

# Onboarding process

- [Onboarding Common](#)

# Onboarding Common

## Welcome to Finmars!

You've joined a vibrant team that prioritizes innovation, personalization, and quality in all we do. We believe in providing our users with adaptable, smart tools that appeal to all levels of financial knowledge.

### Important:

Each step is **independent**, meaning you can complete them in **any order** based on your needs.

## Organizational

### Tools Access Setup

#### Microsoft 365 Account

##### 1. Access Your Account:

1. Go to [Microsoft 365 Portal](#)
2. Click '**Sign In**'.
3. Enter your work email and provided credentials.

##### 2. Install Essential Apps:

1. **Outlook** (Email & Calendar)
2. **Excel** (Data Management & Analysis)
3. **PowerPoint** (Presentations & Reports)
4. **Microsoft Teams** (Communication & Collaboration)

**Download here:** [Microsoft Office 365 for Windows and Mac](#)

##### 3. Activate Two-Factor Authentication (2FA):

1. Go to [Microsoft Security Settings](#)
2. Follow the instructions to enable **2FA**.

#### Slack Account

##### 1. Access Slack:

1. Go to [Log in | Slack](#)
2. Log in with your **Work Email**

##### 2. Set up Your Profile :

1. Add your **Full Name** for team visibility.

3. **Recommended:** Download The [Slack Desktop App](#)

### Jira (Project Management)

1. **Access Jira:**
  1. Go to [Finmars Jira](#)
  2. Sign in with your **Work Email**.
2. **Request Access to Project**
  1. **Platform Development:** Request access to the [Platform](#) project.
  2. **Analytics Department:** Request access to the [Analyst Department](#) projects.
  3. **Contact for Access:** [Oleg Greshnev](#) [ [o.greshnev@finmars.com](mailto:o.greshnev@finmars.com) ]

### Confluence (Internal Documentation)

1. **Access Confluence:**
  1. Go to [Finmars Confluence](#)
  2. Sign in with your **Work Email**.
2. **Request Access to Spaces:**
  1. Main Documentation: [Finmars Documentation](#)
  2. **Contact for Access:** [Oleg Greshnev](#) [ [o.greshnev@finmars.com](mailto:o.greshnev@finmars.com) ]

## Security Setup

1. **Security Interview**
  1. Contact *Andrey Lizunov* [[andrey.lizunov@mars-cap.com](mailto:andrey.lizunov@mars-cap.com)] to schedule a **Security Interview**.
2. **Install Security Software**
  1. Install **Corporate Antivirus**.
  2. Activate **BitLocker** on your device.

## VPN Setup

1. **Request VPN Profile**
  1. Contact *Sergei Zhitenev* [ [s.zhitenev@finmars.com](mailto:s.zhitenev@finmars.com) ] to receive your **.ovpn profile**.
2. **Install OpenVPN Client**
  1. Download: [OpenVPN Client](#) .
  2. Import your **provided VPN Profile**.
  3. Enter and **remember your PIN code**.
3. **Activate VPN**
  1. Connect to the VPN.

2. **Verify** access by opening: [Finmars Stage Environment](#)
3. **Register your account** (Use the format: "**firstname\_lastname**")

## Finmars Docs & License Key

1. **Request Access to Finmars Docs & License Key**
  1. Contact *Sergei Osipov* [[s.osipov@finmars.com](mailto:s.osipov@finmars.com)] to create your **Finmars Docs Account**.
  2. Contact *Sergei Zhitenev* [[s.zhitenev@finmars.com](mailto:s.zhitenev@finmars.com)] to obtain your **Finmars Licence Key**.
2. **Wait for Credentials**
  1. Once you receive **credentials**, access to [Finmars Docs](#)
  2. After obtaining your **license key**, you can **create your own Workspace** in any environment.

## Basic Platform Knowledge

To get started with Finmars, review the following documentation and training materials.

1. **Documentation**
  1. [Quick Overview of Finmars](#)
2. **Videos**
  1. [Balance Report PL Report part 1 V2 \(ENG w/ sub\)](#)
  2. [Transaction Report \(ENG w/ sub\)](#)
  3. [Configuration, Transaction Types, Transaction Book, Import Scheme, Workflow Code \(ENG w/ subs\)](#)
  4. [Finmars Database, Mobile Application \(ENG w/ sub\)](#)
3. **YouTube Playlists**
  1. [Onboarding \(ENG\)](#)
  2. [Finmars School \(RUS\)](#)
  3. [Finmars University \(RUS\)](#)

## Configuration Knowledge

To ensure a smooth transaction setup and management, refer to the following documentation:

1. **Adding a Transaction Type:** [Finmars Documentation-Confluence](#)
2. **Creating a base transaction:** [Finmars Documentation-Confluence](#)

# How to Import Standard Files

Learn how users are onboarded and how they can efficiently import **Standard Files** into the platform.

- **User Quick Start:** [User Quick Start | Finmars](#)

# Workflow Knowledge

**Workflows** in Finmars help automate processes and improve efficiency by defining sequences of actions.

- **Workflow Documentation:** [Workflows | Finmars](#).

# How to Track Time in Jira

**Tracking your time** at Finmars is essential for maintaining accurate work records.

- **How to Track Time:** [Finmars | Documentation](#)