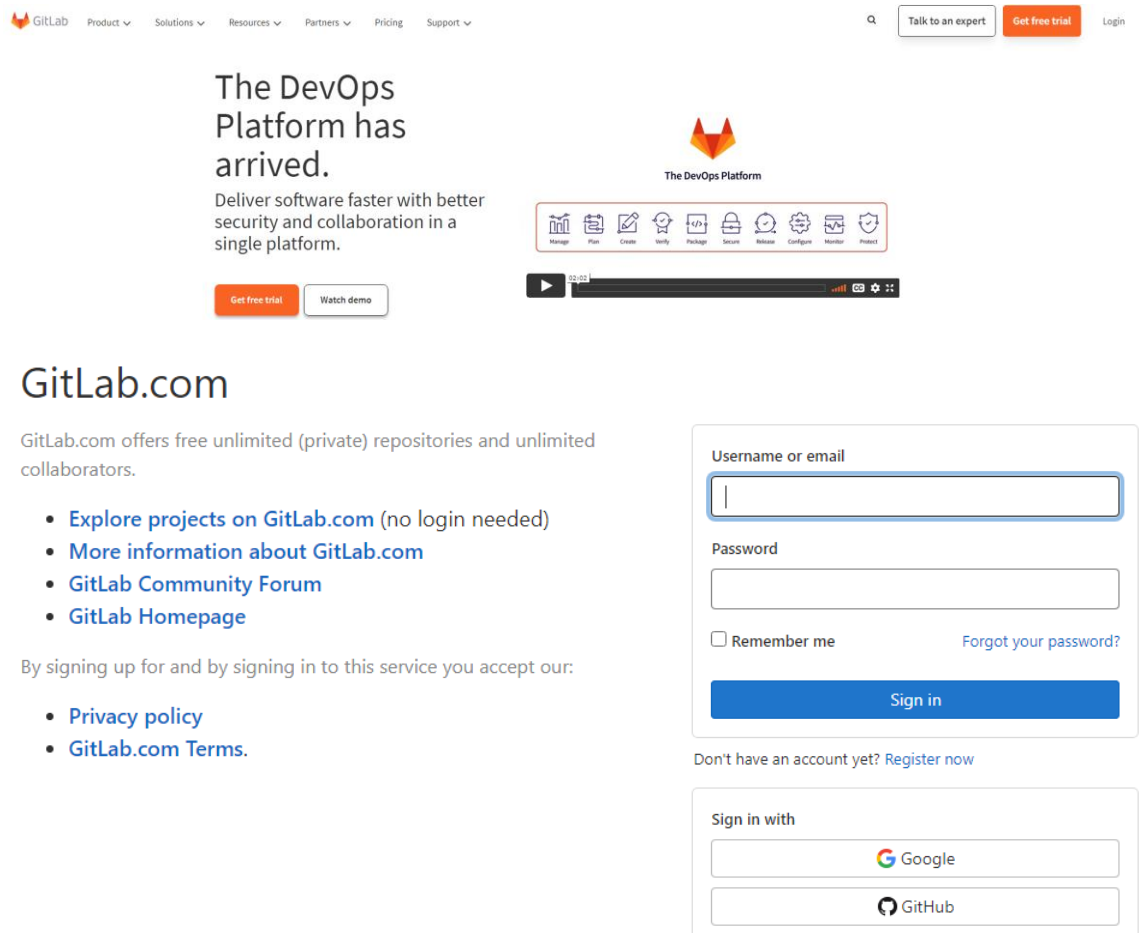
Step-by-Step guide for participants for testing the PCCT workflow in Legend

GITLAB

To begin the workflow you will need a GitLab account. Please create a Gitlab account here https://gitlab.com. You will reach the landing page below to create a Gitlab ID.

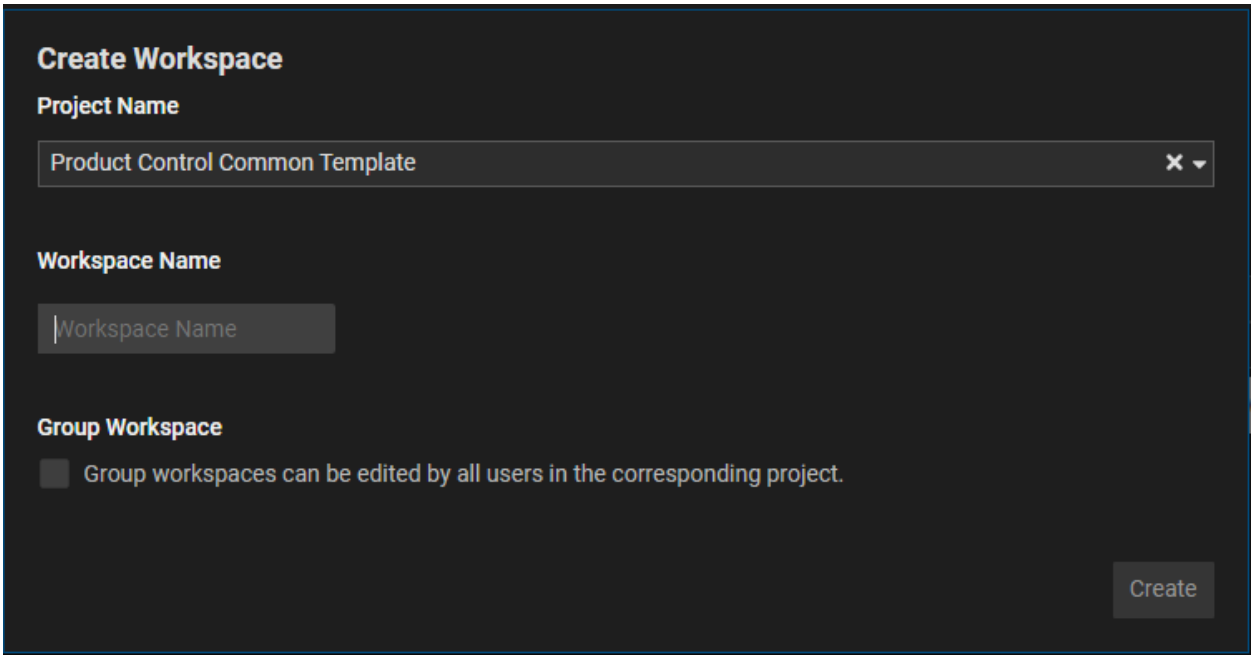


FINOS

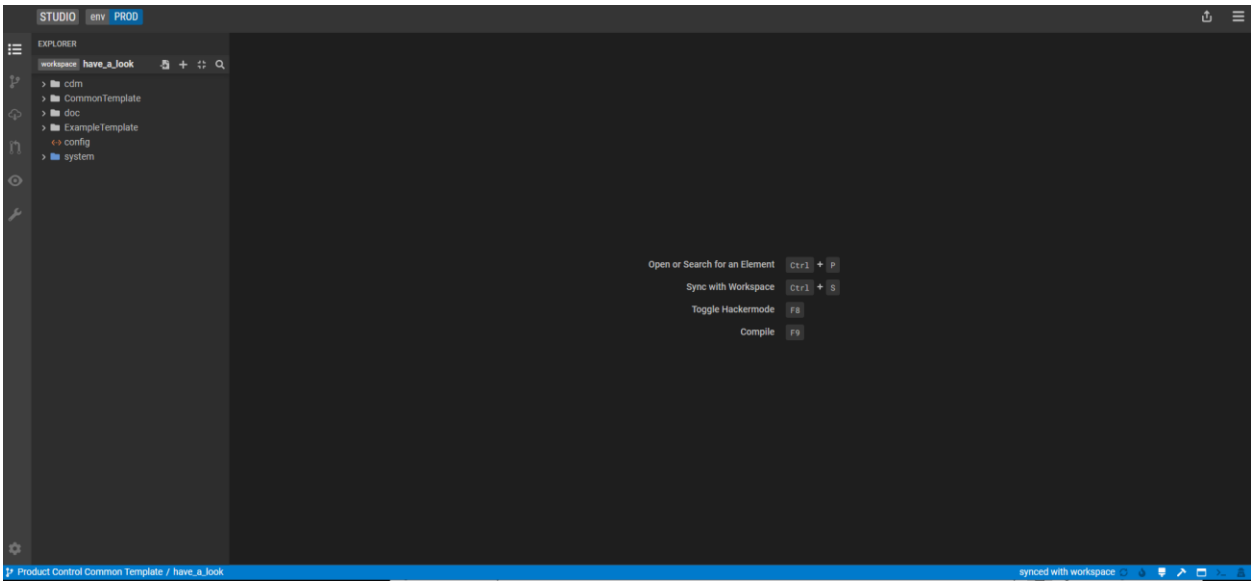
Once Gitlab account is created, register to access FINOS Legend from https://www.finos.org/legend. Access the FINOS Legend in https://legend.finos.org/studio/-/setup

Select project “Product Control Common Template” in FINOS Legend or simply use the project link https://legend.finos.org/studio/-/setup/UAT-28797000

Create a workspace to access the project.



After you have created your workspace, select the workspace from the second drop down menu and hit **Next**, this will bring you to the landing page of the project



On the left side structure tree, you will be able to see

1. Example Template
    a. ExCsvSchema – this define the CSV sample template model in Legend
    b. ExCsv – which is the corresponding data model for the sample template
    c. ExCsvToCommonEqOption – the model to model mapping to transform the sample template model to EqOption model
2. Common Template
    a. EqOptionTemplate – this is the agreed standard template for vanilla equity option

    b. EqOptionToCdmMapping - the model to model mapping to transform the EqOption to CDM
3. CDM
    a. It contains all the CDM attributes
4. Doc
    a. ExampleTemplateData
    b. README – this includes the guideline on how to use the JAR and also shared on the below.

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How to use the JAR

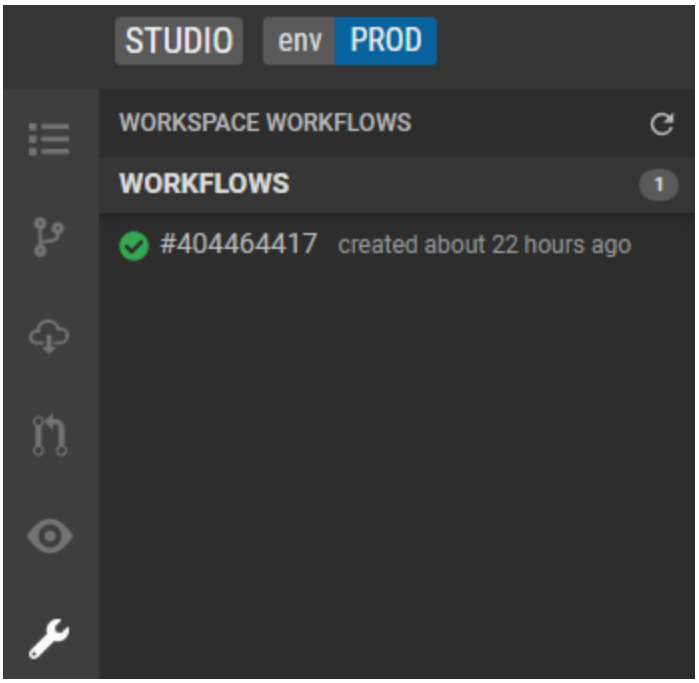
This document assumes knowledge of Java and Maven.

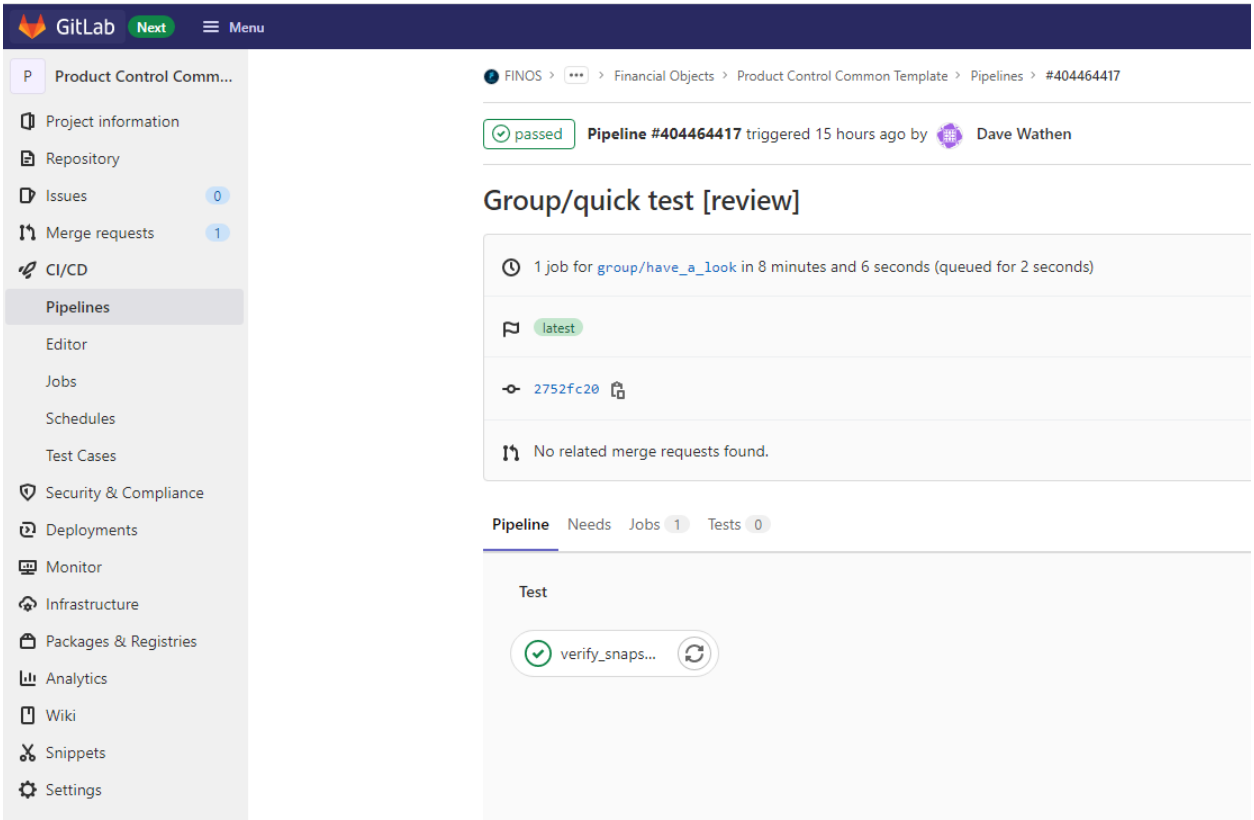
Once a JAR is available from the pipeline it can be demonstrated to read the template and translate to CDM as follows:

1) Create a Maven project of the following structure:

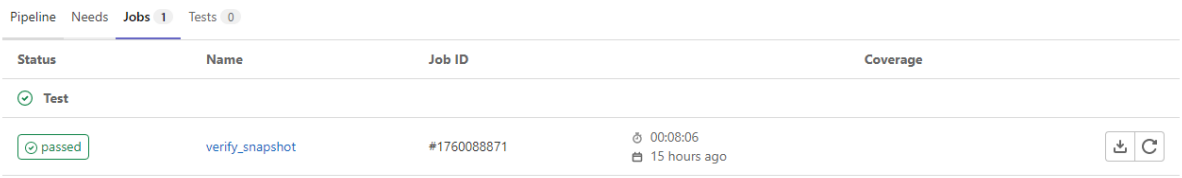
```
template-demo
|-src
| |-main
|   |-java
|   | |-org
|   |   |-finos
|   |     |-demo
|   |       |-Demo.Java  (copy content from doc::DemoJava)
|   |-resources
|     |-Sample.csv      (copy content from doc::ExampleTemplateData)
|-pom.xml               (copy content from doc::DemoPom)
```

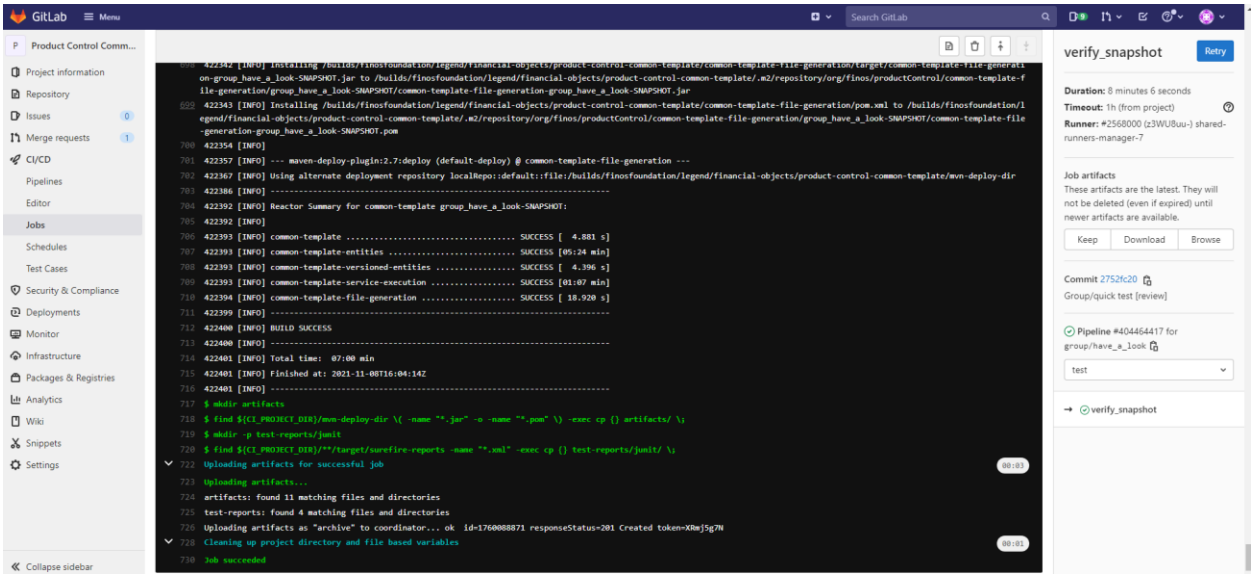
2) Go to the **Workspace Builds** on the left panel and select latest flow, it will redirect you to the Gitlab Project. If there is no existing workflows, you can also go to the Gitlab project and find the workflows under the **Pipelines** section (https://gitlab.com/finosfoundation/legend/financial-objects/product-control-common-template/-/pipelines).





Go to **Jobs** hit the **verify_snapshot** link

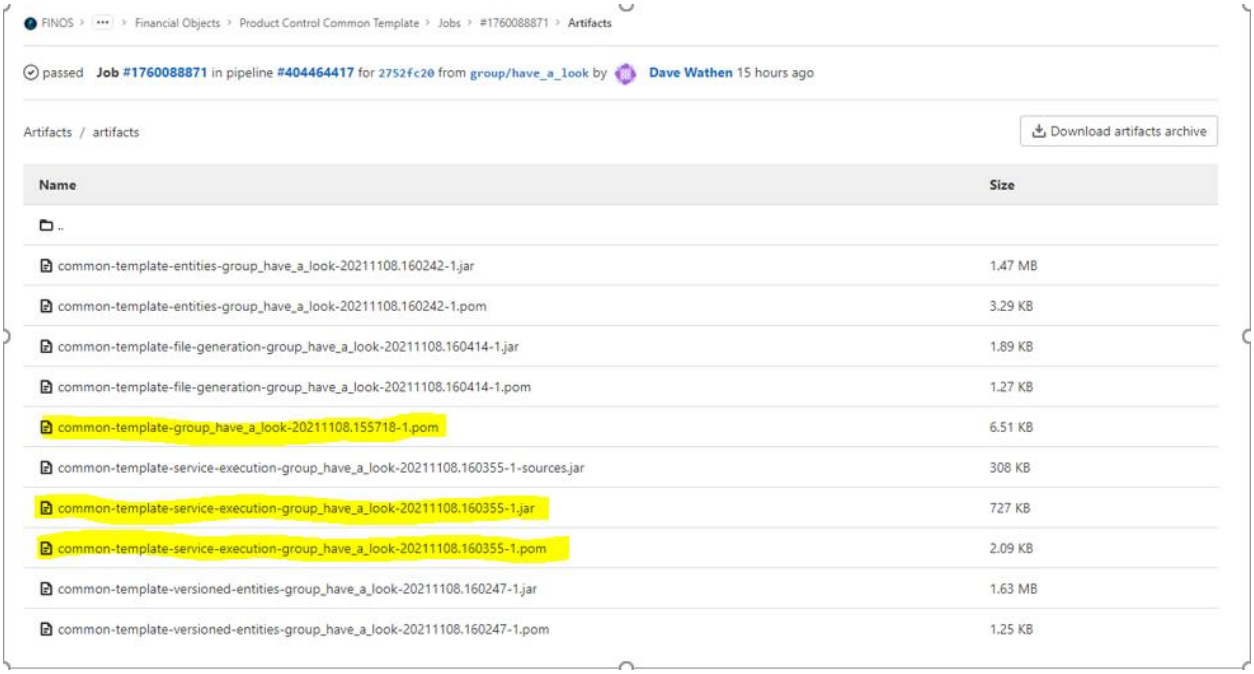




On the right hand side under **Jobs artifacts**, click the **Browse** button.

Expand the artifacts folder and download the following files from the artifacts of the pipeline in GitLab.com.

* the parent pom file
* the service-execution jar file
* the service-execution pom file



3) Install the downloaded files into your local repository using the following command. In a real project this would come from an authoritative repository; this is just for demo purposes.

> mvn install:install-file -Dfile=<path-to-parent-pom> -DpomFile=<path-to-parent-pom>
> mvn install:install-file -Dfile=<path-to-service-execution-jar> -DpomFile=<path-to-service-execution-pom>

4) Update the properties in pom.xml of the template-demo project to ensure they are as follows:

* template.groupId = groupId of the Legend project (should not need to change)
* template.artifactId = artifactpId of the Legend project (should not need to change)
* template.workspace = the workspace you created. If this is a group workspace then prefix it with 'group_'.

5) If it is a personal workspace prefix it with 'workspace_<owner>_' where <owner> is your GitLab account id.
If the template.groupId and/or template.artifactId did need adjusting in step 4, the imports in Demo.java will need to be adjusted in line with those changes.

6) Build and run:

> mvn compile exec:java -Dexec.mainClass="org.finos.demo.Demo"
This should print a message showing the file contianing the output in CDM JSON form