

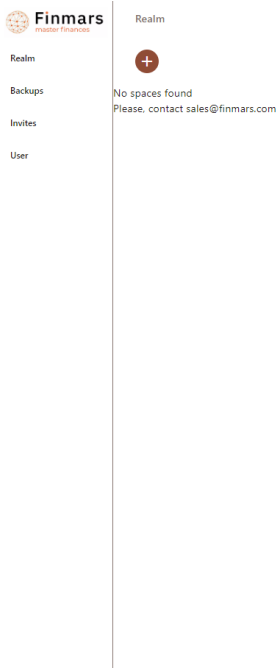
How to Get an Access to the Workspace

Prerequisites

- Already registered in Finmars (see [How to Register in Finmars](#))
- Received the credentials to use in the Finmars platform.

Getting an Access to the Workspace

1. Go to your allocated Finmars URL (environment) which was as the part of your credentials and usually defined for a specific regions in accordance with the compliance requirements.
2. You will access the Profile page which will contain your Workspace (an instance of your Finmars engine with your data).



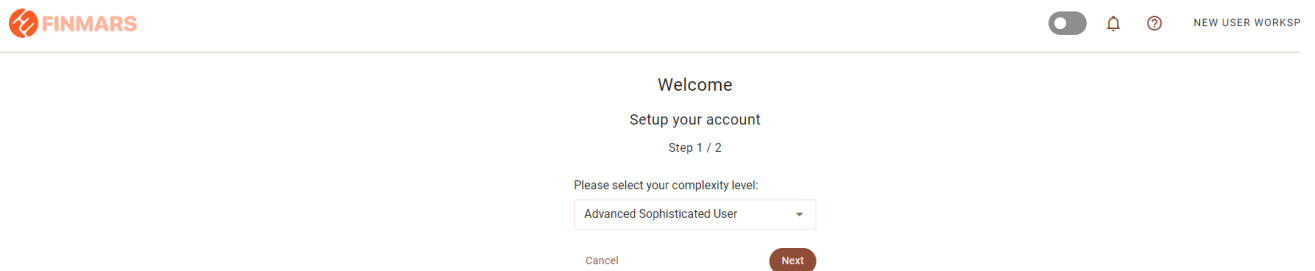
3. At the moment you may not have available Workspaces (like in the screenshot above). You should request Finmars to create your own Workspace, you should provide your Username to get an invitation to the Workspace.
 - You can find your Username in the upper right corner of the profile page (`new_user` - in the example above)
 - That is the exact Username you use as a login

4. Then Finmars will sent you an invitation, which can be found in the "Invites" section of the Profile page: you will see the card with the name of the Workspace, then click "Accept" button



5. After the "Accept" is clicked you will be redirected to the "New User Setup" page consisting of 2 steps:

1. "Please select your complexity level" (deprecated setting) -> Always select "Advanced Sophisticated User"



2. "Please select init configuration you would like to use" (selecting the layouts for reports) -> Select a card representing needed configuration and click button "Finish" (if no cards from the configurations you may select "Blank" card and install layouts directly from the Marketplace.

Welcome

Setup your account

Step 2 / 2

Please select init configuration you would like to use

Blank

Empty Ecosystem. Configure all forms, layouts and tables by myself

Back

STD 2024.10.09

Version: com.finmars.standard-new-user-setup

Finish

6. Upon finishing installation you will be redirected to the "Home" page, meaning that now you have an access to the Workspace.

- Dashboard
- Reports
- Data
- Transactions
- Valuations
- Import
- Reconciliation
- Add-ons
- Explorer
- Configuration
- Administration

Notifications

| All actions | Search | All | | | | | | | | |
|---------------------|---------|---|---------|---------|-------------|---------|---|---|---|-----|
| All | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>6</td> <td>-</td> <td>356</td> </tr> </table> | Errors | Warning | Information | Success | - | 6 | - | 356 |
| Errors | Warning | Information | Success | | | | | | | |
| - | 6 | - | 356 | | | | | | | |
| Events | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </table> | Errors | Warning | Information | Success | - | - | - | - |
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| Instruments | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </table> | Errors | Warning | Information | Success | - | - | - | - |
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| Data | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>6</td> <td>-</td> <td>356</td> </tr> </table> | Errors | Warning | Information | Success | - | 6 | - | 356 |
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| - | 6 | - | 356 | | | | | | | |
| Prices | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </table> | Errors | Warning | Information | Success | - | - | - | - |
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| Report | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </table> | Errors | Warning | Information | Success | - | - | - | - |
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| Import | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </table> | Errors | Warning | Information | Success | - | - | - | - |
| Errors | Warning | Information | Success | | | | | | | |
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| Activity Log | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </table> | Errors | Warning | Information | Success | - | - | - | - |
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| Schedules | | <table border="0" style="width: 100%; text-align: center;"> <tr> <td>Errors</td> <td>Warning</td> <td>Information</td> <td>Success</td> </tr> <tr> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </table> | Errors | Warning | Information | Success | - | - | - | - |
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| - | - | - | - | | | | | | | |

Bookmarks

Coming soon

7. Also the Workspace now will be listed in the "Profile" page



Realm: Core (stage) (realm03va3) Update is available

New User Workspace

2024-10-28

Role: admin
● space0hmkl open

Revision #6

Created 2024-10-28 12:29:54 UTC by Sergei Osipov

Updated 2025-07-09 11:02:15 UTC by Sergei Osipov