

How to Navigate in a Profile page

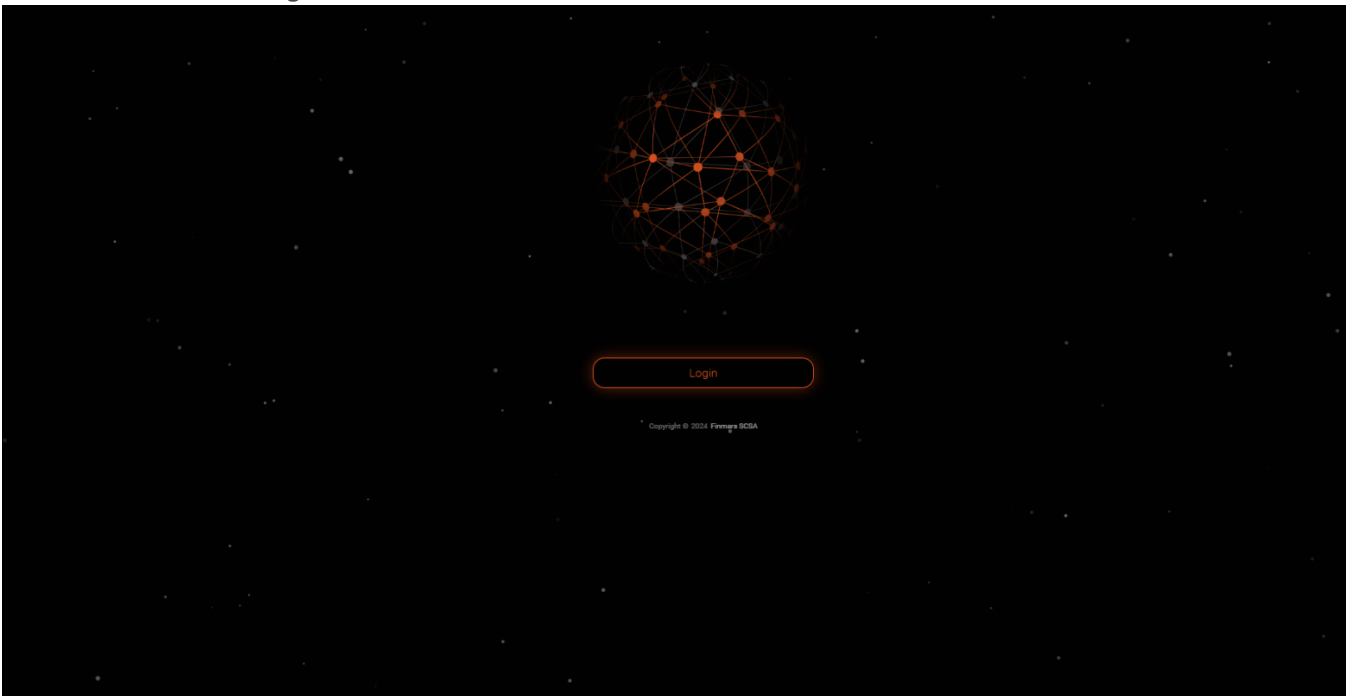
Prerequisites

We assume you have all prerequisites you may need, including:

1. If needed: the VPN is configured to access the Finmars resources
2. If needed: access to the Virtual Machine to work with the sensitive information
3. Must have: registered in Finmars in the needed region environment (self-registered or registered by Finmars)
4. Must have: having permissions set to allow continue with the Action in the Guide

Navigating in a Profile page

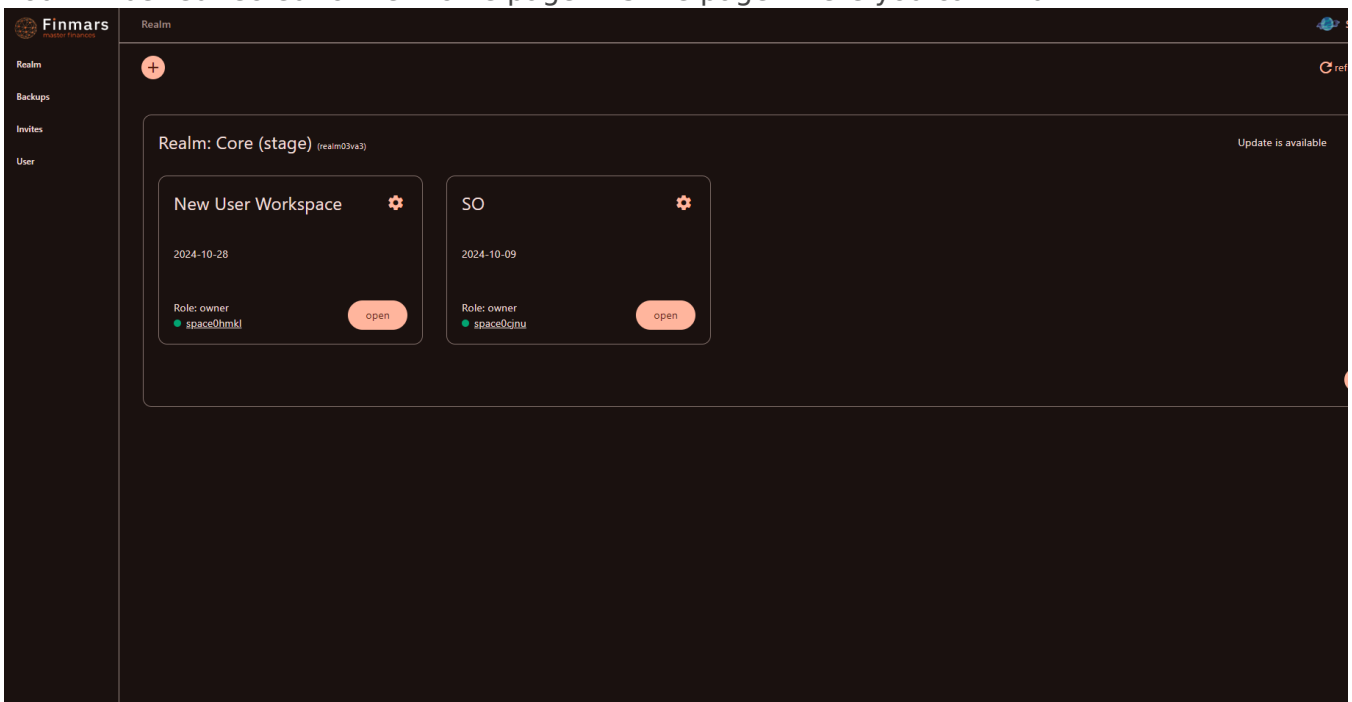
1. Go to the needed region environment URL



2. Login



3. You will be redirected to the Profile page: it's the page where you can find



4. Profile page has a sidebar menu:

1. Realm - default tab with Dashboard with all available Realm & Workspaces in them (see screenshot above). You can:
 1. open available workspaces by clicking "Open"
 2. click on cog icon on a workspace card to
 1. Export Backup
 2. Exit the Workspace (if you are not an owner of the workspace)
 3. Delete the Workspace (if you are an owner of the workspace)
2. Backups - list of all available workspaces and their backups statuses

Finmars
master Finances

Realm → Backups

Search

Workspace	Backups	Autobackup	Last backup
SQ	21	success	
New User Workspace	2	success	
space0o38x	2	success	
space0d7uk	7	success	
space04itr	32	success	
space05fcm	6	success	
space0oyxu	1	success	
space0mbrx	1	success	
space0kdup	1	success	
space0uodm	13	success	

- Invites - list of all pending invitations to join workspaces (reference to the [How to get Access to the Workspace](#) point 4)
- User - tab with the user info

Finmars

Realm → User

Personal data

First name

Last name

E-mail

Select file

Save

Additional settings

Two-factor Authentication

Change settings

Code editor

Universal Input

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