



# Web Based API Simulator Developer Portal Iteration 2.0

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# Mentor Feedback

## Mid Iteration Meeting:

- **Discussion Topics:**
  - Getting basic auth call setup
  - Getting and using postman for testing
  - How to use the JWT Token call within and throughout application
- **Suggestions Given:**
  - Make the call to Accutech's servers for login info
  - Use different library to make http request to Accutech's servers

## Before Client Meeting:

- **Discussion Topics:**
  - Discussed 2nd iteration documentation
  - Began to discuss 3rd iteration features
- **Suggestions Given:**
  - Discuss our iteration 3 features with Cam to get a better understanding of how we'll use Accutech's servers in future iterations

# Client Feedback

- Generally Liked What we added
- What We Have Changed:
  - Client called the edit buttons on the administration page “pencil buttons” so we added a pencil Icon to the button.
- What We Plan To Change
  - Automatic update changes made to the Cheetah API with back-end json parsing logic.
  - Implement record of edits made for administration page
    - Shows exact time of edit and username of who made the edit



## Existing Iteration 1 Features

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- Allows user to request access and an email will be sent to an administrator
- Allows user to view information from an Example API object
- Allows administrator to add a parameter for a given endpoint
  - The basis of the administration page form logic to be completed



# Iteration 2 Features



# 1. Login ( It is a Feature! )

## Sign-in

If you've already been given access to the API, use your username and password to sign in here

Username

JakeC

Password

.....

Gain Access

User can log in with Accutech username and password



Cheetah API Docs

Home



## Explore

Discover how you can take full advantage of our API library

### Accounts

Create, modify, and maintain accounts all in one space. View account files, transactions, holdings, etc.

### Approvals

Keep up-to-date with administrative tasks such as approving trades, deposits, and withdrawals.

### Files


View download attached reports, statements, and other documents.

### Fees

Create, view, and manage account fees.

After logging in the user can access the references page from anywhere in the app, including the home page

## 2. References Page: ( Displays Object + Endpoints )

Cheetah API Docs [Home](#) 

**Objects**

- Account
- AccountCategory
- AccountGroup
- AccountRelationship

[Cheetah](#)

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This is the references landing page. **TBD**  
Click on a references link

Some Information on endpoints when Account Object is Selected

**Get Account Information (GET)**  
/api/v5/Accounts

Parameter	Type	Required
AccountNumber <small>If account number is supplied, returns account for that number.</small>	string	no
InstitutionIdentityRecordId <small>Used to restrict queries to specific Institutions. If not supplied, the query will be restricted to Institutions assigned to the user. To obtain an Id use the /XOLookup service with the parameter GetInstitutionIdentityRecordValues.</small>	integer	no
LastModifiedDate <small>If last modified date is supplied, returns accounts that have been modified since that date.</small>	string	no

**What does this endpoint respond with?**  
Testing this

### It contains Objects + Endpoints!

In the references page the user can now select an object/area which will then direct the user to the page for that object displaying the information for the object and its endpoints.





# 3. Administration Page Feature

## Editing Endpoint Description

Through the administration page the user can select an Area, select an endpoint within the area and edit the description.

Selecting the submit changes button at the bottom of the administration page will submit the changes and redirect the user to the references page.

The description given for the changed endpoint on the references page will show being changed to the description submitted by the user.

### Administration Page

Area: Account

Endpoint Id	Endpoint Name	Endpoint Description	Edit
2	Get Account Information	test	Edit
3	Add a New Account	Adds an account	Edit
4	Get Account Information for the Given ID	Gets an accounts info	Edit

Endpoint: Get Account Information

Description:

New Test

Submit Changes

### References Page

Get Account Information (GET)

/api/v6/Accounts

What do you request?

Parameter	Type	Required
AccountNumber	string	no
If account number is supplied, returns account for that number.		
InstitutionIdentityRecordId	integer	no
Used to restrict queries to specific Institutions. If not supplied, the query will be restricted to Institutions assigned to the user. To obtain an Id use the /vX/Lookup service with the parameter GetInstitutionIdentityRecordValues.		
LastModifiedDate	string	no
If last modified date is supplied, returns accounts that have been modified since that date.		

What does this endpoint respond with?

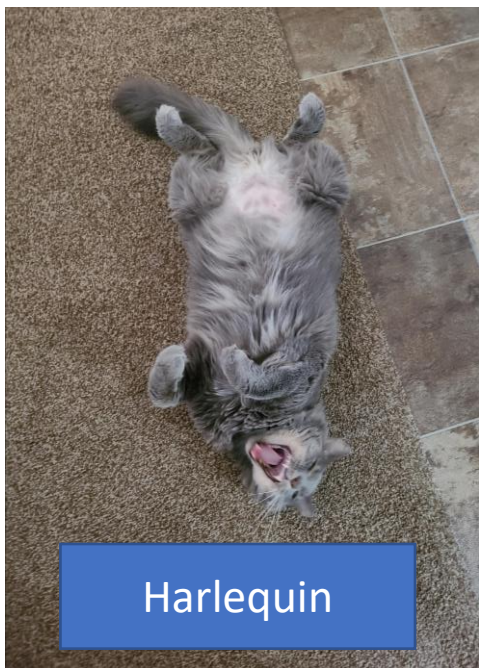
New Test



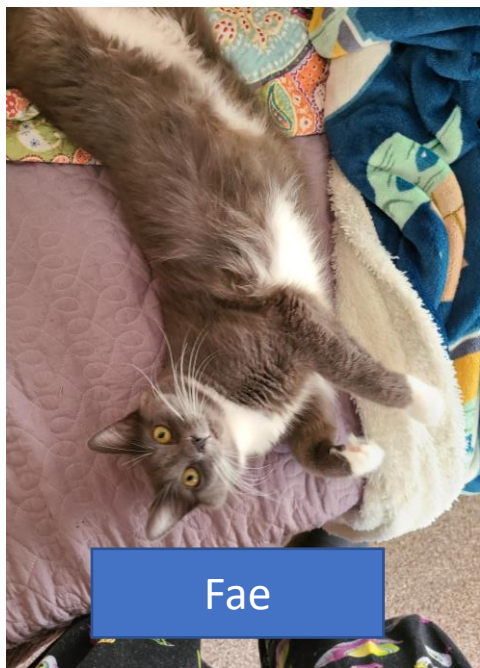
# Planned Iteration 3 Features:

- **FR5:** The application shall have an API references page that documents each endpoint of the API along with the object that the endpoint works with [*High Priority*] (**BR2**)
  - Automatic updates to our References page info when the Cheetah API is changed
- **FR11:** The administration page shall let administrators create the form for each endpoint that will then be seen in the documentation. [*High Priority*] (**BR2**)
  - Able to edit more information
- **FR13:** The application shall automatically update changes made to the Cheetah API by parsing the data from the existing Cheetah API swagger page. [*High Priority*] (**BR2**)
  - Automatic updates made to our database based on changes to the Cheetah API by parsing the json of the swagger page
- **NR6:** The access of each user shall be session based. [*Medium Priority*] (**BR2**)
  - Will allow for user log out and general ease of sign-in
- Add a bootstrap template to the project for general global styling





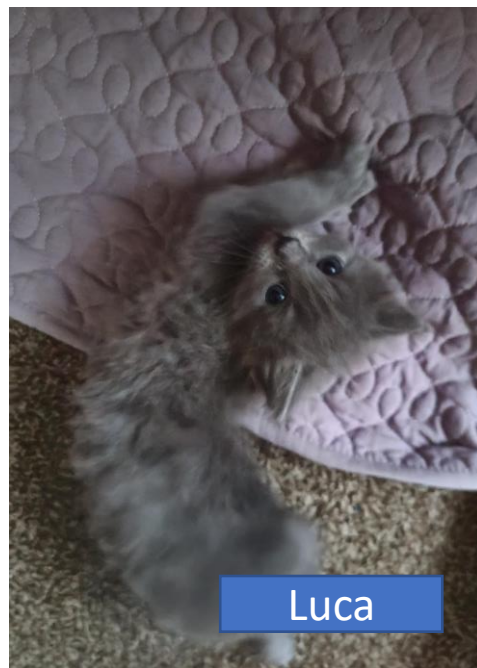
Harlequin



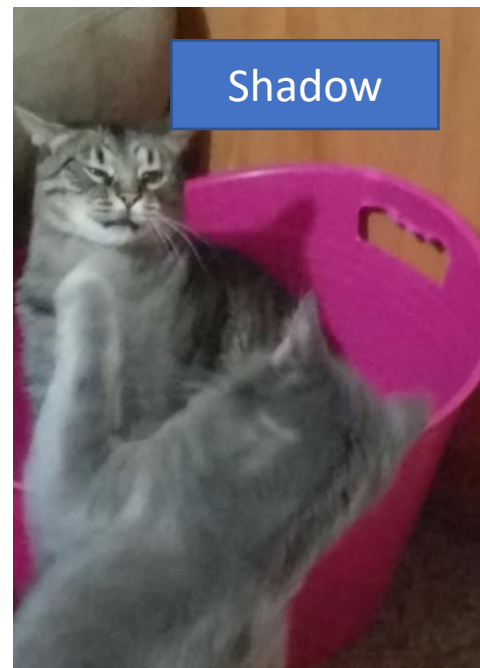
Fae



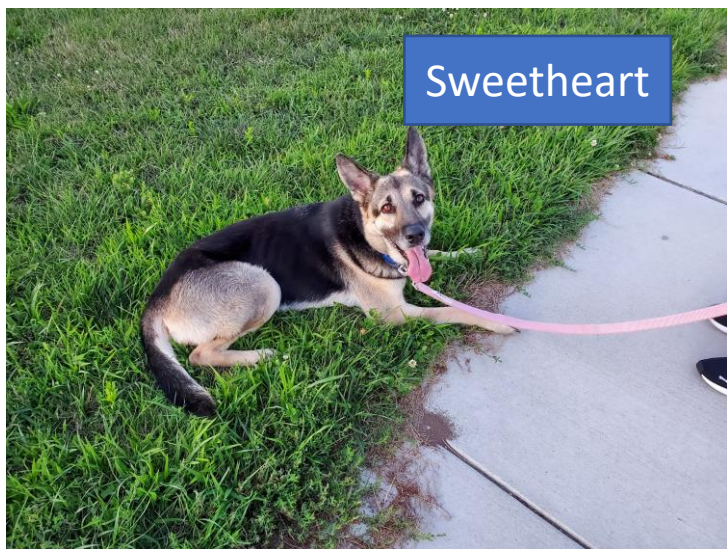
Jade



Luca



Shadow



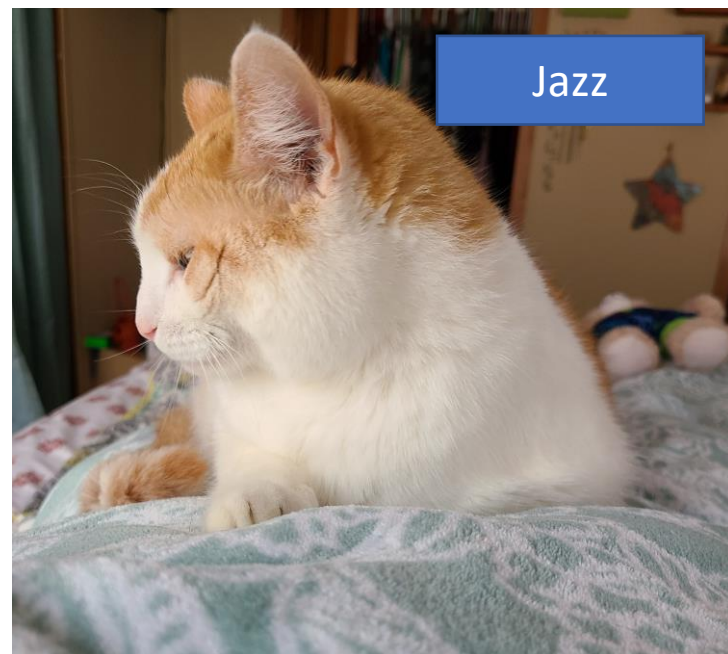
Sweetheart

**+ Dog**

# Interesting Slide

**My Goofy Cats**

**& Chill Cat**



Jazz