

## Company Profile/Overview

Founded in 1999 by some of the most accomplished risk professionals in the industry, Protecht delivers training, advisory, and software solutions that intensify the risk management focus and discipline of corporations and government departments alike. Their services are ideal for any organization that needs to not only build and streamline a practical risk management framework that encompasses risk mitigation and compliance, but also address the risk management expectations of both upper management and external regulatory agencies.

Protecht.ERM accommodates an organization's existing risk assessment methodology and enables them to link back to their central risk event and control libraries. It allows risks to be assessed across multiple departments within the organization and aggregated through reporting.

## Problem/Challenge

Before selecting InetSoft's Style Intelligence for integration, Protecht.ERM already featured a Hyperion Essbase risk management and compliance database system. While their data collecting and storage was robust and comprehensive, their platform was only offering reports on five to ten percent of the risk management data collected, due to the limitations of using the BIRT open source reporting system. Protecht wondered if it was possible to put the power of report design into the hands of their users, so that customers would not need technical help anytime a pre-built risk management report did not answer business questions or demands.

This kind of self-service was a big priority, since Protecht's customer base consists mostly of risk managers who do not have extensive IT training. The ability to DIY dashboards and data manipulations was not a benefit of most of the reporting solutions which Protecht evaluated for integration. Protecht wanted to empower their users to explore their risk management data, along with keeping up with the changing reporting requirements of regulatory bodies.

## A Protecht.ERM Risk Management Obligations Dashboard



## Solution/Requirement

After evaluating many possible solutions, Protecht found that InetSoft's Style Intelligence was the perfect solution for addressing their end-users needs. Protecht.ERM was able to integrate their risk management and compliance database system seamlessly with Style Intelligence and make both accessible through an easy-to-use online customer portal.

InetSoft's user and role based permission system enables Protecht.ERM to provide individual users with a unique view when they login to the Protecht website. The user sees only the type of risk management information that is relevant to their job role, such as compliance obligations, what their key risk indicators or KPIs are, how many actions they have outstanding, and anything else related to their risk management duties.

Style Intelligence is integrated seamlessly with Protecht's risk management database, providing dashboarding and data manipulation functionality while being completely invisible to Protecht's customers. Users input risk management data into entry forms (which they may create themselves) and any of the data inputted may be incorporated into InetSoft-powered dashboards and paginated reports. These dashboards contain hyperlinks going back to the form entry system, so that case statuses may be modified after observing analytics.

### A Protecht.ERM Predictive Risk Analytics Dashboard

#### What If Scenario Dashboard

Approved  Unapproved

##### New Deal: Prebooking Limit Check

Apply

Portfolio	Group	Counterparty	Product	Term	Rating	Face Value
AUD Book	AMP Group	AMP Bank	Bonds	< 1 year	AA	8000000
AUD Book						0
AUD Book						0

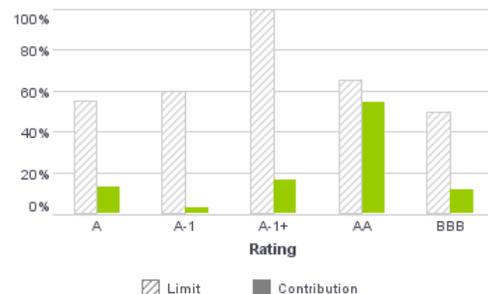
##### Counterparty Limits

Group	Counterparty	Rating	Product	Face Value	Contribution	Group Limit
<b>AUD Book</b>						
AMP Group	AMP Bank	A	Floating Rate Note	4,000,000	13.33%	10,000,000
		AA	Bonds	8,000,000	26.67%	
<b>AMP Group Total</b>				<b>12,000,000</b>	<b>40.00%</b>	
ANZ Group	ANZ	AA	Bonds	2,000,000	6.67%	5,000,000
		BBB	Floating Rate Note	1,500,000	5.00%	
	<b>ANZ Group Total</b>				<b>3,500,000</b>	
CBA Group	CBA	A-1+	Bonds	5,000,000	16.67%	10,000,000
		<b>CBA Group Total</b>				
ME Bank Group	ME Bank	A-1	Floating Rate Note	1,000,000	3.33%	4,000,000
		BBB	Term Deposits	2,000,000	6.67%	
	<b>ME Bank Group Total</b>				<b>3,000,000</b>	
NAB Group	NAB	AA	Bonds	3,500,000	11.67%	8,000,000
			Floating Rate Note	3,000,000	10.00%	
	<b>NAB Group Total</b>				<b>6,500,000</b>	
					<b>100.00%</b>	

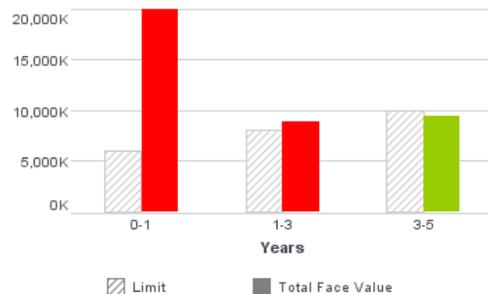
##### Unapproved Deals

Portfolio	Product	Deal Number	Counterparty	Trade Date	Term	Face Value
AUD Book	Subordinated Note	1000001	Bankwest	30/10/15	0-1	6,000,000
AUD Book	Term Deposits	1000002	Rabobank	15/11/15	1-3	2,500,000

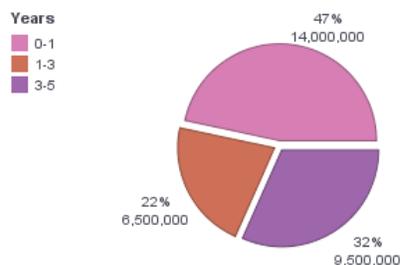
##### Rating Limits



##### Term Limits



##### Maturity Profile



## Customer Value ▶

Protecht.ERM comes with a suite of pre-built dashboards and paginated reports powered by InetSoft's application that are designed to cover common risk management needs. These dashboards are used for risk analytics, and each is linked to a precisely formatted report, ready to be sent to regulatory agencies or the company's board of directors. InetSoft's robust self-service functionality allows Protecht.ERM users the freedom to alter these dashboards and reports to their needs, or even build fresh ones from scratch. This level of self-service extends even beyond the dashboard or report level. End-users can use the InetSoft data worksheet to do their own data mashups and add conditions and calculations to risk management data as it's coming into the dashboard or report. These are functions that would normally require an in-depth knowledge of SQL to perform.

"The beauty of this is that even users who are not tech savvy can learn what data tables they want to use and drag them onto a data worksheet," exclaims April Pethybridge, Information Architect at Protecht. "When we demo the product, we can tell how excited our users are to no longer have to go through IT for dashboard or data modifications."

The innovations at Protecht continue to develop. To keep at the leading edge of the evolving risk management industry, they are expanding their predictive analytics dashboards to include analyses which project the number of incidents 12 months into the future. With the flexibility offered by InetSoft, Protecht.ERM will continue to grow and lead the risk management industry.

## A Protecht.ERM Executive Risk Management Dashboard



### CEO Dashboard

#### Top 10 Risks



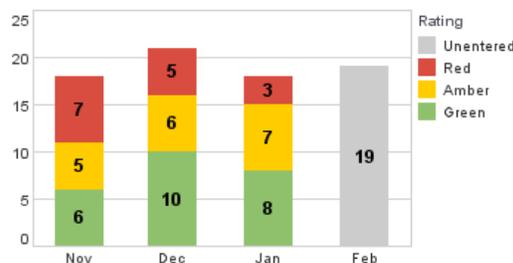
#### Loss Events



#### Actions

- 14 Open Actions
- 5 Critical Open Actions
- 12 Overdue Actions

#### Key Risk Indicators



#### Compliance

