Estate Vault

Second Iteration

Introduction

Team Members

ESTATEVAULT

"This iteration has been imperative in defining who we are separately, but also how each of our skillsets have been essential in making our team work. I am grateful for the knowledge gained during this past month, and I am excited for what's to come."

Cameron Allan
Frontend

"Iteration 2 was like iteration 1 but with ground to stand on. With a foundation, it felt much more natural to set goals and build smarter systems faster. I have no doubt the Estate Vault team will keep delivering into the next iterations."

Landon Hammond
Backend and RDS

"I am super proud of the way the team came together for this iteration. All the late nights really paid off. Our workflow was far improved and everyone brought their a-game!"

Peyton Schaefer
Frontend

"I could not have asked for a better team. Everyone has been an indispensable member of this capstone experience, and I'm so excited to see where we go next."

Nate Slagter
Backend

Client

- Accutech fulfills its purpose to make great things happen for other people by delivering innovative trust and wealth management technology solutions and exceptional, personalized service to over 200 banks and wealth management companies nationwide.

- Located in downtown Muncie.

Mentor Meeting

- Introduced new frontend design and website walkthrough

- Discussed a switch from local database to RDS

- Clarified entity framework for database tables

- Set up branch protection and pull request system

- Squashed bugs that were caught by mentor during demonstration

Client Meeting

- Client appreciated the new design of the frontend

  - More user friendly

- Document upload and contact creation are up to code

- Inquired about permissions system and allowing contacts to veiw their user's documents

- Discussed how to best implement the permission system for the next iteration

Features Completed
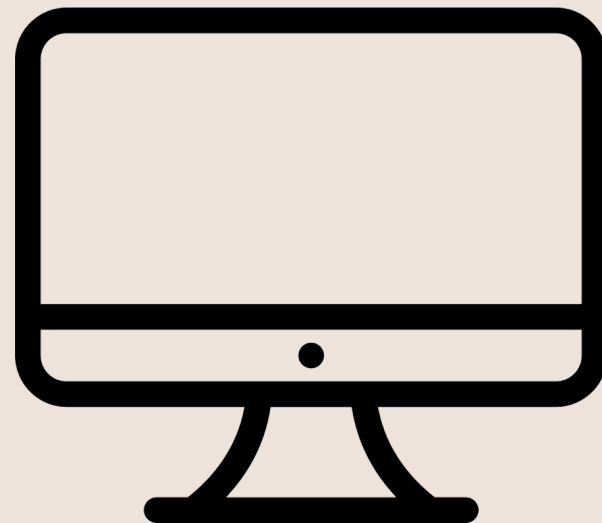
Frontend Overhaul

- Complete overhaul of frontend aesthetics
  - Directs user to sign-in upon loading the website.
  - Can register if you don't have an account.
  - Created logo for the estate vault project.
- Sidebar to direct to different pages
  - Sidebar on website now links to the account, document, and contact pages.
- Dashboard added as main screen
  - Dashboard contains your most recently viewed documents, along with links to download them.

Welcome to Estate Vault

EstateVault

Account

Dashboard

Documents

Contacts

Assets and Liabilities

Help

or start right now   sign in   sign up

Select File   File Tag

File Successfully Uploaded

Account Management

- Endpoints were added to API that allow for a user to edit their personal information.
- Users have the ability to delete their account
  - Confirmation pops up first to ensure no accidental deletions

Delete Account   **x**

We're sad to see you go. So you're aware, deleting your account will permanently remove your account. You cannot undo this action.

Enter the word **CONFIRM** below to perform this action.

Delete Account

Account Settings

First Name   Visible on the home page   Last Name   Viewed by others

Skate   Slagter

Email Address   For notifications and logging in   Phone Number   For receiving notifications

nateslagter@gmail.com   6304325027

Current Password   Enter current password to change your password   New Password   After entering new password, press 'Change Password' then 'Save Changes'.

Enter Current Password   Enter New Password

Change Password

Contact System

- User can add a contact that is directly associated with them
  - Fields include relation, email, notes about the contact, and more
- Every field of the contact is able to be updated, allowing for easy correction of mistakes when inputting initial information

Contacts

Add a Contact +

Peyton Schaefer

Doctor Michael

First and Last Name

✉ Email
☎ Phone Number
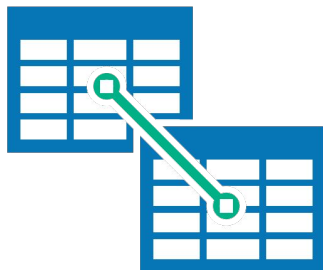🏠 Address

Relation:

Relationship

Notes:

This is where you can make notes about a contact to reference later!

Create Contact

Amazon RDS Integration

- Database was migrated from hosted locally to hosted by Amazon's RDS service
  - More secure transmission of data
  - Easy to manage across all systems
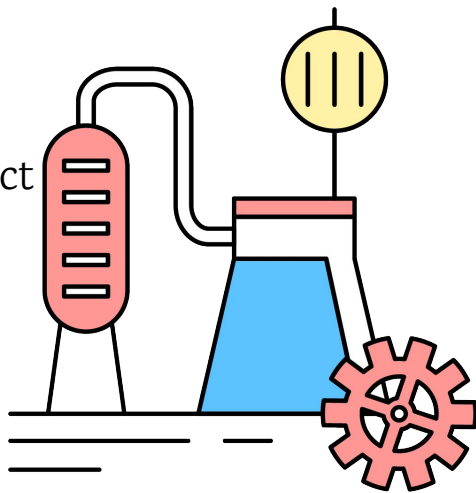 - All developers now have instant and easy access to the database

What's Next

Iteration 3 Features

- Code refinement over the next 3 weeks
  - Areas have been identified that need touch-ups
- Integrating contact system with permission system
  - Each contact can only be associated with one user in current iteration of project
  - Contacts do not have the ability to view documents
  - Contacts cannot join the website proactively
- Hashing
  - All user information is stored in plain text
  - Research needs to be done into hashing libraries for the project
- Secure transmission of data
  - The project is run via Docker right now
  - However, it is run with 'http', and not 'https'

Fun Slide

Questions?