



ADMINISTRATION WORKSHEET

ADMINISTRATION

Duco Cube uses a system of permissions, roles and groups to manage what a user of the platform is or is not allowed to do. Access can vary from read-only through to full Administrator rights. Work through the checklist below to explore this functionality.

Complete the tasks below.

USERS AND GROUPS

User administration in Duco is self-service, with the Administrator having the ability to create new accounts, manage password resets, and regulate access.

- ☐ Create a new **User** account for yourself (by adding a “+training” into your email address you will be able to create a new account, with the same email, eg `alice.cube+training@du.co`).
- ☐ Create a **Group** called “Duco Training”
- ☐ Add a selection of Roles to the new **Group**.
- ☐ Add your new **User** to the **Group**.
- ☐ Suspend your new **User** account.
- ☐ Revoke the suspension.

DASHBOARDS

Dashboards provide a customizable suite of metrics and statistics that deliver an aggregated overview of the activity in your processes. You can have multiple dashboards, allowing for different views across processes, as required.

- ☐ Add and then configure the **Process Groups** gadget.
- ☐ Configure the **Labels** gadget.
- ☐ Create a new additional dashboard called “Training Dashboard”.

LABELS

Labels are a useful tool for categorizing exceptions and runs. You are able to customize both their coloring and also what they say.

- ☐ Create three labels: **Minor**, **Moderate** and **Critical**

REFERENCE DATA

Reference data allows for either the manual or automated upload of reference data, which can then be leveraged as required, ie. FX tables, equivalence tables, look-up tables, etc.

- ☐ Create a simple equivalence table.
- ☐ Permission this table to the process “Futures and Options”.
- ☐ Add your additional user account as a **Viewer** of this table.

PROCESS PERMISSIONS

Permissions for a particular process are graded, with four access levels that can be granted to a user as is appropriate: User Admin, Config Admin, Operator and Viewer. By default, the creator of a process will be granted full rights to a process.

- ☐ Make yourself an **Operator** of a test process.
- ☐ Change a rule on this process.

PROCESS CONFIGURATION

It can be extremely useful to have a copy of the configuration of a process from when a given run took place. Duco Cube provides this feature, allowing you to generate a PDF detailing the configuration in full.

- ☐ Download the configuration PDF for a process.

SUBMISSIONS

Automated submissions into Duco Cube are frequently desirable. Duco Cube supports SFTP submissions, but requires Administrators to configure the routing for the expected files.

- ☐ Configure an automated submission for a file with the naming convention: *testfile_beta_complete_2019-07-09.csv*
- ☐ Link this Data Source to a process.
- ☐ Mark this Data Source as being “Sticky”



ABOUT DUCO

Duco's mission is to make managing data easy. Financial services firms rely on us to reduce costs and dramatically improve efficiency in reconciliation and other data integrity tasks. Our self-service, cloud-based tools empower users to aggregate, normalise and reconcile any type of data on demand. Customers are live in 24 hours, with results in 7 days and tangible business value in 30 days. Headquartered in London, with offices in New York, Luxembourg, Edinburgh, Wroclaw and Singapore, Duco's customers include global banks, brokers, asset managers, exchanges and middle and back office outsourcers. For more information go to [**www.du.co**](http://www.du.co)

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