Iteration 1

Trust Admin Mobile App

Team members

- Clayton Mercer
- Christo Staszewski
- Jakob Lamb
- Michael Keen

Client Information

Accutech Systems

- Trust and wealth management firm
- Utilizes Cheetah API for conducting business
- Administrators use Cheetah to look up information about their clients and tasks

Iteration 1: Mentor feedback (Mid-iteration)

- Software
  - We are on track, but we need to make sure that we get all our coding for the first iteration finished before the time it's due.
- User Documentation, Development Documentation, Deployment Documentation
  - We haven't started creating any documentation yet.
  - Need to get started on that so we can finish it before the time it's due. Ryland likes what we have so far and is glad we have access to the API and tools we actually need to complete iteration one.

Iteration 1: Mentor feedback (Iteration 1)

- Software
  - Make a dynamic XAPI key rather than hardcoding (next Iteration maybe)
    - Ryland Suggests that we setup a config with some different XAPI keys
  - The functionality we offer to the client is the ability to view your accounts on mobile
  - Test that returning information is the correct type and such
  - Editing data needs to be tested
- Development Documentation
  - Clarify that no one else can realistically test it other than us
- Deployment Documentation
  - Ryland thinks this is okay

Iteration 1: Mentor feedback (continued...)

- User Documentation
  - Ryland thinks this is okay
- General Recommendations
  - Add pictures to our Documentation Guides
  - Development documentation should be a step by step process
  - Be specific in our documentation

Iteration 1: Client feedback

- Address user flow and design for the next iteration

- Look at Tony's design feedback

- The login was excellent and they liked the direction the accounts page was going

- Great utilization of the SDK

Iteration 1: Client feedback (continued…)

- The team rethought the deliverables for iteration one (1) due to SDK

  limitations

- The SDK doesn't expose user profile data from the API and thus the profile

  screen has been removed from the app

Iteration 2 features

Complete the accounts section of the app. This includes things like...

- Filtering/searching accounts
- Viewing all the different amounts of money on that account
- Viewing relationships of accounts, plus the navigation attached to those relations
- Viewing files connected to an account

Starting the design work. This includes things like…

- App Icon
- Following the color schemes that our client provided us in the app layout