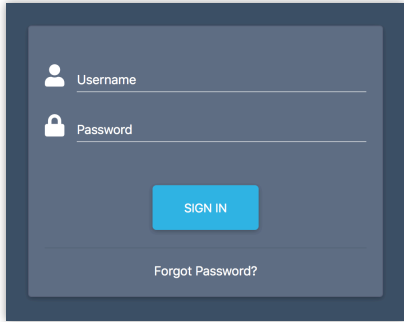




INTERACTIVE MODELS | USER MANUAL

## Gaining Access to the Interactive Models site

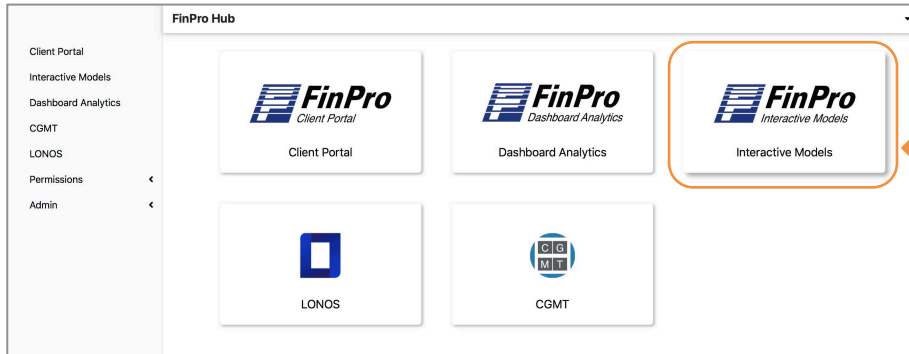
Before logging in, you will receive 2 separate emails containing your username and password, as well as a link for the site.



Click the link in the email or paste it into your browser. You will be brought to the SIGN IN page as shown to the left.

Enter your username and password assigned to you in the email and click SIGN IN.

You may receive a prompt for dual authentication. If so, an email will be sent with the one-time code. Please check your spam folder if you do not see it.



After signing in, you will land on the FinPro Hub shown below.

Click on Interactive Models

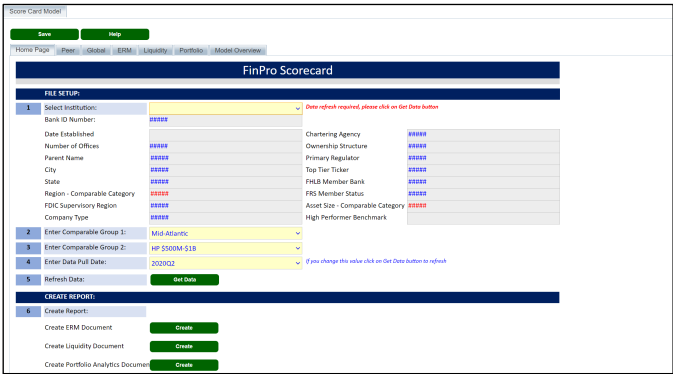
# FinPro Digital – Interactive Models Site Access (continued)



Click on the FinPro Scorecard Model

While the model is loading a progress screen will appear that states **Your model is loading...** (This may take up to 1 minute)

The FinPro Scorecard will load



# FinPro Digital – Scorecard Module Home Page

Score Card Model

Save Help

Home Page Peer Global ERM Liquidity Portfolio Model Overview

## FinPro Scorecard

**FILE SETUP:**

1	Select Institution:	<input type="text" value=""/>	Data refresh required, please click on Get Data button
	Bank ID Number:	#####	
	Date Established		Chartering Agency: #####
	Number of Offices	#####	Ownership Structure: #####
	Parent Name	#####	Primary Regulator: #####
	City	#####	Top Tier Ticker: #####
	State	#####	FHLB Member Bank: #####
	Region - Comparable Category	#####	FRS Member Status: #####
	FDIC Supervisory Region	#####	Asset Size - Comparable Category: #####
	Company Type	#####	High Performer Benchmark: #####
2	Enter Comparable Group 1:	<input type="text" value="Mid-Atlantic"/>	
3	Enter Comparable Group 2:	<input type="text" value="HP \$500M-\$1B"/>	
4	Enter Data Pull Date:	<input type="text" value="2020Q2"/>	If you change this value click on Get Data button to refresh
5	Refresh Data:	<input type="button" value="Get Data"/>	

**CREATE REPORT:**

6	Create Report:	
	Create ERM Document	<input type="button" value="Create"/>
	Create Liquidity Document	<input type="button" value="Create"/>
	Create Portfolio Analytics Document	<input type="button" value="Create"/>

Click here to select and run reports

Select bank from drop down list and click **Get Data**

*\*Wait until data refresh prompt loads*

**After data refresh loads select:**

Comparable Group 1

Comparable Group 2

Data Pull date

Click **Get Data**

*\*Wait until data refresh prompt loads*

To run a report, click on the desired report type and click **Create**

This will take a few minutes for the report to complete. A pop up box will alert you when the report is complete and ready for download.

# FinPro Digital – Scorecard Module - Tips for success

The screenshot shows the 'Score Card Model' interface. At the top, there is a 'Save' button. Below it are navigation tabs: 'Home Page', 'Peer', 'Model Overview', 'Global', 'ERM', 'Liquidity', and 'Portfolio'. The main title is 'FinPro Score Card'. Underneath is a 'FILE SETUP:' section with a list of fields. Fields 1-4 are highlighted in yellow. Field 1 is 'Select Institution:' with a dropdown menu showing 'Millington Bank - Millington - NJ'. Field 2 is 'Enter Comparable Group 1:' with a dropdown menu showing 'Mid-Atlantic'. Field 3 is 'Enter Comparable Group 2:' with a dropdown menu showing 'HP \$500M-\$1B'. Field 4 is 'Enter Data Pull Date:' with a dropdown menu showing '2020Q2'. There is also a 'Refresh Data:' section with a 'Get Data' button. Below that is a 'CREATE REPORT:' section with three 'Create' buttons for 'Create ERM Document', 'Create Liquidity Document', and 'Create Combined Document'. Callout boxes provide the following information:

- Save button:** Saves all values in yellow data input cells to the database. This will save all values in yellow cells as the Banks' default values.
- Yellow boxes:** Yellow boxes throughout the model indicate data input cell fields.
- Get Data button:** Green buttons are action buttons. *Get Data refreshes the data*
- Create buttons:** Green buttons are action buttons. *Create will run the selected report*

# FinPro Digital – Scorecard Module - Reports

Score Card Model

**Save**

Home Page | Peer | Model Overview | Global | ERM | Liquidity | Portfolio

## FinPro Score Card

**FILE SETUP:**

1	Select Institution:	Adams County Bank - Kenesaw - NE	
	Bank ID Number:	14311	
	Date Established	1/1/1878	Chartering Agency
	Number of Offices	2	Ownership Structure
	Parent Name	First Kenesaw Company	Primary Regulator
	City	Kenesaw	Top Tier Ticker
	State	NE	FHLB Member Bank
	Region - Comparable Category	Midwest	FRS Member Status
	FDIC Supervisory Region	Kansas City	Asset Size - Comparable Category
	Company Type	Commercial Bank	High Performer Benchmark

State	
Stock Corporation	
FDIC	
0	
Federal Home Loan Bank of Topeka	
Nonmember	
< \$250M	
HP < \$250M	

2 Enter Comparable Group 1: Mid-Atlantic

3 Enter Comparable Group 2: HP \$500M-\$1B

4 Enter Data Pull Date: 2020Q2 *If you change this value click on Get Data button to refresh*

5 Refresh Data: **Get Data**

**CREATE REPORT:**

6 Create Report:

Create ERM Document	<b>Create</b>
Create Liquidity Document	<b>Create</b>
Create Portfolio Analytics Document	<b>Create</b>
Create Peer Document	<b>Create</b>
Create Combined Document	<b>Create</b>

To run a report, click on the green create button for the desired report. It will take a few minutes for the report to complete. A pop-up box will alert you when the report is complete and you can download it to your local machine.

# FinPro Digital – Scorecard Module - Peer Selection

- The peer selector tab allows the Bank to add up to 20 custom peer banks from the dropdown menu.
- The dropdown peer selectors are the yellow fields illustrated below.

The screenshot displays the 'FinPro Score Card' interface, specifically the 'PEER SELECTOR:' section. It features a table with 20 rows for selecting institutions. The first two rows are populated with '1st Cameron State Bank - Cameron - MO' and '1st Mariner Bank - Baltimore - MD'. A dropdown menu is open for the second row, showing 'Bank ID Number: 32487' and '31286'. A 'Get Data' button is located at the bottom right. Arrows point from the dropdown menu to the 'Get Data' button.

PEER SELECTOR:	Bank ID Number:	Date Established	Number of Offices	City	State	Region - Peer	FDIC Region	Company Type	Chartering Agency	Ownership Structure
1 Select Institution 1:	1st Cameron State Bank - Cameron - MO									
2 Select Institution 2:	1st Mariner Bank - Baltimore - MD									
Select Institution 3:										
Select Institution 4:										
Select Institution 5:										
Select Institution 6:										
Select Institution 7:										
Select Institution 8:										
Select Institution 9:										
Select Institution 10:										
Select Institution 11:										
Select Institution 12:										
Select Institution 13:										
Select Institution 14:										
Select Institution 15:										
Select Institution 16:										
Select Institution 17:										
Select Institution 18:										
Select Institution 19:										
Select Institution 20:										

Select peers from drop down list and click **Get Data** \*Wait until bank ID number(s) are displayed before clicking Get Data

# FinPro Digital – Scorecard Module - Peer selection (continued)

The screenshot displays the 'FinPro Score Card' interface. At the top, there is a 'Save' button and a navigation menu with 'Home Page' highlighted. The 'FILE SETUP:' section contains various fields for institution information, such as 'Select Institution', 'Bank ID Number', 'Date Established', and 'Region - Comparable Category'. Below this, there are dropdown menus for 'Enter Comparable Group 1' (set to 'Custom Peer') and 'Enter Comparable Group 2' (set to 'HP \$500M-\$1B'). A 'Get Data' button is located below the dropdowns. The 'CREATE REPORT:' section at the bottom offers options to create documents for ERM, Liquidity, Portfolio Analytics, Peer, and Combined categories, each with a 'Create' button.

1. Return to Home Page
2. Custom Peer can be chosen for either Comparable Group 1 or Comparable Group 2

**NOTE:** You must complete the custom peer group selector step first/ prior to coming back and selecting on this page.