

# Getting Started



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## GETTING STARTED

### Quick Start Program

Marketcetera offers new clients an initial development and test period for the purpose of evaluation. This requires a regular license agreement to be in place. The development and test term offers a reduced license fee and a one-month termination clause. No strings attached.

During this period we will setup the Marketcetera environment. We will train and support strategy developers and users to get them started quickly. The costs for Marketcetera specialists during this period are included in the reduced license fee.

The initial setup of the Marketcetera Automated Trading Platform is defined in close cooperation with the client.

**The following are typical tasks relating to trading and strategy development before going into production:**

1. Define initial deployment markets, instruments and strategies.
2. Choose market connectivity approach.
3. Choose between using Marketcetera trading strategies or developing proprietary strategies.
4. Arrange training sessions for strategy developers (if applicable).
5. Review trading strategy architecture and implementation with Marketcetera (recommended).
6. Set up portfolio structures and pre-trade risk limits.
7. Arrange clearing.
8. End-user training.
9. Functional testing and validation.

**The following infrastructure tasks are usually involved:**

1. Define workflow and dataflow.
2. Select server locations and data centers based on planned strategy deployment.
3. Define system topology with development and production systems.
4. Procure hardware, based on Marketcetera's recommendations.
5. Review and optimize network setup.
6. Set up VPN connection for accessing Marketcetera's knowledge base and for support purposes.
7. Install and configure the operating environment and the Marketcetera software.
8. Integrate with in-house and third party systems for e.g. position synchronization.
9. System administration training.
10. Set up system monitoring tools.
11. Technical testing and validation.

Your project leader and the Marketcetera client services team will jointly review the scope of the initial set-up and plan activities, ownership and time schedule. Our experience in this domain ensures a smooth and fast implementation process.