Documentation for Financial Transactions Web Application Jason N. June 1, 2020

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1 Disclaimer

This project is meant solely as a proof of concept to demonstrate how different databases might be used in this context. The project is NOT meant to be used in production. Several security flaws are present, including SQL injection, possible XSS, lack of authentication, etc.

2 Setup

This section is meant to serve as a general guide for setting up integrations used in this project. The detail in this guide is limited as the process will depend heavily on your choices, which I have attempted to outline for you. Many materials are referenced in this guide which contain far more detail, I would strongly suggest reading through these if they apply to your setup.

2.1 Google API

This is required for interacting with the Google Sheets database.

Go to https://console.developers.google.com/ and create a new project if you haven't already done that.

From the library panel, enable the Google Sheets API and the Google Drive API.

From the credentials panel, create an API key.

From the credentials panel, create an OAuth Client ID for a web application. Give it a name, which will appear when users are prompted to give the app permissions. Add the URIs that are expected to use the app. When testing this locally, it can be useful to add http://localhost:5000 or similar. These can always be changed at any moment from the developer console.

In the public/googleApiScript.js file of this repository, remember to change the client id and both instances of the api key to the appropriate values for your project.

2.2 Firebase

Firebase is used to host the web application and two of the databases, as well as storing images for all other databases to reference. All features are available through the same firebase project.

To get started, simply navigate to https://console.firebase.google.com and click "Add Project". Follow the instructions to set the name of the project and decide whether or not you want to make use of analytics.

Once a project has been created, follow the instructions at https://firebase.google.com/docs/web/setup to set up firebase with the front-end application. If you are using the files in this repository, the necessary SDKs are already included, though you'll need to change the firebase config to the appropriate values for your project.

To set up the real-time database, follow the instructions at https://firebase.google.com/docs/database/web/start to create a database and get your real-time database url. If you're using files from this repository, modify the firebase config to use this url instead of the given one.

To set up firestore, follow the instructions at https://firebase.google.com/docs/firestore/quickstart to create a database. If you're using files from this repository, modify the contents of the object passed to the

firebase.initializeApp() method to use appropriate values for your project. This method is called in the public/firebaseScript.js file.

To set up cloud functions, follow the instructions at https://firebase.google.com/docs/functions/get-started. If you're using files from this repository, the files already exist and just need to be deployed.

2.3 MySQL

There are several different implementations of MySQL available. MariaDB was used to create and test this project, which is a fork of MySQL.

If you decide to host the database yourself, you'll need to start the program, log in, and create a database. In this repository, it is named 'mydb', however, this can be changed if desired.

Remember to change the ip address, database name, and credentials in the index.js file of the firebase cloud functions folder.

If you wish to use this repository, the database can be imported using the dump.txt file:

```
mysql -u username -p database_name < dump.txt</pre>
```

Otherwise, once the database is created, enter the database using 'use database name;' to enter the database.

To create tables, you can use the following query:

```
CREATE TABLE 'name' ( 'colname1' datatype, 'colname2' datatype, 'colname3' datatype... )
```

Here is a useful website containing various MySQL commands: https://www.mysqltutorial.org/mysql-cheat-sheet.aspx/

3 HTML

3.1 Preamble and head

3.1.1 Preamble

Declares the document as HTML5.

```
1 <!DOCTYPE html>
```

3.1.2 meta charset

Specifies that characters in the file are encoded in UTF-8.

```
4 <meta charset = "UTF-8"/>
```

3.1.3 link rel="stylesheet"

Imports the CSS file.

```
5 1 stylesheet type="text/css" href="./style.css"/>
```

3.1.4 Scripts

Imports the main Javascript file, responsible for the table and UI.

```
7 <script src="./script.js"></script>
```

Imports the Google API library.

```
8 <script src="https://apis.google.com/js/api.js"></script>
```

Imports other Javascript files, responsible for database management.

```
9 <script src="./googleApiScript.js"></script>
10 <script src="./mysqlScript.js"></script>
<11 <script src="./localStorageScript.js"></script>
<2 cript src="./imageFirestore.js"></script>
```

3.2 Inputs

Disables autocomplete which remembers past user input by default. return false specifies that no POST request should be made to the server.

```
20 <form onsubmit="return false" autocomplete="off">
```

3.2.1 Labels

Identifies the purpose of the field to the user, allows the user to select the field by clicking the label. This element is also used by accessibility tools to identify the field.

```
22 <label for="date">Date:</label><br/>
```

3.2.2 Date

The date input type is supported by most modern browsers and provides an intuitive UI for selecting dates. It also includes methods for converting or verifying the Date object.

```
13 <input id="date" name="date" type="date" placeholder="yyyy-mm-dd"/>
```

3.2.3 Text

The text input type allows the user to input a string. For numbers, this string has to be parsed in Javascript.

```
28 <input id="account" name="account" list="accountsList" type="text"

→ placeholder="Account Number"/>
```

3.2.4 List

Lists are created using the select element, containing option elements. Each option has a value which is used in Javascript, and innerText which is seen by the user.

```
34
   <label for="type">Transaction Type:</label><br/>
   <select id="type" name="type">
35
       <option value=""></option>
36
37
       <option value="BUY">BUY</option>
       <option value="SELL">SELL</option>
38
       <option value="!DIVIDEND">DIVIDEND</option>
39
       <option value="!INTEREST">INTEREST</option>
40
       <option value="!WITHDRAW">WITHDRAW</option>
41
42
       <option value="!DEPOSIT">DEPOSIT</option>
43
   </select>
```

3.2.5 File

Files are uploaded using the file input type. The multiple attribute allows the user to upload multiple files, which are interpreted as an array of files in Javascript.

3.2.6 Buttons

Buttons with the submit type can be used to check that all required sections are complete and highlight them in red. These buttons can also be used to send a POST request to a server if desired. The onclick attribute specified the function and parameters that should be executed when pressed.

3.3 Filters

Filter HTML elements are handled exactly the same as their counterparts in the input section. Some fields have two elements to handle a lower and upper bound, but these are handled solely in Javascript.

3.3.1 Tooltip

The span element is a generic container. The title attribute will display its value as a tool tip when the element is hovered.

3.3.2 Checkbox

The input type checkbox provides a toggleable input field which can be evaluated as true or false with Javascript.

```
| 153 | <label for="filterNa">Filter N/A:</label> | (input id="filterNA" name="filterNA" type="checkbox"/> | |
```

3.4 Options

The options section uses buttons, text inputs, a file input, and drop down menus, which are decribed in the inputs section. The special handling of these elements is done in Javascript.

3.5 Table

3.6 frozenColumns

Cells in columns that are meant to be always visible are marked with a frozenColumnx class, where x is the column number. CSS is used to keep the column in place when scrolling.

```
233 
234 <section>
235 Transaction ID
236 </section>
```

3.7 sort buttons

Sorting is done using buttons with an onclick attribute that calls a function sortTable(). The parameters passed are the column index and a boolean value indicating whether the column should be sorted in ascending or descending order.

3.7.1 tbody

The main table body is initially empty. Rows are managed by Javascript and it is marked with a unique id for this purpose.

```
317  318
```

3.8 Firebase scripts

These scripts are taken directly from the firebase documentation. They are required for firebase and its components to function. The firebase-app.js script is the main script and is required for all firebase features. The next three scripts are required for collecting analytics data, the realtime database, and firestore, respectively.

The configuration contains API keys and project information required to identify the app. The key is not secret, though it is unique to the project. As it is easily obtained by users of the app, it is strongly recommended to whitelist your domain in the project settings.

Unlike the other scripts, the firebase script is declared at the bottom, as it requires that the SDKs have loaded first.

```
329
330 | <script >
331
   // Your web app's Firebase configuration
332
    var firebaseConfig = {
333
        apiKey: "AIzaSyAmZLFZHDAB9evhvNunxOe5GxXRd_OizmU",
334
        authDomain: "financial-transactions-6f065.firebaseapp.com",
335
        databaseURL: "https://financial-transactions-6f065.firebaseio.com",
336
        projectId: "financial-transactions-6f065",
337
        storageBucket: "financial-transactions-6f065.appspot.com",
338
        messagingSenderId: "82206982479",
339
        appId: "1:82206982479:web:8937bbd1bd4fb6022b053a",
340
        measurementId: "G-0564DT8RNQ"
341
   };
342
    // Initialize Firebase
343
    firebase.initializeApp(firebaseConfig);
344 | firebase.analytics();
345
346
   var database = firebase.database();
347 | var firestore = firebase.firestore();
348
   </script>
349
350
   <script src="./firebaseScript.js"></script>
```

4 Main Javascript

This file handles the UI and general functions required to bridge the front end with the databases.

4.1 formattedStringToNumber()

Removes leading dollar sign if present. Removes all commas. Converts string to a number datatype.

```
function formattedStringToNumber(numberAsString) {
2
       var number;
3
       if(numberAsString[0] == '$') {
4
5
            numberAsString = numberAsString.substr(1);
6
       }
7
8
       number = Number(numberAsString.replace(/,/g, ''));
9
10
       return number;
11
   }
```

4.2 numberToFormattedString()

Converts number to string datatype. Inserts a comma between every consecutive group of 3 characters.

```
function numberToFormattedString(number) {
   var numberAsString;

numberAsString = String(number).replace(/\B(?=(\d{3})+(?!\d))/g, ",");

return numberAsString;
}
```

4.3 getData()

Gets values from input fields and performs minor formatting changes. Calls the validate() function to have the data verified. If the data is valid, more formatting changes are performed, including adding dollar signs and converting the date to a string. The function returns an array of the data if valid, false otherwise.

```
21
   function getData() {
22
       var date = document.getElementById("date");
23
       var account = document.getElementById("account").value;
       var type = document.getElementById("type").value;
24
       var security = document.getElementById("security").value;
25
       var amount = document.getElementById("amount").value;
26
27
       var dAmount = document.getElementById("dAmount").value;
28
29
       security = security.toUpperCase();
30
       amount = formattedStringToNumber(amount);
31
```

```
32
33
       dAmount = formattedStringToNumber(dAmount);
34
35
       if(validate(date, account, type, security, amount, dAmount)) {
           var costBasis = '$' + numberToFormattedString(calculateCostBasis(
36
               → amount, dAmount));
37
           date = date.value:
38
39
           amount = numberToFormattedString(amount);
40
           dAmount = '$' + numberToFormattedString(dAmount.toFixed(2));
41
           return [ date, account, type, security, amount, dAmount, costBasis
42
43
       }
44
       else return false;
45
   }
```

4.4 validate()

Calls functions to validate all input fields. If any return false, the validate() function returns false. If none of the checks fail, the function returns true.

```
function validate(date, account, type, security, amount, dAmount) {
47
       if(!validateDate(date)) return false;
48
49
       if(!validateAccount(account)) return false;
50
       if(!validateType(type)) return false;
51
       if(!validateSecurity(security)) return false;
       if(!validateAmount(amount)) return false;
52
       if(!validateDAmount(dAmount)) return false;
53
54
55
       return true;
56
   }
```

4.4.1 Check empty

Checks if the input field is an empty string. If so, alerts the user with an error message and returns false. Otherwise, returns true.

```
function validateAccount(account) {
   if(account == '') {
      alert('Error: Missing Account Number');
      return false;
}

return true;
}
```

4.4.2 Check NaN

Uses the built-in isNaN() function to check that a number is valid.

```
107
    function validateAmount(amount) {
         if(amount == '') {
108
109
             alert('Error: Missing Amount');
110
             return false;
111
        }
112
         if(isNaN(amount)) {
113
             alert('Error: Invalid Amount');
114
115
             return false;
116
         }
117
118
        return true;
119
```

4.4.3 Check date

Gets the current date and stores it in the variable realDate. Checks the validity of the date input using the built-in date.checkValidity(). Compares the date input to the current date to ensure that the date input is not in the future.

```
function validateDate(date) {
58
59
        realDate = new Date();
60
        inputDate = date.valueAsNumber;
61
        if(date.value == '') {
62
63
            alert('Error: Missing date');
64
            return false;
65
        }
66
67
        if(!date.checkValidity()) {
68
            alert('Error: Invalid date');
69
            return false;
        }
70
71
72
        if(realDate.valueOf() < inputDate) {</pre>
73
            alert('Error: Date is in the future');
74
            return false;
        }
75
76
77
        return true;
   }
78
```

4.5 generateId()

Generates an ID of length idLength by selecting a random character from the character set using a loop. Checks this ID against all other IDs in the table, if none match, the function returns the ID. If any match, the ID is not unique and the function attempts to generate another until it reaches a unique ID.

```
135
    function generateId() {
        var id = '';
136
137
        var idLength = 6;
138
139
        var characters = 'ABCDEFGHIJKLMNOPQRSTUVWXYZ0123456789';
140
        var charactersLength = characters.length;
141
142
        var unique = false;
143
144
        while(!unique) {
145
             for(var i = 0; i < idLength; i++) {</pre>
146
                 id += characters.charAt(Math.floor(Math.random() *
                    }
147
148
149
             unique = true;
             for(var i = 0; i < document.getElementsByClassName('idCell').</pre>
150
                \hookrightarrow length; i++) {
                 if(document.getElementsByClassName('idCell')[i].innerText ==
151
                     → id) {
152
                     unique = false;
153
                     break;
154
                 }
             }
155
156
        }
157
        return id;
158
    }
```

4.6 calculateCostBasis()

Divides the dollar amount by the amound and sets precision to 2 decimal places.

```
function calculateCostBasis(amount, dAmount) {
    costBasis = (dAmount / amount).toFixed(2);
    return costBasis;
}
```

4.7 addTransaction()

Takes an array as the argument, meant to contain all data necessary to create a row. Constructs remaining cells in the row, such as the actions column, and formats the files column. Adds the new row to the table and adds cells, modifying classes where necessary.

```
function addTransaction(data) {
    var staging = data;
    var tableBody = document.getElementById('tableBody');
    var newRow = tableBody.insertRow(0);
    newRow.classList += "bodyRow";

170
```

```
171
        var actionsContent = "<button type='button' onclick='editRow(this)'>
           → Delete </button >";
172
        var fileContent = '  ';
173
        if(data.length > 8) {
174
           for(let i = 0; i < data[8].length; i++) {</pre>
175
               fileContent += "<a onclick='downloadFile('" + data[8][

    i][0] + "');' href='javascript:void(0);'>" + data[8][i]

                  → ][1] + "</a>";
               fileContent += "<button type='button' onclick='
176

  removeFileFromTable('" + data[8][i][0] + "', this);'>-
                  → button>";
           }
177
178
        }
179
        fileContent += '<input type="file" onchange="addFile(
           \hookrightarrow this, 0);" multiple/>';
180
        staging[8] = fileContent;
181
        staging[9] = actionsContent;
182
183
        var calculateCostBasis = true;
184
        if(data[3][0] == '!') {
185
           calculateCostBasis = false;
186
           data[3] = data[3].substr(1);
187
188
189
       for(var i = 0; i < 10; i++) {
190
           var newCell = newRow.insertCell(i);
191
           var idShowing = (document.getElementById('toggleId').innerText ==
              → "Hide Transaction ID");
192
           newCell.innerHTML = data[i];
193
194
195
           if(i == 0) {
196
               if(idShowing)
197
                   newCell.classList = "idCell frozenColumn1";
198
199
                   newCell.classList = "idCell";
200
                   newCell.setAttribute("hidden", true);
201
202
           }
203
           else if(i == 1) {
204
               if(idShowing)
205
                   newCell.classList = "frozenColumn2";
206
               else
207
                   newCell.classList = "frozenColumn1";
           }
208
209
           /*
           else if(i == 2) {
210
211
               if(idShowing)
212
                   newCell.classList = "frozenColumn3";
213
               else
214
                   newCell.classList = "frozenColumn2";
215
           }
216
           */
```

4.8 fileIdGenerator()

Creates and arbitrary, random file ID, large enough that it is extremely unlikely to generate two identical IDs. This is done as it is less feasible to check existing databases for matching IDs.

4.9 addTransactionButton()

Gets data by calling the getData() function. Adds the transaction ID to the data array. Creates a new empty array for storing file data, calls the uploadFile() function to continue the process.

```
228
    function addTransactionButton() {
229
        var data = getData();
230
        if(data) {
231
             var id = generateId();
232
             data.unshift(id);
233
234
             fileList = new Array()
235
             uploadFile(data, addTransactionWithFileName, fileList, 0);
236
             clearInput(false);
237
        }
238
    }
```

4.10 addTransactionWithFileName()

Takes the row data as an argument and calls addTransaction() to finalise the process. Logs the data in the Javascript console. Calls the loadDataLists() function to update the list of securities and accounts lists.

```
function addTransactionWithFileName(data) {
  addTransaction(data);
  console.log(data);
  loadDataLists();
}
```

4.11 deleteRow()

Gets the row of the delete button. Removes files from the local database which were referenced from this row (using the unique file ID). Removes the row. Resets the buttons in the input section if necessary (i.e. if the deleted row was being edited, the editing actions must be hidden and the add transaction button must be restored).

```
246
    function deleteRow(button) {
247
       var row = button.parentElement.parentElement;
248
249
       var fileRows = row.getElementsByTagName('td')[8].getElementsByTagName
          250
       for(let i = 0; i < fileRows.length; i++) {</pre>
           let fileId = fileRows[i].getElementsByTagName('a')[0].getAttribute
251
              252
           deleteFileFromIndexedDB(fileId);
253
       }
254
255
       document.getElementById("tableBody").removeChild(row);
256
257
       if(document.getElementsByClassName('editing').length == 0) {
           document.getElementById('add').removeAttribute('hidden');
258
259
           document.getElementById('save').setAttribute('hidden', true);
           document.getElementById('discard').setAttribute('hidden', true);
260
261
262
           document.getElementById('add').setAttribute('type','submit');
263
           document.getElementById('save').setAttribute('type', 'button');
264
       }
265
       loadDataLists();
266
```

4.12 editRow()

The function checks if there is already a row with the editing class. If so, it removes this class from the old row.

The function then sets the current row to have the editing class. All the input fields are set to use values from the row.

In the case of type, the function first tries to apply the display value of the type. If this fails, the function tries to add an exclamation mark to the front to account for the indication of types without cost basis.

The add transaction button is hidden and set to a regular button so that the enter key no longer activates it. The save and discard buttons are unhidden, and save is set to the submit type button.

The file upload is cleared and the content of the file upload label is set depending on the number of files from the row.

```
function editRow(button) {

if (document.getElementsByClassName('editing').length > 0)

document.getElementsByClassName('editing')[0].classList = "bodyRow";

271
```

```
272
        var row = button.parentElement.parentElement;
273
        var rowContent = row.getElementsByTagName('td');
274
        row.classList = "bodyRow editing";
275
276
        document.getElementById('date').value = rowContent[1].innerText;
277
        document.getElementById('account').value = rowContent[2].innerText;
278
        document.getElementById('type').value = rowContent[3].innerText;
279
280
        if(document.getElementById('type').value == '') document.

    getElementById('type').value = '!' + rowContent[3].innerText;
281
282
        document.getElementById('security').value = rowContent[4].innerText;
283
        document.getElementById('amount').value = rowContent[5].innerText;
        document.getElementById('dAmount').value = rowContent[6].innerText;
284
285
286
        document.getElementById('add').setAttribute('hidden', true);
287
        document.getElementById('save').removeAttribute('hidden');
288
        document.getElementById('discard').removeAttribute('hidden');
289
290
        document.getElementById('add').setAttribute('type','button');
291
        document.getElementById('save').setAttribute('type', 'submit');
292
293
        removeFileUpload();
294
        uploadLabel = document.getElementById('fileUploadLabel');
        if(rowContent[8].getElementsByTagName('tr').length > 0) {
295
296
            uploadLabel.innerHTML = String(rowContent[8].getElementsByTagName

    ('tr').length) + " file(s)";
297
298
        fileEditted = false;
299
```

4.13 saveChanges()

The function attempts to get data from the input section by calling getData(), which also validates this data.

The row to modify is determined by checking for the editing class. An array is created from the cells in this row.

If the first character of the type is and exclamation mark, this character is removed before being inserted into the row, and the cost basis is set to N/A.

Each element in the data array is moved into the appropriate cell in the row.

The add transaction button is restored, and the other buttons are hidden.

If the file upload was changed (i.e. a file was uploaded or the element was cleared), the uploadFile() function is called to get the new files if they exist. If no changes were made, the file input is cleared.

The date in the input is reset and all other fields are cleared. Lastly, the function loads existing accounts and securities for the autofill feature.

```
301 function saveChanges() {
```

```
302
        data = getData();
        if(data) {
303
             rowToEdit = document.getElementsByClassName('editing')[0];
304
305
             cellsToEdit = rowToEdit.getElementsByTagName('td');
306
307
             if(data[2][0] == '!') {
308
                 data[2] = data[2].substr(1);
309
                 data[6] = "N/A";
310
             }
311
312
             for(var i = 0; i < data.length; i++) {</pre>
313
                 cellsToEdit[i + 1].innerHTML = data[i];
314
315
             rowToEdit.classList = "bodyRow";
316
317
             document.getElementById('add').removeAttribute('hidden');
318
             document.getElementById('save').setAttribute('hidden', true);
319
             document.getElementById('discard').setAttribute('hidden', true);
320
321
             document.getElementById('add').setAttribute('type','submit');
322
             document.getElementById('save').setAttribute('type','button');
323
324
             if(fileEditted) {
325
                 uploadFile([cellsToEdit[8]], updateExistingFileName, new Array
                    \hookrightarrow (), 0);
326
             }
327
             else {
328
                 removeFileUpload();
329
             }
330
331
             resetDate();
332
             clearInput(true);
333
             loadDataLists();
334
        }
335
```

4.14 discardChanges()

The editing class is removed from the row currently being edited.

The add transaction button is restored, and the other buttons are hidden.

The date is reset, input fields are cleared, and any files in the file upload are removed.

```
337
    function discardChanges() {
338
        document.getElementsByClassName('editing')[0].classList = "bodyRow";
339
340
        document.getElementById('add').removeAttribute('hidden');
341
        document.getElementById('save').setAttribute('hidden', true);
342
        document.getElementById('discard').setAttribute('hidden', true);
343
344
        document.getElementById('add').setAttribute('type','submit');
        document.getElementById('save').setAttribute('type','button');
345
```

```
346
347 resetDate();
348 clearInput(true);
349 removeFileUpload();
350 }
```

4.15 sortTable()

The function uses bubble sort to organise rows based on the column number specified by the first argument. The condition evaluated is determined by whether the second argument is set to true or false.

```
352
    function sortTable(column, ascending) {
353
        var rows = document.getElementsByClassName('bodyRow');
354
355
        var sorting = true;
356
        while(sorting) {
357
             sorting = false;
358
             for(var i = 0; i < (rows.length - 1); i++) {
359
                 rowA = rows[i].getElementsByTagName('td')[column];
                 rowB = rows[i + 1].getElementsByTagName('td')[column];
360
361
362
                 var swap = false;
363
364
                 if(ascending && rowA.innerHTML.toLowerCase() > rowB.innerHTML.
                    → toLowerCase()) swap = true;
365
                 else if(!ascending && rowA.innerHTML.toLowerCase() < rowB.
                    → innerHTML.toLowerCase()) swap = true;
366
367
                 if(swap) {
368
                     sorting = true;
                     document.getElementById('tableBody').insertBefore(rows[i +
369
                         \hookrightarrow 1], rows[i]);
370
                 }
            }
371
372
        }
373
    }
```

4.16 resetDate()

A new Date object is created to get the user's current date. The year, month, and day of this object is organised to use the desired format.

Currently, this format is required to sort the table by date. Changes to the format would require a special function for sorting dates to parse numbers and weight them correctly.

4.17 clearInput()

The type, security, amount, and dollar amount input fields are cleared. If necessary, the account field is also cleared, depending on the value of the argument.

```
384
    function clearInput(clearAccount) {
385
        if(clearAccount)
386
            document.getElementById('account').value = '';
387
388
        document.getElementById('type').value = '';
        document.getElementById('security').value = '';
389
        document.getElementById('amount').value = '';
390
        document.getElementById('dAmount').value = '';
391
392
```

4.18 validateFilters()

The function takes the filter input fields as arguments and sends each to a function created to validate the specific field. The function returns false if any checks fail, and true otherwise.

```
394
    function validateFilters(filterId, startDate, endDate, filterAccount,

→ filterType, filterSecurity, minAmount, maxAmount, minDAmount,

       → maxDAmount, minCostBasis, maxCostBasis) {
        if(!validateFilterId(filterId)) return false;
395
396
        if(!validateDateRange(startDate, endDate)) return false;
397
        if(!validateFilterAccount(filterAccount)) return false;
        if(!validateFilterSecurity(filterSecurity)) return false;
398
        if(!validateAmountRange(minAmount, maxAmount)) return false;
399
        if (!validateDAmountRange(minDAmount, maxDAmount)) return false;
400
401
        if(!validateCostBasisRange(minCostBasis, maxCostBasis)) return false;
402
403
        return true;
404
```

4.18.1 always true

Some filters require no validation. These are set to always return true.

```
406 function validateFilterId(id) {
407 return true;
408 }
```

4.18.2 date range

The function checks that both dates in the range are valid dates. The function then checks that the start date is not greater than the end date.

```
410
    function validateDateRange(start, end) {
411
        if(!start.checkValidity()) {
412
             alert('Error: Invalid Start Date');
413
             return false;
414
        }
415
416
        if(!end.checkValidity()) {
             alert('Error: Invalid End Date');
417
418
             return false;
419
        }
420
421
        if(start.valueAsNumber > end.valueAsNumber) {
422
             alert('Error: Invalid Date Range');
423
             return false;
424
        }
425
426
        return true;
427
    }
```

4.18.3 amount range

The function checks that both amounts are valid numbers. The function then checks that the minimum is not greater than the maximum amount.

```
437
    function validateAmountRange(min, max) {
438
        if(isNaN(Number(min))) {
             alert('Error: Min Amount is NaN');
439
440
             return false;
441
        }
442
443
        if(isNaN(Number(max))) {
             alert('Error: Max Amount is NaN');
444
445
             return false;
        }
446
447
        if(Number(min) > Number(max) && min != '', && max != '') {
448
449
             alert('Error: Invalid Amount Range');
450
             return false;
        }
451
452
453
        return true;
454
```

4.19 stringFilter()

For filters with more complex queries, top level queries are separated by AND operations. These are subdivided by OR operations.

Within an AND block, any one OR must be true for the block to be true. All AND blocks must be true for the query to succeed for the item checked.

```
494
    function stringFilter(filtertext, tableitem) {
495
        filters = filtertext.split(" && ");
496
        for(var i = 0; i < filters.length; i++) {</pre>
497
498
             filterORs = filters[i].split(" || ");
499
             var meetsCriteria = false;
500
501
             for(var ii = 0; ii < filterORs.length; ii++) {</pre>
                 if(filterORs[ii][0] == "!" && !tableitem.toUpperCase().
502
                    → includes(filterORs[ii].toUpperCase().substr(1)))
                    → meetsCriteria = true;
503
                 if(filterORs[ii][0] != "!" && tableitem.toUpperCase().includes

    (filterORs[ii].toUpperCase())) meetsCriteria = true;

504
            }
505
506
             if(!meetsCriteria) return false;
507
        }
508
509
        return true;
510
    }
```

4.20 applyFilter()

If the filter is valid, all previous filters are removed, and each column is filtered as necessary. If any condition fails, the row is hidden. Otherwise, the row remains visible.

```
512
    function applyFilter() {
513
        unfilterAll();
514
515
        rows = document.getElementsByClassName('bodyRow');
516
517
        filterId = document.getElementById('filterId').value;
518
        startDate = document.getElementById('startDate');
519
        endDate = document.getElementById('endDate');
520
        filterAccount = document.getElementById('filterAccount').value;
521
        filterType = document.getElementById('filterType').value;
522
        filterSecurity = document.getElementById('filterSecurity').value;
523
        lowAmount = document.getElementById('lowAmount').value;
524
        highAmount = document.getElementById('highAmount').value;
525
        lowDAmount = document.getElementById('lowDAmount').value;
526
        highDAmount = document.getElementById('highDAmount').value;
527
        lowCostBasis = document.getElementById('lowCostBasis').value;
528
        highCostBasis = document.getElementById('highCostBasis').value;
529
        if(lowDAmount[0] == '$') lowDAmount = lowDAmount.substr(1);
530
```

```
531
        if(highDAmount[0] == '$') highAmount = highDAmount.substr(1);
532
        if(lowCostBasis[0] == '$') lowCostBasis = lowCostBasis.substr(1);
533
        if(highCostBasis[0] == '$') highCostBasis = highCostBasis.substr(1);
534
535
        if (validateFilters(filterId, startDate, endDate, filterAccount,

→ filterType, filterSecurity, lowAmount, highAmount, lowDAmount,
           → highDAmount, lowCostBasis, highCostBasis)) {
            for(var i = 0; i < rows.length; i++) {</pre>
536
537
                 cells = rows[i].getElementsByTagName('td');
538
                 var hide = false;
539
540
                 if(filterId != '' && !stringFilter(filterId,cells[0].innerText
                     hide = true;
541
542
543
                 if(startDate.value != '' && startDate.value > cells[1].
                    → innerText)
544
                     hide = true;
545
                 if(endDate.value != '' && endDate.value < cells[1].innerText)</pre>
546
547
                     hide = true;
548
                 if(filterAccount != '' && !stringFilter(filterAccount, cells
549
                    → [2].innerText))
                     hide = true;
550
551
552
                 if(filterType != '' && filterType != cells[3].innerText)
553
                     hide = true;
554
                 if(filterSecurity != '' && !stringFilter(filterSecurity, cells
555
                    → [4].innerText))
556
                     hide = true;
557
558
                 if(lowAmount != '', && Number(lowAmount) >
                    → formattedStringToNumber(cells[5].innerText))
559
                     hide = true;
560
561
                 if(highAmount != '' && Number(highAmount) <</pre>
                    → formattedStringToNumber(cells[5].innerText))
                     hide = true;
562
563
                 if(lowDAmount != ', && Number(lowDAmount) >
564
                    → formattedStringToNumber(cells[6].innerText.substr(1)))
565
                     hide = true;
566
                 if(highDAmount != '', && Number(highDAmount) <</pre>
567
                    → formattedStringToNumber(cells[6].innerText.substr(1)))
568
                     hide = true;
569
                 if(lowCostBasis != '' && Number(lowCostBasis) >
570
                    → formattedStringToNumber(cells[7].innerText.substr(1)))
571
                     hide = true;
572
                 if(highCostBasis != '' && Number(highCostBasis) <</pre>
573
```

```
→ formattedStringToNumber(cells[7].innerText.substr(1)))
574
                     hide = true;
575
576
                 if(filterNA.checked && cells[7].innerText == "N/A")
577
                     hide = true;
578
579
                 if(hide)
                     rows[i].setAttribute('hidden', true);
580
581
             }
582
        }
583
    }
```

4.21 clearFilter()

All previous filters are removed by calling unfilterAll(). All filter fields are set to empty strings to clear them. The checkbox is set to false to uncheck it.

```
585
    function clearFilter() {
586
        unfilterAll();
587
588
        var fields = document.getElementsByClassName('filterField');
589
         for(var i = 0; i < fields.length; i++) {</pre>
590
591
             fields[i].value = '';
592
593
594
         document.getElementById('filterNA').checked = false;
595
    }
```

4.22 unfilterAll()

All previous filters are removed by unhiding all body rows.

```
function unfilterAll() {
   rows = document.getElementsByClassName('bodyRow');

for(var i = 0; i < rows.length; i++) {
   rows[i].removeAttribute('hidden');
}

602
}</pre>
```

4.23 toggleID()

Gets the current state of the ID column depending on the text of the button.

If the column needs to be hidden, the hidden attribute is added to each ID cell. Frozen column classes are shifted to remove the offset that would be created by the absence of these cells.

If the column needs to be revealed, the hidden attribute is removed from each ID cell. Frozen columns are shifted back to create room for the ID column.

```
605
    function toggleID() {
606
        var button = document.getElementById('toggleId');
607
        var rows = document.getElementsByTagName('tr');
        var cells = rows[0].getElementsByTagName('th');
608
609
610
        if(button.innerText == "Hide Transaction ID") {
             button.innerText = "Show Transaction ID";
611
612
613
             cells[0].setAttribute('hidden', true);
614
             cells[0].classList = "":
615
             cells[1].classList = "frozenColumn1";
616
             //cells[2].classList = "frozenColumn2";
617
             for(var i = 1; i < rows.length; i++) {</pre>
                 cells = rows[i].getElementsByTagName('td');
618
619
620
                 cells[0].setAttribute('hidden', true);
                 cells[0].classList = "idCell";
621
622
                 cells[1].classList = "frozenColumn1";
623
                 //cells[2].classList = "frozenColumn2";
624
            }
625
        }
626
        else {
627
            button.innerText = "Hide Transaction ID";
628
629
             cells[0].removeAttribute('hidden');
             cells[0].classList = "frozenColumn1";
630
631
             cells[1].classList = "frozenColumn2";
632
             //cells[2].classList = "frozenColumn3";
             for(var i = 1; i < rows.length; i++) {</pre>
633
                 cells = rows[i].getElementsByTagName('td');
634
635
                 cells[0].removeAttribute('hidden');
636
                 cells[0].classList = "idCell frozenColumn1";
637
                 cells[1].classList = "frozenColumn2";
638
                 //cells[2].classList = "frozenColumn3";
639
640
            }
641
        }
642
    }
```

4.24 readFile()

Gets the contents of a file and sets the value of the typesArray element to these contents.

```
function readFile(fileIn){
   if(fileIn.files && fileIn.files[0]) {
      var reader = new FileReader();
      reader.onload = function (e) {
           var output = e.target.result;
           document.getElementById('typesArray').value = output;
      };
```

```
651 reader.readAsText(fileIn.files[0]);
652 }
653 }
```

4.25 saveFile()

The value of the typesArray element is encoded for utf-8 and written to a file. The user is prompted to download and save this file.

```
655
    function saveFile() {
656
      var element = document.createElement('a');
      element.setAttribute('href', 'data:text/plain;charset=utf-8,' +
657

    encodeURIComponent(document.getElementById('typesArray').value));
      element.setAttribute('download', 'transaction-types.csv');
658
659
660
      element.style.display = 'none';
      document.body.appendChild(element);
661
662
663
      element.click();
664
665
      document.body.removeChild(element);
666
    }
```

4.26 applyTypes()

The value of the typesArray element is split by commas and saved as an array. This array is passed as an argument to the setTransactionTypesList() function.

4.27 editTypes()

The current types, which are read by readCurrentTypes() are formatted as a comma-separated string and used to fill the typesArray element.

4.28 setTransactionTypes()

The existing lists of transaction types, which are found in the input and filter sections, are cleared. Empty values are added to both to serve as default values. New lists are created from the array passed to this function as an argument. If the type is preceded by an exclamation mark, this is kept in the value attribute, but is not displayed to the user.

```
677
    function setTransactionTypesList(typesArray) {
678
        var type = document.getElementById('type');
679
        var filterType = document.getElementById('filterType');
680
681
        type.innerHTML = '<option value=""></option>';
        filterType.innerHTML = '<option value=""></option>';
682
683
684
        for(var i = 0; i < typesArray.length; i++) {</pre>
            var typeAsText = typesArray[i];
685
686
            if(typesArray[i][0] == '!') typeAsText = typesArray[i].substr(1);
687
            type.innerHTML += '<option value="' + typesArray[i] + '">' +
688

    typeAsText + '</option>';

689
            filterType.innerHTML += '<option value="' + typeAsText + '">' +

    typeAsText + '</option>';
690
        }
    }
691
```

4.29 toggleSection()

The section that the button belongs to is hidden or revealed, depending on the text of the button. The text is updated to reflect the status of the section and the action that can be taken, whether hiding or revealing the section.

```
693
    function toggleSection(button) {
694
        var form = button.parentElement.parentElement.getElementsByTagName('
            → form ') [0];
695
696
        if(button.innerText == "Hide") {
697
             form.setAttribute("hidden",true);
698
             button.innerText = "Show";
699
        }
700
        else {
701
             form.removeAttribute("hidden");
702
             button.innerText = "Hide";
703
        }
704
    }
```

4.30 loadDataLists()

Arrays are constructed from unique strings found in the accounts and securities columns of the table. These are used to create option elements for autofill suggestions in these fields.

```
706
    function loadDataLists() {
707
        var accountsList = document.getElementById("accountsList");
708
        var securitiesList = document.getElementById("securitiesList");
709
        var rows = document.getElementsByClassName("bodyRow");
710
711
        var accounts = [];
712
        var securities = [];
713
714
        for(var i = 0; i < rows.length; i++) {</pre>
715
             var tableAccount = rows[i].getElementsByTagName("td")[2].innerText
            var tableSecurity = rows[i].getElementsByTagName("td")[4].
716
                → innerText;
717
718
             if(!accounts.includes(tableAccount)) accounts.push(tableAccount);
719
             if(!securities.includes(tableSecurity)) securities.push(
                → tableSecurity);
720
        }
721
722
        accountsList.innerHTML = '';
723
        securitiesList.innerHTML = '';
724
725
        for(var i = 0; i < accounts.length; i++) {</pre>
726
             accountsList.innerHTML += '<option value="' + accounts[i] + '"/>';
727
        }
728
729
        for(var i = 0; i < securities.length; i++) {</pre>
             securitiesList.innerHTML += '<option value="' + securities[i] +</pre>
730
                → '"/>';
731
        }
732
    }
```

4.31 readCurrentTypes()

A list of current types saved as an array, created from the value attributes of the options in the input dropdown menu.

```
function readCurrentTypes() {
734
735
        var types = document.getElementById('type').getElementsByTagName('
            → option');
736
        var currentTypes = [];
737
738
        for(var i = 1; i < types.length; i++) {</pre>
739
             currentTypes.push(types[i].value);
740
        }
741
742
        return currentTypes;
743
    }
```

4.32 tableToArrays()

The contents of each body row are saved in a two-dimensional array exactly as displayed, except for the file column, which is saved as a list of file names and IDs.

```
745
    function tableToArrays() {
        var rows = document.getElementsByClassName('bodyRow');
746
747
        var data = new Array();
        data.push(["Transaction Id", "Date", "Account Number", "Transaction
748
            → Type", "Security", "Amount", "$ Amount", "Cost Basis", "Files"])
749
750
        for(var i = 0; i < rows.length; i++) {</pre>
             var cells = rows[i].getElementsByTagName('td');
751
752
             var cellData = new Array();
753
             for(var j = 0; j < 8; j++) {
754
755
                 cellData.push(cells[j].innerText);
756
757
             cellData.push(getFileNamesIds(cells[8]));
758
             data.push(cellData);
759
        }
760
761
        console.log(data);
762
        return data;
763
    }
```

4.33 arraysToTable()

All current rows are removed from the table. Buttons in the input field are set to the correct state for adding, as any row being edited would have been removed in the previous step.

For each row stored in the array, the function passes the data to the addTransactionButton, starting with the last row saved. This order is necessary as rows are added to the top of the table, so they must be read from the bottom to preserve order.

The row that was just added is popped from the array, allowing the function to proceed to the next row. This loop continues as long as there are rows remaining in the array.

```
765
    function arraysToTable(dataArr) {
766
        while(document.getElementsByClassName('bodyRow').length > 0) {
767
            document.getElementById("tableBody").removeChild(document.

    getElementsByClassName('bodyRow')[0]);
768
        }
769
770
        document.getElementById('add').removeAttribute('hidden');
        document.getElementById('save').setAttribute('hidden', true);
771
772
        document.getElementById('discard').setAttribute('hidden', true);
773
        document.getElementById('add').setAttribute('type', 'submit');
774
        document.getElementById('save').setAttribute('type', 'button');
775
776
777
        while(dataArr.length > 0) {
```

```
778
             let data = dataArr[dataArr.length - 1];
779
             let files = parseFileNamesIds(data[8]);
             data.pop();
780
781
             if(files.length > 0) {
782
                 data.push(files);
783
             }
             addTransaction(data);
784
785
             dataArr.pop();
786
787
        loadDataLists();
    }
788
```

4.34 window.onload = function()

Once the page is loaded, the date is set to the current date and the local database is initialised.

```
790 window.onload = function() {
791    resetDate();
792    initDb();
793 }
```

5 firebaseScript.js

Removes data stored under the Data reference and the Types reference.

5.1 clearFirebase()

```
function clearFirebase() {
   firebase.database().ref('Data').remove();
   firebase.database().ref('Types').remove();
}
```

5.2 writeToFirebase()

Clears the existing data using clearFirebase(). Creates an array from the table and an array containing types. Contents of each array are written to the respective sections of the database.

```
function writeToFirebase() {
6
7
        writeImagesToFirestore("firebase");
8
        clearFirebase();
9
10
        var data = tableToArrays();
11
        var typesArr = readCurrentTypes();
12
13
        for(var i = 1; i < data.length; i++) {</pre>
            firebase.database().ref('Data/' + String(i - 1)).set({
14
15
                id: data[i][0],
16
                date: data[i][1],
                account: data[i][2],
17
                type: data[i][3],
18
19
                security: data[i][4],
20
                amount: data[i][5],
21
                dAmount: data[i][6],
22
                costBasis: data[i][7],
23
                files: data[i][8]
24
            });
25
26
        for(var i = 0; i < typesArr.length; i++) {</pre>
27
            firebase.database().ref('Types/' + String(i)).set({
28
                value: typesArr[i]
29
            });
30
        }
31
   }
```

5.3 readFromFirebase()

Takes a snapshot of the database at the time it is being read.

Passes the contents of each row to the addTransaction() function.

Creates an array of transaction types from the database, passes this array as an argument to setTransactionTypesList \hookrightarrow ().

Account and securities autofill suggestions are updated using loadDataLists().

```
33
   function readFromFirebase() {
34
       clearIndexedDb("firebase");
       return firebase.database().ref('/').once('value').then(function(
35
           → snapshot) {
36
37
            while(document.getElementsByClassName('bodyRow').length > 0) {
                document.getElementById("tableBody").removeChild(document.
38

    getElementsByClassName('bodyRow')[0]);
39
40
            data = snapshot.val().Data;
41
            console.log(data);
42
            for(var i = data.length - 1; i >= 0; i--) {
43
                let staged = [data[i].id, data[i].date, data[i].account, data[
44
                   → i].type, data[i].security, data[i].amount, data[i].
                   → dAmount, data[i].costBasis];
                if(parseFileNamesIds(data[i].files).length > 0) {
45
                    staged.push(parseFileNamesIds(data[i].files));
46
47
                }
48
                console.log(staged);
49
                addTransaction(staged);
50
           }
51
52
            types = snapshot.val().Types;
53
            var typesArr = [];
54
            for(var i = 0; i < types.length; i++) {</pre>
                typesArr.push(types[i].value);
55
56
57
            setTransactionTypesList(typesArr);
            loadDataLists();
58
       });
59
60
   }
```

5.4 clearFirestore()

The function reads the current Firestore database to get existing document IDs for data and types. Each ID is removed from the database to allow new data to be written.

Note: This function is never called. Instead, it has been used as a template for the writeToFirestore().

```
62
   function clearFirestore() {
63
       firestore.collection("Data").get().then((querySnapshot) => {
           querySnapshot.forEach((doc) => {
64
                firestore.collection("Data").doc(doc.id).delete();
65
66
           });
       }).then(function() {
67
68
           firestore.collection("Types").get().then((querySnapshot) => {
                querySnapshot.forEach((doc) => {
69
```

```
firestore.collection("Types").doc(doc.id).delete();

});

});

}), then(function() { return 0 });

}
```

5.5 writeToFirestore()

Uses the template from the clearFirestore() function to erase the current database.

When finished, creates documents for each row, containing all the necessary fields to recreate the row. This document contains an index to preserve the order of the original table.

Creates a document for each type, containing the value of the type and an index to store the order in which it should be read.

```
76
    function writeToFirestore() {
77
        writeImagesToFirestore("firestore");
        firestore.collection("Data").get().then((querySnapshot) => {
78
79
             querySnapshot.forEach((doc) => {
80
                 firestore.collection("Data").doc(doc.id).delete();
81
            });
        }).then(function() {
82
             firestore.collection("Types").get().then((querySnapshot) => {
83
                 querySnapshot.forEach((doc) => {
84
                     firestore.collection("Types").doc(doc.id).delete();
85
                 });
86
87
             }).then(function() {
88
                 var data = tableToArrays();
89
                 var typesArr = readCurrentTypes();
90
91
                 for(var i = 1; i < data.length; i++) {</pre>
92
                     firestore.collection("Data").add({
93
                          id: data[i][0],
94
                          date: data[i][1],
95
                          account: data[i][2],
96
                          type: data[i][3],
97
                          security: data[i][4],
                          amount: data[i][5],
98
99
                          dAmount: data[i][6],
100
                          costBasis: data[i][7],
                          files: data[i][8],
101
102
                          index: i - 1
                     })
103
104
                     .then(function(docRef) {
105
                          console.log("Document written with ID: ", docRef.id);
106
107
                     .catch(function(error) {
108
                          console.error("Error adding document: ", error);
109
                     });
110
111
                 for(var i = 0; i < typesArr.length; i++) {</pre>
                     firestore.collection("Types").add({
112
```

```
113
                          value: typesArr[i],
114
                          index: i
115
                      })
116
                      .then(function(docRef) {
117
                          console.log("Document written with ID: ", docRef.id);
118
                      })
119
                      .catch(function(error) {
120
                          console.error("Error adding document: ", error);
121
                      });
122
                 }
123
             })
124
        });
125
    }
```

5.6 readFromFirestore()

Creates an array of rows, arranged in the original order using the stored index property. Creates an array of types using the same method.

Each row is written to the table using the addTransaction() function, reading from the last item in the array to preserve the original order. Account and security autofill suggestions are updated by calling loadDataLists().

The types array is passed to setTransactionTypes() to update the transaction types.

```
127
    function readFromFirestore() {
128
        clearIndexedDb("firestore");
        firestore.collection("Data").get().then((querySnapshot) => {
129
130
            var data = new Array();
131
132
            querySnapshot.forEach((doc) => {
                 data[doc.data().index] = doc.data();
133
134
                 console.log(data);
135
            });
136
137
            while(document.getElementsByClassName('bodyRow').length > 0) {
138
                 document.getElementById("tableBody").removeChild(document.

    getElementsByClassName('bodyRow')[0]);
139
            }
140
141
            for(let i = data.length - 1; i >= 0; i--) {
                 let staged = [data[i].id, data[i].date, data[i].account, data[
142
                    → i].type, data[i].security, data[i].amount, data[i].

    dAmount, data[i].costBasis];
143
                 if(parseFileNamesIds(data[i].files).length > 0) {
144
                     staged.push(parseFileNamesIds(data[i].files));
145
146
                 console.log(staged);
147
                 addTransaction(staged);
148
149
            loadDataLists();
150
        });
151
```

```
firestore.collection("Types").get().then((querySnapshot) => {
152
153
            var typesArr = [];
154
            querySnapshot.forEach((doc) => {
155
                typesArr[doc.data().index] = doc.data().value;
156
157
            });
158
159
            setTransactionTypesList(typesArr);
160
        });
161
    }
```

6 googleApiScript.js

6.1 Global Variables

auth2 is the authentication object created to verify that a user is logged in, and to allow modifications to the sheet on behalf of the user.

sheetId and shettIdNum are the IDs for the currently selected sheet, as a numeric value and as a string. Both of these are used to identify the sheet to read from or modify, depending on the situation.

```
var auth2;
var spreadsheetId = "1ROHpaAIUw-JHX8SrzvkEPCG1qgI-siJ9oucY6g5e4Co";
var sheetId = "Sheet1";
var sheetIdNum = 0;
```

6.2 loadSheetData()

The function checks if the user is logged in through OAuth.

If so, getAllUserSheets() is called to load the user's Google Sheets.

If not, the function asks them to log in. If successful, it calls getAllUserSheets().

```
7
   function loadSheetData() {
8
        if (auth2.isSignedIn.get())
9
10
            getAllUserSheets();
        }
11
12
        else {
13
            authenticate()
14
                 .then(function() {
                     if(auth2.isSignedIn.get()) getAllUserSheets();
15
16
                 });
17
        }
   }
18
```

6.3 getNewSheetData()

This function verifies that the user is logged in before getting the tabs from the selected sheet.

If necessary, the function asks the user to log in before reading these tabs.

```
function getNewSheetData() {
    spreadsheetId = document.getElementById('sheet').value;
    if(auth2.isSignedIn.get())
    {
        getTabsOfSheet();
    }
    else {
```

6.4 populateSheetSelector()

Updates the list of sheets to select from. The first value is always the default sheet. Subsequent values are read from an array passed to this function as an argument.

```
34
   function populateSheetSelector(arrayOfSheets) {
       document.getElementById('sheet').innerHTML = '<option value="1</pre>
35
           → ROHpaAIUw-JHX8SrzvkEPCG1qgI-siJ9oucY6g5e4Co">default</option>';
36
37
       for(var i = 0; i < arrayOfSheets.length; i++) {</pre>
38
            document.getElementById('sheet').innerHTML += '<option value="' +
               → arrayOfSheets[i].id + '">' + arrayOfSheets[i].name + '
               → option > ';
39
       }
   }
40
```

6.5 getNewTabData()

Gets the string and numeric IDs of the currently selected tab and stores them as global variables.

```
function getNewTabData() {
    data = document.getElementById('tab').value.split(/,(.+)/);
    sheetIdNum = data[0];
    sheetId = data[1];
}
```

6.6 populateTabSelector()

Takes an array of tabs as an argument. Creates a new option for each element in the array, allowing the user to select any tab from the sheet.

```
function populateTabSelector(arrayOfTabs) {
48
49
       document.getElementById('tab').innerHTML = '';
50
51
       for(var i = 0; i < arrayOfTabs.length; i++) {</pre>
52
            document.getElementById('tab').innerHTML += '<option value="' +</pre>
               → arrayOfTabs[i].properties.sheetId + ',' + arrayOfTabs[i].
               → properties.title + '">' + arrayOfTabs[i].properties.title +
               → '</option>';
       }
53
54
   }
```

6.7 getAllUserSheets()

Gets the name and ID of 1000 of the user's sheets, sorted by name.

```
function getAllUserSheets() {
56
57
        return gapi.client.drive.files.list({
            "pageSize": 1000,
58
59
            "orderBy": "name",
            "q": "mimeType = 'application/vnd.google-apps.spreadsheet'",
60
61
       })
            .then(function(response) {
62
63
                populateSheetSelector(JSON.parse(response.body).files);
64
                getNewSheetData();
                console.log("Response", response);
65
66
            function(err) { console.error("Execute error", err); });
67
68
```

6.8 getTabsOfSheet()

Gets JSON data for all tabs of the selected sheet. Populates the dropdown menu for tabs and gets necessary data for the tab, including the numeric and string IDs.

```
70
   function getTabsOfSheet() {
71
       return gapi.client.sheets.spreadsheets.get({
72
          "spreadsheetId": spreadsheetId,
          "includeGridData": false
73
74
       })
75
            .then(function(response) {
                populateTabSelector(JSON.parse(response.body).sheets);
76
77
                getNewTabData();
78
                console.log("Response", response);
79
            },
            function(err) { console.error("Execute error", err); });
80
81
```

6.9 authenticate()

Attempts to sign the user in through Google using OAuth.

```
function authenticate() {
  return gapi.auth2.getAuthInstance()
    .signIn({scope: "https://www.googleapis.com/auth/drive"})
    .then(function() { console.log("Sign-in successful"); },
    function(err) { console.error("Error signing in", err); });
}
```

6.10 loadClientSheets()

Loads the sheets API.

6.11 loadClient()

Loads the drive API.

6.12 readGoogleSheetDB()

Reads the table section of the sheet and stores values as a two-dimensional array. Passes this array as an argument to arraysToTable() to write the arrays to the website. Calls readGoogleTypes() to get transaction types from the sheet.

```
104
    function readGoogleSheetDB() {
105
        clearIndexedDb("sheets");
106
        return gapi.client.sheets.spreadsheets.values.get({
             "spreadsheetId": spreadsheetId,
107
            "range": sheetId + "!A2:I214748354"
108
109
        })
110
             .then(function(response) {
                 console.log("Response", response);
111
112
113
                 dataArr = [];
114
                 if(JSON.parse(response.body).values != undefined) {
115
                     dataArr = JSON.parse(response.body).values;
116
117
                 arraysToTable(dataArr);
118
119
                 readGoogleTypes();
```

```
120 },
121 function(err) { console.error("Execute error", err); });
122 }
```

6.13 readGoogleTypes()

The column of transaction types is read as an array, using columns as the major dimension. The result is passed to setTransactionTypesList.

```
124
    function readGoogleTypes() {
125
        return gapi.client.sheets.spreadsheets.values.get({
126
            "spreadsheetId": spreadsheetId,
127
            "range": sheetId + "!J1:J214748354",
            "majorDimension": "COLUMNS"
128
129
        })
130
131
             .then(function(response) {
132
                 console.log("Response", response);
133
                 var typesArr = JSON.parse(response.body).values[0];
134
                 setTransactionTypesList(typesArr);
135
            },
136
            function(err) { console.error("Execute error", err); });
137
    }
```

6.14 writeGoogleSheetDB()

If the user is authenticated, the function begins the process of saving to the database by calling $setGoogleRows \hookrightarrow$ (). Otherwise, the function attempts to authenticate the user, and starts this process if successful.

```
139
    function writeGoogleSheetDB() {
140
         if (auth2.isSignedIn.get())
         {
141
142
             setGoogleRows()
143
         }
144
         else {
145
             authenticate()
146
                  .then(function() {
                       if(auth2.isSignedIn.get()) setGoogleRows();
147
148
                  });
149
         }
150
    }
```

6.15 setGoogleRows()

The rows and columns of the spreadsheet are reduced to the minimum amount, removing most residual data and preventing the sheet from growing over time.

```
function setGoogleRows() {
return gapi.client.sheets.spreadsheets.batchUpdate({
```

```
154
             "spreadsheetId": spreadsheetId,
155
             "resource": {
             "requests": [
156
157
                  {
158
                  "updateSheetProperties": {
                      "properties": {
159
160
                           "gridProperties": {
                               "columnCount": 10,
161
162
                               "rowCount": 1
163
                      },
                           "sheetId": sheetIdNum
164
165
166
                      "fields": "gridProperties"
167
                  }
168
                  }
             ]
169
170
             }
         })
171
172
             .then(function(response) {
173
                  console.log("Response", response);
174
175
                  clearGoogleRow();
176
             },
177
             function(err) { console.error("Execute error", err); });
178
    }
```

6.16 clearGoogleRow()

The remaining row is cleared to remove data from previous use.

```
180
    function clearGoogleRow() {
181
        return gapi.client.sheets.spreadsheets.values.clear({
182
        "spreadsheetId": spreadsheetId,
183
        "range": sheetId + "!A1:J1",
184
        "resource": {}
185
186
             .then(function(response) {
187
                 console.log("Response", response);
188
189
                 writeGoogleDB();
190
             },
191
             function(err) { console.error("Execute error", err); });
192
```

6.17 writeGoogleDB()

tableToArrays() is used to create a two-dimensional array from the table, which is easily mapped to the spreadsheet. The array of transaction types is written similarly, using columns as the major dimension to write them vertically. The spreadsheet will automatically expand as necessary during this process.

```
194
    function writeGoogleDB() {
195
        writeImagesToFirestore("sheets");
196
        return gapi.client.sheets.spreadsheets.values.batchUpdate({
197
             "spreadsheetId": spreadsheetId,
             "resource": {
198
                 "data": [
199
200
                 {
201
                      "range": sheetId + "!A1",
202
                      "values": tableToArrays(),
203
                     "majorDimension": "ROWS"
204
                 },
205
206
                     "range": sheetId + "!J1",
207
                     "values": [readCurrentTypes()],
208
                      "majorDimension": "COLUMNS"
209
                 }
210
                 ],
211
                 "valueInputOption": "RAW"
212
             }
213
             })
             .then(function(response) {
214
215
                 console.log("Response", response);
216
             },
217
             function(err) { console.error("Execute error", err); });
218
    }
```

6.18 gapi.load()

Starts the OAuth plugin using the client ID from the Google Developer Console for this project. Calls loadClient() to begin loading API clients.

7 imageFirestore.js

7.1 writeImagesToFirestore()

Reads the database to get all document IDs of images for the dataset, then deletes those files.

Loads data from the local database. Creates a new document on the Firestore database for each file, saved with the file ID, type, name, and base64 encoded data.

```
function writeImagesToFirestore(database) {
1
 2
        firestore.collection("Images:" + database).get().then((querySnapshot)
           → => {
 3
            querySnapshot.forEach((doc) => {
                firestore.collection("Images:" + database).doc(doc.id).delete
4
                    \hookrightarrow ();
5
            });
6
        }).then(function() {
7
            var trans = db.transaction(['files'], 'readonly');
8
            var dlReq = trans.objectStore('files').getAll();
9
10
            dlReq.onerror = function(e) {
                console.log('error reading data');
11
                console.error(e);
12
13
            };
14
15
            dlReq.onsuccess = function(e) {
16
                console.log(dlReq.result);
17
                for(let i = 0; i < dlReq.result.length; i++) {</pre>
18
                     firestore.collection("Images:" + database).add({
19
20
                         id: dlReq.result[i].id,
21
                         type: dlReq.result[i].type,
22
                         name: dlReq.result[i].name,
23
                         data: dlReq.result[i].data,
24
                    })
25
                     .then(function(docRef) {
26
                         console.log("Image written with ID: ", docRef.id);
27
                     })
28
                     .catch(function(error) {
29
                         console.log("Error adding image: ", error);
30
                     });
31
                }
32
            };
33
       });
   }
34
```

7.2 readImagesFromFirestore()

Reads files from Firestore for a specific database. Saves these files in the local database.

```
36 function readImagesFromFirestore(database) {
```

```
37
       firestore.collection("Images:" + database).get().then((querySnapshot)
           → => {
            let trans = db.transaction(['files'], 'readwrite');
38
39
40
            trans.oncomplete = function(e) {
                console.log('data stored');
41
42
43
44
            querySnapshot.forEach((doc) => {
45
                console.log("Writing ", doc.data().name);
46
                let ob = {
47
                    id: doc.data().id,
48
                    type: doc.data().type,
49
50
                    name: doc.data().name,
51
                    data: doc.data().data
52
                };
53
54
                let addReq = trans.objectStore('files').put(ob);
            });
55
56
       });
57
   }
```

7.3 getFileNamesIds()

Creates a slash-delimited string from the file names and IDs.

```
59
   function getFileNamesIds(cell) {
60
       var links = cell.getElementsByTagName('a');
        var result = '';
61
62
63
       for(let i = 0; i < links.length; i++) {</pre>
64
            result += links[i].innerText + '/' + links[i].getAttribute('
               → onclick').split('')[1] + '/';
65
        }
66
67
        return result;
   }
68
```

7.4 parseFileNamesIds()

Takes a string and splits it by '/' characters. Groups characters in pairs and saves this information in a two-dimensional array.

7.5 clearIndexedDb()

Removes all data from the local database and calls the function to read from Firestore.

```
83
   function clearIndexedDb(database) {
       console.log("db reset");
84
       let trans = db.transaction(['files'], 'readwrite');
85
       var clearReq = trans.objectStore('files').clear();
86
87
88
       trans.oncomplete = function(e) {
           readImagesFromFirestore(database);
89
90
91
   }
```

8 localStorageScript.js

8.1 Global Variables

Variables to store the database object, the version number, and the state of the database.

8.2 initDb()

Deletes the database if it previously existed by calling indexedDB.deleteDatabase() to clear it from previous use.

Once the old database has been deleted, a new database is created with a name 'FileStorage' and a version number determined by the dbVersion global variable.

The global variable db is set to the database object for future reference. An object store is created using db.createObjectStore(), called files, which is keyed using the 'id' field.

Lastly, dbReady is set to true to signal to other functions that the database can be used for reading and writing.

```
7
   function initDb() {
8
       let reset = indexedDB.deleteDatabase('FileStorage');
9
       reset.onsuccess = function(a) {
10
            let request = indexedDB.open('FileStorage', dbVersion);
11
            request.onerror = function(e) {
12
13
                console.error('Unable to open database.');
14
15
            request.onsuccess = function(e) {
16
17
                db = e.target.result;
18
                console.log('db opened');
            }
19
20
21
            request.onupgradeneeded = function(e) {
22
                let db = e.target.result;
                db.createObjectStore('files', {keyPath:'id', autoIncrement:
23
                   → false});
24
                dbReady = true;
25
            }
26
       }
27
   }
```

8.3 fileUploadChanged()

This function is called whenever the user performs an action that would change the contents of the file upload in the input section.

In this case, the function sets the label to display the number of files present in the element. The global variable fileEditted is set to true so that the app will know that the row has to be updated if the user is editing a row.

```
29
   function fileUploadChanged() {
30
       fileIn = document.getElementById('fileUpload');
31
       if(fileIn.files && fileIn.files[0]) {
            document.getElementById('fileUploadLabel').innerHTML = String(
32

    fileIn.files.length) + " file(s)";
33
       }
34
       fileEditted = true;
35
       console.log("updated file upload");
   }
36
```

8.4 uploadFile()

Calls the fileIdGenerator() function to create a unique ID to reference the file being uploaded.

If a file exists in the file upload at the index specified, the function reads the file as a binary string and converts to base64 for storage.

The file creates an object with the file ID, type, name, and base64 encoded data. A transaction is created with a request to add the object to the local database. Because the key has been set to use the id property, the ID will automatically use the ID from the object.

Once the transaction is complete, the new ID and file name is added to an array. The index is incremented to prepare for the next file, and the function calls itself with this new index.

Once the function reaches an index it cannot read (i.e. the function has reached the end of the list), the file upload element is cleared and the array of IDs and names is added to the data array. The function then passes this argument to the callback function, which is specified as an argument of this function. The callback function is likely the function responsible for adding or editing transactions.

```
38
   function uploadFile(data, cb, fileList, index) {
39
       fileId = fileIdGenerator();
       fileIn = document.getElementById('fileUpload');
40
       if(fileIn.files && fileIn.files[index]) {
41
            var reader = new FileReader();
42
            reader.onload = function (e) {
43
                console.log(e.target.result);
44
45
                let bits = btoa(e.target.result);
46
47
                let ob = \{
                    id: fileId,
48
49
                    type: fileIn.files[index].type,
                    name: fileIn.files[index].name,
50
                    data: bits
51
52
                };
```

```
53
54
                let trans = db.transaction(['files'], 'readwrite');
                let addReq = trans.objectStore('files').put(ob);
55
56
57
                addReq.onerror = function(e) {
                     console.log('error storing data');
58
                     console.error(e);
59
                }
60
61
62
                trans.oncomplete = function(e) {
63
                     console.log('data stored');
64
                     fileList.push([fileId, fileIn.files[index].name]);
65
                     index++;
                     uploadFile(data, cb, fileList, index);
66
67
                }
68
            };
69
            reader.readAsBinaryString(fileIn.files[index])
        }
70
71
        else {
72
            removeFileUpload();
73
            data.push(fileList);
74
            cb(data);
75
        }
76
   }
```

8.5 addFile()

This function is responsible for appending files to an existing list.

Similar to the uploadFile() function, an initial index is provided and the function reads through each index until it reaches one where there is not file, indicating the end of the list.

The method for reading and sending files to the local database is identical to the uploadFile() function. Files are stored as an object with an ID, type, name, and base64 encoded data. A transaction is created with a request to add this object to the database.

Once added, the function gets the parent element of the file input element and adds a new row including the file, with a hyperlink to download the file and a button to remove it. The index is then incremented and the function calls itself, attempting to read the next file in the list.

```
78
   function addFile(fileIn, index) {
79
       fileId = fileIdGenerator();
       if(fileIn.files && fileIn.files[index]) {
80
            var reader = new FileReader();
81
82
            reader.onload = function (e) {
83
                console.log(e.target.result);
84
85
                let bits = btoa(e.target.result);
86
                let ob = \{
87
                    id: fileId,
88
                    type: fileIn.files[index].type,
89
                    name: fileIn.files[index].name,
                    data: bits
90
```

```
};
91
92
                let trans = db.transaction(['files'], 'readwrite');
93
                let addReq = trans.objectStore('files').put(ob);
94
95
                addReq.onerror = function(e) {
96
97
                     console.log('error storing data');
                     console.error(e);
98
99
                }
100
101
                trans.oncomplete = function(e) {
102
                     console.log('data stored');
103
                     let table = fileIn.parentElement.getElementsByTagName(')

→ tbody ') [0];

104
                     let newRowContent = "<a onclick='downloadFile('" +</pre>
                            fileId + "');' href='javascript:void(0);'>" +

    fileIn.files[index].name + "</a>";
                     newRowContent += "< button type='button' onclick='</pre>
105

    removeFileFromTable('" + fileId + "', this);'>-
                        → button>";
106
                     table.innerHTML += newRowContent;
107
                     index++;
108
                     addFile(fileIn, index);
109
110
            };
111
            reader.readAsBinaryString(fileIn.files[index])
112
        }
113
        else {
114
            fileIn.value = null;
115
        }
116
    }
```

8.6 updateExistingFileName()

Note: The name of this function was from when the app only handled a single file per row. The purpose of this function is to edit all files in a row. The name is no longer accurate, however, it was kept to simplify the upgrade.

This function is used to edit the files stored in a row when the editing a row and the file upload has been changed, indicating that the existing files should be overwritten.

The function loops through the list of files for that row and gets the ID of each file, using the onclick attribute of the anchor tags. Each of these IDs is passed to the deleteFileFromIndexedDB() function to have them removed.

A string fileContent is created to store the contents of the list of files as its being constructed.

Each file is added to this element with the proper HTML formatting using a loop. Each entry contains the correct name and file ID.

Once all files have been added, a new file input element is appended to the bottom of the list to allow new files to be easily uploaded. The contents of the cell are then replaced by this fileContent string to update the UI.

```
118
    function updateExistingFileName(data) {
        for(let i = 0; i < data[0].getElementsByTagName('tr').length; i++) {</pre>
119
120
            let fileId = data[0].getElementsByTagName('tr')[i].

→ getElementsByTagName('a')[0].getAttribute('onclick').split

              → (','')[1];
121
            deleteFileFromIndexedDB(fileId);
122
        }
123
124
       var fileContent = '';
125
        if (data.length > 1) {
126
            for(let i = 0; i < data[1].length; i++) {</pre>
127
                fileContent += "<a onclick='downloadFile('" + data[1][
                   → i][0] + "');' href='javascript:void(0);'>" + data[1][i
                   → ][1] + "</a>";
128
               fileContent += "<button type='button' onclick='
                   → removeFileFromTable('" + data[1][i][0] + "', this);'>-
                  → button>";
129
            }
130
        }
131
        fileContent += '<input type="file" onchange="addFile(

    this, 0); " multiple/>';

132
        data[0].innerHTML = fileContent;
133
   }
```

8.7 removeFileFromTable()

When an individual file is being removed, this function gets the ID of the file as an argument and passes it to the deleteFileFromIndexedDB() function to have it removed from the local database. The row element that contains the link to this file is also removed.

```
135
    function removeFileFromTable(fileId, cell) {
136
        var row = cell.parentElement.parentElement;
137
138
        if(confirm("Delete " + row.getElementsByTagName('a')[0].innerText +
           → "?")) {
139
            row.parentElement.removeChild(row);
140
            deleteFileFromIndexedDB(fileId);
141
        }
142
    }
```

8.8 deleteFileFromIndexedDB()

Given a file ID to remove, this function creates a transaction to the local database, with a request to delete the entry at the given ID.

```
function deleteFileFromIndexedDB(fileId) {
let trans = db.transaction(['files'], 'readwrite');
let addReq = trans.objectStore('files').delete(fileId);
}
```

8.9 removeFileUpload()

This function is responsible for clearing the file upload in the input, which is done when the x button is pressed, when a transaction is added, or when a row is edited.

The function sets the file upload to null, effectively clearing it.

The label for the file upload is set to Upload file, to indicate that no file currently exists in the element.

The fileEditted variable is set to true to indicate that a change has been made and that, if this process is an edit, a row has to be updated.

```
function removeFileUpload() {
    document.getElementById('fileUpload').value = null;
    document.getElementById('fileUploadLabel').innerHTML = "Upload file";
    fileEditted = true;
}
```

8.10 downloadFile()

A readonly transaction is created with a request to read the object at the specified ID.

If the request is successful, an anchor element is created with the attributes to download the base64 encoded data as a file. The type of this file is set using the type property of the object being read. The name of the file is set using the name property.

The anchor element is set to not display and is added to the HTML page. A click on this element is simulated, which prompts the user to download the file. The anchor element is then removed.

```
155
    function downloadFile(fileId) {
156
        console.log('downloading');
        var trans = db.transaction(['files'], 'readonly');
157
158
        var dlReq = trans.objectStore('files').get(fileId);
159
        dlReq.onerror = function(e) {
160
161
            console.log('error reading data');
162
            console.error(e);
163
        };
164
165
        dlReq.onsuccess = function(e) {
166
            console.log('data read');
            console.log(dlReq.result);
167
            var element = document.createElement('a');
168
            element.setAttribute('href', 'data:' + dlReq.result.type + ';
169
                → base64, ' + dlReq.result.data);
            element.setAttribute('download', dlReq.result.name);
170
171
172
            element.style.display = 'none';
173
             document.body.appendChild(element);
174
175
             element.click();
176
177
            document.body.removeChild(element);
```

```
178 };
179 }
```

8.11 window.onbeforeunload = function()

This function is meant to execute before the page exits. The purpose of this function is to remove the local database.

```
window.onbeforeunload = function(){
   indexedDB.deleteDatabase('FileStorage');
}
```

9 mysqlScript.js

9.1 writeToMySQL()

```
function writeToMySQL() {
1
2
       writeImagesToFirestore("mysql");
3
       var data = tableToArrays();
       var types = readCurrentTypes();
4
5
6
       fetch('http://localhost:5000/api', {
            method: 'POST',
7
            headers: {
8
9
                'Content-Type': 'application/json',
10
            body: JSON.stringify([data, types]),
11
12
       });
13
   }
```

9.2 readFromMySQL()

```
15
   function readFromMySQL() {
16
       clearIndexedDb("mysql");
17
       fetch('http://localhost:5000/api')
18
            .then(response => {
                return response.json()
19
20
            })
            .then(fullresponse => {
21
22
                console.log(fullresponse);
23
24
                while(document.getElementsByClassName('bodyRow').length > 0) {
                    document.getElementById("tableBody").removeChild(document.
25

    getElementsByClassName('bodyRow')[0]);
26
                }
27
28
                var data = fullresponse[0];
29
                for(var i = data.length - 1; i >= 0; i--) {
30
                    let staged = [data[i].id, data[i].date, data[i].account,

→ data[i].type, data[i].security, data[i].amount, data
                       → [i].dAmount, data[i].costBasis];
31
                    if(parseFileNamesIds(data[i].files).length > 0) {
32
                         staged.push(parseFileNamesIds(data[i].files));
33
34
                    addTransaction(staged);
35
36
                loadDataLists();
37
38
                var types = fullresponse[1];
39
                var typesArr = [];
40
                for(var i = 0; i < types.length; i++) {</pre>
41
                    typesArr.push(types[i].typename);
                }
42
```

```
43 setTransactionTypesList(typesArr);
44 })
45 }
```

10 NodeJs

10.1 Dependencies

```
const functions = require('firebase-functions');
const express = require('express');
const mysql = require('mysql');
const cors = require('cors');
const api = express();
api.use(cors({ origin: true }));
```

10.2 mysql.createConnection()

```
8 var con = mysql.createConnection({
9    host: "localhost",
10    user: "user",
11    password: "pass",
12    database: "mydb"
13 });
```

10.3 con.connect()

```
con.connect(function(err) {
    if (err) throw err;
    console.log("Connected to MySQL Database!");
});
```

10.4 readDataFromMySQL()

```
function readDataFromMySQL(cb) {
   con.query("SELECT * FROM data;", function (err, data, fields) {
      if (err) throw err;
      cb(data);
});
}
```

10.5 readTypesFromMySQL()

```
function readTypesFromMySQL(cb) {
    con.query("SELECT * FROM types;", function (err, types, fields) {
        if (err) throw err;
        cb(types);
}

});
```

10.6 writeToMySQL()

```
34
   function writeToMySQL(jsonData) {
35
       var data = jsonData[0];
36
       var types = jsonData[1];
37
38
       con.query("TRUNCATE TABLE data;");
39
40
       for(var i = 1; i < data.length; i++) {</pre>
41
           con.query("INSERT INTO data (id, date, account, type, security,

→ amount, dAmount, costBasis, files) VALUES ('" + data[i].join

              42
       }
43
44
       con.query("TRUNCATE TABLE types;");
45
46
       for(var i = 0; i < types.length; i++) {</pre>
           con.query("INSERT INTO types (typename) VALUES ('" + types[i] +
47
              → "');");
48
       }
49
   }
```

10.7 api.post()

10.8 api.get()

```
api.get('/api', (req, res) => {
57
58
       readDataFromMySQL(function(data) {
59
            console.log(data);
            readTypesFromMySQL(function(types) {
60
61
                console.log(types);
62
                return res.status(200).send([ data, types ]);
63
            });
64
       });
   });
65
```

10.9 exports.api

```
67 exports.api = functions.https.onRequest(api);
```

- 11 CSS
- 11.1 Vertical Scrolling Table
- 11.2 Horizontal Scrolling on Overflow
- 11.3 Miscellaneous
- 11.3.1 Sort buttons
- 11.3.2 Editing highlight
- 11.3.3 Table borders