AutoCert+ EBS Risk Management API User Manual

October 6, 2021

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Getting Started

The AutoCert+ tool is an automated testing tool for validating application functionality. It provides an easy-to-use web interface for walking through CME Group certification scenarios.

To facilitate the process of connecting a customer application, CME Group provides a dedicated certification environment to allow customers to test their systems before they complete certification.

This Help system accompanies the AutoCert+ EBS Risk Management API test suite.

EBS Risk Manager API

EBS Risk Manager API provides API access to EBS risk administrators through simple API calls to retrieve lists of entity groups, retrieve and set credit limits and kill or unkill trading.

EBS Risk Management API is a JSON (JavaScript Object Notation) Representation State Transfer (REST) API which provides REST endpoints (URLs) representing the HTTP methods GET request to retrieve records, and the POST request to create new records. EBS Risk Management API risk authenticates risk administrators using OAuth 2.0 protocol.

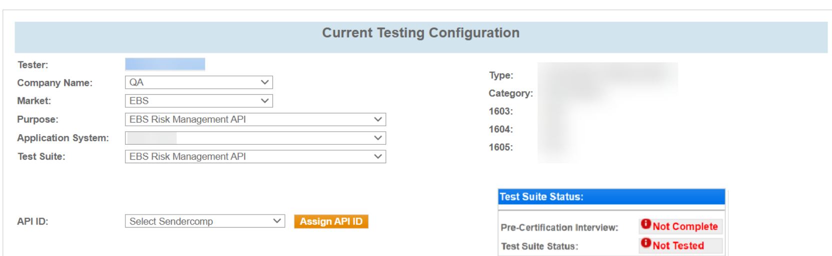
EBS risk administrators can use the EBS Risk Manager API or User Interface(UI) to manage risk.

See also: EBS Risk Management API - Features and Functions client impact assessment.

Run and Navigate AutoCert+

To run and navigate AutoCert+:

1. Log into the automated certification tool.
2. Review general AutoCert+ test suite navigation and general interview information.
3. Navigate to the AutoCert+ EBS Risk Management API test suite.



   a. Select a **Company Name**.

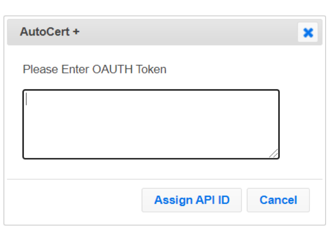
   b. For **Market**, select EBS.

   c. For **Purpose**, select EBS Risk Management API.

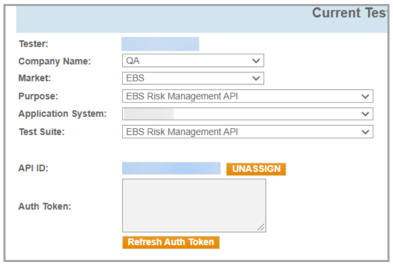
   d. Select an **Application System**.

   e. For **Test Suite**, select EBS Risk Management API.

4. Select an **API ID** and select **ASSIGN API ID**.



5. Enter an **OAUTH Token**.
6. Select **Assign API ID**.



Note: The Auth Token must be refreshed every 30 minutes.

6. Complete the Interview for this test suite.
7. Complete applicable test cases.
8. Complete the certification process from the Post Certification tab.

What's New

The list below illustrates the updates made to the AutoCert+ EBS Risk Management API Help system.

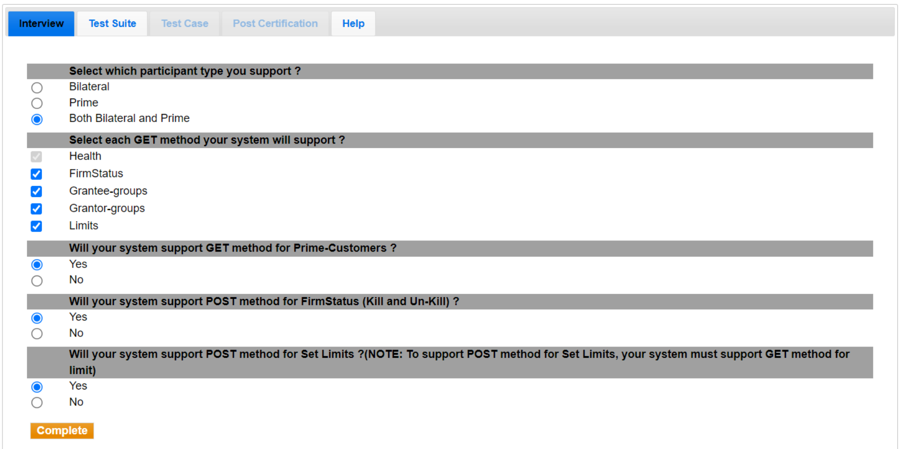
Date	Description
October 6, 2021	Initial release.

Interview

The interview consists of a series of questions about your trading application. Based on your responses, certain tests are required and others are optional. You must complete the pre-certification interview before running the test cases.

To complete the interview:

Answer each question and select **Complete** when finished.



Certification Tests

The following topics contain information on the AutoCert+ EBS Risk Management API certification tests.

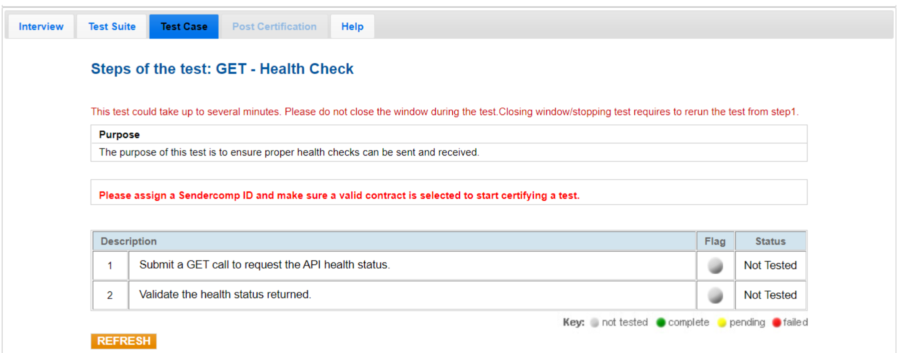
GET - Health Check

The purpose of this test is to ensure proper health checks can be sent and received.

Note: See the Get Health Status message specification for more information.

1. Select an **API ID** and select **ASSIGN API ID**.
2. Enter an **OAUTH Token**.
3. Select **Assign API ID**.

   Note: The Auth Token must be refreshed every 30 minutes.



To run a GET - Health Check test:

1. Submit a GET call to request the API health status.
2. Validate the health status returned.

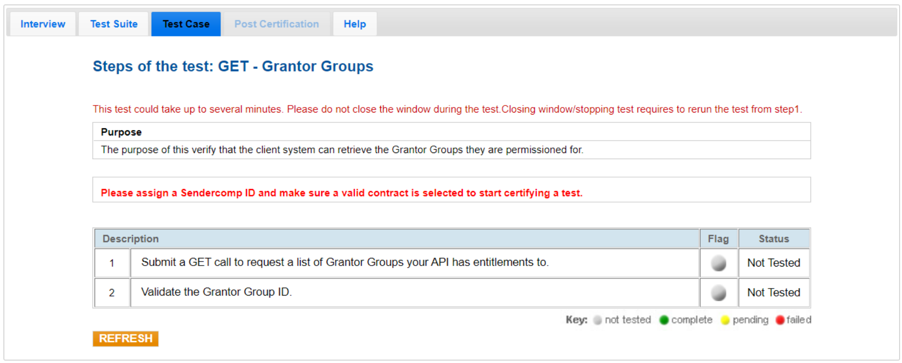
GET - Grantor Groups

The purpose of this verify that the client system can retrieve the Grantor Groups they are permissioned for.

Note: See the List Grantor Groups message specification for more information.

1. Select an **API ID** and select **ASSIGN API ID**.
2. Enter an **OAUTH Token**.
3. Select **Assign API ID**.

   Note: The Auth Token must be refreshed every 30 minutes.



GET - Grantor Groups test:

1. Submit a GET call to request a list of Grantor Groups your API has entitlements to.
2. Validate the health status returned.

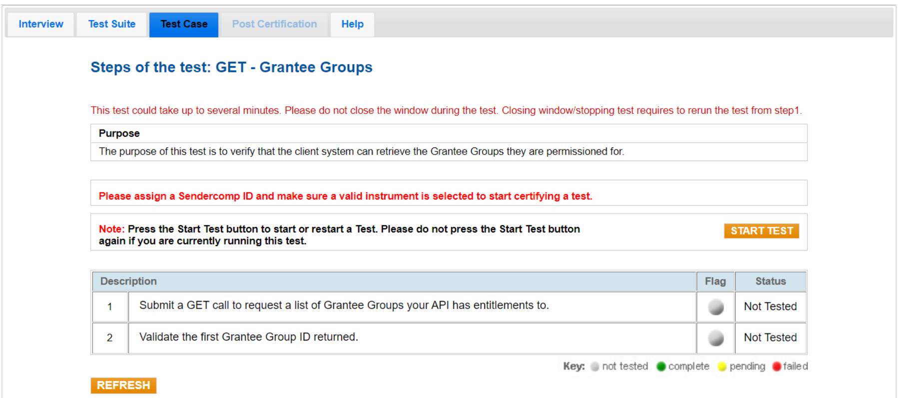
GET - Grantee Groups

The purpose of this verify that the client system can retrieve the Grantee Groups they are permissioned for.

Note: See the List Grantee Groups message specification for more information.

1. Select an **API ID** and select **ASSIGN API ID**.
2. Enter an **OAUTH Token**.
3. Select **Assign API ID**.

   Note: The Auth Token must be refreshed every 30 minutes.



GET - Grantee Groups test:

1. Submit a GET call to request a list of Grantee Groups your API has entitlements to.
2. Validate the health status returned.

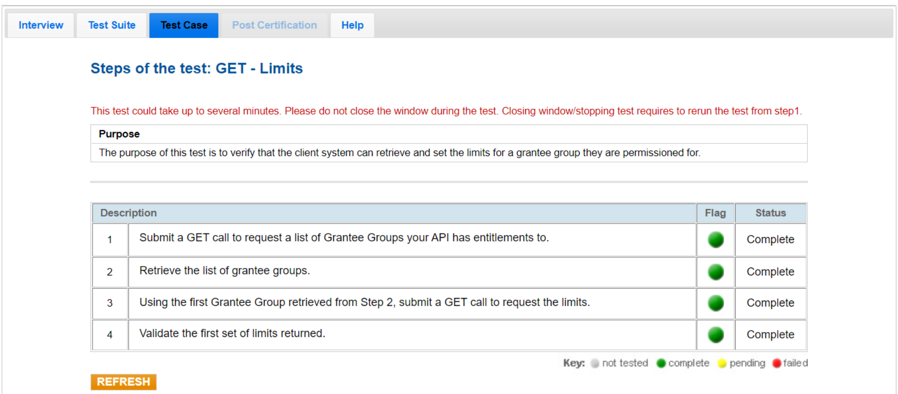
GET - Grantee Limits

The purpose of this verify that the client system can retrieve and set the limits for a grantee group for which they are permissioned.

Note: See the List Grantee Group Limits message specification for more information.

1. Select an **API ID** and select **ASSIGN API ID**.
2. Enter an **OAUTH Token**.
3. Select **Assign API ID**.

    Note: The Auth Token must be refreshed every 30 minutes.



To run a GET - Limits test:

1. Submit a GET call to request a list of Grantee Groups your API has entitlements to.
2. Validate the first Grantee Group ID returned.
3. Retrieve the list of grantee groups.
4. Validate the first set of limits returned.

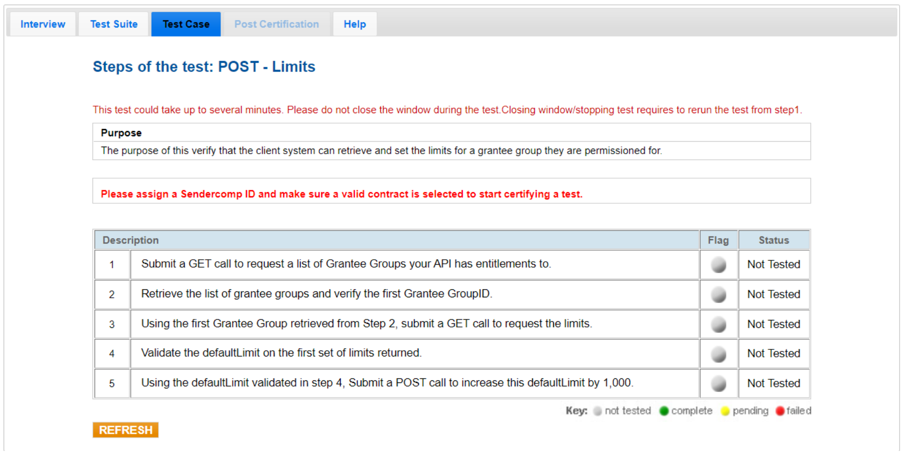
POST - Limits

The purpose of this verify that the client system can retrieve and set the limits for a grantee group they are permissioned for.

> **Note:** See the Update Grantee Group Limits message specification for more information.

1. Select an **API ID** and select **ASSIGN API ID**.
2. Enter an **OAUTH Token**.
3. Select **Assign API ID**.

> **Note:** The Auth Token must be refreshed every 30 minutes.



To run a POST - Limits test:

1. Submit a GET call to request a list of Grantee Groups your API has entitlements to.
2. Retrieve the list of grantee groups and verify the first Grantee GroupID.
3. Using the first Grantee Group retrieved from Step 2, submit a GET call to request the limits.
4. Validate the defaultLimit on the first set of limits returned.
5. Using the defaultLimit validated in step 4, Submit a POST call to increase this defaultLimit by 1,000.

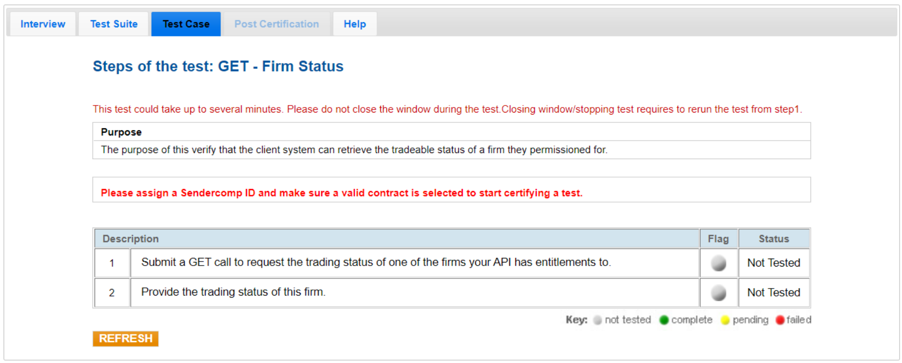
GET - Firm Status

The purpose of this verify that the client system can retrieve the tradeable status of a firm they permissioned for.

> **Note:** See the Get Firm Status message specification for more information.

1. Select an **API ID** and select **ASSIGN API ID**.
2. Enter an **OAUTH Token**.
3. Select **Assign API ID**.

> **Note:** The Auth Token must be refreshed every 30 minutes.



To run a GET - Firm Status test:

1. Submit a GET call to request the trading status of one of the firms your API has entitlements to.
2. Provide the trading status of this firm.

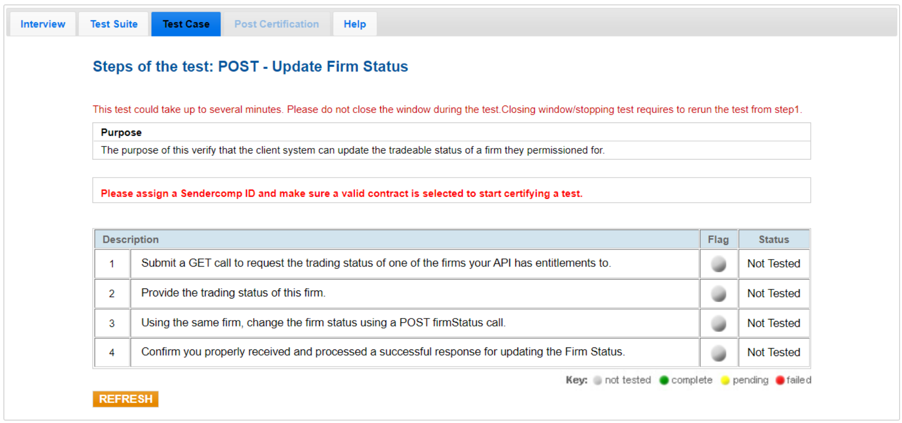
POST - Update Firm Status

The purpose of this verify that the client system can update the tradeable status of a firm they permissioned for.

Note: See the Update Firm Status message specification for more information.

1. Select an **API ID** and select **ASSIGN API ID**.
2. Enter an **OAUTH Token**.
3. Select **Assign API ID**.

   Note: The Auth Token must be refreshed every 30 minutes.



Note: Step 4 is only required for systems receiving Snapshot+Updates.

To run a POST - Update Firm Status test:

1. Submit a GET call to request the trading status of one of the firms your API has entitlements to.
2. Provide the trading status of this firm.
3. Using the same firm, change the firm status using a POST firmStatus call.
4. Confirm you properly received and processed a successful response for updating the Firm Status.

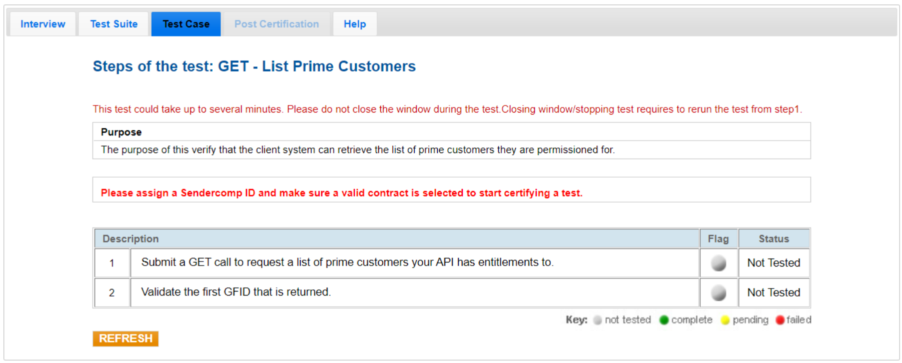
GET - List Prime Customers

The purpose of this verify that the client system can retrieve the list of prime customers they are permissioned for.

> **Note:** See the List Prime Customers message specification for more information.

1. Select an **API ID** and select **ASSIGN API ID**.
2. Enter an **OAUTH Token**.
3. Select **Assign API ID**.

> **Note:** The Auth Token must be refreshed every 30 minutes.



To run a GET - List Prime Customers test:

1. Submit a GET call to request a list of prime customers your API has entitlements to.
2. Validate the first GFID that is returned.