

Collateral Management Web

User Guide

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1. INTRODUCTION

1.1. OVERVIEW

This is a User Guide for NASDAQ OMX Collateral Management Web (CMS Web) to be used by NASDAQ OMX Members who place Default Fund contributions on Default Fund Accounts with NASDAQ OMX.

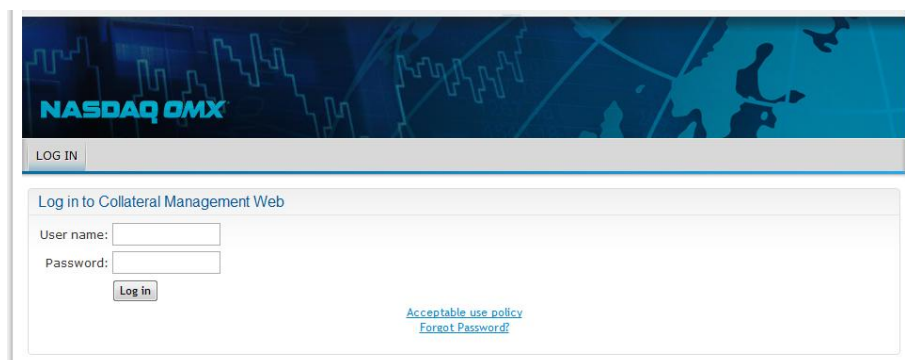
CMS Web provides Members with functionality for

- Viewing of collateral and collateral transactions
- Viewing of accrued and capitalized interest on cash contribution
- Viewing of Members cash and instrument SSI (standing settlement instructions)
- Viewing of instruments eligible as Default Fund contribution
- Input of instructions for deposit and callback of instrument collateral
- Input of instructions for cash callback

1.2. HOW TO ACCESS CMS WEB

CMS Web is a web based application that can be accessed from a standard web browser. For user administration and access details, please contact NASDAQ OMX: defaultfund@nasdaqomx.com

When CMS Web has been accessed a user is required to login by specifying a username and password.



The screenshot shows the login interface for the NASDAQ OMX Collateral Management Web. At the top, there is a header with the NASDAQ OMX logo and a background image of a world map and financial charts. Below the header is a 'LOG IN' button. The main content area is titled 'Log in to Collateral Management Web' and contains two input fields: 'User name:' and 'Password:'. A 'Log in' button is positioned below the password field. To the right of the input fields, there are two links: 'Acceptable use policy' and 'Forgot Password?'. The entire form is enclosed in a light gray border.

1.3. USER ROLES IN CMS WEB

There are two kinds of user roles defined in the Collateral Management Web:

- **User** – an ordinary user of the CMS Web
- **Administrator** – an authorized person at the member that is allowed to administrate user accounts for the member

In CMS Web each user will be connected to a Member organization. The organizational connection determines the users access rights in CMS Web, i.e. accounts, transactions etc.

1.3.1. USER

An ordinary user will have access to the following functionality

- **Collateral** – View information about placed cash and instrument collateral on Default Fund Accounts
- **Transactions** – Search for transactions, create cash callback and create instrument instructions per Default Fund Account
- **Instruments** – View instrument information
- **Settlement instructions** – View cash and instrument standing settlement instructions (SSI) per Default Fund Account
- **Accounts** – view information about Default Fund Accounts connected to the users Member organization.
- **Password** – Change of user password

1.3.2. ADMINISTRATOR

The administrator role has the same access as an ordinary user with the following extensions:

- **Users** - Possibility to administer users (create, update and delete) for a Member organization

2. FUNCTIONALITY

2.1. COLLATERAL

Select the “COLLATERAL” top level menu item.

Collateral

8080 Storbanken - Default Fund Commodities

Holdings on account 8080 Storbanken - Default Fund Commodities at 2012-04-10:

Cash:

Currency	Preliminary balance	Collateral balance	Accrued interest	Interest rate
DKK	223 000,00	223 000,00	0,00	0,00%
EUR	3 052,19	3 052,19	0,51	0,60%
SEK	1 223 026,96	1 212 026,96	0,00	1,00%
USD	2 500,00	2 500,00	0,00	0,00%

Export options: [Excel](#)

Instruments:

Instrument name	ISIN	Currency	Depository	Preliminary position	Collateral holding
5 BERGEN KOMMUNE 1701	NO0012366444	NOK	VPS Norge	42 500 000	46 000 000
SVENSKA STATENS STATSOBLIGATIONER	SE0210489185	SEK	EuroClear Sweden	1 000 776	1 000 762
DANSKA STADS OBLIGATIONER 4 0	DK0025095713	DKK	VP Danmark	10	0

This page displays the cash and instrument collateral contribution for a given Default Fund Account.

Search Options

- **Account** – Select a Default Fund account from the account drop down box. The result view will be automatically updated when a new account is selected.

Sort Options

By pressing the column heading it is possible to sort the retrieved information. By repeating the sorting it will switch between ascending and descending sort order.

Export Options

- **Excel** – Press the “Excel” link in order to export the displayed table to an excel document.

2.2. TRANSACTIONS

Select the “TRANSACTIONS” top level menu item. This will display a page with three different tabs:

- **Transactions** – Display transactions related to a selected Default Fund Account (this tab is selected by default).
- **Cash instruction** – Input a cash callback instruction for transfer of excess cash from Members Default Fund Account to Members bank account according to Members Cash SSI
- **Instrument instruction** – Has the following options:
 - Input an instrument deposit instruction to place instrument collateral on Members Default Fund
 - Input an instrument callback instruction for transfer of excess instrument holding from Members Default Fund Account to CSD/ICSD according to Members Instrument SSI

TIP: When moving the mouse over the “TRANSACTIONS” option a submenu containing direct links to the three different tabs will be displayed.

2.2.1. TRANSACTIONS TAB

The screenshot shows the NASDAQ OMX Collateral Management Web interface. The top navigation bar includes links for HOME, COLLATERAL, TRANSACTIONS, INSTRUMENTS, SETTLEMENT INSTRUCTIONS, ACCOUNTS, USERS, PASSWORD, and LOG OUT. The main content area is titled "Transactions" and shows a dropdown menu for the account "8080 Storbanken - Default Fund Commodities". Below this is a filter section with fields for "Instruction date interval" (2012-03-11 to 2012-04-10), "Settlement date", "Status" (All), "Asset class" (All), and "ISIN". A "Search" button is present. Below the filter, a table displays transactions performed on the account between 2012-03-11 and 2012-04-10. The table has columns for Transaction, Status, Instruction date, Settlement date, ISIN, Settlement amount, Qty/Nom amount, Currency, and Reference. Three transactions are listed: one settled, one pending, and one pending.

Transaction	Status	Instruction date	Settlement date	ISIN	Settlement amount	Qty/Nom amount	Currency	Reference
Receive	Settled	2012-03-20	2012-04-03	SE0000115446	0	3	SEK	fria16379
Receive	Pending	2012-03-20	2012-04-10	SE0000115446	0	2	SEK	fria16378
Receive	Pending	2012-03-20	2012-04-10	SE0000115446	0	7	SEK	fria16371

This page displays the cash and instrument transactions on a selected Default Fund Account. For more details on a specific transaction, press the information icon (i). A transaction that is possible to cancel has a “Cancel” link (see 2.2.4 Cancellation of a Transaction).

Search Options

- **Account** – Select a Default Fund account from the account drop down box. The result view will be automatically updated when a new account is selected.

Optional Filters

- **Instruction date interval** – The view will include transactions registered between from and to date.
- **Settlement date** – Include transactions with the specified settlement date.
- **Status** – Include transactions with a specific status.
- **Asset class** – Include transactions of a specific asset class, i.e. cash or instrument.
- **ISIN** – Include transactions with an ISIN code that starts with the specified value.
- **Without date interval** – search for all transactions without regards to the date the transaction was created

In order for the optional filters to take effect, the “Search” button must be pressed.

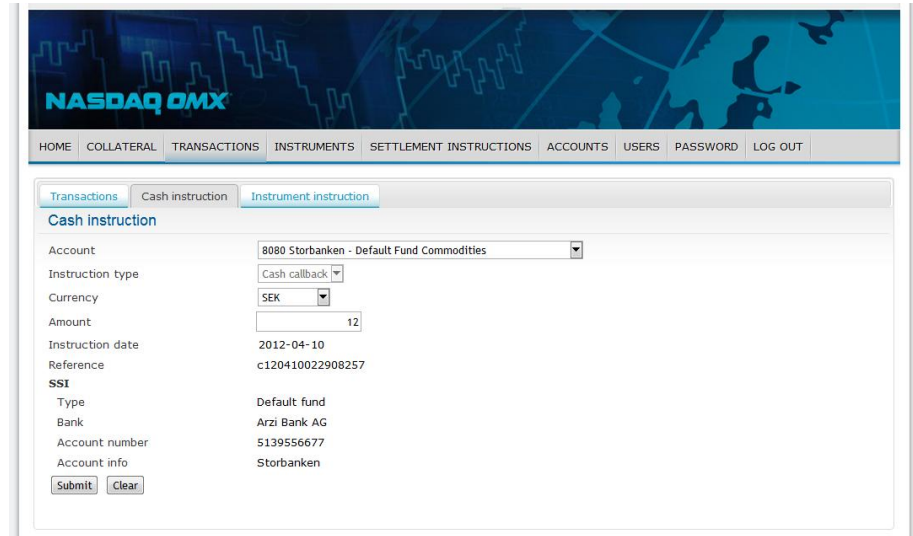
Sort Options

By pressing the column heading it is possible to sort the retrieved information. By repeating the sorting it will switch between ascending and descending sort order.

Export Options

Excel – Press the "Excel" link in order to export the displayed table to an excel document.

2.2.2. CASH INSTRUCTION TAB



The screenshot shows the NASDAQ OMX web interface. At the top, there is a navigation menu with links: HOME, COLLATERAL, TRANSACTIONS, INSTRUMENTS, SETTLEMENT INSTRUCTIONS, ACCOUNTS, USERS, PASSWORD, and LOG OUT. Below this, there are three tabs: Transactions, Cash instruction (which is selected), and Instrument instruction. The main content area is titled "Cash instruction" and contains the following fields:

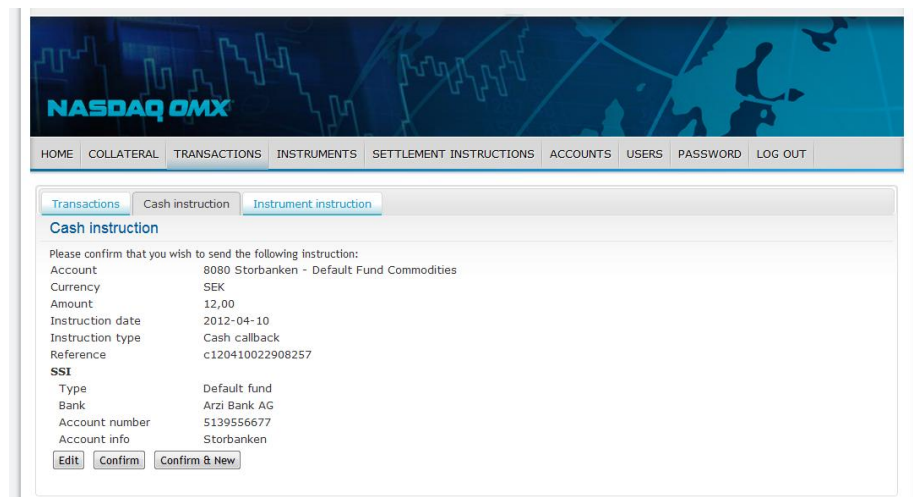
Account	8080 Storbanken - Default Fund Commodities
Instruction type	Cash callback
Currency	SEK
Amount	12
Instruction date	2012-04-10
Reference	c120410022908257
SSI	
Type	Default fund
Bank	Arzi Bank AG
Account number	5139556677
Account info	Storbanken

At the bottom of the form, there are two buttons: "Submit" and "Clear".

The cash callback tab is used by a Member to request transfer of excess cash on a Default Fund Account. If the Cash Callback is accepted the transfer of the Cash Callback amount will be made to the Members bank account as stated in the Members cash SSI set up on the Members Default Fund Account. The cash callback will automatically get a payment date of T+3 bank days (where T is the instruction date).

When a user inputs a Cash Callback request all fields must be filled after which the user presses the "Submit" button. At this step a validation will occur to make sure the cash callback is accepted. If the validation is accepted the user will be transferred to the confirmation dialogue.

NOTE: In order to be able to submit the cash instruction a valid cash SSI must exist, the web will automatically try to find an existing cash SSI when the account or currency changes.



The screenshot displays the NASDAQ OMX Collateral Management Web interface. At the top, there is a navigation menu with links: HOME, COLLATERAL, TRANSACTIONS, INSTRUMENTS, SETTLEMENT INSTRUCTIONS, ACCOUNTS, USERS, PASSWORD, and LOG OUT. Below the navigation menu, there are three tabs: Transactions, Cash instruction, and Instrument instruction. The 'Cash instruction' tab is active, showing a confirmation screen for a cash instruction. The screen contains the following information:

Please confirm that you wish to send the following instruction:

Account	8080 Storbanken - Default Fund Commodities
Currency	SEK
Amount	12,00
Instruction date	2012-04-10
Instruction type	Cash callback
Reference	c120410022908257

SSI

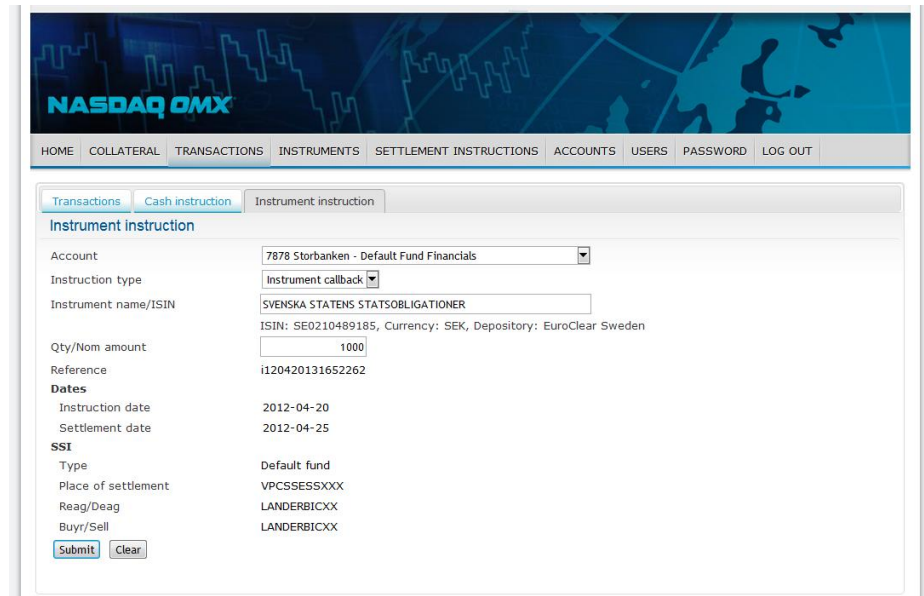
Type	Default fund
Bank	Arzi Bank AG
Account number	5139556677
Account info	Storbanken

At the bottom of the confirmation screen, there are three buttons: **Edit**, **Confirm**, and **Confirm & New**.

Options:

- **Edit** – move back to the previous step.
- **Confirm** – Confirm the cash callback and move to the transactions page.
- **Confirm & New** – Confirm the cash callback and move back to the cash callback page with the possibility to enter another cash callback e.g. in another currency

2.2.3. INSTRUMENT INSTRUCTION TAB



The screenshot shows the NASDAQ OMX web interface. At the top, there is a navigation menu with links: HOME, COLLATERAL, TRANSACTIONS, INSTRUMENTS, SETTLEMENT INSTRUCTIONS, ACCOUNTS, USERS, PASSWORD, and LOG OUT. Below the navigation menu, there are three tabs: Transactions, Cash instruction, and Instrument instruction. The 'Instrument instruction' tab is selected. The form contains the following fields and values:

Account	7878 Storbanken - Default Fund Financials
Instruction type	Instrument callback
Instrument name/ISIN	SVENSKA STATENS STATSOBLIGATIONER
ISIN	SE0210489185, Currency: SEK, Depository: EuroClear Sweden
Qty/Nom amount	1000
Reference	i120420131652262
Dates	
Instruction date	2012-04-20
Settlement date	2012-04-25
SSI	
Type	Default fund
Place of settlement	VPCSSESSXXX
Reag/Deag	LANDERBICXX
Buyr/Sell	LANDERBICXX

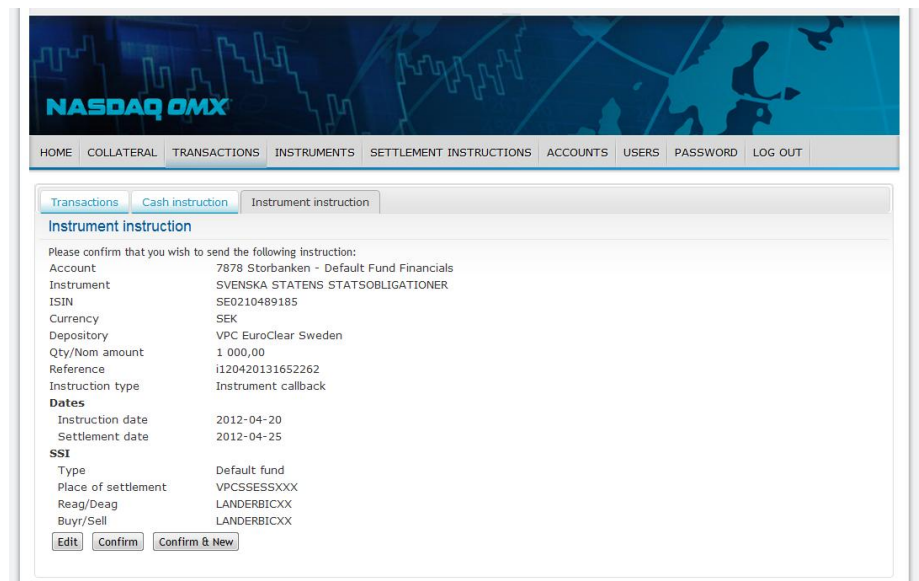
At the bottom of the form, there are two buttons: 'Submit' and 'Clear'.

The instrument instruction tab is used by a Member to deposit instruments as collateral on Members Default Fund Account respectively to callback excess instruments posted as collateral on Members Default Fund account.

NOTE: The instrument is added by typing the instrument name or ISIN code (or part of it).

When a user inputs an Instrument Deposit or Instrument Callback all fields must be filled after which the user presses the “Submit” button. At this step a validation will occur to make sure the Instrument deposit respectively instrument callback is accepted. If the validation is accepted the user will be transferred to the confirmation dialogue.

NOTE: In order to be able to submit the instrument instruction a valid instrument SSI as well as valid instruction and settlement dates must exist, the web will automatically try to find these values when the account, instrument or instruction type changes.



The screenshot displays the NASDAQ OMX Collateral Management Web interface. At the top, there is a navigation menu with links: HOME, COLLATERAL, TRANSACTIONS, INSTRUMENTS, SETTLEMENT INSTRUCTIONS, ACCOUNTS, USERS, PASSWORD, and LOG OUT. Below the navigation menu, there are three tabs: Transactions, Cash instruction, and Instrument instruction. The 'Instrument instruction' tab is selected, and the page title is 'Instrument instruction'. The main content area contains the following information:

Please confirm that you wish to send the following instruction:

Account	7878 Storbanken - Default Fund Financials
Instrument	SVENSKA STATENS STATS OBLIGATIONER
ISIN	SE0210489185
Currency	SEK
Depository	VPC EuroClear Sweden
Qty/Nom amount	1 000,00
Reference	i120420131652262
Instruction type	Instrument callback

Dates

Instruction date	2012-04-20
Settlement date	2012-04-25

SSI

Type	Default fund
Place of settlement	VPCSESSXXX
Reag/Deag	LANDERBICXX
Buyr/Sell	LANDERBICXX

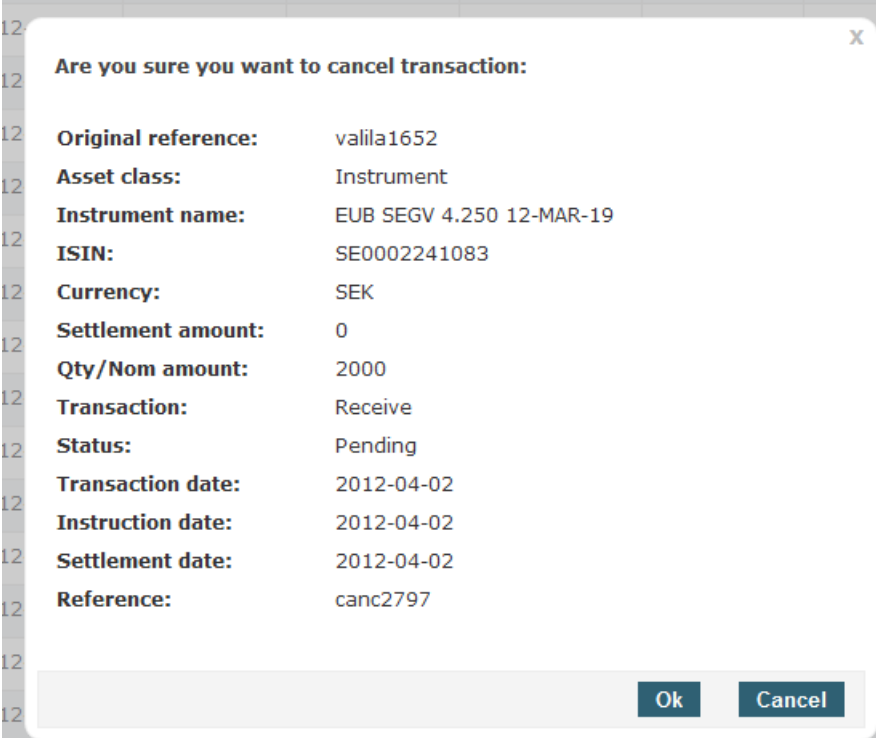
At the bottom of the form, there are three buttons: **Edit**, **Confirm**, and **Confirm & New**.

Options:

- **Edit** – move back to the previous step.
- **Confirm** – Confirm the instrument instruction and move to the transactions page.
- **Confirm & New** – Confirm the instrument instruction and move back to the instrument instruction page with the possibility to enter an additional Instrument callback or deposit.

2.2.4. CANCELLATION OF A TRANSACTION

It is possible for a user to cancel a cash or instrument instruction input in CMS Web. This is done by pressing the “Cancel” link in the transactions list (see 2.2.1 Transactions Tab)



A confirmation dialog box titled "Are you sure you want to cancel transaction:" with a close button (X) in the top right corner. The dialog contains the following details:

Original reference:	valila1652
Asset class:	Instrument
Instrument name:	EUB SEGV 4.250 12-MAR-19
ISIN:	SE0002241083
Currency:	SEK
Settlement amount:	0
Qty/Nom amount:	2000
Transaction:	Receive
Status:	Pending
Transaction date:	2012-04-02
Instruction date:	2012-04-02
Settlement date:	2012-04-02
Reference:	canc2797

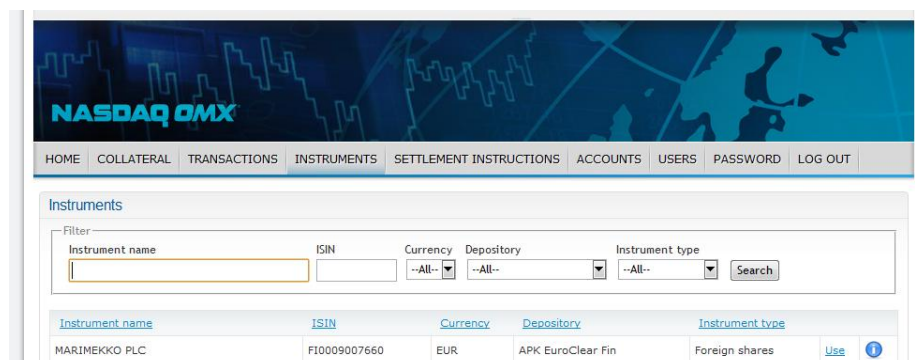
At the bottom right of the dialog are two buttons: "Ok" and "Cancel".

Press “Ok” to submit the cancellation request for the transaction and “Cancel” to abort the request and move back to the transaction list.

NOTE: When a cancellation is submitted validations will be performed to accept or reject cancellation. A Cancellation will be rejected if e.g. a cash callback has been sent to the bank or an instrument instruction is matched or settled in the CSD/ICSD. If a cancellation is rejected the user will be notified with an error message.

2.3. INSTRUMENTS

Select the “INSTRUMENTS” top level menu item.



This page displays information about instruments accepted by NASDAQ OMX as instrument contribution to NASDAQ OMX Default Fund. For more details on a specific instrument, press the information icon (i). In order to use an instrument in an instrument instruction, press the “Use” link, the user will then be automatically forwarded to the “Instrument instruction tab” (see above) with the instrument information already filled in.

The “Search” button must be pressed in order for a result to be displayed.

Optional Filters

- **Instrument name** – Include instruments that have a long name starting with the specified value
- **ISIN** – Include instruments with an ISIN code that starts with the specified value
- **Currency** – Include instruments with the specified currency
- **Depository** – Include instruments belonging to a specific depository
- **Instrument type** – Include instruments with the specific instrument type.

In order for the optional filters to take effect, the “Search” button must be pressed.

Sort Options

By pressing the column heading it is possible to sort the retrieved information. By repeating the sorting it will switch between ascending and descending sort order.

Export Options

-
- **Excel** – Press the "Excel" link in order to export the displayed table to an excel document.

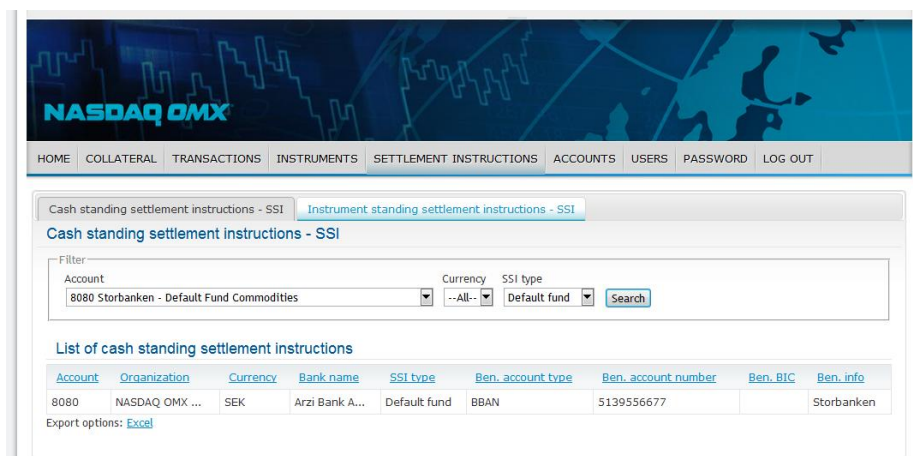
2.4. SETTLEMENT INSTRUCTIONS

Select the “SETTLEMENT INSTRUCTIONS” top level menu item. This will display a page with two different tabs related to standing settlement instructions (SSI):

- **Cash standing settlement instructions** – View available cash SSIs (this tab selected by default).
- **Instrument standing settlement instructions** – View available instrument SSIs.

TIP: When moving the mouse over the “SETTLEMENT INSTRUCTIONS” option a submenu containing direct links to the two different tabs will be displayed

2.4.1. CASH STANDING SETTLEMENT INSTRUCTIONS TAB



The screenshot shows the NASDAQ OMX Collateral Management Web interface. The top navigation bar includes links for HOME, COLLATERAL, TRANSACTIONS, INSTRUMENTS, SETTLEMENT INSTRUCTIONS, ACCOUNTS, USERS, PASSWORD, and LOG OUT. The main content area is titled "Cash standing settlement instructions - SSI" and features a filter section with dropdown menus for Account (8080 Storbanken - Default Fund Commodities), Currency (--All--), and SSI type (Default fund), along with a Search button. Below the filter is a table titled "List of cash standing settlement instructions" with columns for Account, Organization, Currency, Bank name, SSI type, Ben. account type, Ben. account number, Ben. BIC, and Ben. info. The table contains one row of data for account 8080 at Storbanken.

Account	Organization	Currency	Bank name	SSI type	Ben. account type	Ben. account number	Ben. BIC	Ben. info
8080	NASDAQ OMX ...	SEK	Arzi Bank A...	Default fund	BBAN	5139556677		Storbanken

Export options: [Excel](#)

This page will display the available cash standing settlement instructions. By default the cash standing settlement instructions for all accounts will be displayed.

Optional Filters

- **Account** – Include cash standing settlement instructions related to the specified account.
- **Currency** – Include cash standing settlement instructions of the specified currency.
- **SSI type** – Include cash standing settlement instructions of the specified type.

In order for the optional filters to take effect, the “Search” button must be pressed.

Sort Options

By pressing the column heading it is possible to sort the retrieved information. By repeating the sorting it will switch between ascending and descending sort order.

Export Options

- **Excel** – Press the “Excel” link in order to export the displayed table to an excel document.

2.4.2. INSTRUMENT STANDING SETTLEMENT INSTRUCTIONS TAB

Cash standing settlement instructions - SSI | Instrument standing settlement instructions - SSI

Instrument standing settlement instructions - SSI

Filter

Account: 7878 Storbanken - Default Fund Financials | Depository: --All-- | SSI type: Default fund | Search

List of instrument standing settlement instructions

Account number	Organization	Country	Depository	SSI type	SSI instrument type	SSI sub instrument type
7878	NASDAQ OMX ST...	SE	VPC EuroClear Sweden	Default fund	Equities	i
7878	NASDAQ OMX ST...	SE	VPC EuroClear Sweden	Default fund	Government fixed income	i
7878	NASDAQ OMX ST...	NO	VPS Norge	Default fund	Equities	i

Export options: [Excel](#)

This page will display the available instrument standing settlement instructions. By default the instrument standing settlement instructions for all accounts will be displayed. For more details on a specific instrument, press the information icon ([i](#)).

Optional Filters

- **Account** – Include instrument standing settlement instructions related to the specified account.
- **Depository** – Include instrument standing settlement instructions belonging to the specified depository.
- **SSI type** - Include instrument standing settlement instructions belonging to the specified SSI type.

In order for the optional filters to take effect, the “Search” button must be pressed.

Sort Options

By pressing the column heading it is possible to sort the retrieved information. By repeating the sorting it will switch between ascending and descending sort order.

Export Options

- **Excel** – Press the “Excel” link in order to export the displayed table to an excel document.

2.5. ACCOUNTS

Select the “ACCOUNTS” top level menu item.

The screenshot shows the NASDAQ OMX Accounts page. At the top, there is a navigation menu with the following items: HOME, COLLATERAL, TRANSACTIONS, INSTRUMENTS, SETTLEMENT INSTRUCTIONS, ACCOUNTS (selected), USERS, PASSWORD, and LOG OUT. Below the menu, the page title is "Accounts". There is a filter section with the following fields: Account (8080), Owner, Organization (All), Type (All), and SSN. A "Search" button is located to the right of the SSN field. Below the filter section, there is a table with the following columns: Account, Owner, Organization, Type, Description, Address, and SSN. The table contains one row of data: Account 8080, Owner Storbanken, Organization NASDAQ OMX STO..., Type Default Fund..., Description Default Fund, Address 18430, Åkersberga, and SSN 556059-9473. Below the table, there is a link for "Export options: Excel".

This page displays details about the Default Fund Accounts that the user has access to. By pressing the link in the “Account” column the user will be transferred to the Collaterals page.

Optional Filters

- **Account** – Search for a specific account number.
- **Owner** – Account owner name.
- **SSN** – Search on social security number.
- **Organization** – Search on accounts belonging to a specific organization.
- **Type** – Search for accounts of a specific type.

In order for the optional filters to take effect, the “Search” button must be pressed.

Sort Options

By pressing the column heading it is possible to sort the retrieved information. By repeating the sorting it will switch between ascending and descending sort order.

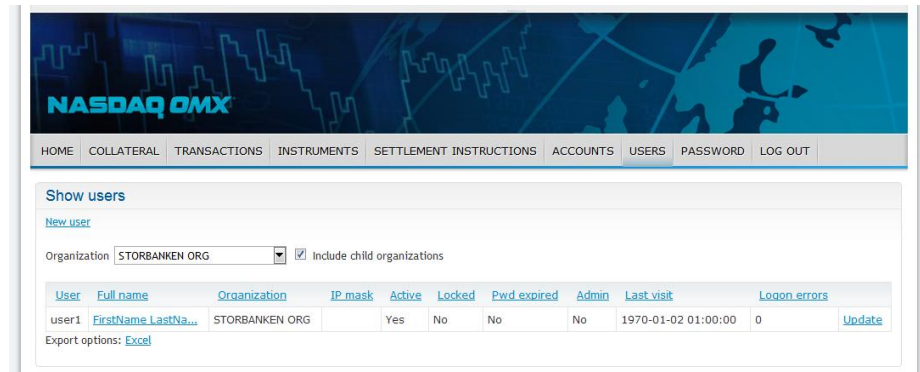
Export Options

- **Excel** – Press the “Excel” link in order to export the displayed table to an excel document.

2.6. USERS

Select the “USERS” top level menu item. A user is the personal identity of someone entitled to access the CMS web. The user will be granted access to an organization and will only be allowed access to data related to that organization.

NOTE: This menu item is only available for administrators.



Organization: STORBANKEN ORG Include child organizations

User	Full name	Organization	IP mask	Active	Locked	Pwd expired	Admin	Last visit	Logon errors	
user1	FirstName LastNa...	STORBANKEN ORG		Yes	No	No	No	1970-01-02 01:00:00	0	Update

Export options: [Excel](#)

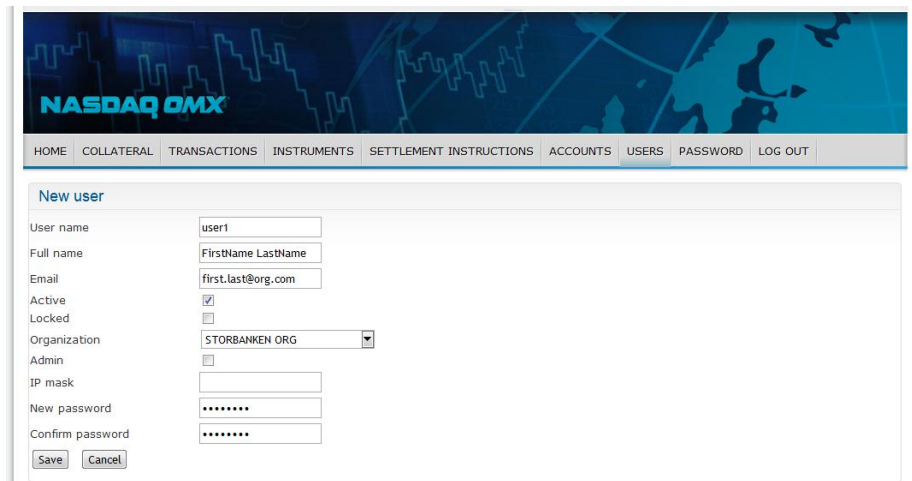
This page displays the users that the administrator is responsible for and is allowed to update. It also has the possibility to add a new user or to “deregister a user”.

Optional Filters

- **Organization** – Include users belonging to this specific organization.
- **Include child organizations** – Include users in related child organizations to the currently selected organization.

2.6.1. NEW USER

In order to add a new user, press the “New user” link at the “Users” page.



Supply the information for the new user.

The user name must apply to the following rules:

- Must be between 3 and 10 characters
- May only contain:
 - Letters: A-Z or a-z
 - Digits: 0-9
 - Underscore: _
 - Dash: -

The IP mask is used to lock access to a user account to specific IP addresses

- Not active if left empty
- May contain a IPv4 address or a partial IP address (the filter will check that the IP address starts with the configured value
- May end with an optional wildcard (*). If not supplied an implicit wildcard match will be made.
- Example: “10.20.” or equivalent “10.20.*” – will allow access from IP address 10.20.*.*

The new password entered must apply to the following rules:

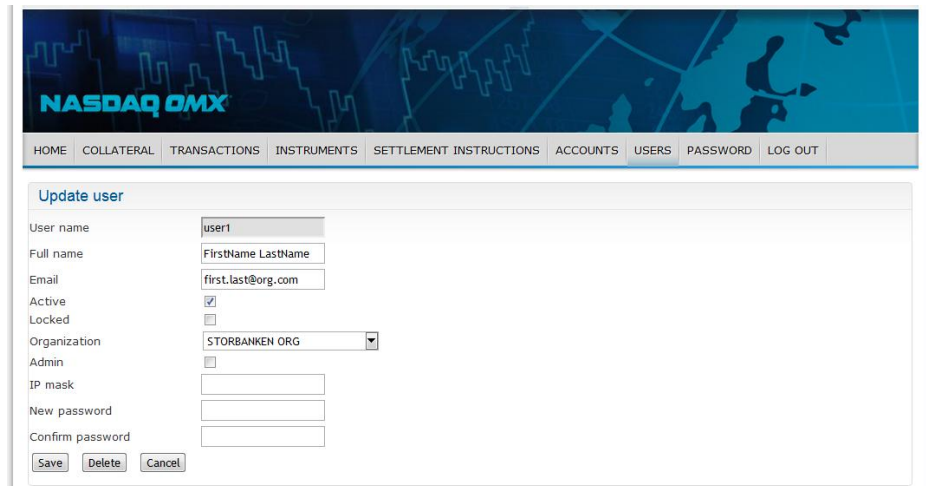
- Must be at least 8 characters and apply to the following rules:
- May only contain letters (A-Z or a-z) or digits (0-9)
- Must contain: at least one digit, one uppercase letter and one lowercase letter
- May not contain the user name

Options:

-
- **Save** – Save the new user and move back to the "Users" page.
 - **Cancel** – Move back to the "Users" page without saving any changes.

2.6.2. UPDATE USER

In order to update the user details for a specific user, press the “Update” link at the “Users” page. From this view it is also possible to delete a user.



The screenshot shows the 'Update user' form within the NASDAQ OMX Collateral Management Web interface. The form is titled 'Update user' and contains the following fields and controls:

- User name: user1
- Full name: FirstName LastName
- Email: first.last@org.com
- Active:
- Locked:
- Organization: STORBANKEN ORG (dropdown menu)
- Admin:
- IP mask:
- New password:
- Confirm password:

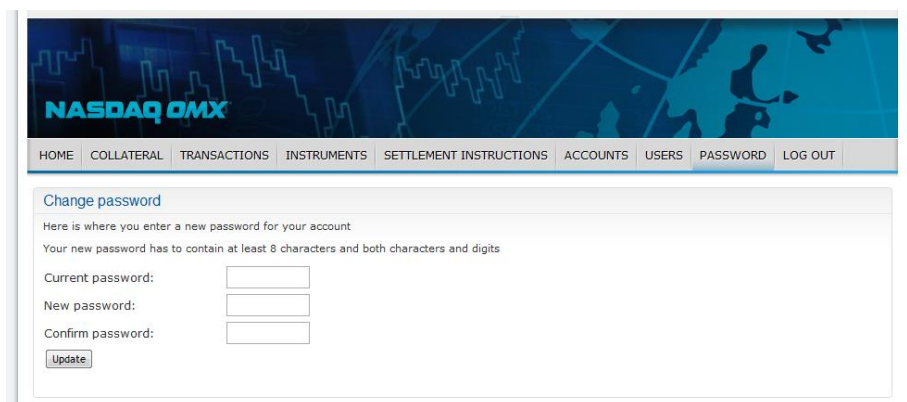
At the bottom of the form, there are three buttons: Save, Delete, and Cancel.

Options:

- **Save** – Save the changes and move back to the “Users” page.
- **Delete** – Delete the selected user. A confirmation dialogue will be displayed prior of deletion.
- **Cancel** – Move back to the “Users” page without saving any changes.

2.7. PASSWORD

Select the “PASSWORD” top level menu item.



The screenshot shows the NASDAQ OMX web application interface. At the top, there is a navigation menu with the following items: HOME, COLLATERAL, TRANSACTIONS, INSTRUMENTS, SETTLEMENT INSTRUCTIONS, ACCOUNTS, USERS, PASSWORD, and LOG OUT. Below the navigation menu, the 'Change password' form is displayed. The form includes the following text and fields:

- Change password
- Here is where you enter a new password for your account
- Your new password has to contain at least 8 characters and both characters and digits
- Current password:
- New password:
- Confirm password:
-

This page allows a user to change password. A new password will be valid for 30 days, after that period the user will be requested to change password.

NOTE: Omitting to change the password when requested might result in a locked account.

The new password entered must apply to the following rules:

- Must be at least 8 characters
- May only contain letters (A-Z or a-z) or digits (0-9)
- Must contain: at least one digit, one uppercase letter and one lowercase letter
- May not contain the user name
- May not be reused for a configurable number of times

NOTE: This page might also be displayed when the user logs in to the application if a change of password has been forced, i.e. if the password has expired or has been changed by an administrator