

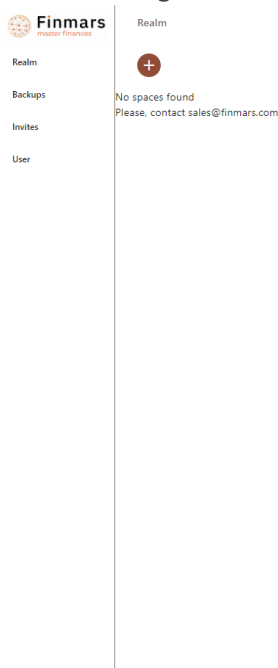
How to Get an Access to the Workspace

Prerequisites

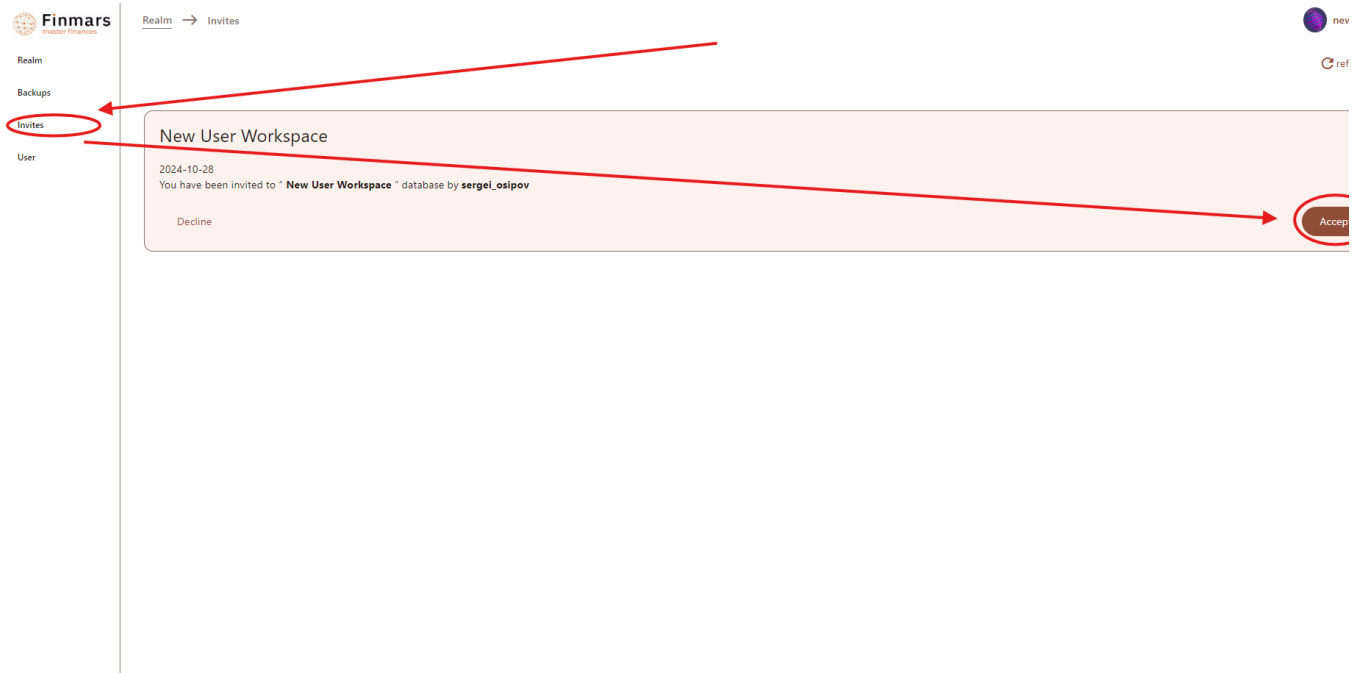
- Already registered in Finmars (see [How to Register in Finmars](#))
- Received the credentials to use in the Finmars platform.

Getting an Access to the Workspace

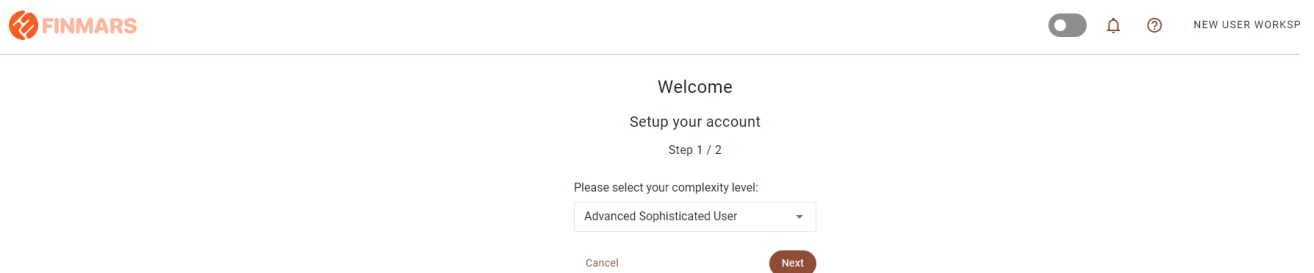
1. Go to your allocated Finmars URL (environment) which was as the part of your credentials and usually defined for a specific regions in accordance with the compliance requirements.
2. You will access the Profile page which will contain your Workspace (an instance of your Finmars engine with your data).



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

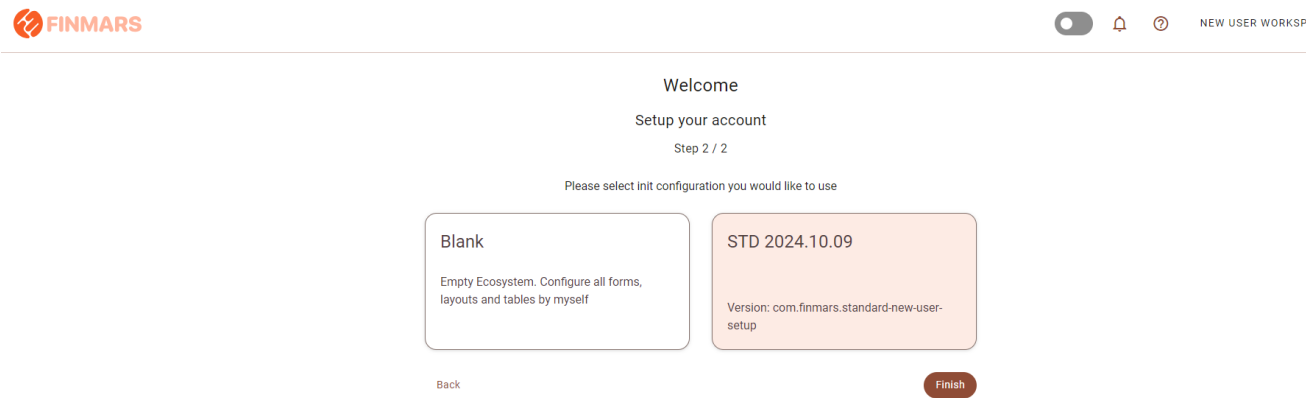


5. After the "Accept" is clicked you will be redirected to the "New User Setup" page consisting of 2 steps:
 1. "Please select your complexity level" (deprecated setting) -> Always select "Advanced Sophisticated User"

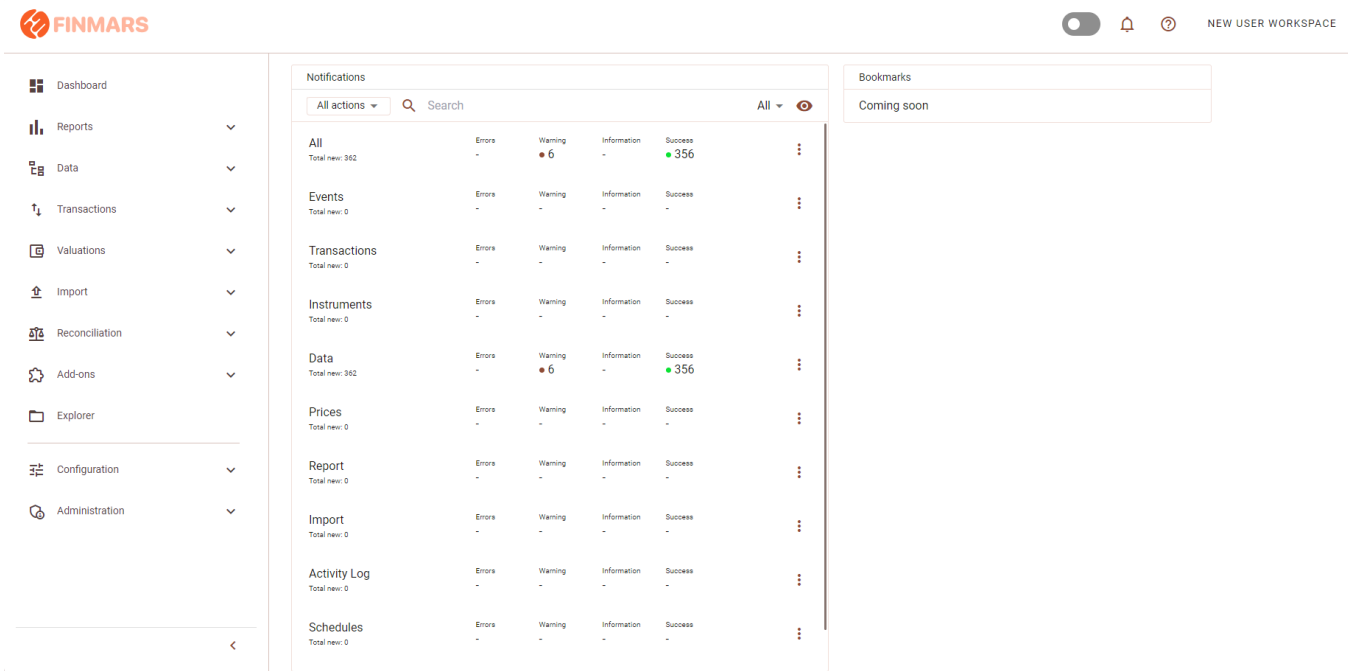


2. "Please select init configuration you would like to use" (selecting the layouts for reports) -> Select a card representing needed configuration and click button "Finish"

(if no cards from the configurations you may select "Blank" card and install layouts directly from the Marketplace.



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



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 #5

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