

PORTMAN API

Online API help

How to get started

Vitec Aloc/TS

Version 1.0

This document is based on the underlying system PORTMAN 7.27

Contents

1. Introduction.....	3
2. API Help	3
3. API calls in Help.....	7

1. Introduction

PORTMAN's Online API Help has been upgraded and is now available in a new and more user-friendly format. This guide describes how to best use the new options available in the API Help.

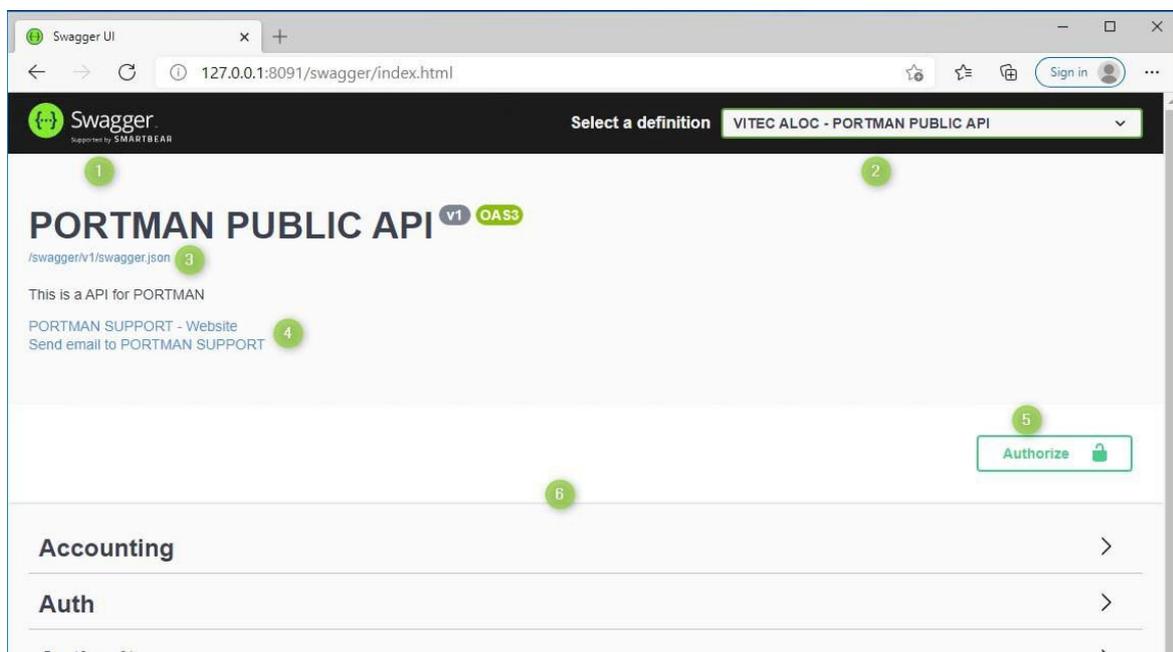
The new API Help uses an open-source standard called Swagger. Swagger ensures that documentation follows standards that can be used by other systems. The help-pages in themselves are a visualisation of the documentation, which means that you don't have to know about the underlying data structures to use the API Help.

To get to API Help, open a browser (not Internet Explorer) and type the following: `http://server:8091/`.

'Server' is the server running PORTMAN, and '8091' is the port used by the API. The port may be different to the one shown here, but port 8091 is often used.

2. API Help

The API Help page looks like this:

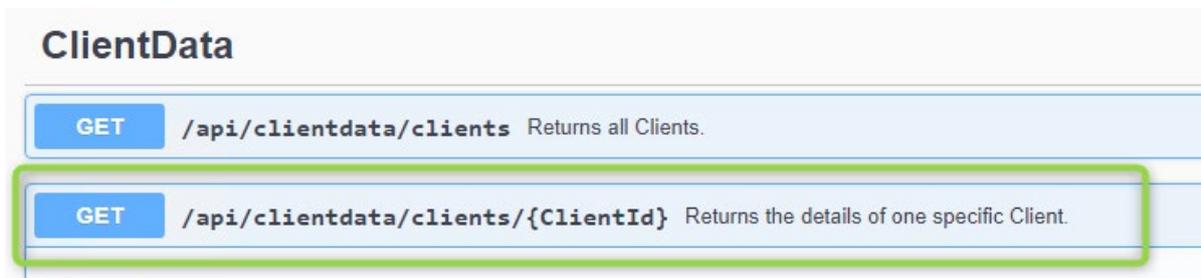


The numbered markings:

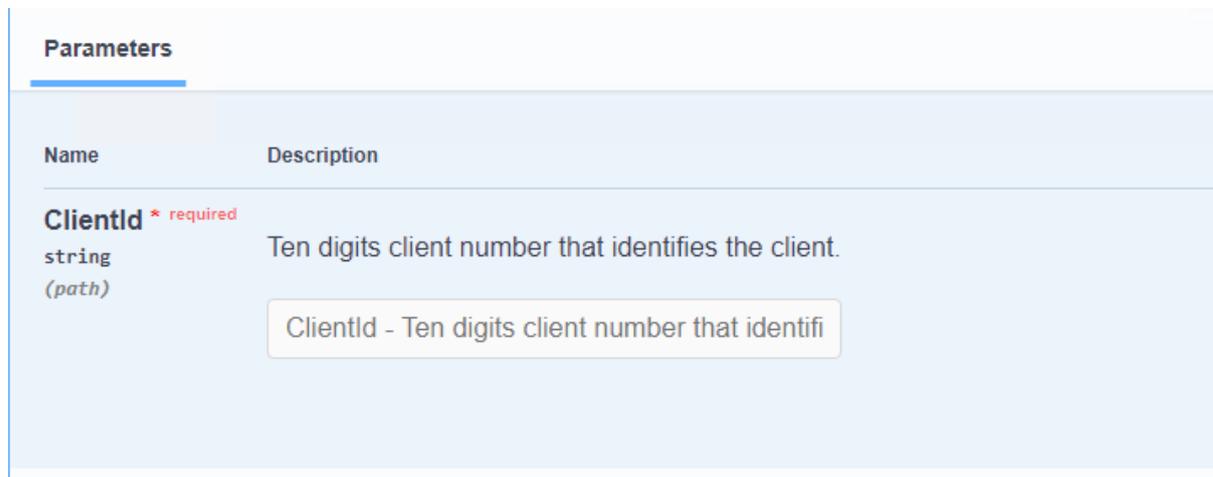
- 1: Clarifies that the underlying data structure follows Swagger specifications.
- 2: List of APIs you can view help for. At present, there is only one API, but more may be added in the future.
- 3: Link to the technical documentation.

- [4](#): Links to the PORTMAN Support page and to send an email to Support.
- [5](#): Allows you to send API-requests directly from Help. Enter your PORTMAN username and password to send API-requests (further details later in this guide). The Authorize button only stores user credentials. A "locked" image only indicates that the credentials are saved and gives no indication that the credentials are correct. Authorization happens with the stored credentials at every API call.
- [6](#): List of API groups. If you click on one of the groups, you'll see a list of all related API- requests. The method used for each call (GET, PUT, POST, etc.) is marked with a different colour.

The following example shows the API request: `/api/clientdata/clients/{ClientId}`



At the top is shown which parameters that the request includes. The data type for each parameter is displayed, and it states whether the parameter is required or optional. In the example, the 'ClientId' parameter is a required string.

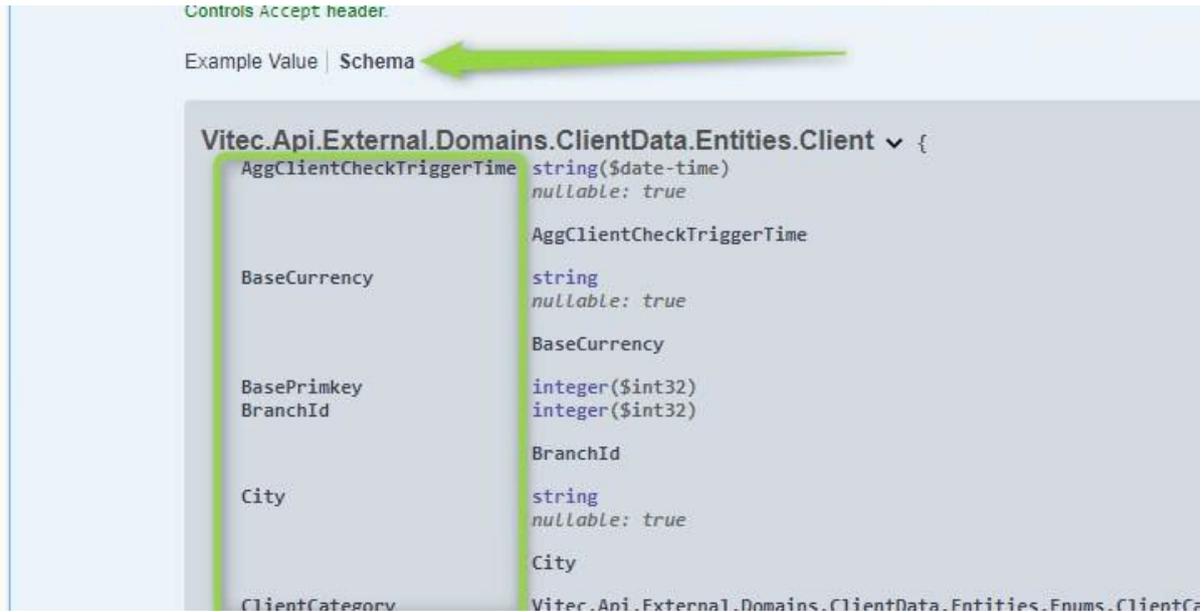


A description of the API response is displayed under the parameters.

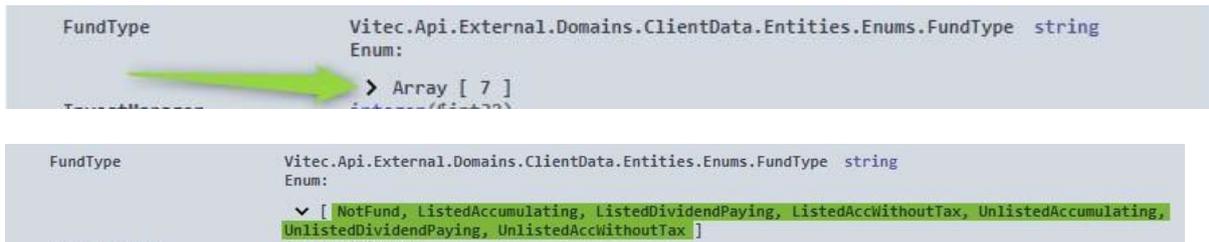
Response code '200' means that the request was successful, and an example is shown of what the response looks like. Above the example, you can select 'Media type' where you can choose to see the response in XML (default) or JSON.

Responses	
Code	Description
200	<p>Success</p> <p>Media type</p> <p><input type="text" value="text/plain"/> ▾</p> <p>Controls Accept header.</p> <p>Example Value Schema</p> <pre>{ "AggClientCheckTriggerTime": "2021-03-01T11:36:50.886Z", "BaseCurrency": "string", "BasePrimkey": 0, "BranchId": 0, "City": "string", "ClientCategory": "Unknown", "ClientId": "string", "ClientManager": 0, "ClientRefId": "string", "ClientRefType": "string", "ClientState": "Unknown", "Co_Name": "string", "Company": "string", "Contact1": "string", "Contact2": "string", "Country": "string", "CreatedByUserId": "string", "CreditSpreadDerivativesPct": 0, "CreditSpreadLoanPct": 0, "DateOfBirth": "2021-03-01T11:36:50.886Z", "Description": "string", "DescriptionOrName": "string", "DiscontinuedAsPerDate": "2021-03-01T11:36:50.886Z", "DiscontinuedByUserId": "string", "DiscontinuedTimestamp": "2021-03-01T11:36:50.886Z", "EBoks": true, "Email": "string",</pre>
400	Bad Request

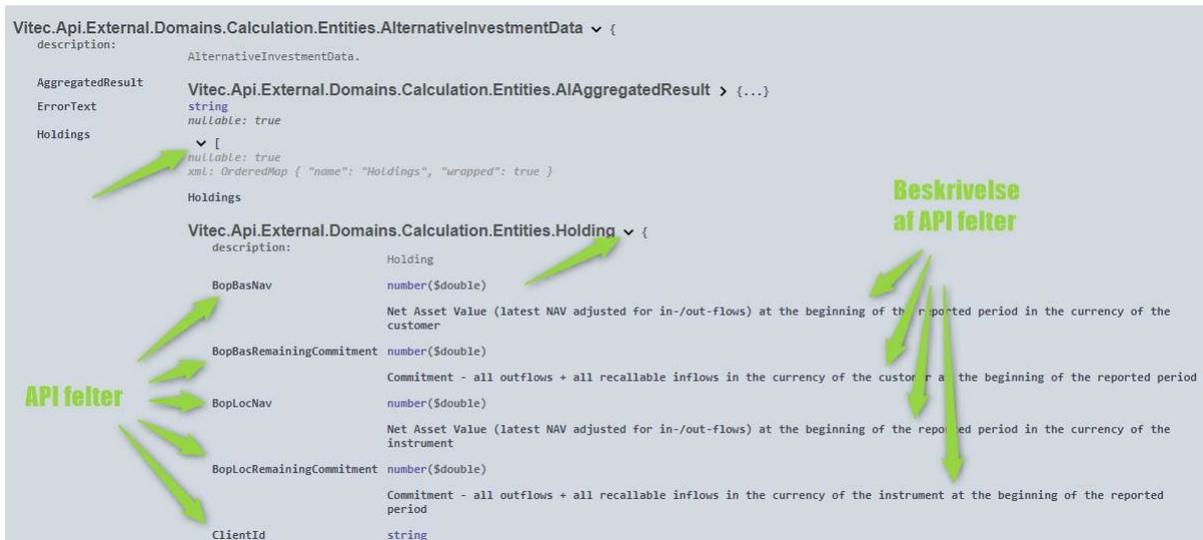
Just below 'Media type', you can choose to see an example as before, or click on 'Schema' to see a description of all the fields that are returned.



If the description contains a '>', this means that more information is available by clicking on the arrow. For example, under 'FundType' you can see which type of funds are possible values for the field.

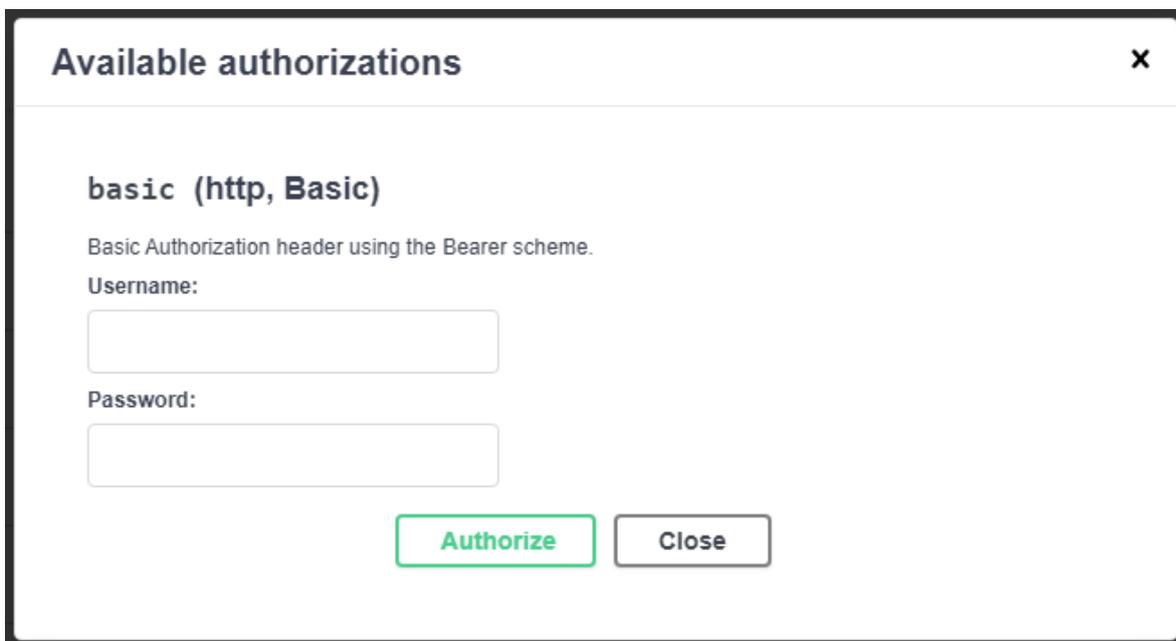


For some requests, you must expand more data structures before you get to the description of the API fields. In the example below for 'Alternative Investment', you must expand twice before you can see the fields returned for each inventory and the description of each field.

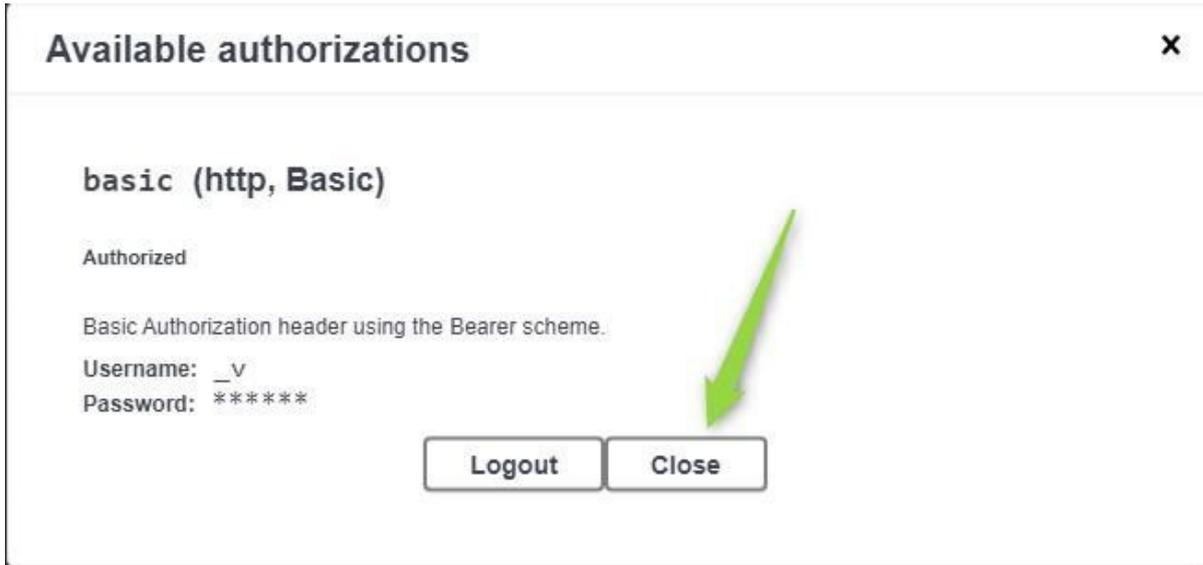


3. API calls in Help

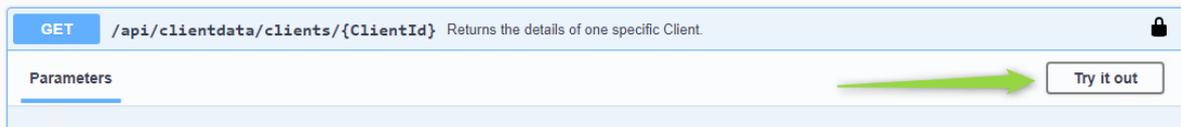
If you want to send an API-request directly from Help, first click 'Authorize', which is located just above the group of API calls, and then enter your PORTMAN username and password.



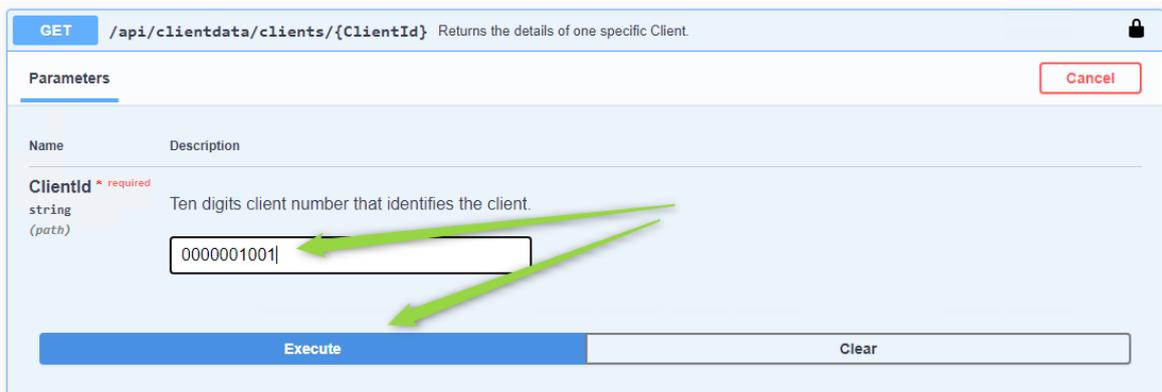
Then click 'Authorize', then 'Close' on the following pop-up.



For the same request as we saw earlier, click on the 'Try it out' button.



Then you can enter your values. After you have entered values for all the required parameters, click on 'Execute'.



In the example, the response looks like this:

Responses

Curl

```
curl -X GET "http://127.0.0.1:8091/api/clientdata/clients/0000001001" -H "accept: text/xml" -H "Authorization: Basic [REDACTED]"
```

Request URL

```
http://127.0.0.1:8091/api/clientdata/clients/0000001001
```

Server response

Code	Details
200	<p>Response body</p> <pre><Client xmlns:i="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://schemas.datacontract.org/2004/07/Vitec.Api.External.Domains.ClientData.Entities"> <BasePrimkey xmlns="http://schemas.datacontract.org/2004/07/Vitec.Api.Core.Model.Entities">261</BasePrimkey> <AggClientCheckTriggerTime>2021-02-24T14:33:58.229</AggClientCheckTriggerTime> <BaseCurrency>DKK</BaseCurrency> <BranchId>0</BranchId> <City>Odense C</City> <ClientCategory>Person</ClientCategory> <ClientId>0000001001</ClientId> <ClientManager>111111</ClientManager> <ClientRefId>1504682036</ClientRefId> <ClientRefType>CPR</ClientRefType> <ClientState>Active</ClientState> <Co_Name> </Co_Name> <Company> </Company> <Contact1> </Contact1> <Contact2> </Contact2> <Country>DK</Country></pre>

‘Curl’ a technical detail – it’s a command that can be used to send the API-request to PORTMAN.

‘Request URL’ is the string that you can send in a regular browser to retrieve data – in this case, basic data on customer ‘0000001001’.

Status ‘200’ is the response, telling you that the request was successful. In the box just below, you’ll find the actual data that PORTMAN returns in the API-request.