Excel addin installation

1. **Install the database**
   1. Connect to PostgreSql and run the script \api-stub\db folder\create.sql
   2. If the script is failed, create database middlewaredb and user specified in the scrip manually. After that run the scritp’s part to create tables and add initial data to managers table
   3. The managers table contain two users: one is regular, and one who has an ability to modify orders
2. **Run the server**
   1. Open the \api-stub\config.json file and modify the value “postgres\_connection\_string” to correct the server host
   2. Install all dependencies by running : npm install
   3. Run the server by using: node app.js
   4. You can test the server-side API using curl:
      1. **Login:**

curl -X POST \

http://localhost:3000/login \

-H 'Accept: \*/\*' \

-H 'Accept-Encoding: gzip, deflate' \

-H 'Cache-Control: no-cache' \

-H 'Connection: keep-alive' \

-H 'Content-Length: 42' \

-H 'Content-Type: application/json' \

-H 'Host: localhost:3000' \

-H 'cache-control: no-cache' \

-d '{

"username":"admin",

"password":"admin"

}’

* + 1. **Get Orders:**

curl -X GET \

http://localhost:3000/orders \

-H 'Accept: \*/\*' \

-H 'Accept-Encoding: gzip, deflate' \

-H 'Cache-Control: no-cache' \

-H 'Connection: keep-alive' \

-H 'Content-Length: 56' \

-H 'Content-Type: application/json' \

-H 'Host: localhost:3000' \

-H 'cache-control: no-cache' \

-d '{

"user\_token":"66B3B68E-84B2-4F96-984B-8F9C81A90BCA"

}’

* + 1. **Add Order:**

curl -X POST \

http://localhost:3000/order \

-H 'Accept: \*/\*' \

-H 'Accept-Encoding: gzip, deflate' \

-H 'Cache-Control: no-cache' \

-H 'Connection: keep-alive' \

-H 'Content-Length: 593' \

-H 'Content-Type: application/json' \

-H 'Host: localhost:3000' \

-H 'cache-control: no-cache' \

-d '{

"user\_token":"66B3B68E-84B2-4F96-984B-8F9C81A90BCA",

"account":"1",

"parseketable":"2",

"isin":"3",

"op\_type":"4",

"amount\_ordered":"5",

"limit\_price":"6",

"tif":"7",

"instructions":"8",

"security\_name":"9",

"side":"10",

"filled\_name":"11",

"working":"12",

"amnt\_left":"13",

"pct\_left":"14",

"average\_price":"15",

"broker\_name":"16",

"status":"17",

"portfolio\_manager":"18",

"trader\_name":"19",

"order\_date":"20",

"order\_creation":"21",

"last\_touched":"22",

"ts\_order\_date":"23",

"settle\_date":"24",

"security\_id":"25",

"order\_number":"26",

"ticket\_number":"27"

}’

* + 1. **Update Order**

curl -X POST \

http://localhost:3000/order/5 \

-H 'Accept: \*/\*' \

-H 'Accept-Encoding: gzip, deflate' \

-H 'Cache-Control: no-cache'

-H 'Connection: keep-alive' \

-H 'Content-Length: 647' \

-H 'Content-Type: application/json' \

-H 'Host: localhost:3000' \

-H 'cache-control: no-cache' \

-d '{

"user\_token":"66B3B68E-84B2-4F96-984B-8F9C81A90BCA",

"account":"aa1",

"parseketable":"aa2",

"isin":"aa3",

"op\_type":"aa4",

"amount\_ordered":"aa5",

"limit\_price":"aa6",

"tif":"aa7",

"instructions":"aa8",

"security\_name":"aa9",

"side":"aa10",

"filled\_name":"aa11",

"working":"aa12",

"amnt\_left":"aa13",

"pct\_left":"aa14",

"average\_price":"aa15",

"broker\_name":"aa16",

"status":"aa17",

"portfolio\_manager":"aa18",

"trader\_name":"aa19",

"order\_date":"aa20",

"order\_creation":"aa21",

"last\_touched":"aa22",

"ts\_order\_date":"aa23",

"settle\_date":"aa24",

"security\_id":"aa25",

"order\_number":"aa26",

"ticket\_number":"aa27"

}’

1. **Setup the Excel addin**
   1. Install all dependencies by running : npm install
   2. Run npm run-script start-ssl
   3. Open web browser and login to your MS Office account
   4. Open a new Workbook, click the Insert Addins, select Upload My addin, select the \rm-addin\manifests\manifest.xml and click Ok
   5. The workbook’s ribbon will have RM Addin/Dashboard button
   6. Use username/password from managers table to login