

BankFocus Migration

The new version of the BankFocus platform is now live and it's time to switch to a modern, more streamlined interface and the new portfolio monitoring functionality.

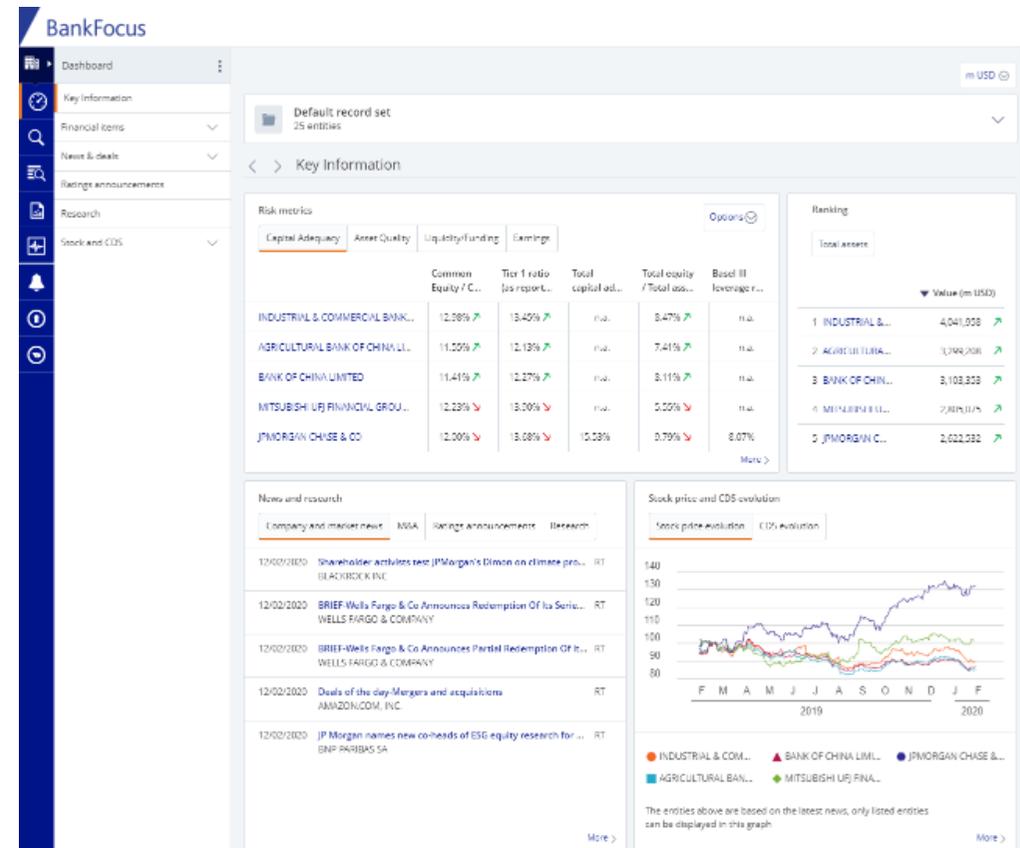
The Portfolio Landing Page is the default start page for the BankFocus platform. It provides a way to actively monitor the institutions in your portfolio.

The Landing Page contains the following widgets:

- Risk Metrics – showing the relevant risk metrics and their evolution for banks, including capital adequacy, asset quality, liquidity/funding and earnings.
- Ranking – ranks all institutions in your portfolio by risk metrics.
- News and Research – recent news and research for the institutions in your portfolio.
- Stock Price and CDS Evolution – equity and credit market information for banks.

The Landing Page is driven by your saved **Entity Sets**. You can easily switch between different entity sets to monitor different types of banks or various geographies. If you don't have a saved Entity Set yet, the Landing Page will load a default set of 25 major banks worldwide.

The new interface

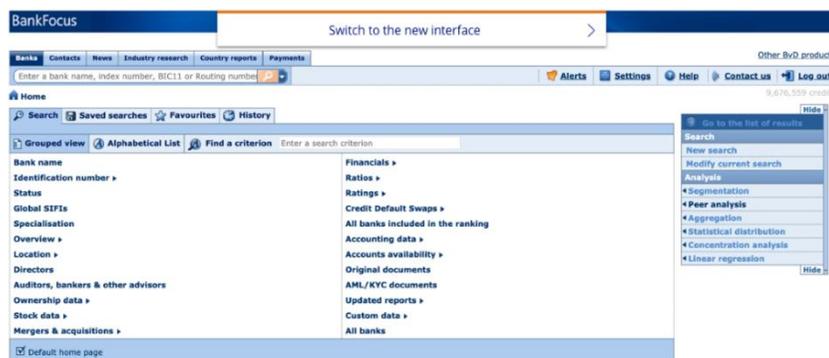


Dependent on your current version, your BankFocus migration will require different actions.

Migrate from v3.0

To migrate:

1. Open BankFocus as normal.

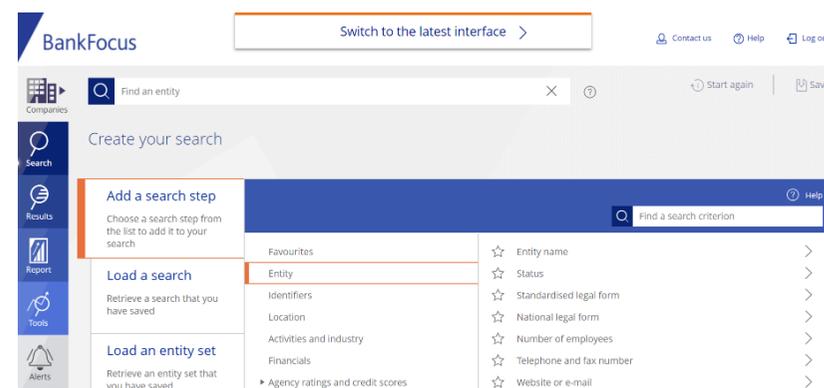


2. Click on the **Switch to the new interface** banner at the top of the home screen.
3. The new interface opens. The landing page is driven by your saved Entity Sets. Switch between different entity sets to monitor different types of banks or various geographies. If you don't have a saved Entity Set yet, the landing page will load a default set of 25 major banks worldwide.
4. You now need to import the user-defined content. Individual users are able to view and migrate their own content. Administrators can view and migrate all content. See *Migration Tool* on the following page for more information on migrating data.

Migrate from v4.0

To migrate:

1. Open BankFocus as normal.



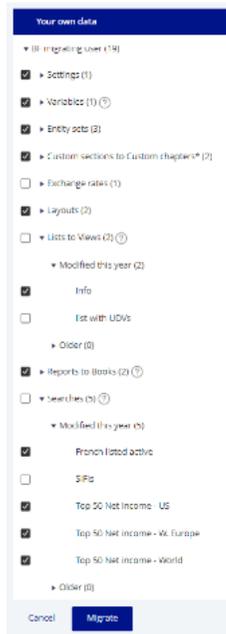
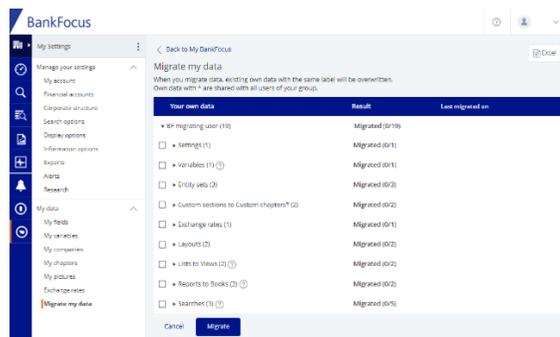
2. Click on the **Switch to the latest interface** banner at the top of the home screen.
3. The new interface opens. Migrating from v4.0 involves little change to your interface. The theme has been updated and the navigation menu is now on the left of your screen in line with other products.
4. All user-defined settings are still valid, no further action is required.

Migration Tool

Note:

The Migration Tool is only required for BankFocus v3.0 users

1. Go to **My BankFocus > My Settings**. Click on **Migrate my data**.



Note:

If you cannot see the **Migrate my data** option, contact support or your account manager.

2. Expand each section to see all the user-defined data created in your previous version of BankFocus. All data sections are arranged by *Data modified this year* and *Older*.
3. Select any or all items you want to be recreated in the new interface.

Note:

It is recommended that variables are migrated first, followed by other data.

4. Click **Migrate** to begin the transfer. The progress of all transfers is displayed against the data.

Your own data	Result	Last migrated on
▼ BF migrating user (19)	Migrated (16/19)	
<input type="checkbox"/> ▼ Searches (5) <ul style="list-style-type: none"> ▼ Modified this year (5) <ul style="list-style-type: none"> <input type="checkbox"/> French listed active <input type="checkbox"/> SIFIs <input type="checkbox"/> Top 50 Net income - US <input type="checkbox"/> Top 50 Net income - W. Europe <input type="checkbox"/> Top 50 Net income - World ▶ Older (0) 	Migrated (4/5)	
	Success	09/03/2020 1:11 PM
	Not Started	
	Success	09/03/2020 1:11 PM
	Success	09/03/2020 1:11 PM
	Success	09/03/2020 1:11 PM

Note:

Success indicates a completed transfer. If the transfer results in a *Partially migrated* or *Not migrated* status then contact your account manager for assistance.