CIS PORTFOLIO ANALYTICS

API Quickstart Guide

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API QUICKSTART GUIDE

Welcome to CryptoIndexSeries Portfolio Analytics. This guide will help you get up & running quickly with your CIS Portfolio Analytics Sandbox Tenant.

Pre-Requisites:
- Crypto Index Series Account
- Unique Tenant Name

If you have not received confirmation of your unique tenant name then please contact us here

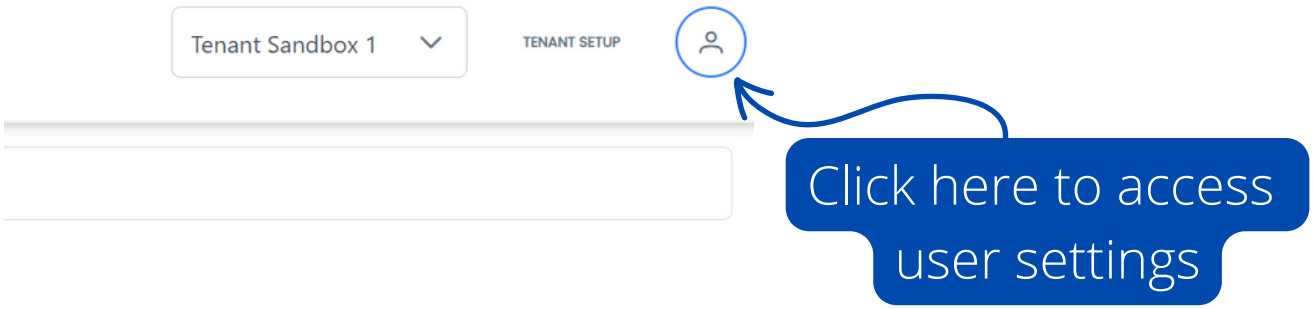
What is covered in this guide?

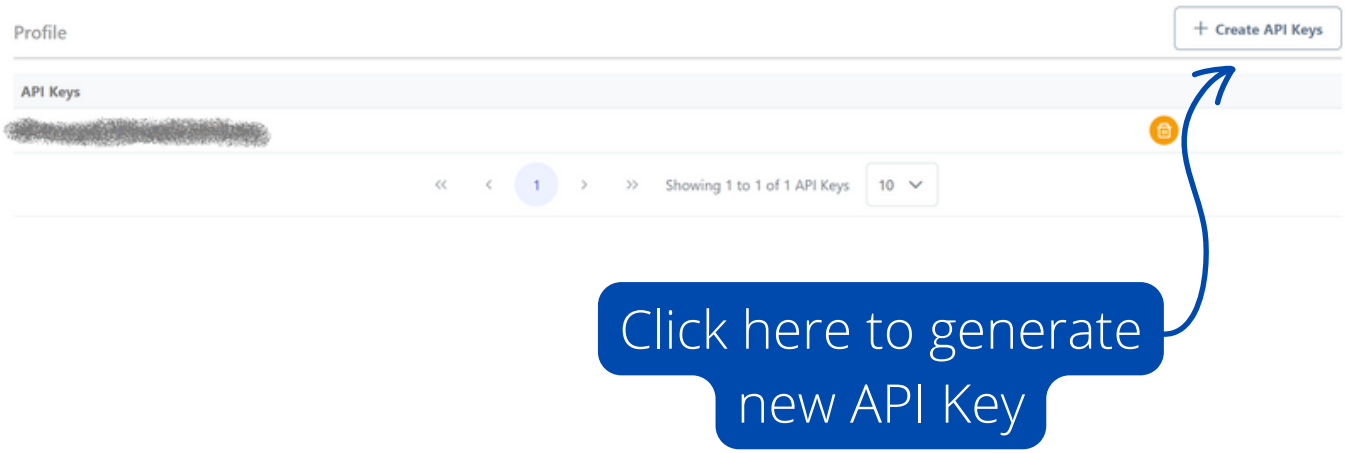
1. Generate API Key & Secret
2. Postman Collection QuickStart
3. Sandbox Seed data
4. Appendix

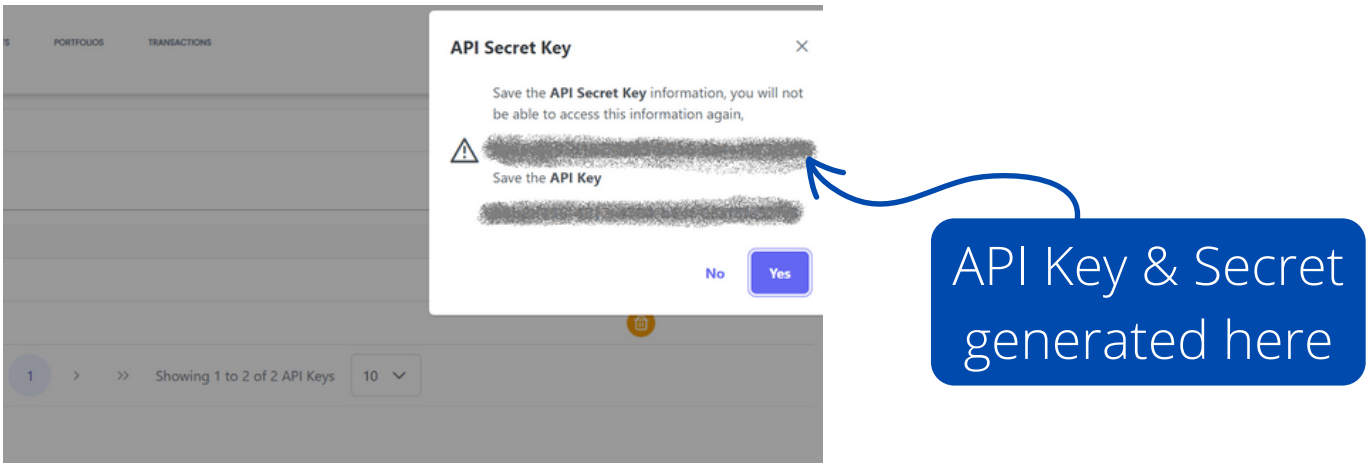
1. Generate API Key & Secret

You can generate API Key & secret via the Admin Application

url: https://admin-portfolioanalytics.cryptoindexseries.com/profile







2. Postman Collection Quickstart

We've created a postman collection to help you get up and running as quickly as possible.

Follow the steps on the next pages to import the postman collection and get started.

**If you wish to test the API with a method other than Postman then please review the appendix section on authentication.*

Postman is an API platform for building and using APIs. You can use the web application or download the desktop application:

desktop: https://www.postman.com/downloads/

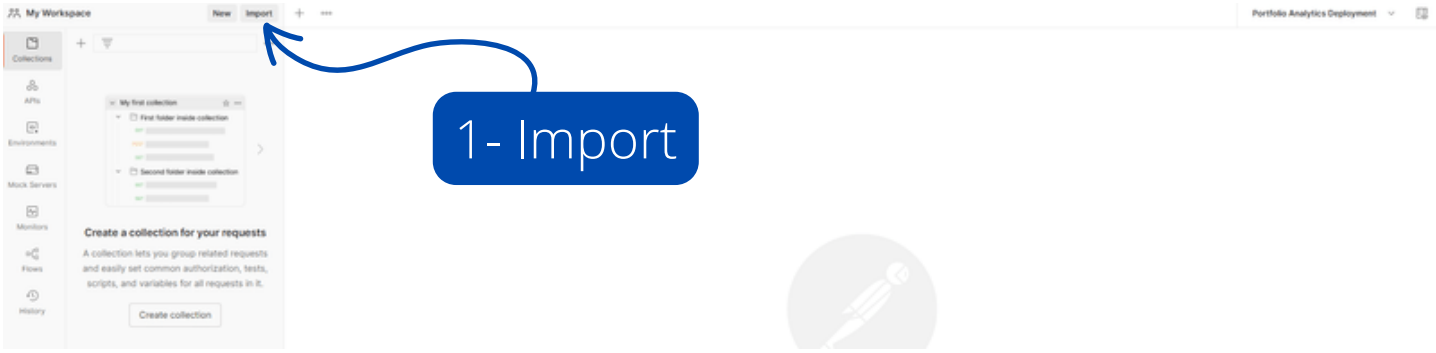
web app: https://web.postman.co/

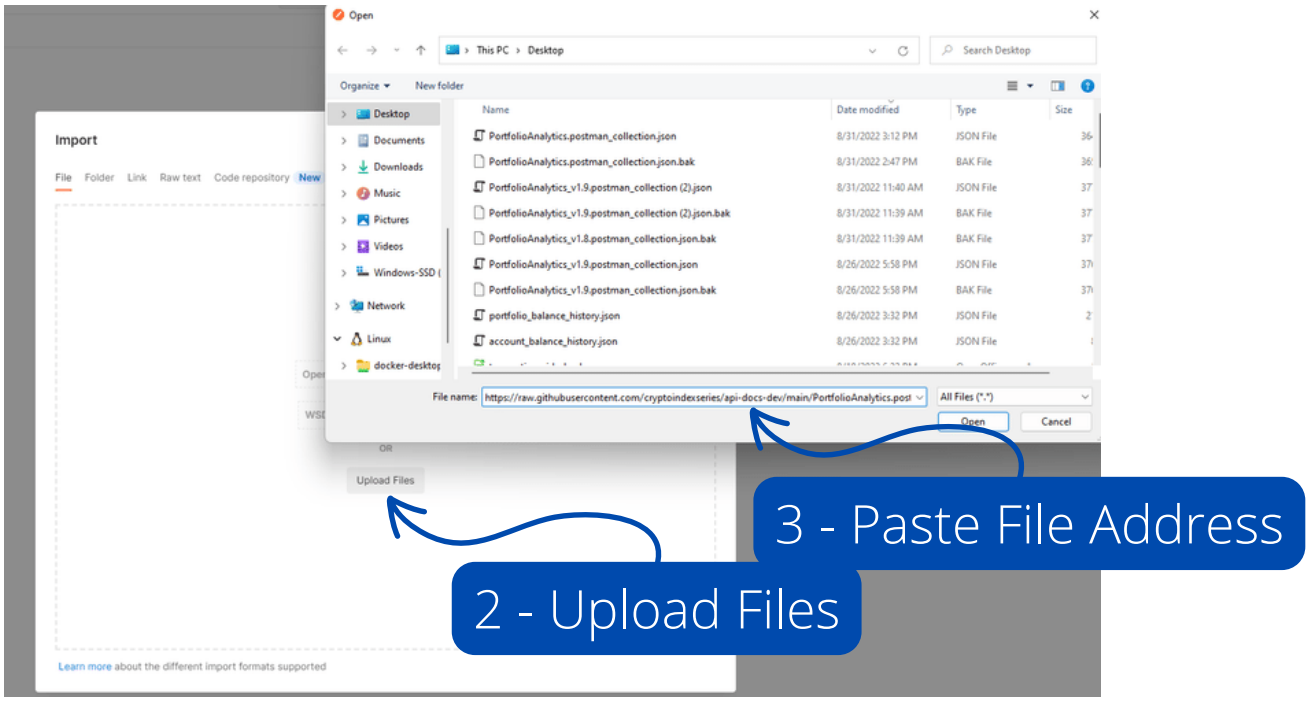
2. Postman Collection Quickstart

Step 1:

Open Postman (https://www.postman.com/downloads/), go to collections >> import >> upload file and copy the address below:

https://raw.githubusercontent.com/cryptoindexseries/api-docs-dev/main/PortfolioAnalytics.postman_collection.json



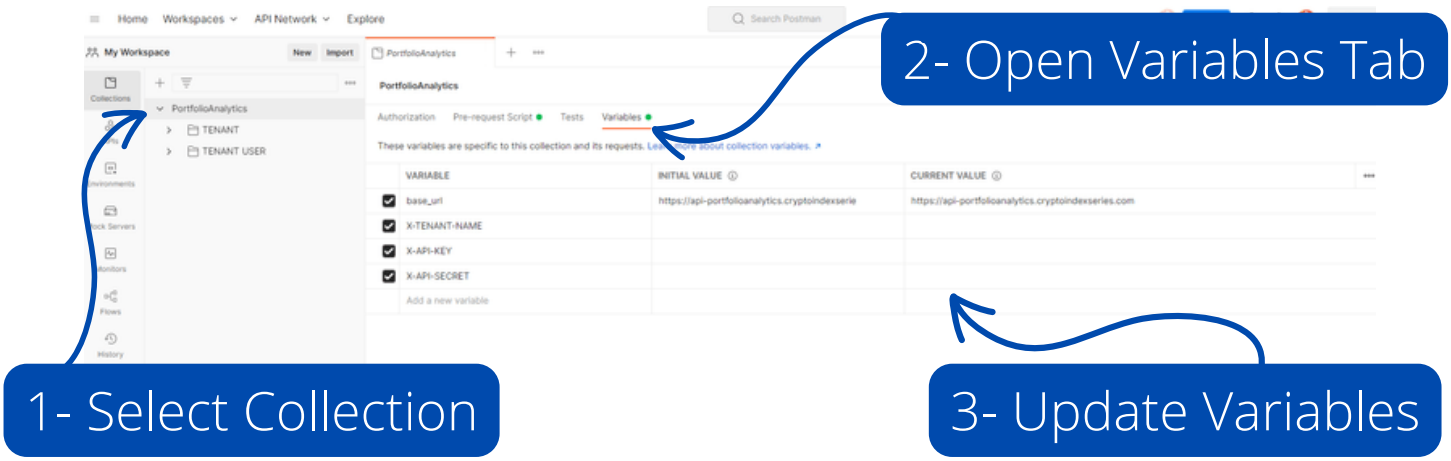


2. Postman Collection Quickstart

Step 2:

Open Collection Variables, edit and update the variables (current value) as follows:

X-API-KEY: <your-api-key>
X-API-SECRET: <your-api-secret>
X-TENANT-NAME: <you-unique-tenant-name>



3. Sandbox Seed Data

We've added some dummy data to your sandbox environment to help speed things up.

- Top 50 Digital Assets (mapped to CIS assets for pricing)
- Test Users
- Test Accounts
- Test portfolios
- Test transactions spread across each account

Recommended First API Calls:

- /Tenant/Assets/Search
- /Tenant/Users/Search
- /Tenant/Accounts/Search
- /Tenant/Portfolios/Search
- /Tenant/Transactions/Search
- /Tenant/Accounts/BalanceHistory
- /Tenant/Accounts/AssetAllocation
- /Tenant/Portfolios/BalanceHistory
- /Tenant/Portfolios/AssetAllocation
- /Tenant/Transactions/AddTransactions

4. APPENDIX

API Authentication

Extensive API Documentation can be found here:

API Docs: https://cis-portfolio-analytics.readme.io/

If you have downloaded the postman collection for your testing purposes then we've added a pre-request script that will handle the necessary authentication process for you.

If you want to test the API via some other means then the below notes are important.

When making calls to endpoints using an API Key the following must be provided to authenticate the request:

X-API-KEY
A header containing the API Key

X-API-TIMESTAMP
A header containing the current, UTC UNIX timestamp

X-API-SIGNATURE
A header containing a HMAC SHA256 signature generated from the timestamp and the API private Key / Secret

4. APPENDIX

API Authentication

Signature Generation

The signature should be generated using the current, UTC UNIX timestamp and the API private Key / Secret.

The following javascript code shows how to generate this using the CryptoJS node.js package CryptoJS

```
const apiSecret = "2028c72a-2bd3-4b0d-9e0e-1c9b5d4274df";

const timestamp = 1625609684;

let query = 'timestamp=' + timestampconst sign =
CryptoJS.HmacSHA256(query,
apiSecret).toString(CryptoJS.enc.Hex);

console.log(sign)

>> bccfa3ff9fbdfaf48426d689dcaa23b5874ffbbf17acfa887036ff5d26461831
```

- The timestamp must be a UTC, UNIX timestamp to seconds precision
- The timestamp should be prefixed with the string 'timestamp=' - the resulting string should be used to generate the signature.
- If a request is received and the signature generated is for a timestamp that is older than 60 seconds (or 60 seconds in the future) - the request will be rejected

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