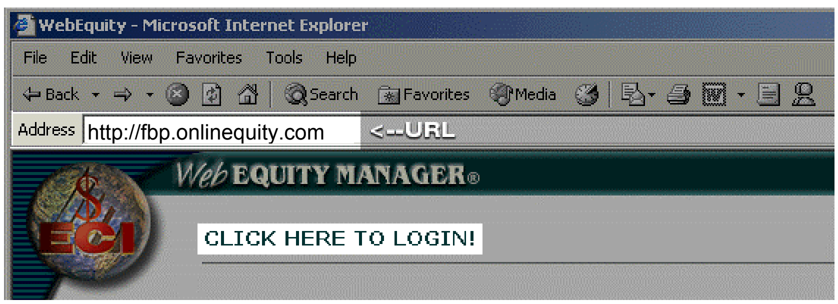
FBP Module 1: System Overview and General Information

Getting Started:

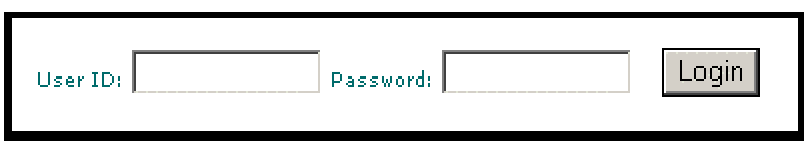
To complete the data input exercises throughout this training, you will be accessing a special Web Equity Manager® training site. This training site is separate from the live site you will use to access live customer data when you return to your office.

Because this training site does not interface with WebCAAF and SCIMS, the steps you take to access Web Equity Manager® and create a new customer record in training will be different from the steps you will take back in your office on the live site, as described in the WebCAAF & SCIMS demonstration you just experienced. It is only in Module 1 that you will notice these differences. For Modules 2-8, the training site will behave exactly like your live site will.

- Open your Web browser (Internet Explorer 6.0 or higher)
- **NOTE:** For this training we have put the Web Address (URL) for the training site in your "Favorites" list (@fbp.onlinequity.com). Use that feature now or simply enter **http://fbp.onlinequity.com** into the browser "Address" field and press "Enter" on your keyboard.



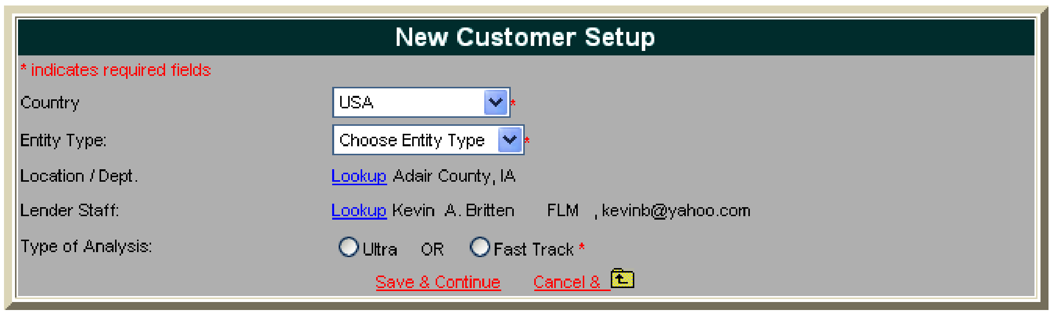
- Login to the Web Equity Manager® system
  - Click "CLICK HERE TO LOGIN!"
  - Enter "User ID" and "Password" and click "Login"
    - For this training your "User ID" is your WebCAAF ID, and your "Password" is "omaha" (lowercase).



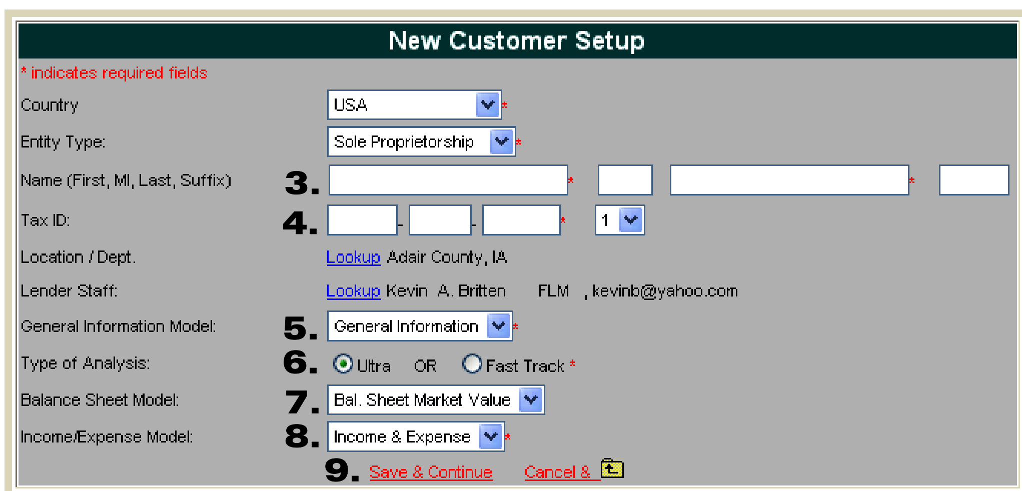
<u>Add New Customer</u>:

- Click the “Add New” link in the top-left corner of the Locator screen.

- The “New Customer Setup” screen that displays (shown below) requires a few pieces of basic information about the customer you are entering into Web Equity Manager®.



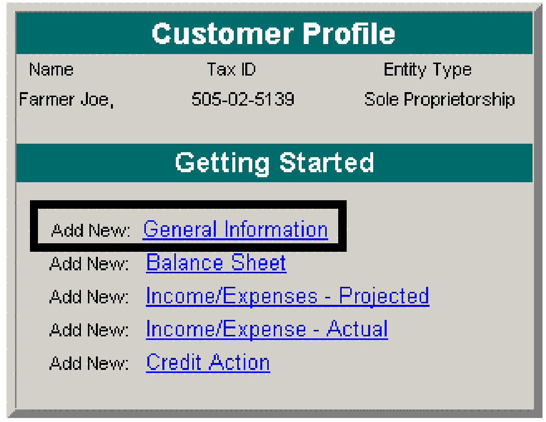
1. Choose the Country. This is defaulted to “USA.”
2. Choose the Entity Type. For this training you will choose “Sole Proprietorship.” When you choose this, the “Name” fields will display (shown below).



3. Enter your own First Name and Last Name (so the ECI Instructor can easily identify your specific training file).
4. Enter your own Tax ID (Social Security Number).
5. General Information Model: For this training you will choose “General Information” from the drop list.
6. Type of Analysis: For this training you will choose “Ultra.” When you choose “Ultra” the screen will automatically reveal additional fields to complete.
7. Balance Sheet Model: For this training you will choose “Bal. Sheet Market Value.”
8. Income & Expense Model: For this training you will choose “Income & Expense.”
9. Click the “Save & Continue” link.

Next, the dialog box (shown right) will display key sections of the system that you will be entering personal and financial information into. Click on the “General Information” link at this time.

Enter a fictitious case number and click the “Save & Stay” link. Click the “Select” link next to “Type of Operation- Primary.” In the popup window select “Agriculture.” From the right side of the popup window select any NAICS code.

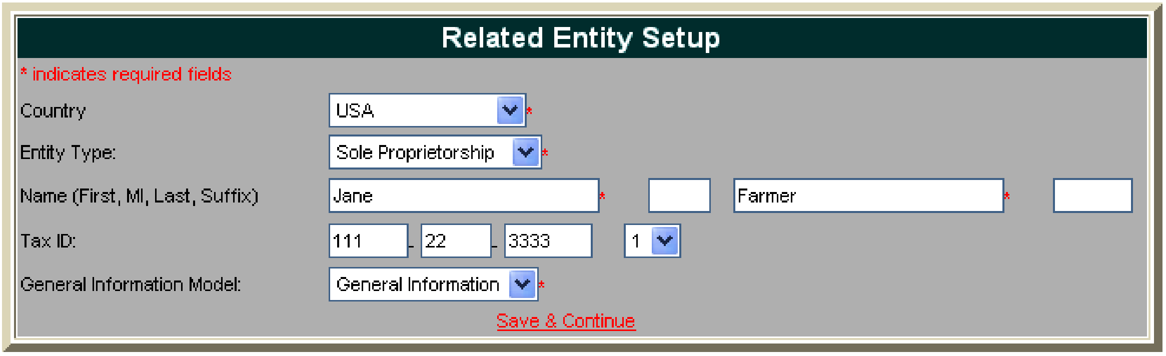


Use your personal information to complete the rest of the “General Information” down through the “Borrower Financial Training” fields. Fill out every field even if the information is fictitious. Click “Save & Stay” when finished here. Do not enter any data under the Farm Assessment Narrative section of the screen. This will be covered later in Module 7.

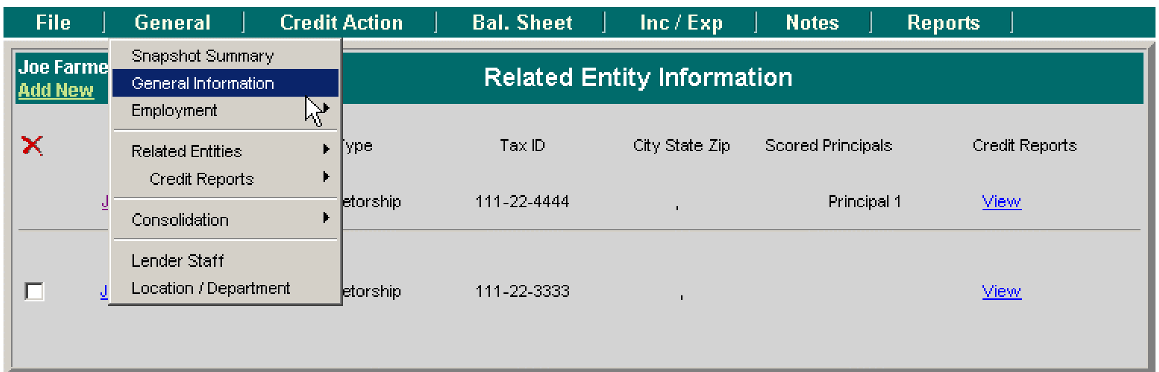
NOTE: When you return to your office and work on the live site, SCIMS will populate the majority of the “General Information” for you.

Next, scroll down the screen and locate the “Related Entities (Spouse, Co-App., Co-Owners)” link and click on it.

Enter the “Related Entity Setup” information displayed in the sample below. Click the “Save & Continue” link when finished.



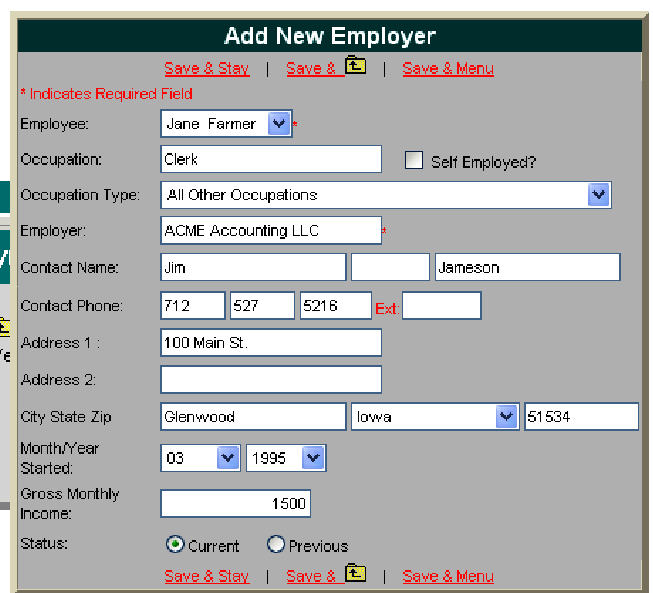
Re-enter the General Information screen by using the menu bar and clicking “General Information.”



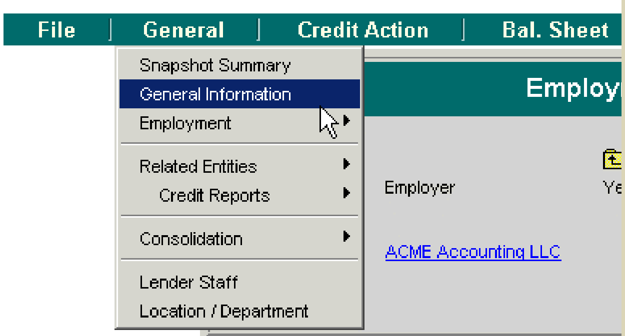
Next, scroll down the screen and locate the “Employment” link and click on it.

The first time you enter this section the screen on the right will display. Click on the “Add New” link in the top left corner.

This will display the sample shown lower right. Enter the information as it is shown in the sample here and click “Save & Stay.”



Use the menu bar to return to the General Information section (shown below).



You are now finished with this data entry exercise.

NOTE: The customer record you just created will be used throughout the training modules. The data input you do in one module is built upon in each subsequent module. Therefore, it is critical that you make no changes to this record outside of what you are instructed to do in the data input exercises.

Your next step will be to go to the eLearning Center to take the test for this module. While taking the test it may be necessary to refer back to your Web Equity Manager® input. It is recommended that you leave the browser window open where you were just working in Web Equity Manager® and open a second browser window now for the eLearning Center to facilitate easy switching between the two applications.

- In the new browser window you just opened, proceed to the ECI eLearning Center at http://elearning.onlinequity.com. **NOTE:** This resource has also been added to your "Favorites" list.
- eLearning instructions:
  - Log into the eLearning Center using the same User ID/Password you used to access Web Equity Manager®.
  - Click on the "My Classes" link.
  - Below the module you just completed click on the "Test Now" link.
  - Answer each question. When you have answered all of the questions click "Grade Now."
  - After reviewing the test, click "↥" in the top right corner of the screen to return to the "My Classes" screen where you may retest if desired.
  - On the right side of the screen, under the "Rate Class" column, click the link for the module you just completed. Complete the feedback form. When finished, click the "Save & ↥" link.
  - Log out of the eLearning Center and out of Web Equity Manager when finished.

You are now ready to attend the next module.

While it is not a requirement before moving on to the next module, we strongly encourage you this training week to review the following information in your spare time or upon your return to your office.

- View Program Basics in Web Equity Manager® eHelp at the following Web address:
  - **http://help.onlinequity.com/@WEMehelp/Basics/Program_Basics.htm**
  - Or on page 7 of the Web Equity Manager® Users Manual.