Guide for dash API Vendor QA self-certification through API portal

Introduction:

This document outlines steps to kickstart & complete dash API Vendor QA process through self-certification option of API portal.

Workflow:

Product Self Certification – Workflow
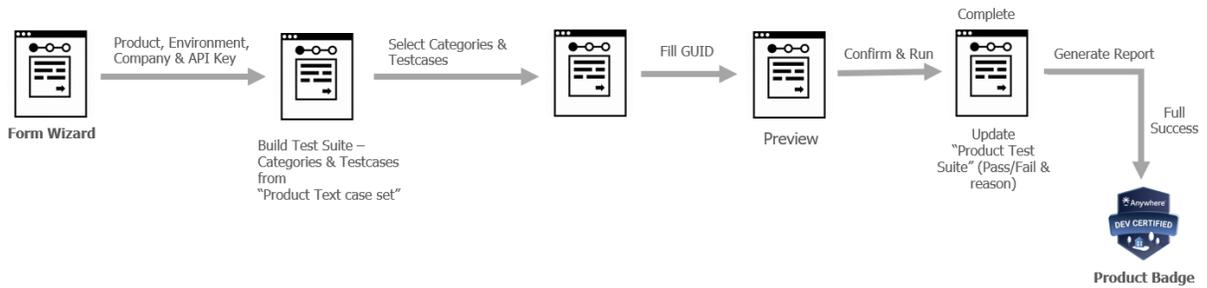
Kickstarting dash API QA process:

1. dash API vendors who need to go through and complete Vendor QA process can request access to QA environment (Trial) by logging in into API portal (https://developers.anywhere.re).
2. Click on 'Add App' button under 'Request API credentials' section in dashboard.

Request API Credentials

Request API Credentials for API products by adding an APP. App will provide you apikey and okta credentials to access API product.

Add App
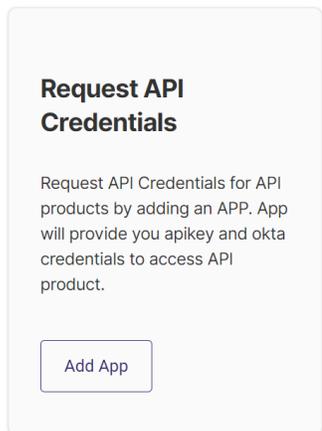
3. From Product dropdown select option as 'Back Office Management', 'Trial' option from Environment dropdown and click on 'Request API Credentials' button by entering app name in 'Prefix App name' field.

4. Requester would receive an email confirmation with request ID which is awaiting approval from the dash API onboarding team.
5. Once the request is approved by dash API onboarding team, requester would receive one more email confirming the access.
6. Requester needs to log back into API portal to retrieve respective API credentials by clicking on 'View Credentials' button in My Apps section.

Using Self-Certification option:

1. Once requester completes above mentioned steps, they should be able to see option as 'Certifications' on left side of the portal in dashboard.
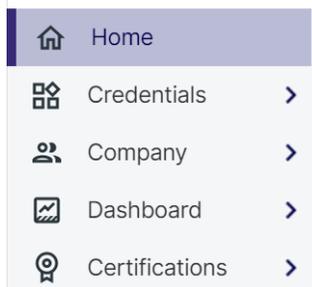
2. Click on Back Office Management option.
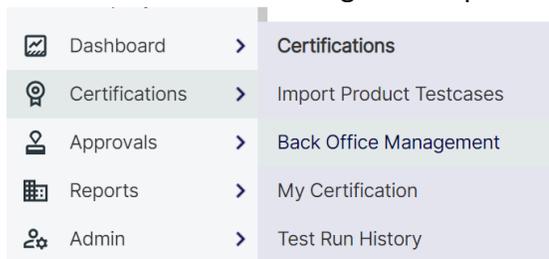
3. Click on Continue button.
4. Select Back Office Management product & click on Continue button.
5. Select options as 'Trial' from Environment dropdown, Brand & dash Company ID based on the brokerage for which QA process is being performed and click on Continue button.
6. Select categories of dash entities that are supported by the vendor system for which QA process is being performed and click on Continue button.
7. Select test cases for which certification is being performed & that are supported by the vendor system and click on Continue button. Test cases which are not supported by the vendor system can unselected so that they can reviewed & approved by the Brand & Broker.

8. Vendor will have option to download the test case template and upload it back by entering the test GUIDs for the test cases selected in the previous step or they can enter GUID manually for the test cases by selecting the toggle 'Enter your GUID manually'.
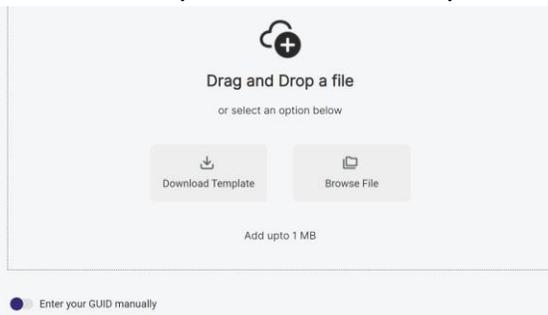
9. Click on Continue button after either entering the GUID for the test cases manually or by uploading the template with respective details.
10. Click on 'Run All Tests' button.
11. Self-Certification process will get triggered and validation results will be displayed accordingly, which can be either Pass or Fail. Email with respective results will also get triggered.
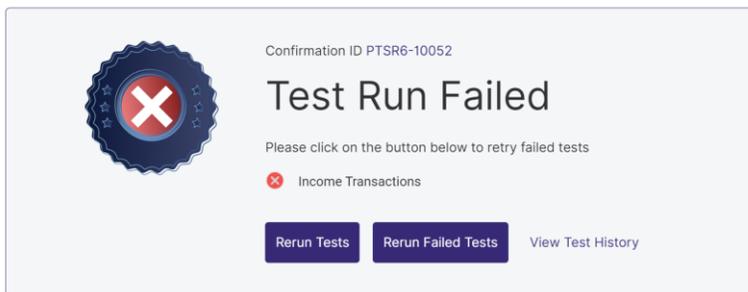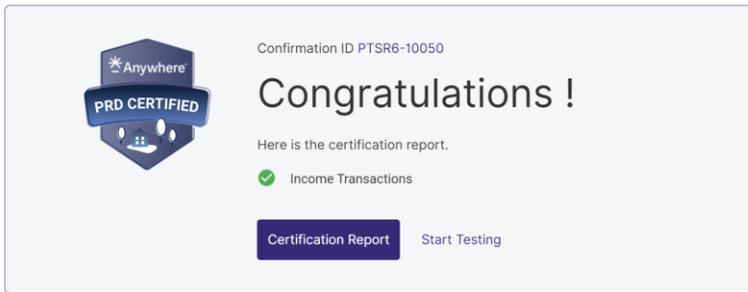
12. If passed, vendor can move onto next step in onboarding process. If failed, vendor will get options to either Rerun Tests or Rerun Failed Test Cases. Vendor can also see the reason for test case failure by scrolling down on the same page and by clicking on expanding option for the failed test cases.

13. If passed, generated badge needs to emailed to Gerry (Gerry.Mayer@anywhere.re) & Hemanth (Hemanth.Badarawada@anywhere.re) of onboarding team.

Viewing Certification & Test Run History:

Vendor will have options to view their Certifications or view their Test Run History from the Certification tab and can be accessed by clicking on respective options.

Point of Contact:

Email with details can be sent to Gerry (Gerry.Mayer@anywhere.re) & Hemanth (Hemanth.Badarawada@anywhere.re) for any issues during the process.