



Prerequisites & Installation Document

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Prerequisites:

- Free Trial Account with Interactive Brokers: Click on [this link](#) to open a free trial (demo) account with IB. This is required to run/execute examples during the class.
- Java 8 update 192 or higher: [Click here](#) to download the required version of Java.
- Client Portal Gateway aka CP WebAPI Gateway. [Click here](#) to download the Gateway. Alternatively, visit [this page](#) to download it.

Important Note on Interactive Broker's (IB) support on Free Trial Accounts:

- As we understand, recently, there are some ongoing issues with regard to accessing REST API with IB Free Trial accounts. As a result, students not having a regular IB account might not be able to run codes during the class for now.
- Please note that IB REST API is covered only as an illustration. The concepts covered in this session can be used with various brokers who offer access through the REST API.

Installation Steps:

- Java installation:
 - For installation instructions on Windows machines, see [this](#).
 - For installation instructions on Linux platforms, refer to [this](#).
 - For installation instructions on MacOS, go [here](#).
- CP WebAPI Gateway
 - Navigate to the directory where the gateway has been downloaded and unzip it
 - Open the command prompt or terminal window and navigate to the unzipped directory.
 - Once you have navigated to the unzipped folder, execute the following commands:
 - On Windows machines, execute “bin\run.bat root\conf.yaml” without quotes
 - On Mac/Linux machines, execute “bin/run.sh root/conf.yaml” without quotes
 - Minimize the command prompt or terminal and let it run
 - Open a browser and go to this link: <https://localhost:5000/>
 - Enter your username/password and log in.
 - After successful authentication, you should see a “Client login succeeds” message on the screen.