

Trust Admin App



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Team Member Information

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

Client Information

Accutech Systems

- Trust and wealth management firm
- Utilizes Cheetah API for conducting business
- Cheetah used by both clients and administrators

Business Requirements

BR1 - Native mobile application; is meant to be an on-the-go solution for Accutech administrators

BR2 - Only supported operating systems will be only iOS and Android, since it is intended to be mobile

BR3 - Administrators have sole access to application resources; every other person is to be excluded

BR4 - Provides customer account info, e.g. portfolio view, account market value, relationships, documents, etc.

BR5 - Allow administrators to access their daily tasks, including resolve, dismiss, and push notification abilities

BR6 - Allow administrators access to activities, which can include past tasks and ability to create

BR7 - Administrators should be able to approve items, use push notifications to communicate with others

Use Cases

UC1 - View a users high level portfolio view.

UC2 - View and map a users relationships

UC3 - Add new relationships or delete

UC4 - View a users documents

UC5 - View a users limited transaction history

UC6 - View Tasks

UC7 - Resolve or dismiss tasks

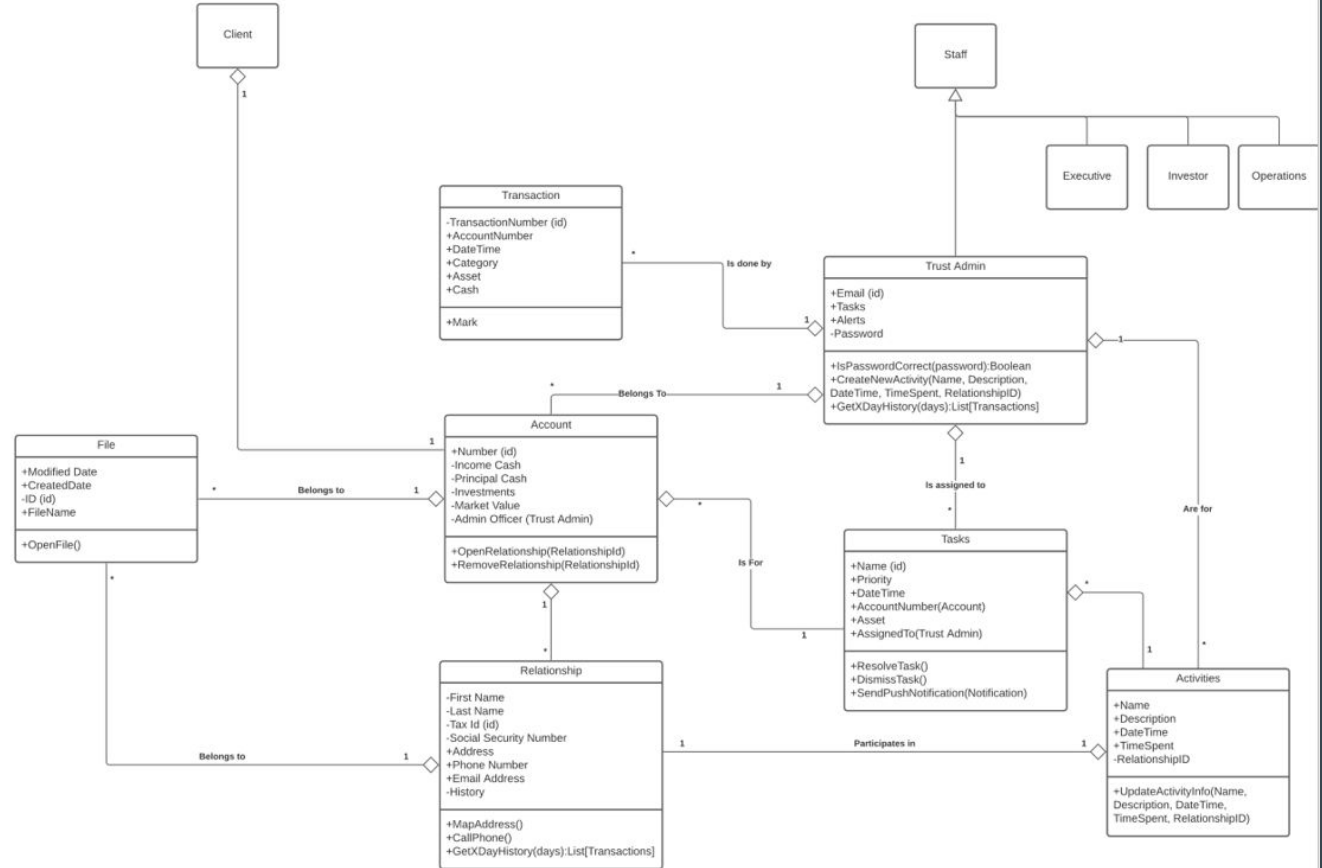
UC8 - View activities

UC9 - Create activities

Requirements

- FR1: The application shall provide access to a Trust Admin's personal account information : BR4 : High
- FR2: The application shall show a high level portfolio view consisting of accounts including : BR4 : High
- FR4: The application shall allow administrators to access their tasks : BR5 : High
- FR5: The application shall allow administrators to view and set Relationships : BR6 : High
- FR6: The application shall allow administrators to interact with activities : BR6 : High
- FR7: The application shall allow administrators to view items sent for an approval : BR7 : Low
- FR8: Support for Google Maps/Waze on all maps across the application : BR4 : High
- FR9: Support the login for Cheetah for application credentials : BR4 : High
- FR10: The Application shall utilize the Cheetah API provided : BR4 : High

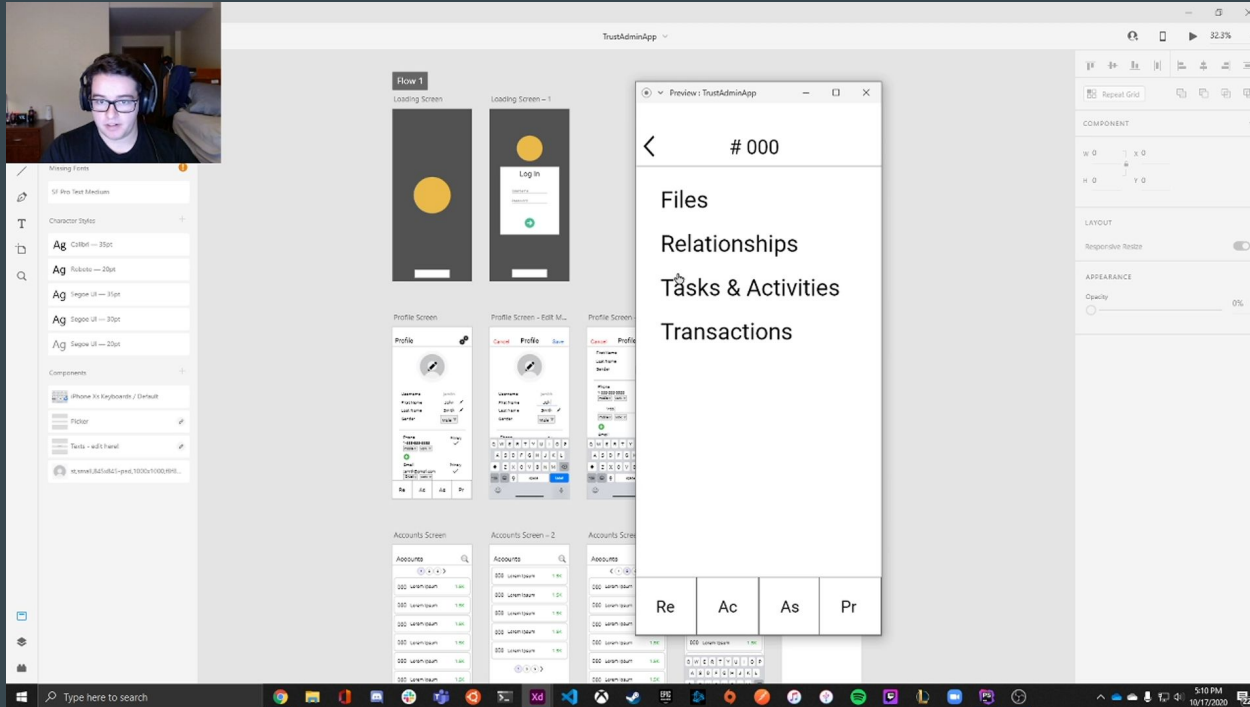
Domain Model



Tech Stack

- Visual Studio
- Xamarin
- C#
- .NET
- Git
- Github
- Slack
- Microsoft Teams
- Android SDK
- Xcode
- Atlassian Jira
- Atlassian Bitbucket
- Atlassian Confluence
- Cheetah API
 - The api we are to use, provided by the client, in order to communicate with their servers.

Prototype



First Iteration Features

FR1 - The application shall provide access to a Trust Admin's personal account information

FR9 - Support the login for Cheetah for application credentials

FR10 - The application shall utilize the Cheetah API provided

NR1 - The application should be a mobile app for IOS

NR2 - The application should be a mobile app for Android

NR3 - The application should be built using Xamarin

NR4 - The application will be designed for administrators of Cheetah

NR5 - No other individual should be permitted access to information in the app

Mentor Feedback

- Clarifications:
 - Programs being used in techstack
 - Which operating systems the application will be deployed to
 - Parts, flow, and functions of the domain model
 - Prototype navigation flow
 - Deliverable features for 1st iteration (login page functionality)
- Results
 - Mentor approval on demonstrated items
 - Meeting with clients scheduled

Client Feedback

- We should use their design team to help with the UI design
- Clarified that the prototype was only for flow purposes, not design
- Cheetah api consists of list > search> single item flow pattern
- The reviews tab of our prototype is actually a bonus, not part of the specifications given by clients
- Going through checklist to see if anything missing in prototype
 - Save for last, filter reviews/approvals by person
 - Use dummy data in place for that functionality for now

