FPI Credit Products

New Business Analyst

Overview

Welcome to the Credit Products team!

Think of this document as your “cheat sheet” to help you learn how to navigate the many places you will find the information you need to do your job.

Got questions? Ask your neighbors!

FPI Credit Products

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Table of Contents

[FPI Credit Products 1](#_Toc458511343)

[Credit Products SharePoint Sites 2](#_Toc458511344)

[Central 2](#_Toc458511345)

[Extranet 2](#_Toc458511346)

[Getting Started 3](#_Toc458511347)

[Credit Pro 3](#_Toc458511348)

[Credit Pro Development/Release Cycle 4](#_Toc458511349)

[Credit Pro Environments 5](#_Toc458511350)

[eReview 6](#_Toc458511351)

[eReview Environments 6](#_Toc458511352)

[eReview Functional Item Testing in TFS 7](#_Toc458511353)

# Credit Products SharePoint Sites

## Central

* [Department Site](https://central.financialpartners.com/Depts/CreditAnalysis/default.aspx) - Credit Analysis Systems (*old name*)
  + Internal documents live here, like testing documentation, and other things our customers don’t need to see
  + This site also houses the [team calendar](https://central.financialpartners.com/Depts/CreditAnalysis/Lists/TeamCalendar/calendar.aspx). Keep this up-to-date with vacation dates and any other situations where you will be out of the office.
* [FPI Brand Central](https://central.financialpartners.com/BrandCentral/Forms/AllItems.aspx)
  + You can find all logos, documentation and PPT templates here.
* [TFS](https://tfs.financialpartners.com/tfs/FPICD/FPI/_workitems) eReview
  + Team Foundation Server (TFS) – FPI Project template
  + This is where we log and track all work items for eReview.
* [TFS](https://tfs.financialpartners.com/tfs/FPICD/FPI%20Agile/Credit%20Pro/_workitems) Credit Pro/Benchmark/Collateral Web
  + Team Foundation Server (TFS) – FPI Agile Project template
  + This is where we log and track all work items for Credit Pro, Benchmark and Collateral Web.
* [eReview Site](https://central.financialpartners.com/Depts/eReview/default.aspx)
  + eReview [BA Tasks and Resources](https://central.financialpartners.com/Depts/eReview/Documents/Reference%20Material/BA%20Tasks%20and%20Resources.xlsx) spreadsheet

## Extranet

* [Credit Pro Project Site](https://extranet.financialpartners.com/Workspaces/Shared/Middle%20Market%20Credit%20Analysis/SitePages/Home.aspx)
  + Collaboration area with our customers, especially Steering Committee
  + Each Association has their own library that only they can see (*FPI can see it, too*)
  + Only FPI staff can view the contents of the [FPI Documents](https://extranet.financialpartners.com/Workspaces/Shared/Middle%20Market%20Credit%20Analysis/FPI%20Documents/Forms/AllItems.aspx) library
  + Some libraries are public, like the [Steering Committee](https://extranet.financialpartners.com/Workspaces/Shared/Middle%20Market%20Credit%20Analysis/Steering%20Committee/Forms/AllItems.aspx) and [Lab Release Notes](https://extranet.financialpartners.com/Workspaces/Shared/Middle%20Market%20Credit%20Analysis/2013%20Sprint%20Materials/Forms/AllItems.aspx) libraries
* [Credit Pro Application Site](https://extranet.financialpartners.com/FPIProducts/CreditPro/default.aspx)
  + Also known as the Training Hub, this is where all Credit Pro training materials are stored
  + This is also the generic application site that all association staff have access to.
  + Production Release Notes get posted [here](https://extranet.financialpartners.com/FPIProducts/CreditPro/Documents/Forms/AllItems.aspx).
* [Financial Benchmarks Application Site](https://extranet.financialpartners.com/FPIProducts/DesktopProdApps/financialbenchmarks/default.aspx)
  + Benchmarks training hub and application site
  + Everything you need to get started in Benchmarks is here!
* [eReview Project Site](https://extranet.financialpartners.com/Workspaces/Shared/eReview/default.aspx)
  + Collaboration area with our customers, especially Steering Committee
* [eReview Application Site](https://extranet.financialpartners.com/FPIProducts/eReview/default.aspx)
  + This is the generic application site that all association staff have access to.

# Getting Started

## Credit Pro

* Training
  + [Quick Start Guide](https://extranet.financialpartners.com/FPIProducts/CreditPro/Documents/Credit%20Pro%20Quick%20Start%20Guide.pdf)
  + [Grid Navigation Guide](https://extranet.financialpartners.com/FPIProducts/CreditPro/Documents/Credit%20Pro%20Grid%20Navigation.pdf)
  + Other [Documents](https://extranet.financialpartners.com/FPIProducts/CreditPro/Documents/Forms/AllItems.aspx) and [Videos](https://extranet.financialpartners.com/FPIProducts/CreditPro/Phase2Videos/Forms/AllItems.aspx)
* Testing
  + [Regression Master Plan](https://central.financialpartners.com/Depts/CreditAnalysis/Team%20Documents/Testing/Credit%20Pro%20Testing%20Plans/UPDATED%20Master%202015.xlsx) (*Please do not edit this document.*)
  + [TFS](https://tfs.financialpartners.com/tfs/FPICD/FPI%20Agile/Credit%20Pro)
    - TFS is the system where we log and track all of our work
      * BAs log **Requirements** and **Bugs**
      * BAs then assign these items to Developers for coding
      * When a Developer sets their item to “Resolved”, the BA can pick the item back up to complete the Testing task
      * Testing either passes or fails
        + If the item **passes** testing:

Document the successful test – this is especially important for Release Notes generation, particularly when the item has morphed or changed a lot from its initial description during development.

Close the item.

This includes closing the Dev and Testing tasks.

* + - * + If the item **fails** testing:

Document how the item failed.

Set the **item** and **Dev task** back to “Proposed” for the Developer to pick up again.

* + - There is no official user guide for TFS (but you can Google almost anything you need to know about it), and each project is a bit different, so we’ll do a hands on walk through of logging and tracking items in TFS.
  + SQL
    - We use SQL to query our databases for information
    - You will eventually take part in the SQL for FPI class, which will help you learn a bit about making and running queries to get the data you need
    - We’ll also give you some hands on training in SQL specific to Credit Pro!
* Prod Support
  + [ServiceNow](https://financialpartners.service-now.com/) is the system we use to track Incidents reported by our customers
    - [ServiceNow User Guide](https://central.financialpartners.com/Depts/CCOE/Documents/_Service%20Now%20Documentation/ServiceNow%20User%20Guide.docx)
    - We also use ServiceNow for Change Control management and Security Access Requests (SAR).
    - Please take a look at the [Credit Pro Change Control Checklist Template](https://central.financialpartners.com/Depts/CreditAnalysis/Team%20Documents/How%20To/Credit%20Pro%20Change%20Control%20Checklist.xlsx).
  + We also use email and Cisco Jabber (IM) to communicate with our customers for production support questions.
    - Please see the Customer Communications bullet below for more information.
  + It will be several weeks before you are handling production support cases on your own – we’ll walk you through our process several times before setting you loose! ☺
* Release Notes
  + As a BA, you will be responsible for helping to produce Release Notes for QA and QANext lab releases, as well as for our Production releases.
  + Release Notes are made up of two parts:
    - New feature write-ups
    - Resolved Items Matrix
  + [Here](https://extranet.financialpartners.com/Workspaces/Shared/Middle%20Market%20Credit%20Analysis/FPI%20Documents/Testing/In%20Process%20Walk%20Thru%20Docs/QANext%20v2015.12.28.1%20Hand-off%20Matrix%2012.31.15.docx) is an example of a recent Release Notes document for QANext.
* Design Docs
  + As a BA, you will also be called on to assist in generating functional design documents for proposed features.
  + We use these functional design documents to get a true understanding of the enhancement request and to discuss the feature with our Steering Committee.
  + Examples of several design documents can be found [here](https://central.financialpartners.com/Depts/CreditAnalysis/Team%20Documents/Forms/All%20Documents.aspx?RootFolder=%2FDepts%2FCreditAnalysis%2FTeam%20Documents%2FFunctional%20Design%20Docs%202015&FolderCTID=0x01200030FB929DE8B05041B4620B4923A298CA&View=%7bD5425F21-35EC-4392-B31E-1D3857E922FF%7d&InitialTabId=Ribbon%2EDocument&VisibilityContext=WSSTabPersistence).
* Customer Communications
  + For your first few months on the job, **please send all written customer communications to the other BAs first for review**.
  + Our customers can be extremely particular (most are not!), so we need to be very careful in how we phrase discussions of bugs and training issues.
    - Be especially careful with Farm Credit West and AgCountry when communicating via email or IM.

### Credit Pro Development/Release Cycle

* Previous release (*Release A*) goes out to Production
* Coding/testing underway on new release (*Release B*) in DevNext
* Every other week, push latest for Release B out to QANext (*customer facing*)
* After the last QANext only lab release, merge Release B code up to Dev
* Start coding/testing Release B in Dev
  + Coding/testing can begin on Release C in DevNext
* Every week starting 4 weeks prior to Release B’s prod release date, push latest for Release B out to QA & QANext (*same version both labs*)
* Last QA/QANext lab release is week prior to prod release date – this is the PRODUCTION RELEASE CANDIDATE.
* Push Release B to production on prod release date.
* Continue coding/testing Release C in DevNext.
* Process repeats.

DevNext -> QANext

Dev -> QA & QANext

QA -> Production

### Credit Pro Environments

|  |  |  |  |
| --- | --- | --- | --- |
| **ACA** | **Dev/DevNext** | **EmPOWER Lab/Server** | **SQL (EmPOWERDB)\*** |
| FCE | <https://creditpro-dev.farmcrediteast.com>  <https://creditpro-devnext.farmcrediteast.com> | NXK-A3  NXM-A3 | NXK\FEX\_EmPOWER  NXM\FEX\_EmPOWER |
| YNK | <https://creditpro-dev.yankeeaca.com>  <https://creditpro-devnext.yankeeaca.com> | NXK-A2  NXM-A2 | NXK\YAX\_EmPOWER  NXM\YAX\_EmPOWER |
| FCW | <https://creditpro-dev.farmcreditwest.com>  <https://creditpro-devnext.farmcreditwest.com> | NXK-A5  NXM-A5 | NXK\FWX\_EmPOWER  NXM\FWX\_EmPOWER |
| NW | <https://creditpro-dev.northwestfcs.com>  <https://creditpro-devnext.northwestfcs.com> | NXK-A6  NXM-A6 | NXK\NWX\_EmPOWER  NXM\NWX\_EmPOWER |
| AgC | <https://creditpro-dev.agcountry.com>  <https://creditpro-devnext.agcountry.com> | NXK-A4  NXM-A4 | NXK\ACX\_EmPOWER  NXM\ACX\_EmPOWER |

\*What is shown in this table for SQL connections is used if you need to find EmPOWER related data (Customer and Loan data). If you want ***Credit Pro*** data, you need to access the MMCADB and MMCADB\_Next databases.

MMCADB and MMCADB\_Next databases are stored on NX4 for Dev and DevNext. The SQL connection for NX4 is **NX4\EmPOWER**.

|  |  |  |  |
| --- | --- | --- | --- |
| **ACA** | **QA/QANext** | **EmPOWER Lab/Server** | **SQL Connection** |
| FCE | <https://creditpro-qa.farmcrediteast.com>  <https://creditpro-qanext.farmcrediteast.com> | TGX-A1  TNX-A1 |  |
| YNK | <https://creditpro-qa.yankeeaca.com>  <https://creditpro-qanext.yankeeaca.com> | TPX-A1  TRX-A1 |  |
| FCW | <https://creditpro-qa.farmcreditwest.com>  <https://creditpro-qanext.farmcreditwest.com> | TQX-A1  TLX-A1 |  |
| NW | <https://creditpro-qa.northwestfcs.com>  <https://creditpro-qanext.northwestfcs.com> | TAX-A1  TIX-A1 |  |
| AgC | <https://creditpro-qa.agcountry.com>  <https://creditpro-qanext.agcountry.com> | TBX-A1  TKX-A1 |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **ACA** | **PRODUCTION** | **EmPOWER Lab/Server** | **SQL Connection** |
| FCE | <https://creditpro.farmcrediteast.com> | FEX-A1 | FEX\EmPOWER |
| YNK | <https://creditpro.yankeeaca.com> | YAX-A1 | YAX\EmPOWER |
| FCW | <https://creditpro.farmcreditwest.com> | FWX-A1 | FWX\EmPOWER |
| NW | <https://creditpro.northwestfcs.com> | NWX-A1 | NWX\EmPOWER |
| AgC | <https://creditpro.agcountry.com> | ACX-A1 | ACX\EmPOWER |

|  |  |  |  |
| --- | --- | --- | --- |
| **ACA** | **PRODUCTION SUPPORT** | **EmPOWER Lab/Server** | **SQL Connection** |
| FCE | <https://creditpro-ps.farmcrediteast.com> | NGX | NGX\FEX\_EmPOWER |
| YNK | <https://creditpro-ps.yankeeaca.com> | DBEMYADV01 | DBEMYADV01\EMPOWER |
| FCW | <https://creditpro-ps.farmcreditwest.com> | DBEMFWDV01 | DBEMFWDV01\EMPOWER |
| NW | <https://creditpro-ps.northwestfcs.com> | NGX | NGX\NWX\_EmPOWER |
| AgC | <https://creditpro-ps.agcountry.com> | NGX | NGX\ACX\_EmPOWER |

## eReview

* [Training Videos](https://extranet.financialpartners.com/FPIProducts/eReview/Videos/Forms/AllItems.aspx)
  + These Training Videos will help provide information across the board for the eReview application
* [BA Task and Resources](https://central.financialpartners.com/Depts/eReview/Documents/Reference%20Material/BA%20Tasks%20and%20Resources.xlsx)
  + An eReview spreadsheet with a lot of useful information – When in doubt, check the BA Task and Resources spreadsheet!
* [Testing (regression test plan)](https://central.financialpartners.com/Depts/eReview/Documents/Testing%20and%20Print%20Screens/eReview%20Regression%20Test%20Plan%20-%20MASTER.xlsx)
  + Regression testing is completed before EVERY new version is released to Production.
  + Completed regression spreadsheets will be attached to the new version release change control in ServiceNow.
* Customer Communications
  + CoBank – In addition to our Associations, CoBank also uses eReview. We send our code over to CoBank before a release, so they are able to update eReview accordingly
  + For your first few months on the job, **please send all written customer communications to the other BAs first for review**.
* [eReview Checkout](https://central.financialpartners.com/Depts/eReview/Documents/Testing%20and%20Print%20Screens/eReview%20vn.n%20Checkout%20mmddyyyy%20-%20MASTER.xlsx)
  + This spreadsheet is used as a guide to validate PRODUCTION releases (see below)

### eReview Environments

eReview environments are set up a bit differently than Credit Pro’s environments. For eReview, we only have one Lab environment. Based on which Association you have access to, certain configurations will apply.

**Lab (QA):** <http://ereview-qa.financialpartners.com/ereview/home.aspx>

* **QA** is typically where ALL testing takes place as we prepare for a future release

**Production Services:** <http://ereview-ut.financialpartners.com/ereview/home.aspx>

* **Production Services (PS)** is one version behind what is currently out in Production. This site is useful to determine if we introduced a bug, or if it has been broken for a while. For example, say a user calls in and says that a certain report is not running properly. What we would do as a tester is go into QA and see if we can reproduce the issue. We would also go into PS to see if we can reproduce the issue. If we can reproduce the issue in PS, then that means that we have not “introduced” the issue in the current release

**PRODUCTION:** <http://ereview.financialpartners.com/ereview/home.aspx>

* **Production** is typically used only for maintenance weekend validations, or for checkout purposes on releases. You will only have Read Only access in Production, and your Association will always be FPI.

### eReview Functional Item Testing in TFS

eReview TFS items need to be documented individually for audit purposes.

* [Template](https://central.financialpartners.com/Depts/CreditAnalysis/Team%20Documents/Testing/Functional%20Item%20Testing%20Template_Credit%20Products.docx) for documenting your testing.
* Document **all** TFS items for eReview, whether the item passes or fails.
  + You may need to also document steps with videos when an item fails
  + Videos help the developers when they are trying to resolve the issue
* A TFS item can be tested when its State is “**Ready for Testing**”
  + When you pick up a TFS item for testing, change the State to “**In Test**”
  + If the item **FAILS**, set the TFS item back to “**Approved**” and link your testing documentation of the failure in the Description field of the item.
  + If the item **PASSES**, set the TFS item to “**In Test Review**” and link your passing testing documentation in the Description field of the item.
* Store your completed documents [here](https://central.financialpartners.com/Depts/eReview/Documents/Forms/AllItems.aspx?RootFolder=%2FDepts%2FeReview%2FDocuments%2FTesting%20and%20Print%20Screens%2FTFS%20Items&FolderCTID=0x0120003B6CC07B01864F4E950A29738910078B&View=%7b8709006C-E389-4318-9E8C-4BE33794BA47%7d&InitialTabId=Ribbon%2EDocument&VisibilityContext=WSSTabPersistence) on the [eReview Central](https://central.financialpartners.com/Depts/eReview/default.aspx) site
  + Create a new folder for each new eReview version