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 <u>Slack Desktop App</u>

Jira (Project Management)

1. **Access Jira:**
   1. Go to <u>Finmars Jira</u>
   2. Sign in with your **Work Email**.
2. **Request Access to Project**
   1. **Platform Development:** Request access to the <u>Platform</u> project.
   2. **Analytics Department:** Request access to the <u>Analyst Department</u> projects.
   3. **Contact for Access:** *Oleg Greshnev* [**o.greshenev@finmars.com**]

Confluence (Internal Documentation)

1. **Access Confluence:**
   1. Go to <u>Finmars Confluence</u>
   2. Sign in with your **Work Email**.
2. **Request Access to Spaces:**
   1. Main Documentation: <u>Finmars Documentation</u>
   2. **Contact for Access:** *Oleg Greshnev* [**o.greshenev@finmars.com**]

Security Setup

1. **Security Interview**
   1. Contact *Andrey Lizunov* [**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**] to receive your **.ovpn profile.**
2. **Install OpenVPN Client**
   1. Download: <u>OpenVPN Client</u> .
   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: <u>Finmars Stage Environment</u>
   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**] to create your **Finmars Docs Account.**
   2. Contact *Sergei Zhitenev* [**s.zhitenev@finmars.com**] to obtain your **Finmars Licence Key.**
2. **Wait for Credentials**
   1. Once you receive **credentials**, access to <u>Finmars Docs</u>
   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. <u>Quick Overview of Finmars</u>
2. **Videos**
   1. <u>Balance Report PL Report part 1 V2 (ENG w/ sub)</u>
   2. <u>Transaction Report (ENG w/ sub)</u>
   3. <u>Configuration, Transaction Types, Transaction Book, Import Scheme, Workflow Code (ENG w/ subs)</u>
   4. <u>Finmars Database, Mobile Application (ENG w/ sub)</u>
3. **Playlist**
   1. <u>Onboarding (ENG)</u>

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

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