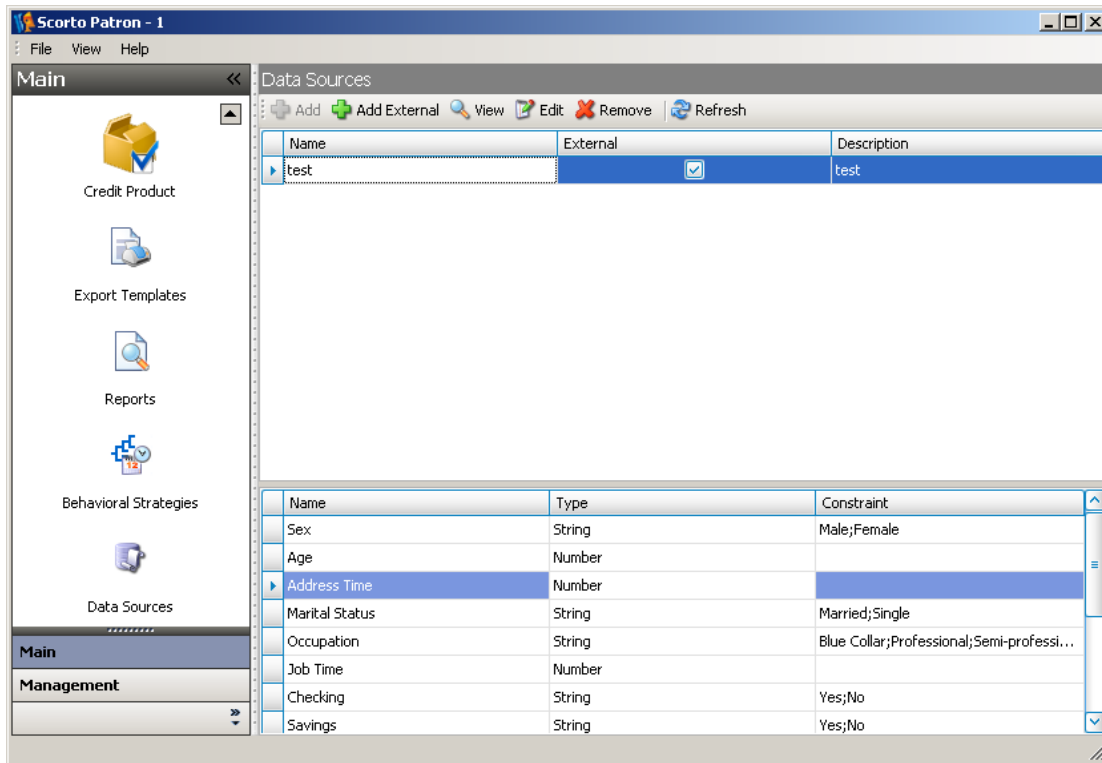


Figure 9-1: Table *Data Sources*

3. Click .

The list of available data sources is successfully refreshed.

Adding New Data Sources

This section contains a description of the procedure for adding new data sources.

To add a new data source:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Data Sources**.

The **Data Sources** table is displayed:

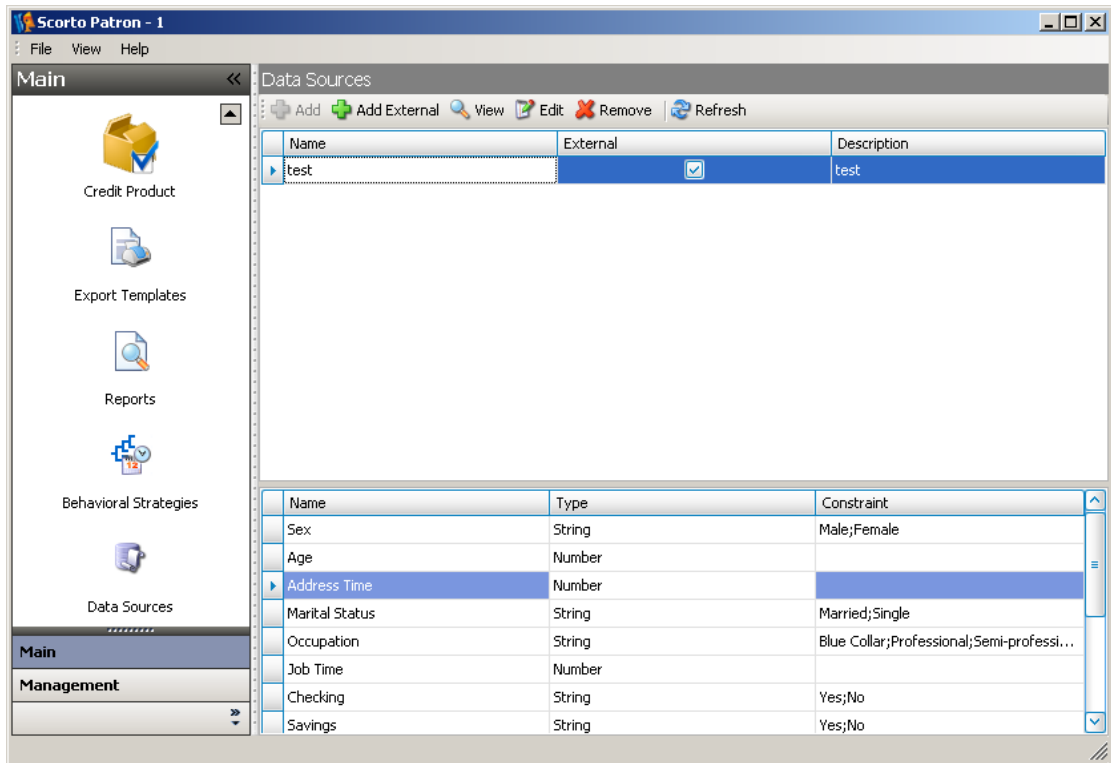


Figure 9-2: Data Sources

3. Click  Add External .

The *External Data Source* dialog box is displayed:

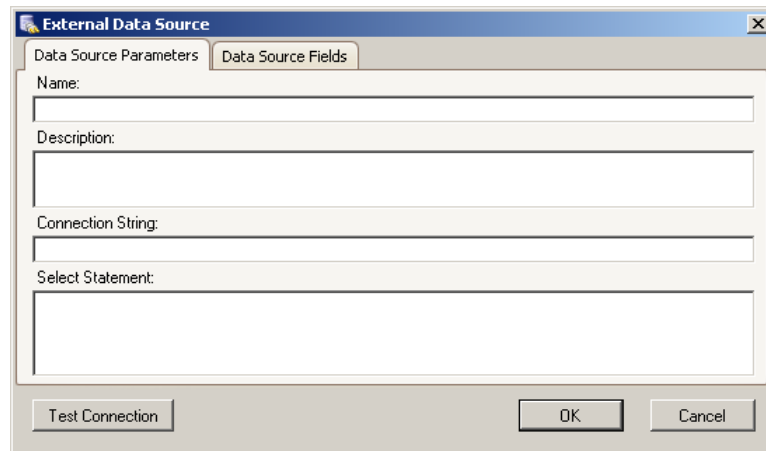



Figure 9-3: The *External Data Source* dialog box


4. In the **Name** box, enter the name of the data source.
5. If required, in the **Description** box, enter a description of the data source.
6. In the **Connection String** box, enter the connection string, specifying the format and location of data storage.
7. In the **Select Statement** box, enter an expression for data selection.
8. Click .

The entered parameters of the data source are being validated.

If the parameters of the data source are set incorrectly, the following message is displayed:



Figure 9-4: Connection error message

9. Modify the entered parameters of the data source and click again .

If connection is successful, the following confirmation is displayed:

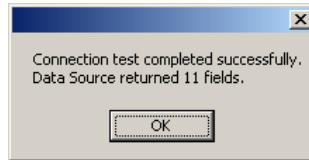


Figure 9-5: Connection successful message

10. Select the **Data Source Fields** tab.

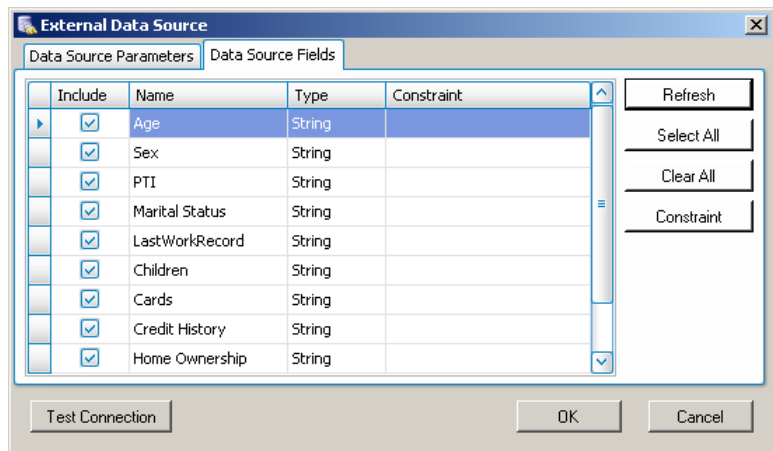


Figure 9-6: Data source fields

11. Check all the required fields of the data source (the **Refresh** button allows refreshing the list of the fields of the data source, the **Select all** button allows selecting all the fields of the data source and the **Clear all** button allows removing selection for all the fields.)
12. To process a text field of the data source as a variable of the String Column type, select this text field and click **Constraint**.

The constraints are displayed for the selected field:

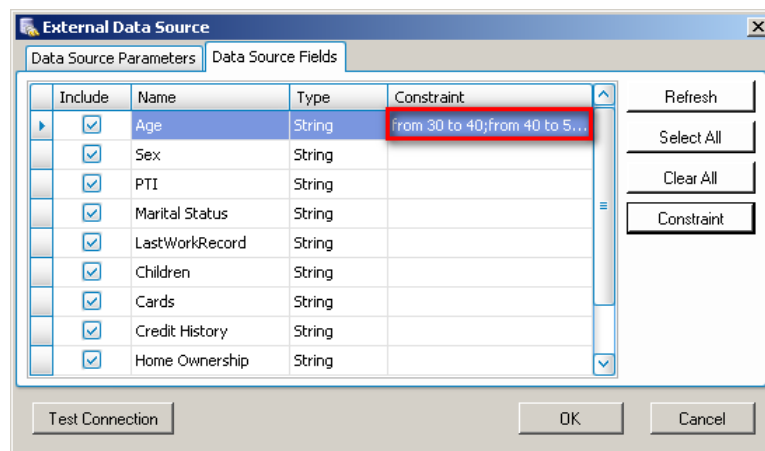


Figure 9-7: Constraints of selected field

13. Click **OK**.

The new data source is successfully added.

Viewing Details of Data Sources

This section contains a description of the procedure for viewing the details of data sources.

To view details of a data source:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Data Sources**.

The **Data Sources** table is displayed:

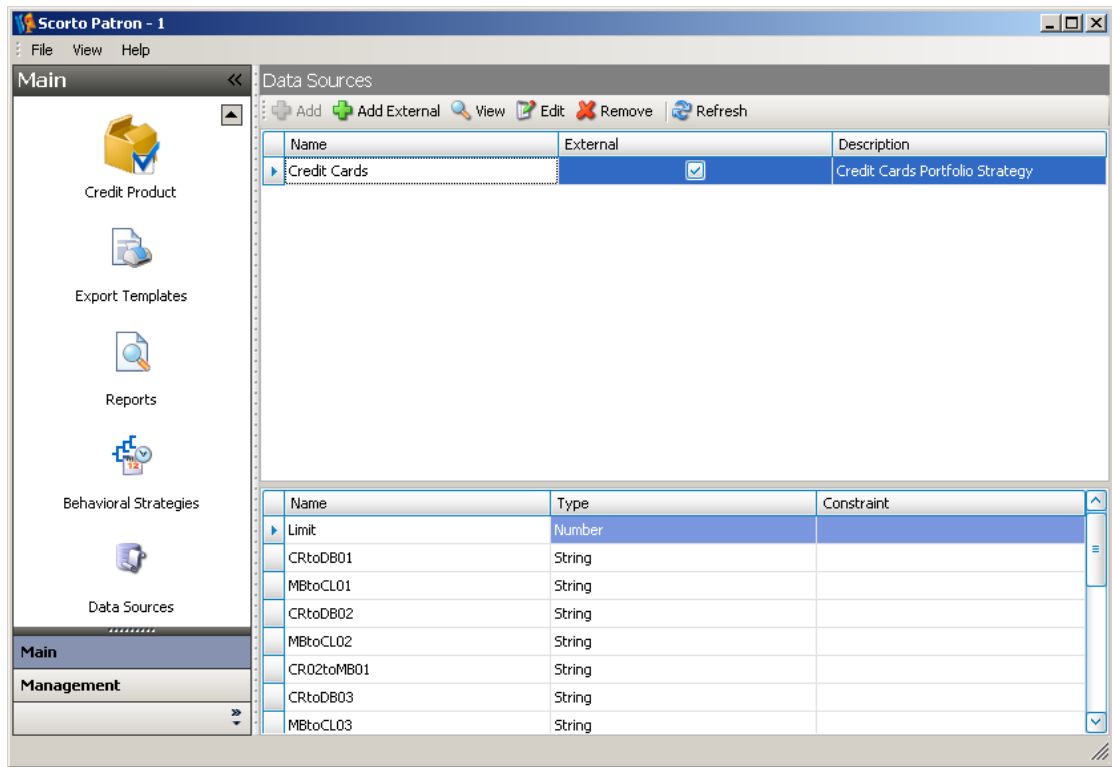



Figure 9-8: Table Data Sources

3. Select the required data source.
4. Click .

The *External Data Source* dialog box is displayed:

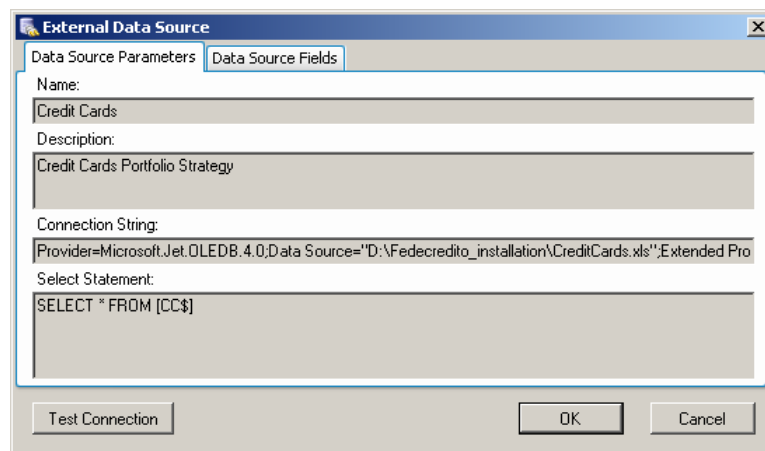


Figure 9-9: The *External Data Source* dialog box

6. After the information has been viewed, click **OK**.

Changing Parameters of Data Sources

This section contains a description of the procedure for changing the parameters of a data source.

To change the parameters of a data source:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Data Sources**.

The **Data Sources** table is displayed:

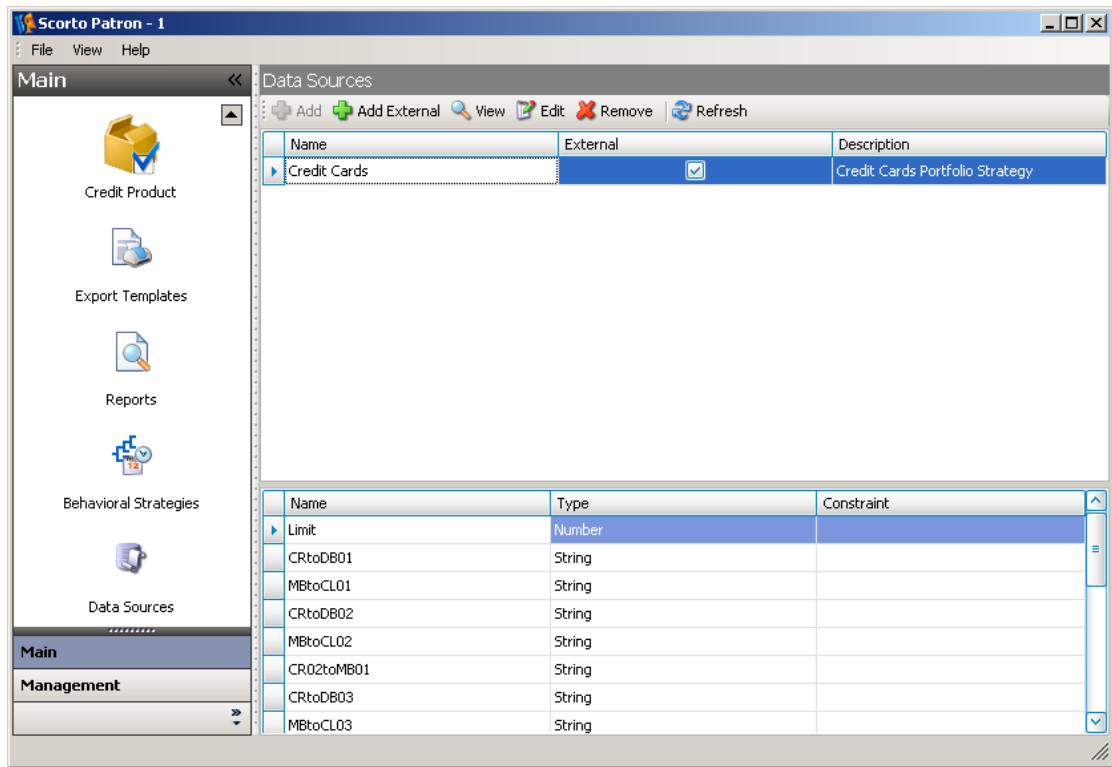



Figure 9-10: Data Sources

3. Select the required data source.
4. Click .

The *External Data Source* dialog box is displayed:

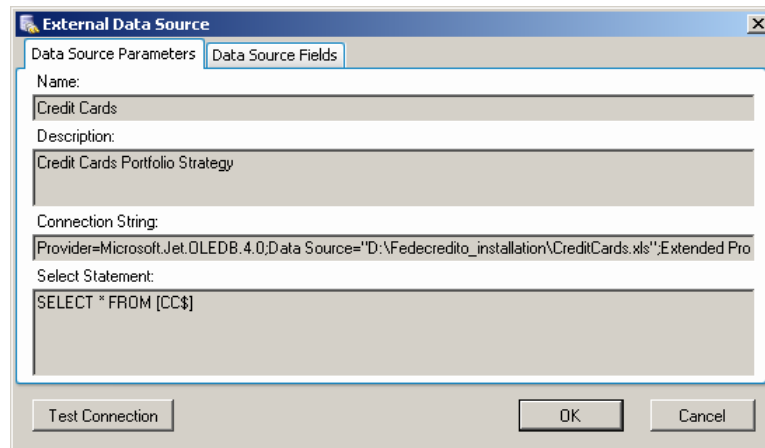



Figure 9-11: The *External Data Source* dialog box

5. Enter the required changes in to the parameters of the selected data source.
6. Click .

The entered parameters of the data source are being validated.

If the parameters of the data source are set incorrectly, the following message is displayed:

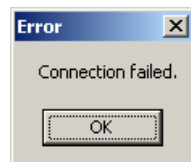



Figure 9-12: Connection error message

Modify the entered parameters of the data source and click again .

If connection is successful, the following confirmation is displayed:

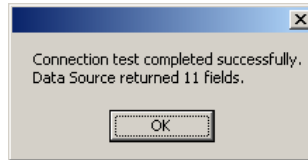


Figure 9-13: Connection successful message

7. Select the **Data Source Fields** tab.

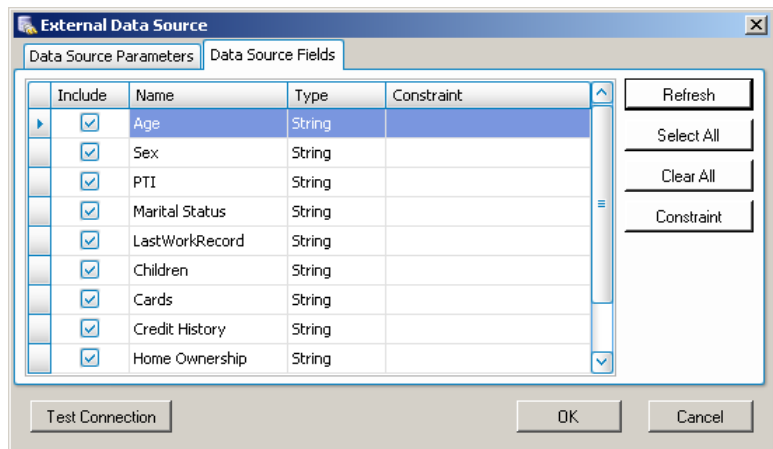


Figure 9-14: Data source fields

8. If necessary, correct the list of the fields of the data source (the **Refresh** button allows refreshing the list of the fields of the data source, the **Select all** button allows selecting all the fields of the data source and the **Clear all** button allows removing selection for all the fields.)
9. Click **OK**.

The parameters of the selected data source are successfully changed.

Deleting Data Sources

This section contains a description of the procedure for deleting data sources.

To delete a data source:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. In the **Main** area, select **Data Sources**.

The **Data Sources** table is displayed:

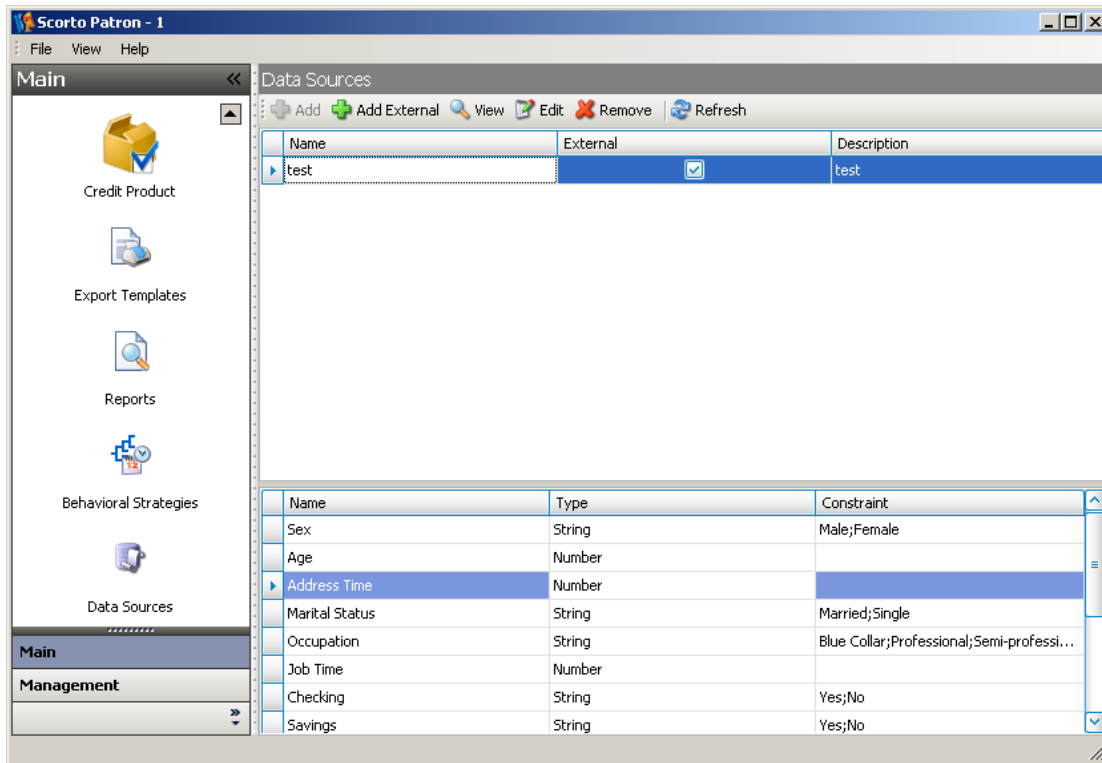


Figure 9-15: Data Sources

3. Click .

The following confirmation request is displayed:

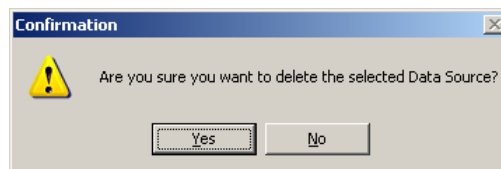


Figure 9-16: Confirmation request

4. Click **Yes**.

The selected data source is successfully deleted.

10 DECISION AREA CONFIGURATION

This chapter contains information on the procedures for configuration of decision areas of behavioral strategies in the Scorto Patron application.

The Scorto Patron application allows performing the following actions in order to configure decision areas of behavioral strategies:

- manage the list of decision areas;
- manage the list of decision areas tasks;
- manage the set of strategies for tasks.

The procedures for performing the above-listed actions are described in the sections that follow.

Overview

This chapter comprises the following sections:

List of Decision Areas Management, page 93, contains a description of the procedures for managing the list of decision areas.

Management of List of Tasks for Decision Areas, page 98, contains a description of the procedures for managing the list of tasks for decision areas.

Management of Strategy Set for Tasks, page 105, contains a description of the procedures for managing the set of strategies for tasks.

List of Decision Areas Management

This section contains a description of the following procedures for managing the list of decision areas:

- view and refresh;
- adding a new decision area;
- deleting an existing decision area.

The explanation of how to execute the above procedures is provided in the sections that follow.

View and Refresh

This section contains a description of the procedure for viewing and refreshing the list of decision areas.

To view and refresh the list of decision areas:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

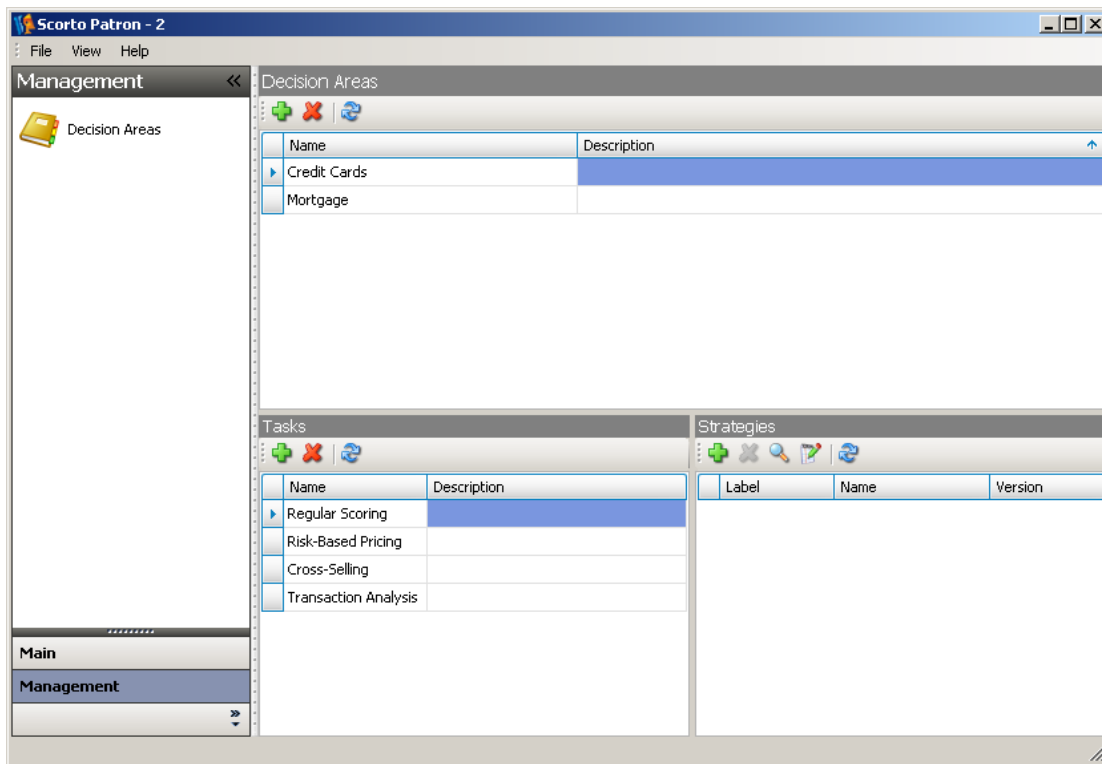


Figure 10-1: Decision areas

3. Click .

The list of available decision areas is successfully refreshed.

Adding New Decision Areas

This section contains a description of the procedure for adding a new decision area.

To add a new decision area:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

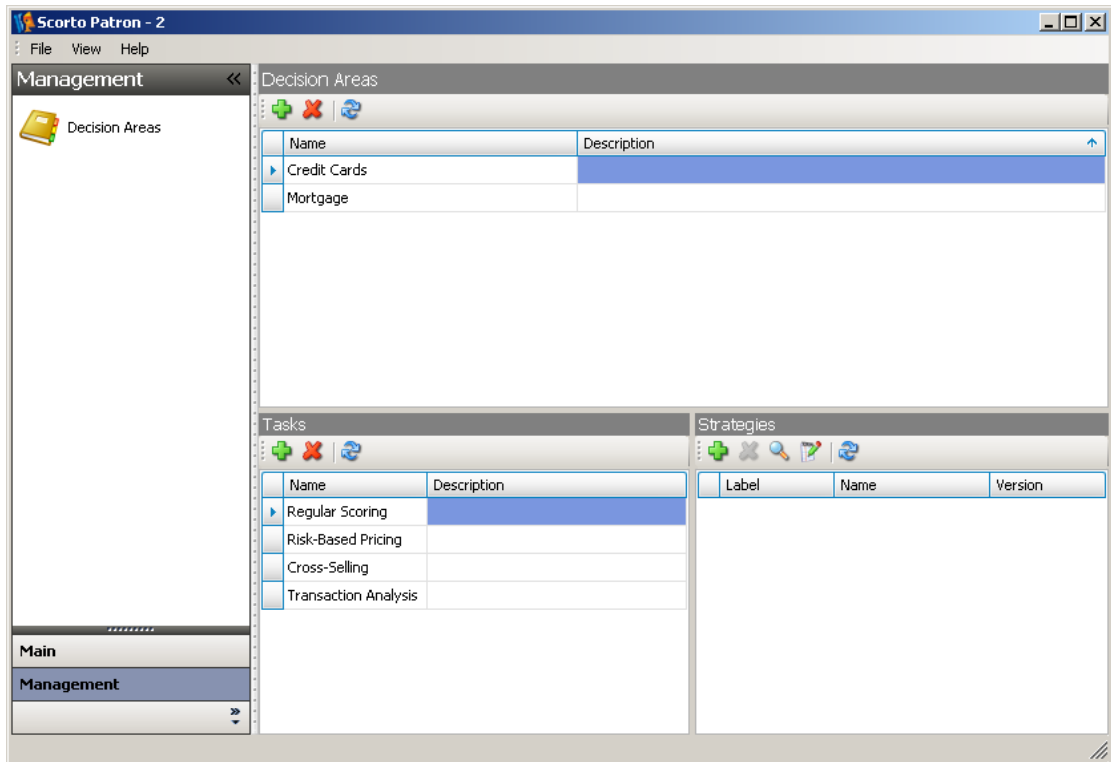


Figure 10-2: Decision areas

3. Click .

The *New Decision Area* dialog box is displayed:

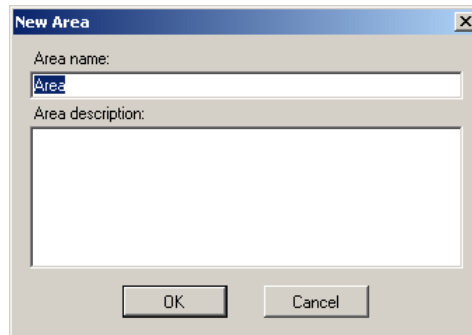


Figure 10-3: The *New Decision Area* dialog box

4. Enter the name of the decision area.
5. If required, enter a description of the decision area.
6. Click **OK**.

The new decision area is successfully added.

Deleting Decision Areas

This section contains a description of the procedure for deleting decision areas.

To delete a decision area:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

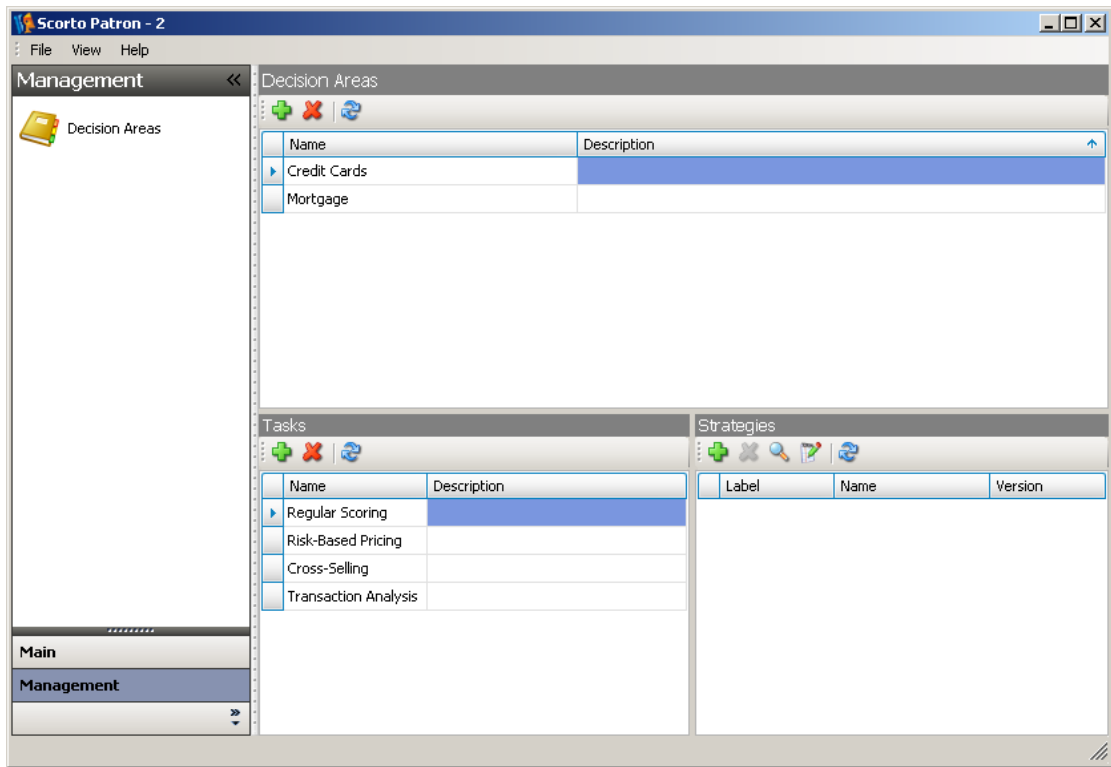


Figure 10-4: Decision areas

8. Select the decision area to be deleted.

9. Click .

The following confirmation request is displayed:

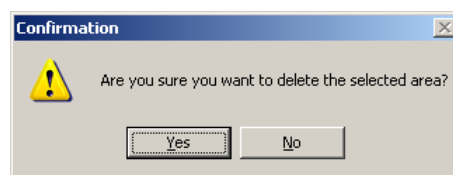


Figure 10-5: Confirmation request

10. Click **Yes**.

The selected decision area is successfully deleted.

Management of List of Tasks for Decision Areas

Several tasks can be linked to a particular decision area.

This section contains a description of the following procedures for managing the list of tasks for decision areas:

- view and refresh;
- adding a new task;
- deleting an existing task.

The explanation of how to execute the above procedures is provided in the sections that follow.

Viewing and Refreshing List of Tasks

This section contains a description of the procedure for viewing and refreshing the list of tasks.

To view and refresh the list of tasks:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

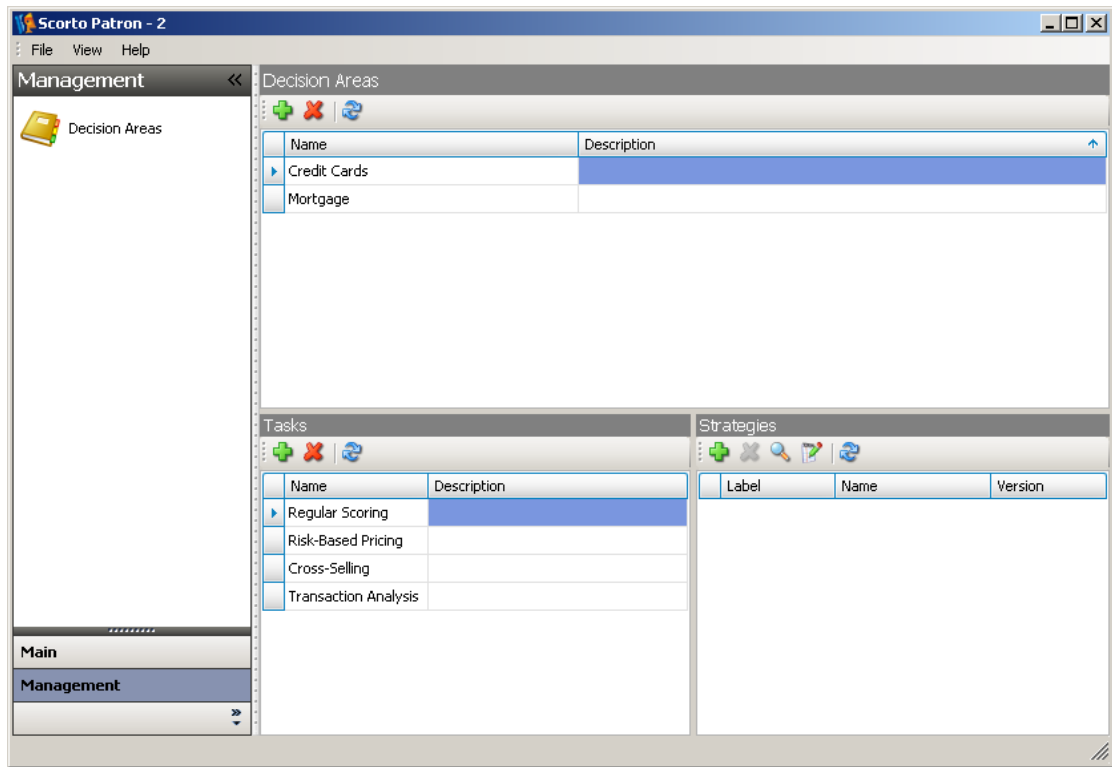


Figure 10-6: Decision areas

3. In the **Decision Areas** table, select the required area.

The list of tasks is displayed in the **Tasks** table:

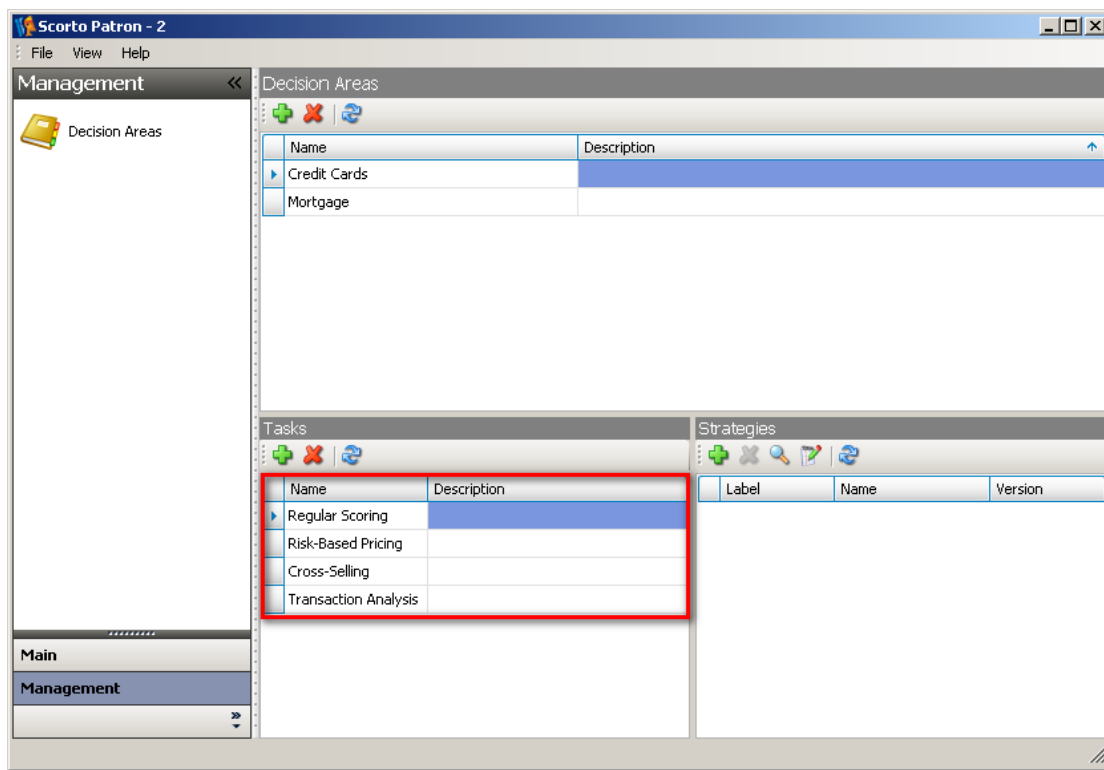



Figure 10-7: List of tasks

4. On the toolbar of the **Tasks** table, click .

The list of tasks for the selected area is successfully refreshed.

Adding a New Task

This section contains a description of the procedure for adding a new task.

To add a new task:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

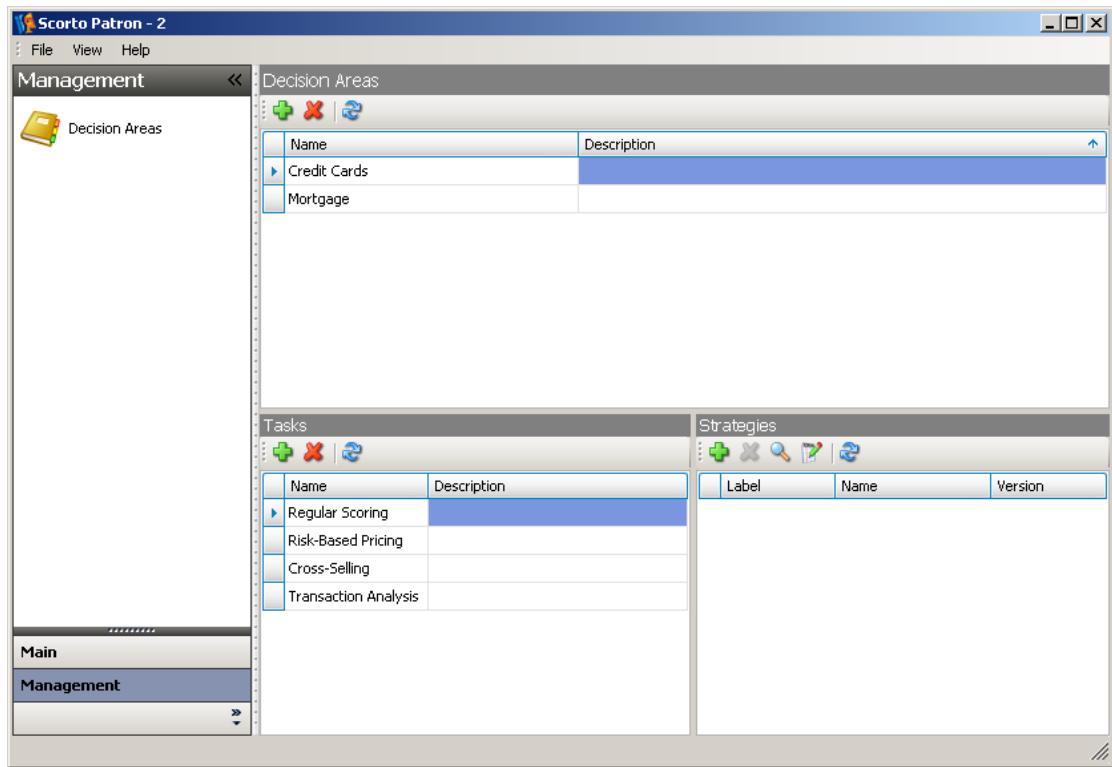


Figure 10-8: Decision areas

3. In the **Decision Areas** table, select the required area.

The list of tasks is displayed in the **Tasks** table:

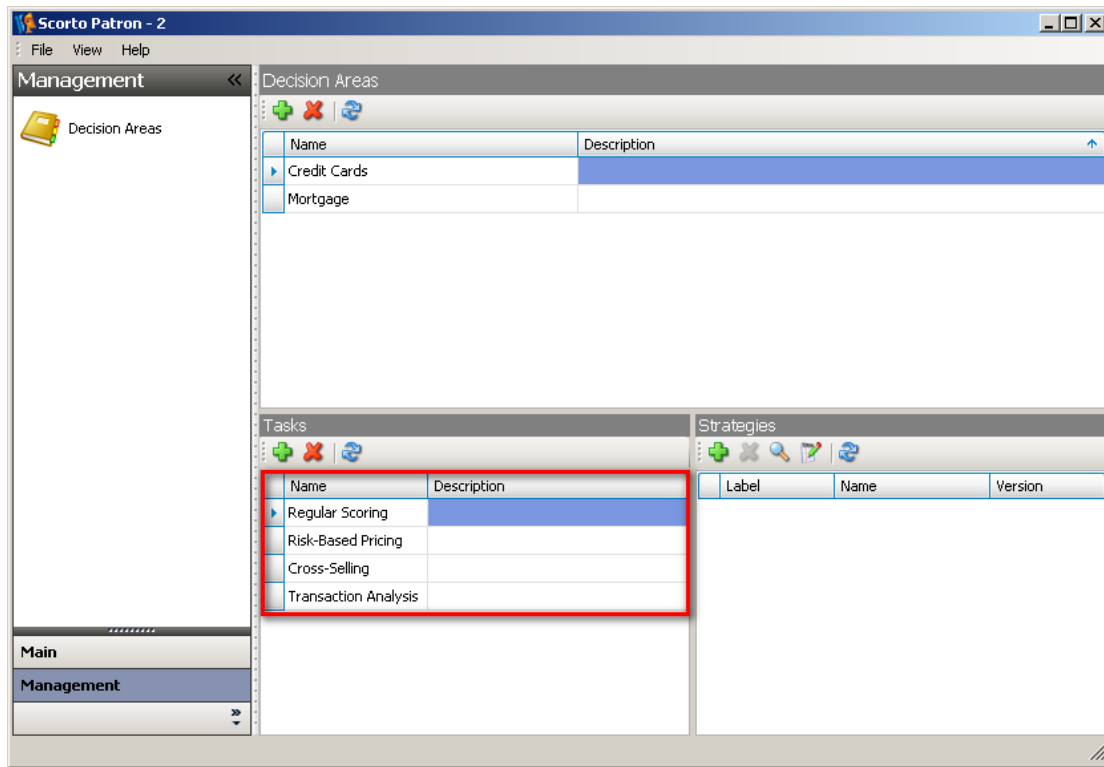



Figure 10-9: List of tasks

4. On the toolbar of the **Tasks** table, click .

The *New Task* dialog box is displayed:

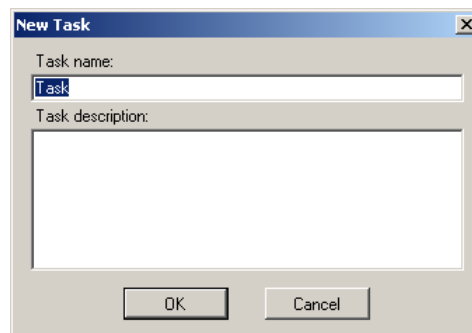


Figure 10-10: *New Task* dialog box

5. Enter the name of the task.

6. If required, enter a description of the task.
7. Click **OK**.

The new task is successfully added.

Deleting Tasks

This section contains a description of the procedure for deleting an existing task.

To delete a task:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

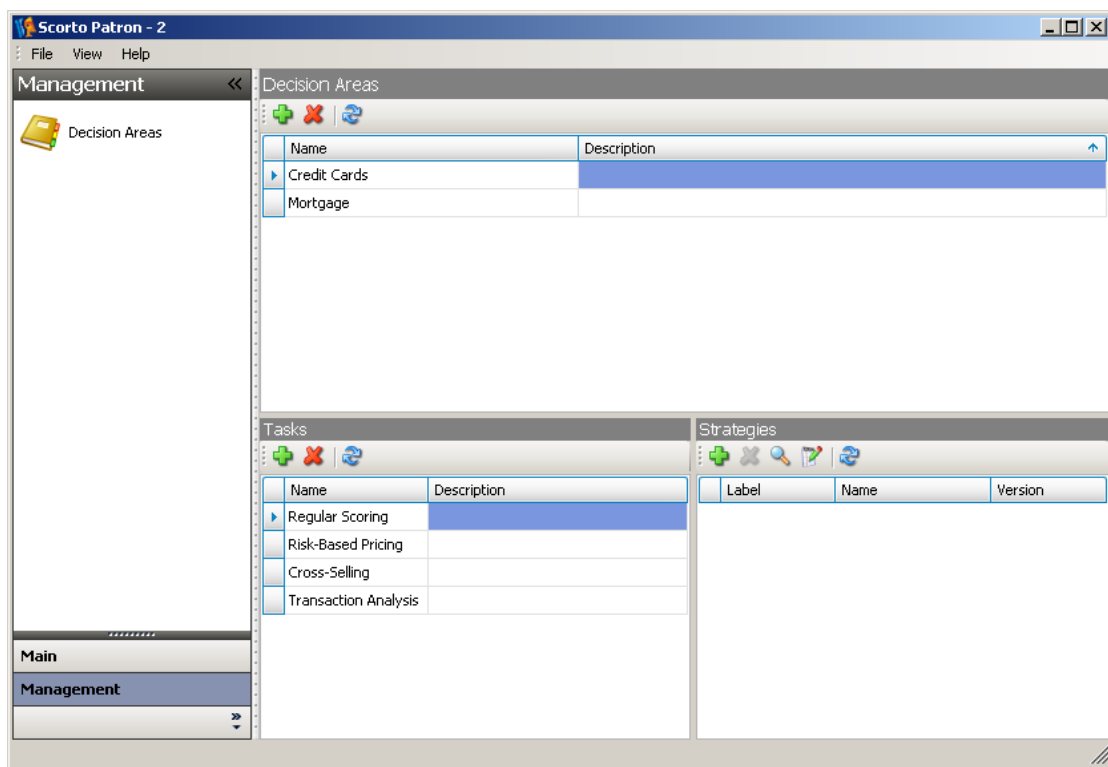


Figure 10-11: Decision areas

3. In the **Decision Areas** table, select the required area.

The list of tasks is displayed in the **Tasks** table:

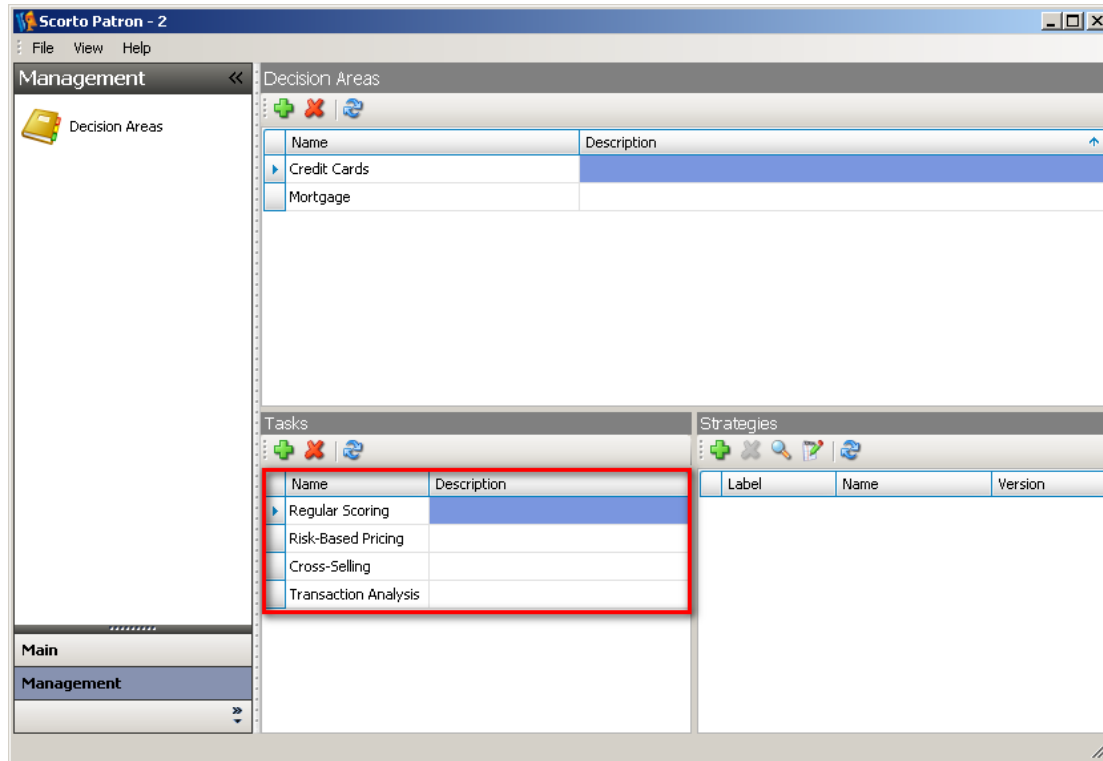


Figure 10-12: List of tasks

11. Select the required task.

12. Click .

The following confirmation request is displayed:

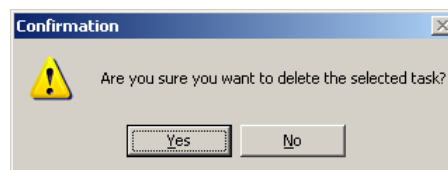


Figure 10-13: Confirmation request

13. Click **Yes**.

The selected task is successfully deleted.

Management of Strategy Set for Tasks

A set of strategies can be linked to each task of the decision area.

This section contains a description of the following procedures for managing the list of strategies that are linked to tasks of decision areas:

- viewing and refreshing a set of strategies;
- adding a new strategy;
- deleting an existing strategy;
- viewing user-controlled strategy parameters.
- editing user-controlled strategy parameters.

The explanation of how to execute the above procedures is provided in the sections that follow.

Viewing and Refreshing a Set of Strategies

This section contains a description of the procedure for viewing and refreshing the set of strategies.

To view and refresh the set of strategies:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

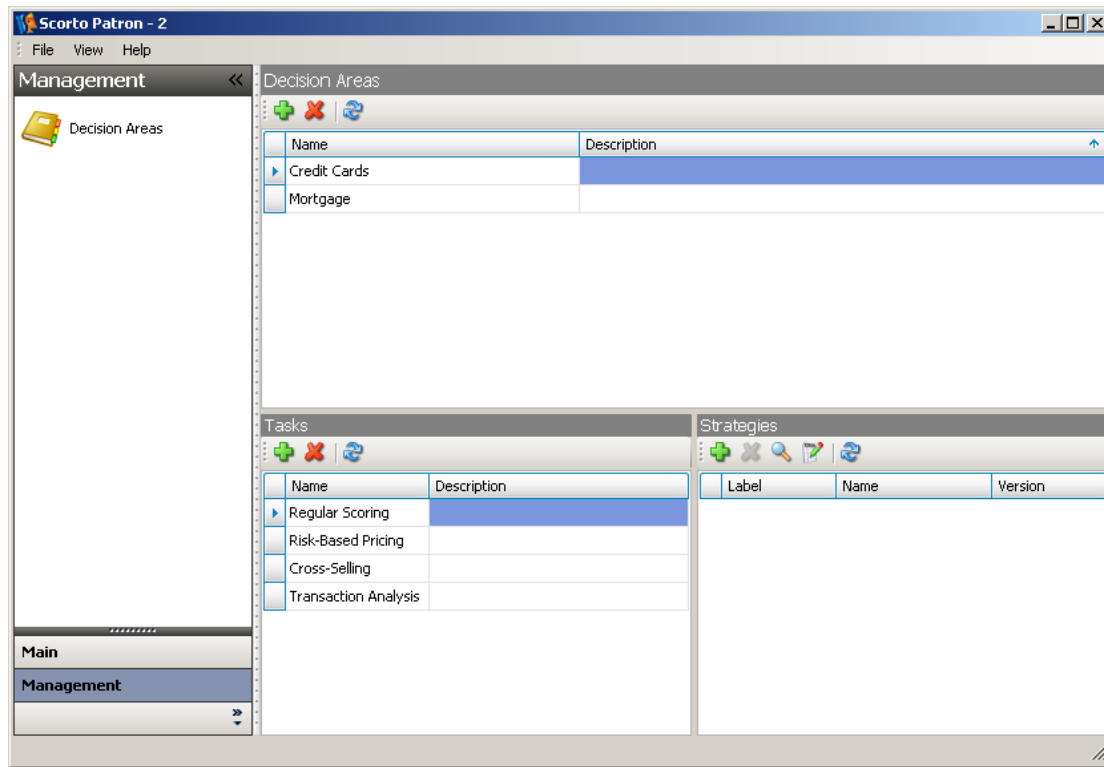


Figure 10-14: Decision areas

3. In the **Decision Areas** table, select the required area.

The list of tasks is displayed in the **Tasks** table:

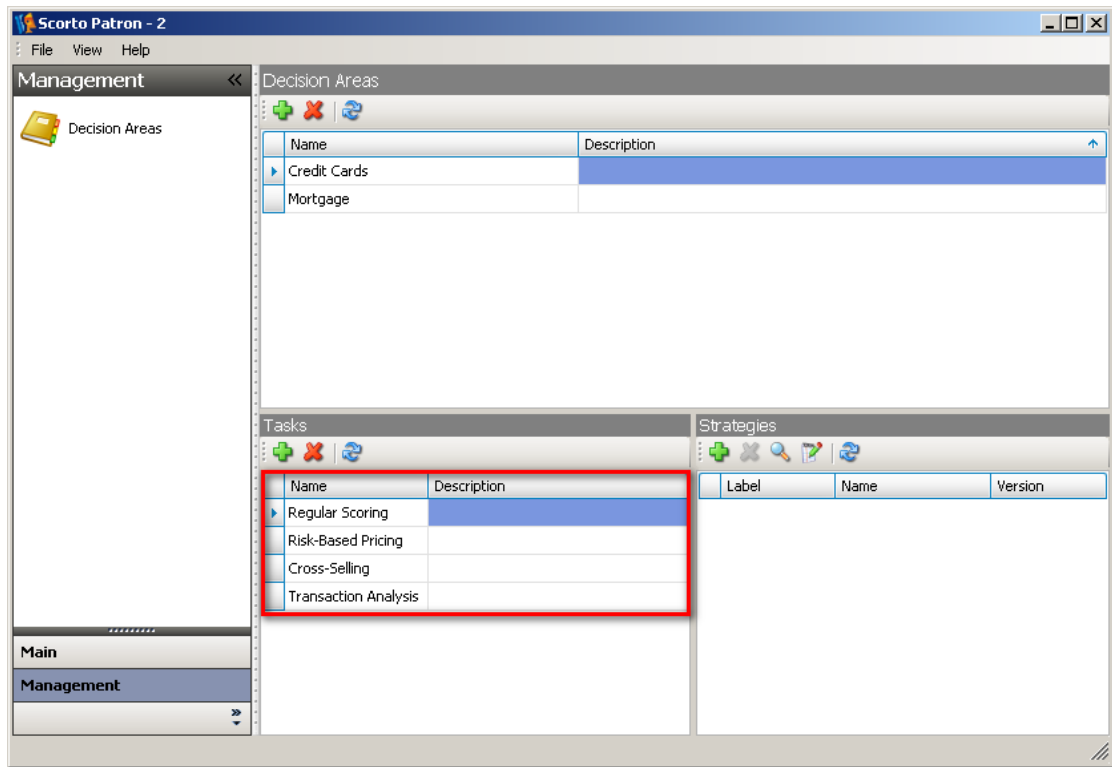


Figure 10-15: List of tasks

4. Select the required task in the **Tasks** table.

The list of linked strategies is displayed in the **Strategies** table:

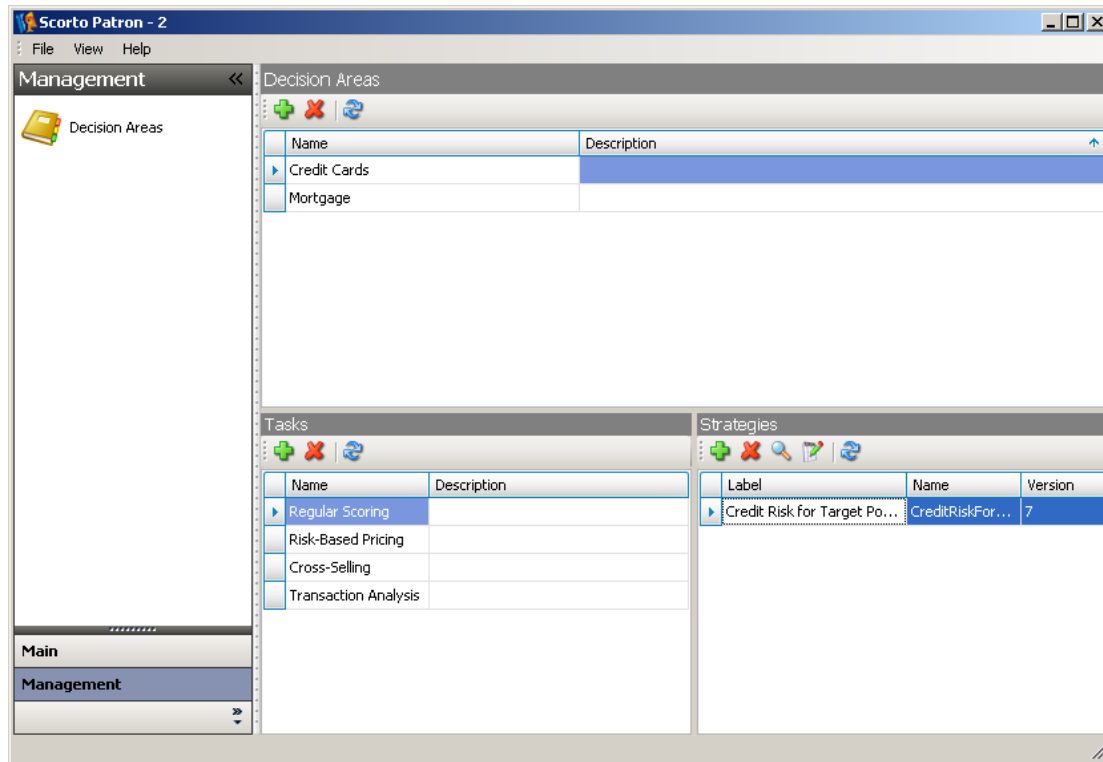


Figure 10-16: Strategies

5. On the toolbar of the **Strategies** table, click .

The list of strategies for the selected tasks is successfully refreshed.

Adding New Strategies

This section contains a description of the procedure for adding a new strategy.

To add a new strategy:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

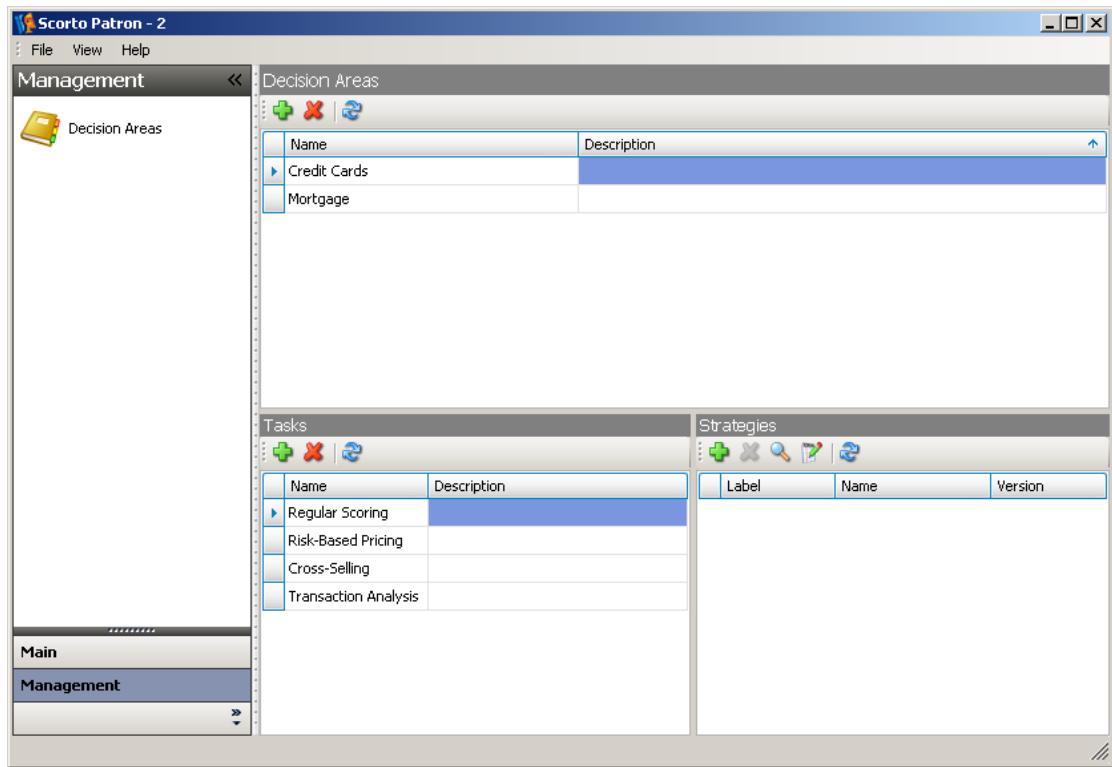


Figure 10-17: Decision areas

3. In the **Decision Areas** table, select the required area.

The list of tasks is displayed in the **Tasks** table:

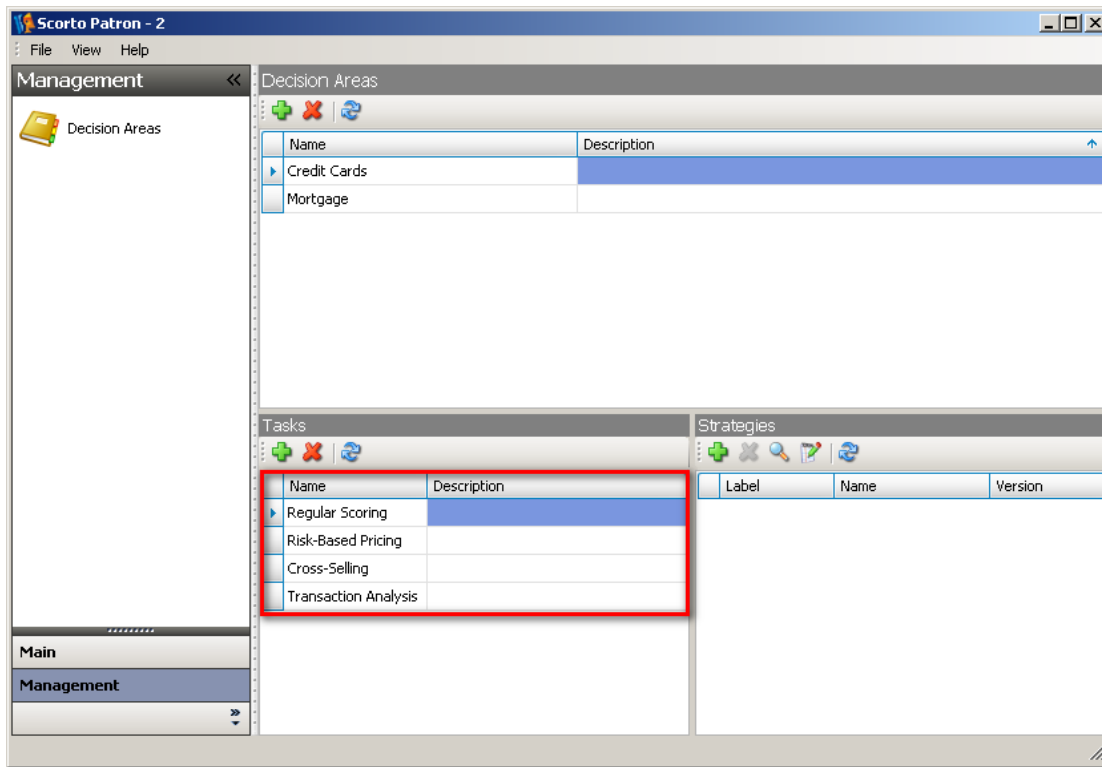


Figure 10-18: List of tasks

4. Select the required task in the **Tasks** table.

The list of linked strategies is displayed in the **Strategies** table:

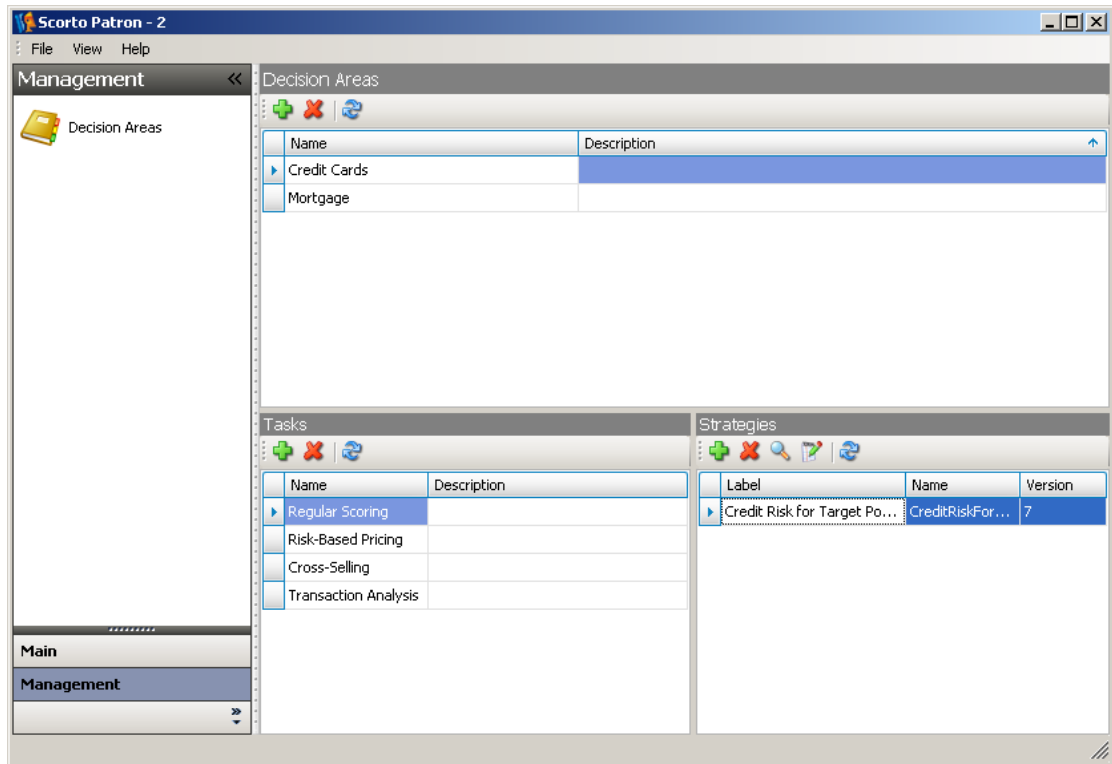


Figure 10-19: Strategies

8. On the toolbar of the **Strategies** table, click .

The *New Strategy* dialog box is displayed:

The dialog box is titled "New Task Strategy". It contains the following elements:

- Strategy Label:** A text input field.
- Strategy:** A dropdown menu currently showing "New Strategy".
- User Controlled Parameters:** A section containing a table with the following columns: "Param...", "Display Name", "Type", "Constr...", and "Description". The table is currently empty.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Figure 10-20: *New Task* dialog box

9. Enter the label of the task.
10. Click **OK**.

The new strategy is successfully added.

Deleting Strategies

This section contains a description of the procedure for deleting strategies.

To delete a strategy:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

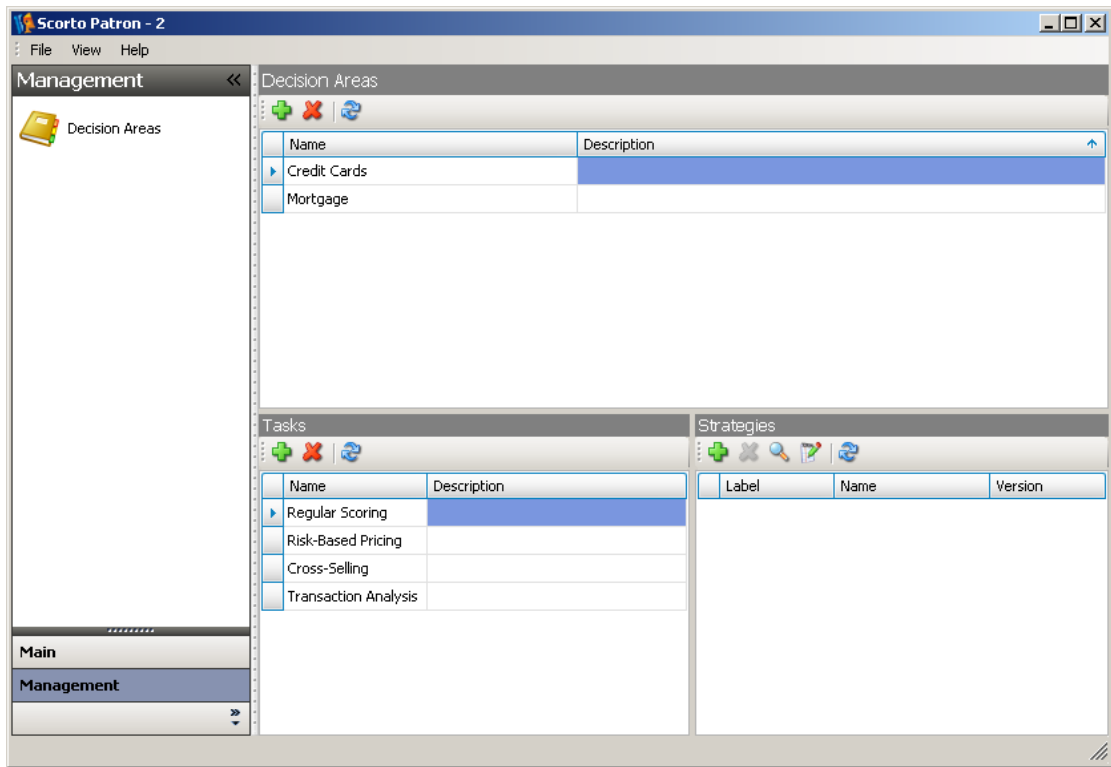


Figure 10-21: Decision areas

3. In the **Decision Areas** table, select the required area.

The list of tasks is displayed in the **Tasks** table:

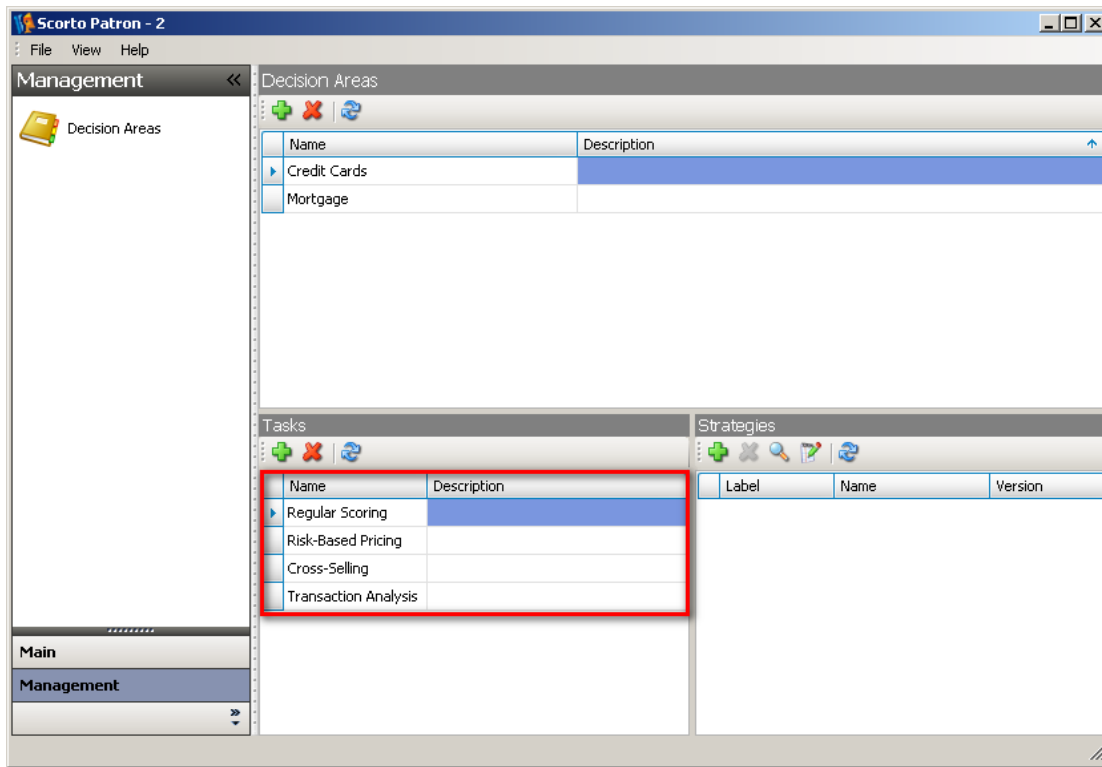


Figure 10-22: List of tasks

4. Select the required task in the **Tasks** table.

The list of linked strategies is displayed in the **Strategies** table:

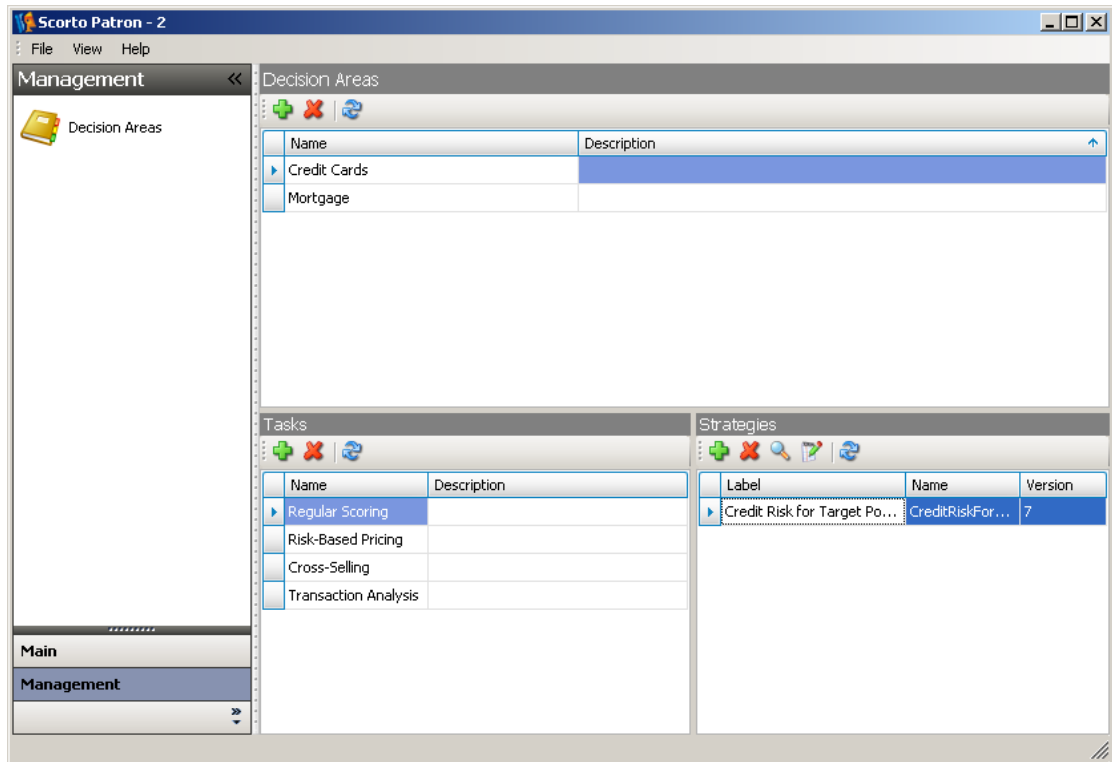



Figure 10-23: Strategies

5. In the **Strategies** table, select the required strategy.
6. On the toolbar of the **Strategies** table, click .

The following confirmation request is displayed:

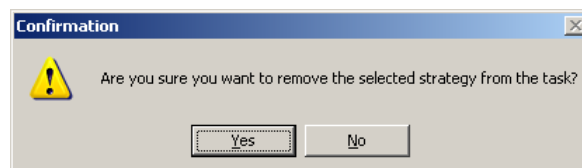


Figure 10-24: Confirmation request

7. Click **Yes**.

The selected strategy is successfully deleted.

Viewing Strategy Parameters

This section contains a description of the procedure for viewing user-controlled parameters of strategies.

To view user-controlled parameters of the strategy:

1. Log on to the Scorto Patron application. For more information on the login procedure, refer to Section *Logging On To Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

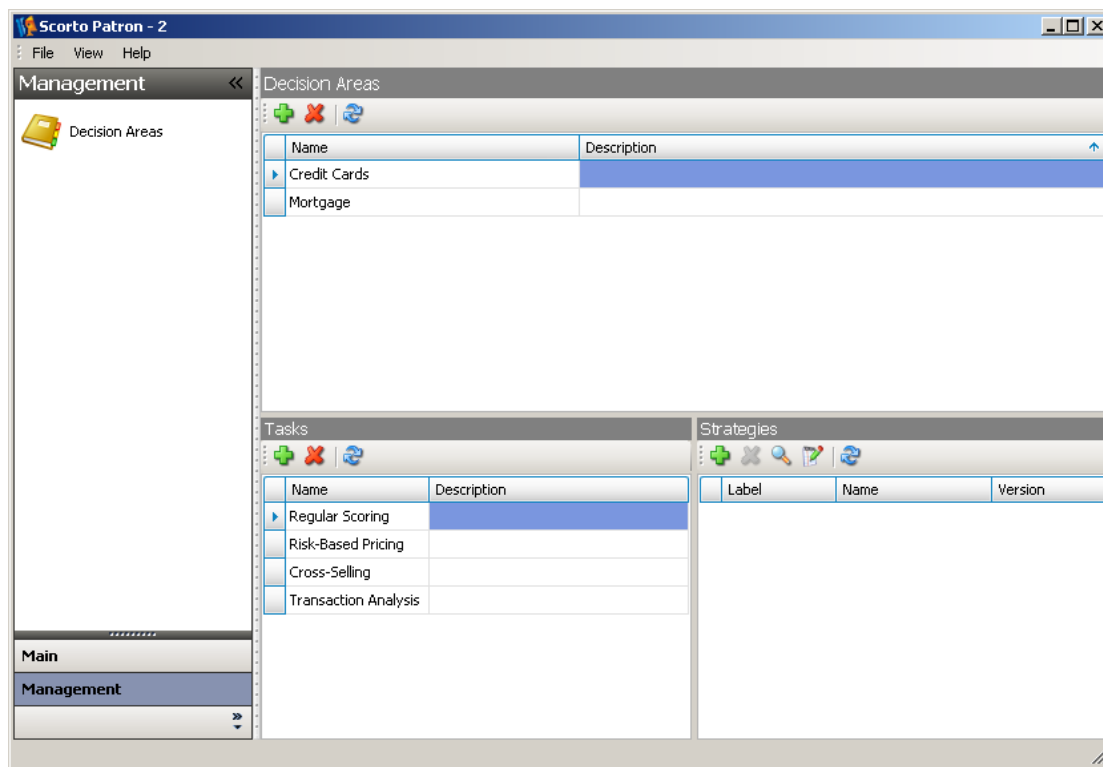


Figure 10-25: Decision areas

3. In the **Decision Areas** table, select the required area.

The list of tasks is displayed in the **Tasks** table:

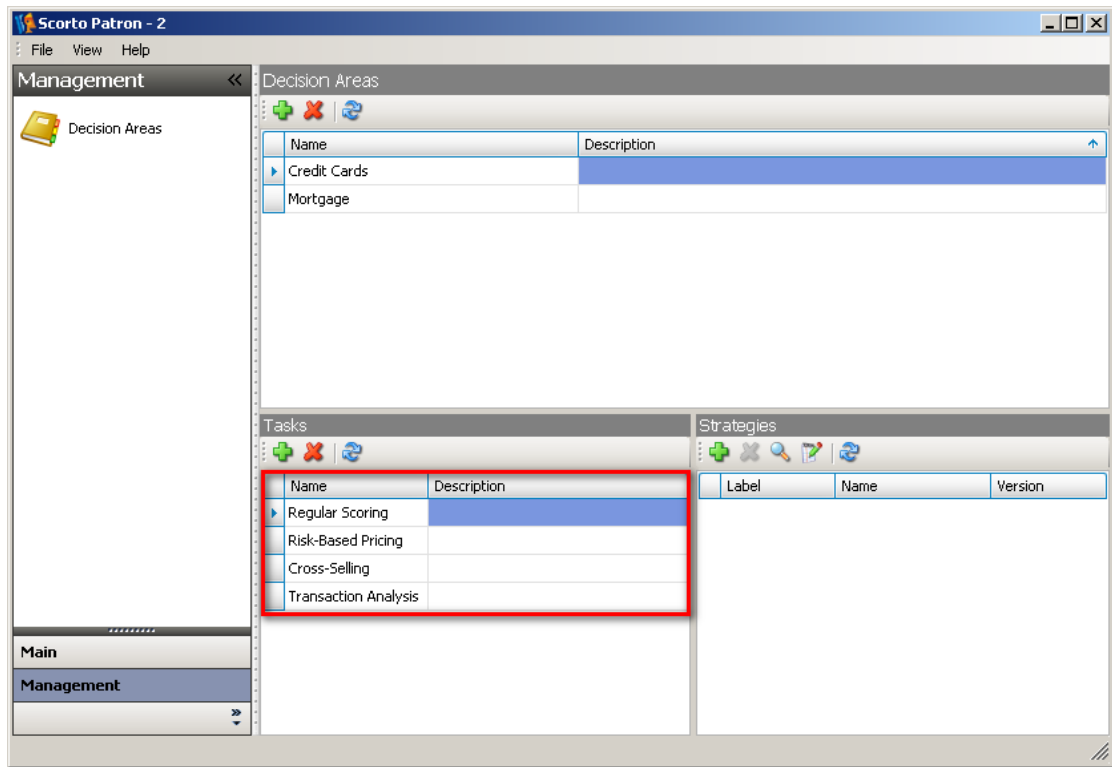


Figure 10-26: List of tasks

4. Select the required task in the **Tasks** table.

The list of linked strategies is displayed in the **Strategies** table:

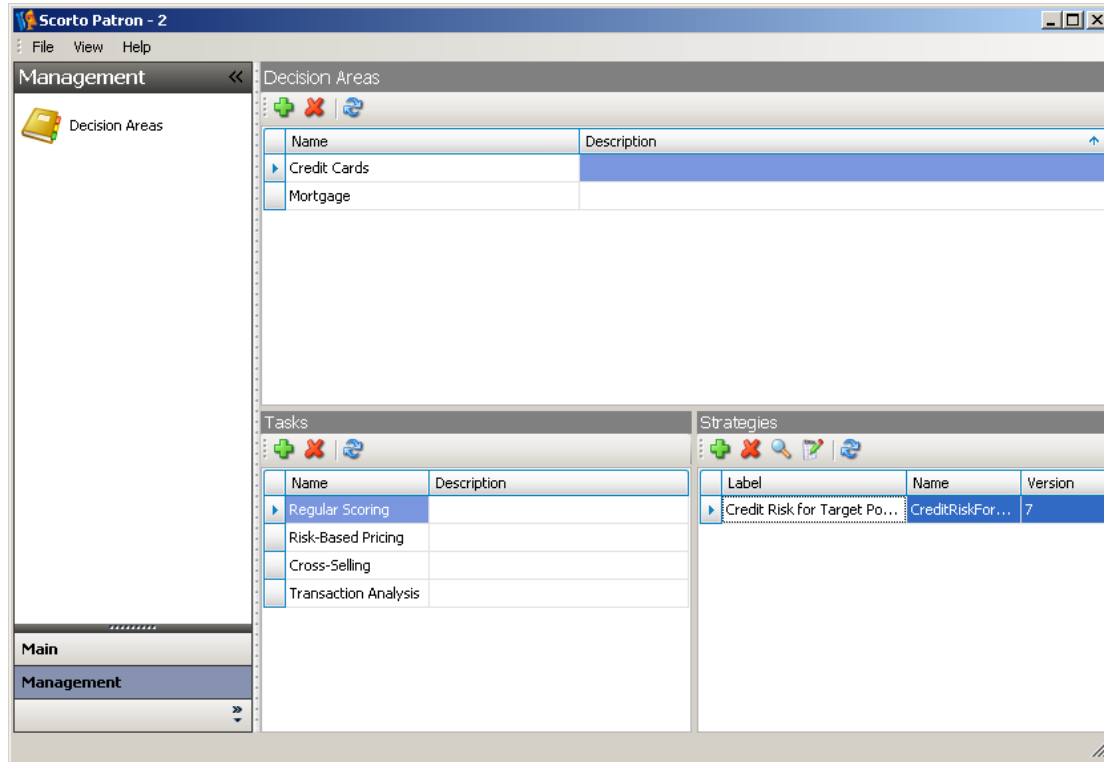



Figure 10-27: Table *Strategies*

5. In the **Strategies** table, select the required strategy.
6. On the toolbar of the **Strategies** table, click .

The list of user-controlled strategy parameters is displayed:

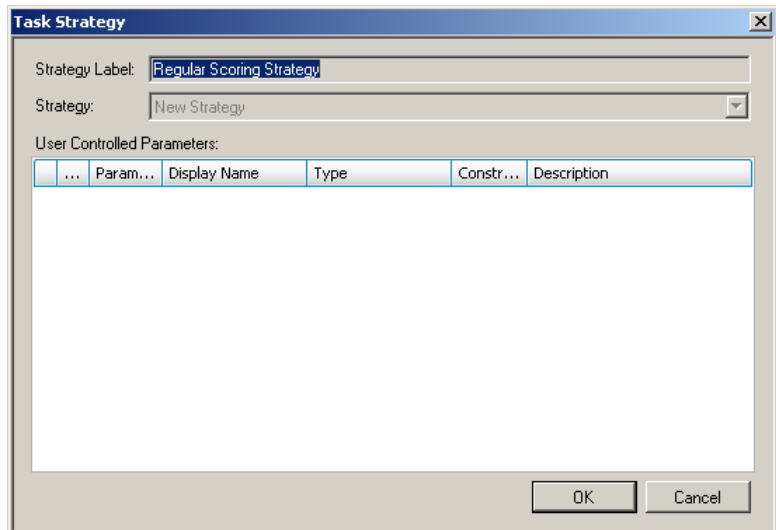


Figure 10-28: User-controlled strategy parameters

7. After the parameters have been viewed, click **OK**.

Changing Strategy Parameters

To change user-controlled parameters of the strategy:

1. Log on to Scorto Patron. For more information on how to log on the application, see *Section Logging On to Application*, page 3.
2. Select the **Management** tab.

The **Decision Areas** table is displayed:

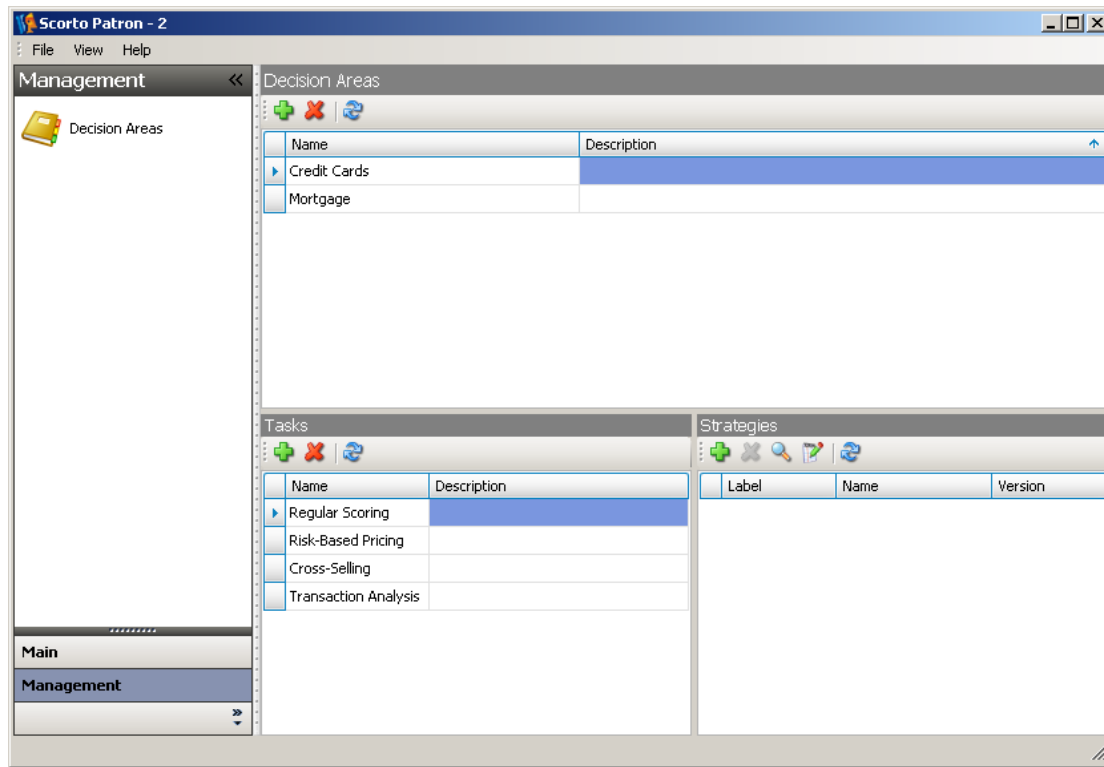


Figure 10-29: Decision Areas table

3. In the **Decision Areas** table, select the required area.

The list of tasks is displayed in the **Tasks** table:

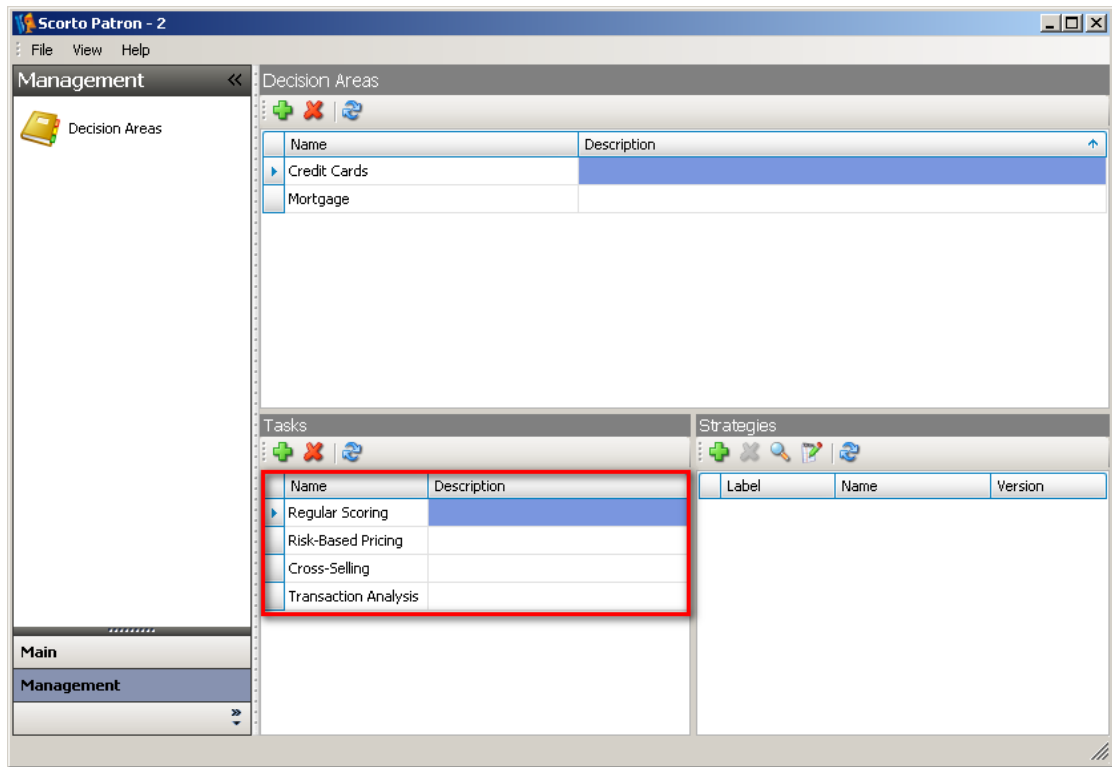


Figure 10-30: List of tasks

4. Select the required task in the **Tasks** table.

The list of linked strategies is displayed in the **Strategies** table:

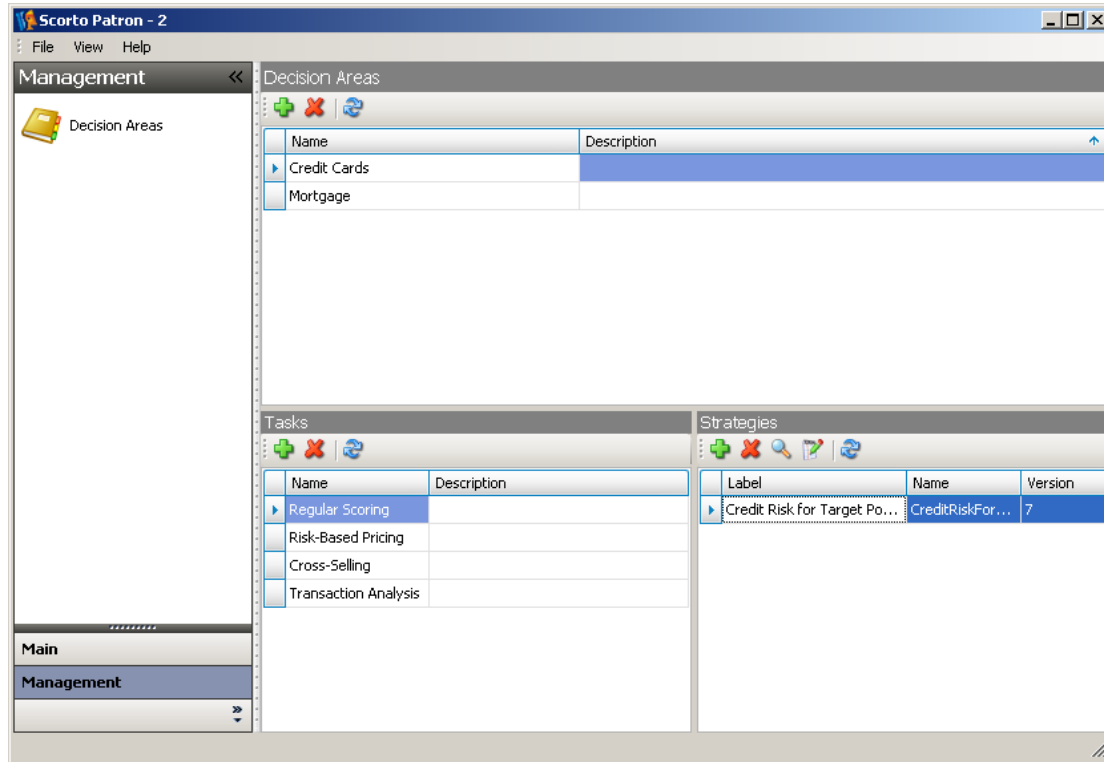



Figure 10-31: Table Strategies

5. In the **Strategies** table, select the required strategy.
6. On the toolbar of the **Strategies** table, click .

The list of user-controlled strategy parameters is displayed:

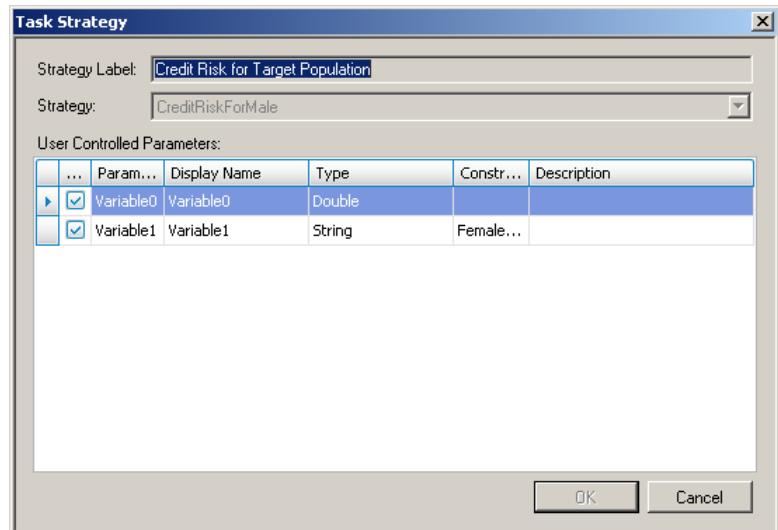


Figure 10-32: User-controlled strategy parameters

7. Change the list of user-controlled strategy parameters is displayed.
8. Click **OK**.

The list of user-controlled strategy parameters is successfully changed.

