

Matter

# Partner API Documentation

## API Reference

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Need assistance for integration?  
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# 1. Introduction

The Matter Partner API is organised around REST with resource-oriented URLs and OAuth 2.0 authentication. The API returns JSON-encoded responses and uses standard HTTP response codes.

Requesting analysis results is done by creating an analysis job and subsequently requesting the result of that job. Analysing large portfolios can take a few seconds and this two-step approach enables flexible implementation.

This document describes the authentication, end points and error handling for the API and includes code examples for implementation in Python, C# and NodeJS / TypeScript.

## 1.1. Prerequisites

Using the API requires a *client id* and *client secret* that is available on our platform. You can acquire any number of id and secret pairs you need or use a single key across your usage.

Client IDs and secrets are generated from your account on

<https://platform.thisismatter.com/> by navigating to the Partner API section from the main lobby.

## 2. Authentication

Authentication is done by requesting an access token that is to be included in all subsequent API calls. A token is valid for one hour.

### Endpoint

```
https://api.thisismatter.com/auth/v1/token
```

### Request method

POST

### Request

Include your API key in the request headers using the Authorization header field. Use the Basic authentication scheme with the client id and the client secret that can be found on our platform (See 1.1 Prerequisites):

```
Header
BasicAuth([client_id], [client_secret])
```

### Response

```
{
  'access_token': '[token]',
  'expires_in': 3600,
  'token_type': 'Bearer'
}
```

access_token	The access token to be used in subsequent API calls.	String
expires_in	Seconds the token is valid in. This is always 3600 seconds.	Integer

token_type	The type of token. This is always 'Bearer'	String
------------	--------------------------------------------	--------

## 2.1. Using authentication

All subsequent requests should include the token in the request header.

```
Header
Authorization: Bearer {auth_token}
```

## 3. Specify portfolio holdings for analysis

The portfolio to be analysed is specified by creating an analysis job with a specification of holdings and their weights in the portfolio. A unique alphanumeric identifier (external id) must be specified for each analysis job, to be used later to retrieve the analysis results. Multiple simultaneous analysis jobs can be created.

### Endpoint

```
https://api.thisismatter.com/partner-api/v1/analysis/jobs?external_id={your_external_id}
```

### Request method

POST

### Request parameters

external_id	Identifier for a portfolio. Any alphanumeric value (including dash and underscore) is allowed.	String
-------------	------------------------------------------------------------------------------------------------	--------

Request

The request must contain an JSON object with the holdings and their weights in the portfolio. In addition, an identifier for the portfolio should also be included. The identifier can be any alphanumeric string and include dashes and underscores.

```
{
  "holdings": [
    {
      "id_value": "US0378331005",
      "weight": 0.123
    },
    {
      "id_value": "US5949181045",
      "weight": 0.06
    },
    {
      "id_value": "LU1503114545",
      "weight": 0.3
    }
  ],
  "default_id_scheme": "ISIN"
}
```

holdings	Array of individual holdings in the portfolio	Array
> id_value	The ISIN of the holding.	Alphanumeric
> weight	The weight of the holding in the portfolio. Specified as a value between 0.001 and 1. The sum of weights across all holdings should be equal to 1.	Float
default_id_scheme	Optional. Scheme for the provided IDs. Only allowed value is “ISIN”.	String

## Response

Upon successful upload a 201– Created status will be returned, and the response containing the portfolio identifier, which can be used to retrieve the analysis results.

```
{
  "created": "2023-07-10T09:24:10.413291",
  "time_stamp": 1688981050,
  "external_id": "EX-123456789"
}
```

created	ISO 8601 formatted time of when the request was received.	DateTime
time_stamp	Unix timestamps of when the request was received.	Integer
external_id	The identifier that was specified for the portfolio in the request.	String

## 4. Retrieve analysis results

Results for analysis are obtained by requesting the results of an analysis job. The same set of metrics will be returned for all requests. Metrics with no data for a given portfolio will be omitted from the results.

Analysis results are generally available after 2 seconds from the upload of portfolio holdings. This varies for the size of the portfolio and the type of entities in the portfolio. For valid requests where the analysis is not yet ready a status code of *202 – Accepted* will be returned.

### Endpoint

```
https://api.thisismatter.com/partner-api/v1/analysis/jobs/{external_id}
```

### Request method

GET

### Request

external_id	The identifier specified when specifying the portfolio holdings and creating the analysis job.	String
-------------	------------------------------------------------------------------------------------------------	--------

No additional parameters or body should be specified for the request.

### Response

Upon successful return of an analysis a *200 – OK* will be returned, and the response containing the metrics for the specified portfolio.

```
{
  "created": "2023-07-10T09:24:10.413291",
  "time_stamp": 1688981050,
  "external_id": "EX-123456789",
  "holdings_matched": 1.0,
  "analysis": {
    "basic": [
      {
```



```

    "metric_id": "f10a915d-708a-4eba-ad4b-6ff6b6dc0b9b",
    "metric_name": "SDG_ALL_A_CAPEX",
    "metric_value": {
      "raw": 2.1899119435638137,
      "extrapolated": 18.178219814619435
    },
    "coverage": {
      "weight": 0.12046899893919344,
      "entity_count": 21
    },
    "metric_unit": "PERCENTAGE OF CAPEX",
    "metric_type": "sdg_capex_metric"
  },
]
}

```

created	ISO 8601 formatted time of when the request was received.	DateTime
time_stamp	Unix timestamps of when the request was received.	Integer
external_id	The unique alphanumeric ID for the analysis job.	String
holdings_matched	The weighted share of holdings matched. Specified as a number between 0.001 and 1.	Float
analysis > basic	Array of metrics for the portfolio	Array
> metric_id	A unique ID of the metric.	UUID
> metric_name	The unique name of the metric in English.	String
> metric_value	Container for metric values	Key value pair
>> raw	Aggregated data based on the entities covered by the metric	Float

> extrapolated	Aggregated data based on the entities covered by the metric and extrapolated to have a 100% weight covered	Float
> coverage	Container for metric coverage	Key value pair
> weight	The weighted share of the holdings that the metric has coverage of. Specified as a number between 0.001 and 1.	Float
> entity_count	How many entities is covered	Integer
> metric_unit	The unit of the metric in English.	String
> metric_type	This can flag, impact, selected, universal, etc	String

## 5. Metric list

A full overview of the metrics that are available can be requested by a client

### Endpoint

```
https://api.thisismatter.com/partner-api/v1/metrics
```

### Request method

GET

### Request

No additional parameters or body should be specified for the request.

### Response

The response will contain a JSON object with a detailed list of metrics for your organisation.

```
{
  "created": "2023-07-10T09:24:10.413291",
```

```

    "time_stamp": 1688981050,
    "metrics": [
      {
        "metric_id": "17cd0fca-2d88-4ef0-8696-57c35222596e",
        "metric_name": "SDG_ALL_A_CAPEX",
        "metric_unit": "PERCENTAGE OF CAPEX",
        "metric_type": "sdg_capex_metric",
        "metric_equation": "EVIC",

      },
      {
        "metric_id": "d09d41e3-4411-4da6-8f98-e5ffcc9281a7",
        "metric_name": "BIOFUELS_CONTESTED_PRODUCT_E_TIER_2",
        "metric_unit": "",
        "metric_type": "flag",
        "metric_equation": "FLAG"
      }
    ]
  }
}

```

created	ISO 8601 formatted time of when the request was received.	DateTime
time_stamp	Unix timestamps of when the request was received.	Integer
metrics	List of metrics that are available	Array
> metric_id	A unique ID of the metric.	UUID
> metric_name	The unique name of the metric in English.	String
> metric_type	This can flag, impact, selected, universal, etc	String
> metric_equation	The type of normalizer used, i.e. EVIC, EVEC, revenue and market cap.	String

## 6. Error Handling

If any errors occur during API requests, appropriate HTTP status codes will be returned along with error messages in the response body. The response body will follow this format:

```
{
  "detail": [
    {
      "loc": [
        "body",
        "holdings",
        1,
        "weight"
      ],
      "msg": "ensure this value is greater than 0",
      "type": "value_error.number.not_gt",
      "ctx": {
        "limit_value": 0
      }
    }
  ]
}
```

msg	Description or suggestion to fix the error	String
type	Type of error	String

### 6.1. Upload portfolio return codes and errors

201 – Created	<b>Success</b>	Job submitted successfully
403 – Forbidden	<b>Error</b>	Illegal operations like using the wrong request method. Check request and retry. Contact us for support if errors persist.

404 – Not Found	<b>Error</b>	No identifiers could be matched to entities. Check identifiers and retry. If error persists for identifiers that should have matched, contact us for support
409 – Conflict	<b>Error</b>	Analysis is already in process for external_id. Submit analysis job with another external_id
422 – Unprocessable Entity	<b>Error</b>	Invalid input. Possibly due to negative weights or duplicate identifiers. Check identifiers and retry. If error persists contact us
5xx – Internal Server Error	<b>Error</b>	The request could not be satisfied. Retry once. If error persists contact us for support.

## 6.2. Request analysis return codes and errors

200 – OK	<b>Success</b>	–
202 – Accepted	<b>Error</b>	The analysis job is still being processed.. Retry every 2 seconds until response status code = 200
403 – Forbidden	<b>Error</b>	Illegal operations like using the wrong request method. Check request and retry. Contact us for support if errors persist.
404 – Not Found	<b>Error</b>	No portfolio with the specified external_id is found. Check external_id and retry.
400 – Bad Request	<b>Error</b>	Unable to resolve the portfolio. Check request and retry. Contact us for support if errors persist.
5xx – Internal Server Error	<b>Error</b>	The request could not be satisfied. Retry once. If error persists contact us for support.