



API Developers Profile Setup

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Overview

There are two ways to give an outside developer access to your API documentation:

1. Add the 'Developer' category to an existing profile
2. Create a new 'Developer' profile

Which method you choose will depend on the users you want to grant access to the documentation. If you want all employees to have access to the API documentation, you can add the developer category to the Employee profile. Most often, however, you will want to give a user access to **only** the API documentation, which means you will need to create a new profile. For purposes of this guide, we will focus on creating a new profile only for Developers.

As a best practice, and to make giving developers' access to your API documentation as easy as possible, we recommend doing the following 3 things:

1. Create a 'Generic Template' page with information on/links to the API documentation specifically for your Developer Profile.
2. Create a new dashboard to share with your developers so they will only see the generic template page created in step 1 when logging into your Fluxx instance.
3. Creating a new developer profile.

Please be aware that the Developer profile/ category cannot generate Application Keys.

Creating a Generic Template 'Information' page

To make this process more efficient, we recommend creating an information page to store API information for your Developers. By using an assigned dashboard (which we'll create in the next section), you can have this information readily available for developers needing to access your API documentation.

To create a new Generic Template page, as a Fluxx Admin you will need to:

1. Log into your Fluxx environment.
 2. Navigate to Admin Panel → Forms → Generic Template.
 3. Click 'New Template'.
 4. In the modal that appears:
 1. Name your Generic Template (i.e. Developer API Info).
 2. Select 'Start from scratch'.
 3. Click 'Save'.
 5. From your newly created Developer API form, click the builder (hammer) icon in the form builder tab.
 6. Since this is a new form, a new field will already be started for you.
 1. In the 'Attributes' tab, select: Kind = Text.
 2. Select 'Edit Text'.
 3. Here you can enter help text for your Developers who need to access the API documentation. We suggest including:
 1. Instructions for the Fluxx Admin to contact to receive API token.
 2. Links to each version of the API (please ensure you are customizing this link for production and pre-production **or** that you are calling out to use different URLs for each environment).
 4. After you have entered the information you want to convey, click 'Save'.
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Creating a Dashboard for the Developer Profile

To save you time, you will want to create a dashboard your Developers will see when they log into your Fluxx environment. This dashboard will contain the Generic Template you created above and will give your developers the information they need to access your API documentation. To create a new dashboard:

1. On the left-hand side of your dashboard, click to open the gray drawer.
2. Click the 'v' button next to the 'Default' dashboard.
3. Select 'New'.
4. A section to create a new dashboard will appear.
 1. Enter a Dashboard Name.
 2. Click the '+' button to the right of your new dashboard name.
5. A blank dashboard will appear.
6. Click the '+' icon in the bottom center of the dashboard.
7. From the 'Add Card' menu that appears, find the 'Generic Template' section.
 1. Select the 'Generic Template' you created above.
 2. The template will appear on your Dashboard.
 3. Click outside of the Add Card menu to close the menu.

Next, you'll need to make this dashboard a template so you can assign it to your Developer profile you'll create in the next section. To make this dashboard a template:

1. Click the 'v' next to your new Dashboard.
 2. Select 'Edit'.
 3. Click the arrow icon next to your new Dashboard.
 4. A modal will appear.
 5. In the drop-down, select 'Copy Dashboard to a Template'.
 6. Select 'Save'.
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Creating a New Developer Profile

As a Fluxx Admin you will need to:

1. Log into your Fluxx environment
 2. Navigate to Admin Panel → User Settings → Profiles.
 3. Select 'New Profile' at the bottom of the Profiles Page.
 4. In the '**Attributes**' column that appears on the right, name your new Developer Profile.
 5. Under 'Categories', check the box next to 'Developer' to add the category to your new profile.
 6. Under 'Dashboard Template' check the box next to the dashboard you created specifically for your Developer profile.
 7. Check the box next to 'Prevent Users From Adding or Removing Dashboards (This ensures this user will only be on this dashboard you created).
 8. Click the '**Rights**' tab to adjust the permissions for this profile.
 1. Click the green '+' button to add a new permission.
 2. In the modal that appears, select:
 1. Permission name = All Permissions
 2. Model type = Client Stores
- Ensure the box is checked next to 'Allowed'
1. Click 'Save' on the modal.
 2. For all other default permissions listed, you will need to click the red '-' button to delete them (*this is to lock down access to your system to only the necessary items for this profile*).
 1. Next to each permission (except client stores), click the red '-' button.
 2. Click '**OK**' in the modal that appears asking if you are sure you want to delete the record (permission).
 3. Repeat for every permission except the 'Client Stores' permission you created.
 4. Once all permissions (*except client stores*) are deleted, click '**Save**'.

Now when you add a new Developer to your Fluxx instance, you simply need to assign them the 'Developer' profile on their user record.

When they log into your Fluxx instance, they will see the Developer Dashboard you created with the Generic Template containing the API information they need to access the documentation.
