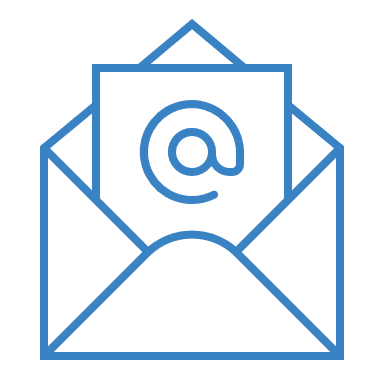
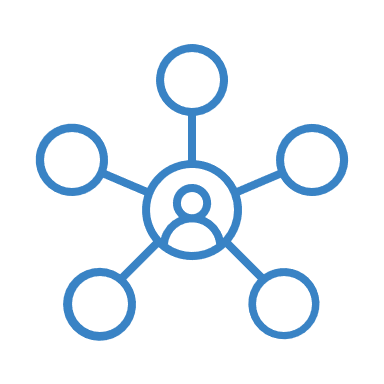


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API Guide

Reporting Extract Data

Portfolio Module

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# Scope Of The Document

Exposing of the Reporting Data from the SPM Analytics API These API endpoints is currently consumed over the Dashboard application the same can be used to retrieve data externally,

User: supplied separately

Pwd: supplied separately

|  |  |  |
| --- | --- | --- |
| Environment | | BaseUrl |
| Production | <https://spm.uppwise.com/ReportingAPI_SPMAnalytics/api> | |

# Versioning of the API

Some of the API has versioning implemented the purpose of the versioning was to not impact the existing layout created over the SPM Analytics Application. In this document we are considering the latest API that are available.

# API Parameters

To get the proper data from the API end points there is a need to pass the correct parameters to the API, there are few parameters that are necessary for the proper fetch of data from the API,

The API required below parameters

* **Token** – For the authentication to get the exposed data user with the Global Administrator rights.

# Default API Parameters Table

Please consider this table for all the Parameters API Endpoints.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Required to generate Please refer to the Authentication below |

# Authentication

For all the data that is exposed through the SPM Analytics API for which a token is required, the token is generated through another API which is a POST request the token is valid as long as there is no change of the user credential if there is a change in user credential there is a need to generate a new token **api/v1/Authentication/GetJwtToken**

Below are the steps to generate a token for the SPM Analytics API

|  |  |
| --- | --- |
| **HTTP Method** | POST |
| **Endpoint** | **<** Base Url **>/v1/Authentication/GetJwtToken** |
| **HTTP Headers** | none |

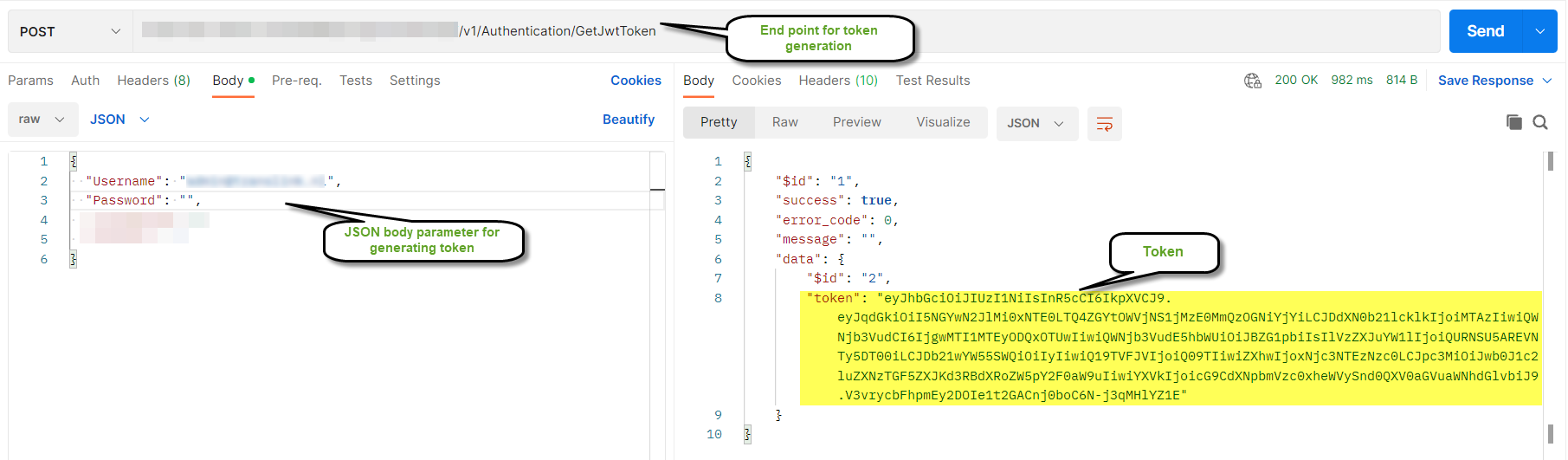
## Input Parameters

The method accepts a two Json body Parameter for the authentication

* username– the user with the Global Administrator rights
* password- the user password credentials

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {username} | the user with the Global Administrator rights | String | Yes | Please consider the Default API Parameters Table |
| {password} | The user password credentials | String | Yes | Please consider the Default API Parameters Table |

* To generate a token the user credential is passed as the body parameter is in Json form.
* There are two Json property i.e. username and password
* The endpoint for the token generation is **<** BaseUrl **>/v1** **/Authentication/GetJwtToken**



## Output

On successfully authentication structure of the output JSON document returned from the API in which token key is present.

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": {

"$id": "2",

"token": "eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJqdGkiOiIxZGE0ZjNiZC0yZTU3LTQ1M2ItYmY5NS05NTA5NzRhNWE1NWEiLCJDdXN0b21lcklkIjoiMCIsIkFjY291bnQiOiI4MDEyNTExMjg0MTk1MCIsIkFjY291bnROYW1lIjoiQWRtaW4iLCJVc2VybmFtZSI6IkFETUlOQFRSQU5TTElOSy5OTCIsIkNvbXBhbnlJZCI6IjIiLCJDX1NUUlUiOiJDT1MiLCJleHAiOjE2NzIzOTQ0MzUsImlzcyI6InBvQnVzaW5lc3NMYXllckp3dEF1dGhlbmljYXRpb24iLCJhdWQiOiJwb0J1c2luZXNzTGF5ZXJKd3RBdXRoZW5pY2F0aW9uIn0.anCHTRmVj144V0X5xuWuafWAUaV9\_eaGJXNl\_qVRfpI"

}

In case of any error during the authentication, the following JSON is returned

{

"$id": "1",

"success": **false**,

"error\_code": 2,

"message": "Invalid Credentials",

"data": **null**

}

## Token Generation from the Application

In SPM Application in on clicking on the user image My Preferences>General>SPM Integration the token is coming which will used in authenticaation.

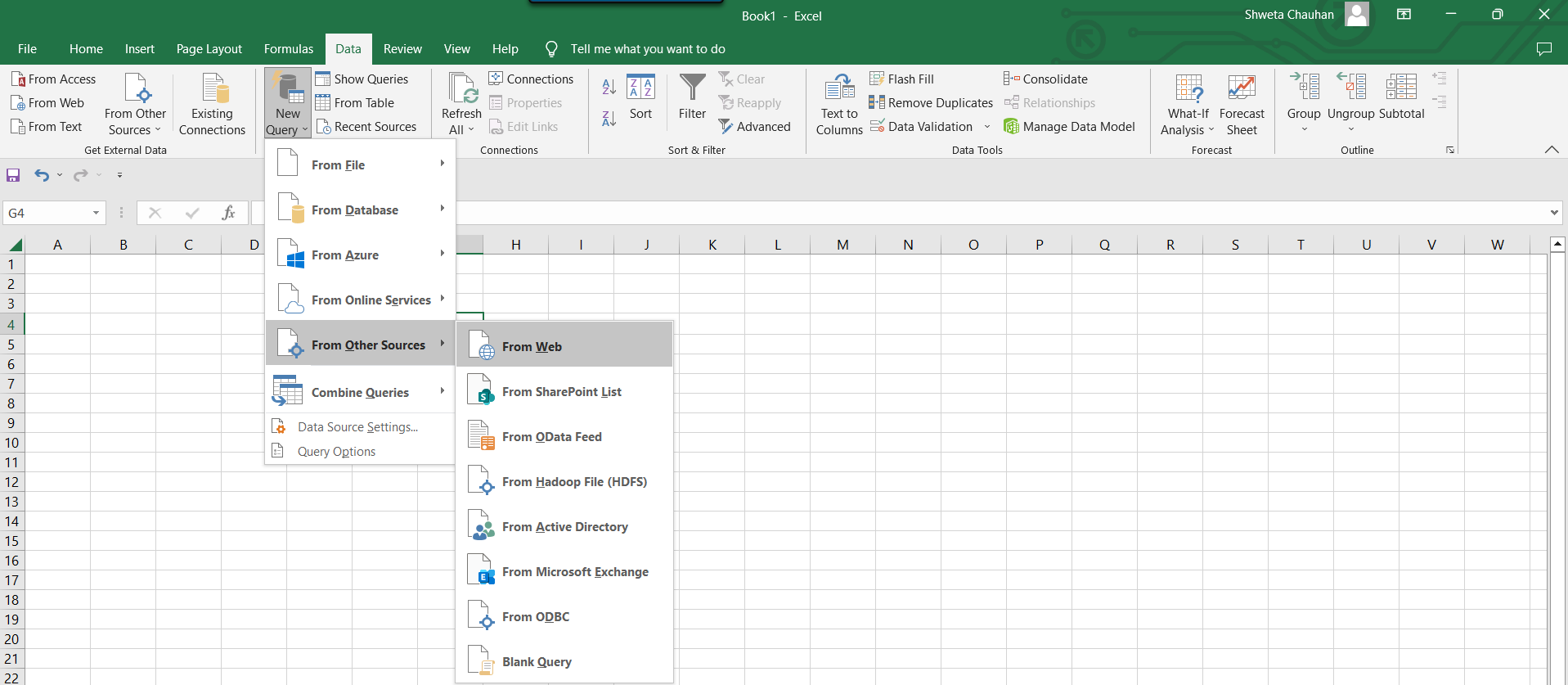
Graphical user interface, text, application

Description automatically generated

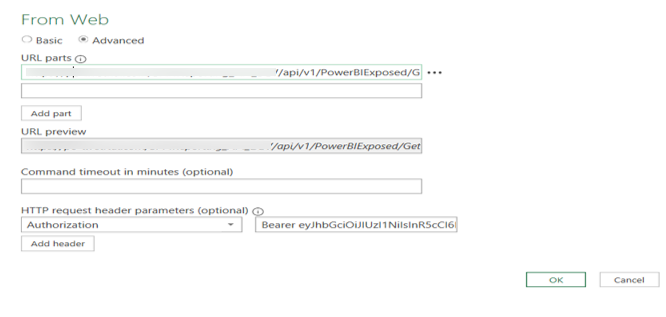
# How to connect to excel

Please follow the below Steps to connect Excel file.

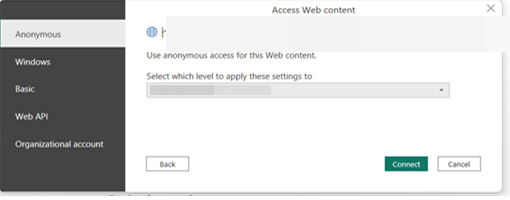
1. Open Excel file, go to the **data** tab.
2. Select “ **from web** ” option from **Get & transform** section/module( Refer to the below screenshot).



1. Choose advance option radio button.
2. Put the **endpoints link** in the Url parts form field.
3. Add header, Fill **authorization** inside HttpRequest header form field, and the field next to the authoriztion with **Bearer** keyword after giving a space paste the copied **token.**
4. Once the details get filled up click **Ok** button(Refer to the below screenshot).



1. After that you will get a window(Refer to the below screenshot), click on **connect** button.



1. Once you will get connected the below shown window will open.

Graphical user interface, application

Description automatically generated

1. Go to the convert tab and select **into table,** the data will shown into a table (refer to the below screenshot).

Graphical user interface, application, Word

Description automatically generated

1. Then select the value which you want to extract, for an example **data column value** from the above table, click on its value(**List**) the vaues will be expand (refer to the below screenshot).

Graphical user interface, application

Description automatically generated

1. Right click over the **list** column select **to table** option.

Graphical user interface, application, table

Description automatically generated

1. Click on the expanded icon on the left side of column, select the columns you want to display and click **ok** button.

Graphical user interface, application, Word

Description automatically generated

1. After expanding the column, you will get your entire details of a record respectively.

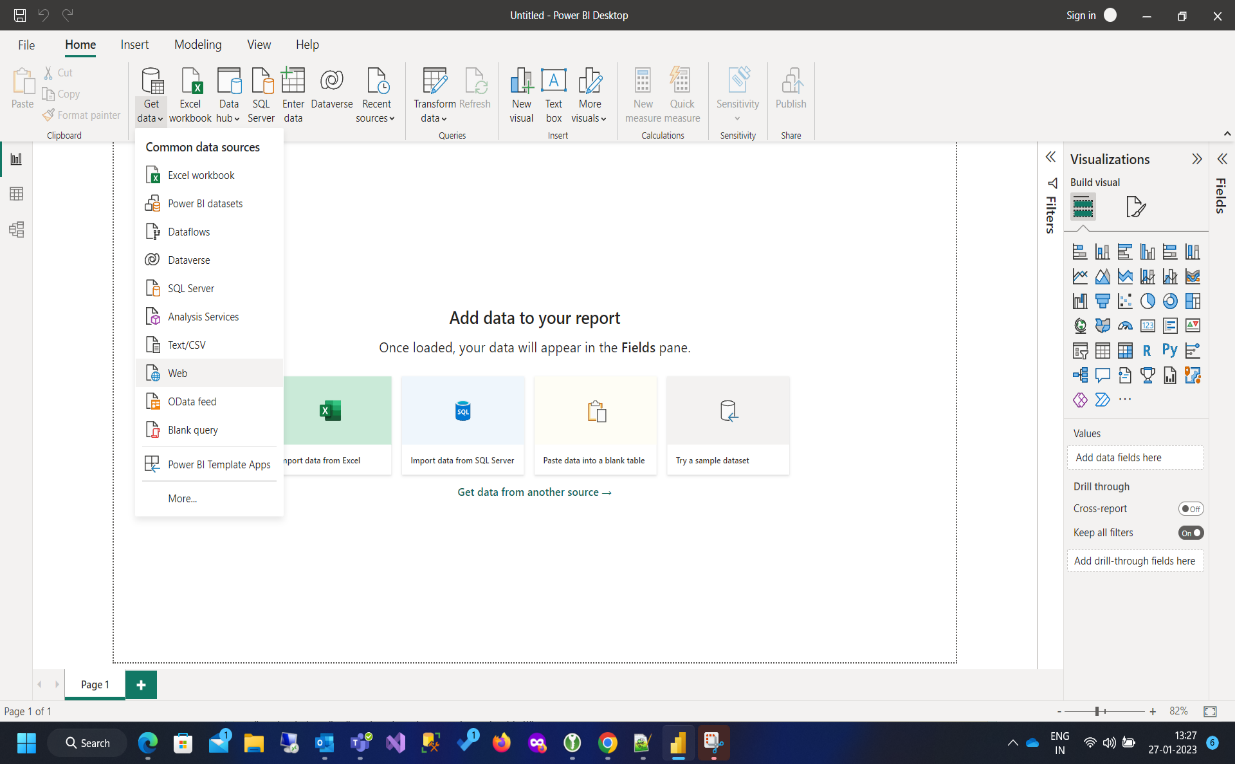
A screenshot of a computer

Description automatically generated with medium confidence

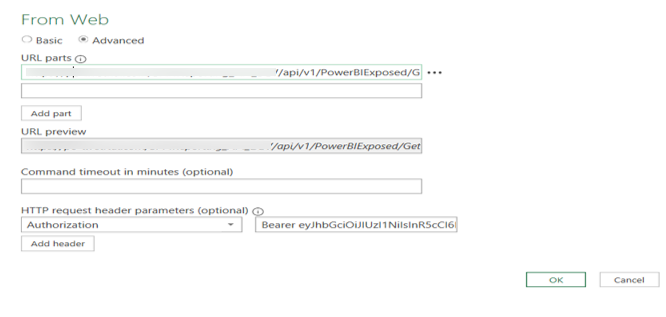
# How to connect to power BI tool

Please follow the below Steps to connect to power BI tool.

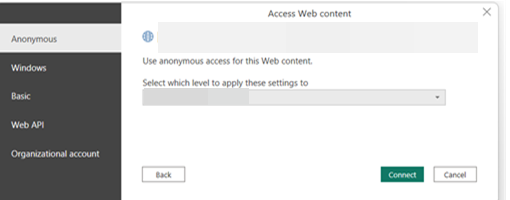
1. Open Excel file, go to the **Get** **data** tab.
2. Select “ **web** ” option from **Data** section/module( Refer to the below screenshot).



1. Choose advance option radio button.
2. Put the **endpoints link** in the Url parts form field.
3. Add header, Fill **authorization** inside HttpRequest header form field, and the field next to the authoriztion with **Bearer** keyword after giving a space paste the copied **token.**
4. Once the details get filled up click **Ok** button(Refer to the below screenshot).



1. After that you will get a window(Refer to the below screenshot), click on **connect** button.



1. Once you will get connected the below shown window will open.

Graphical user interface, application

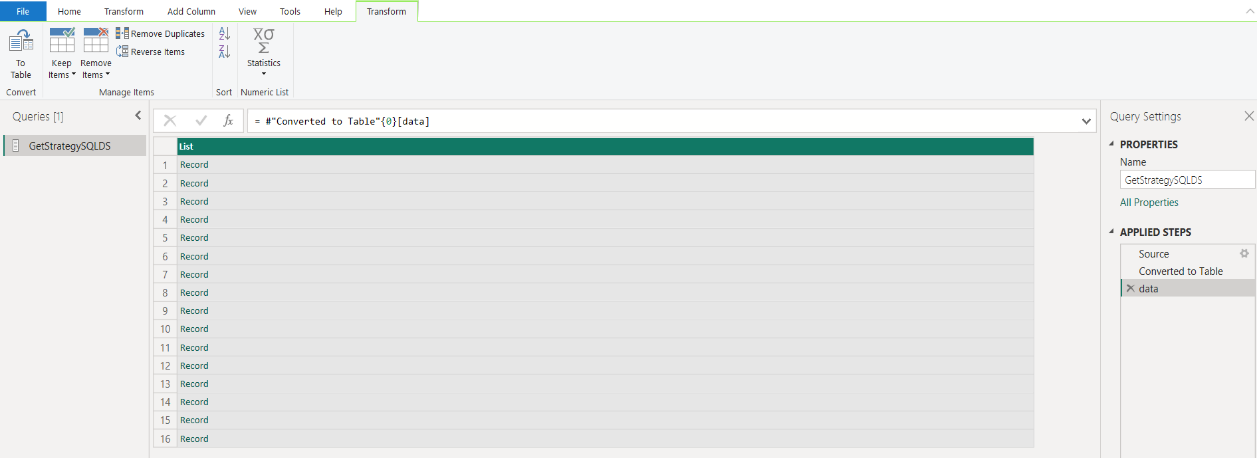
Description automatically generated

1. Go to the convert tab and select **into table,** the data will shown into a table (refer to the below screenshot).

Graphical user interface, text, application

Description automatically generated

1. Then click on the value which you want to extract, for an example **data column value** from the above table, click on its value(**List**) the vaues will be expand (refer to the below screenshot).

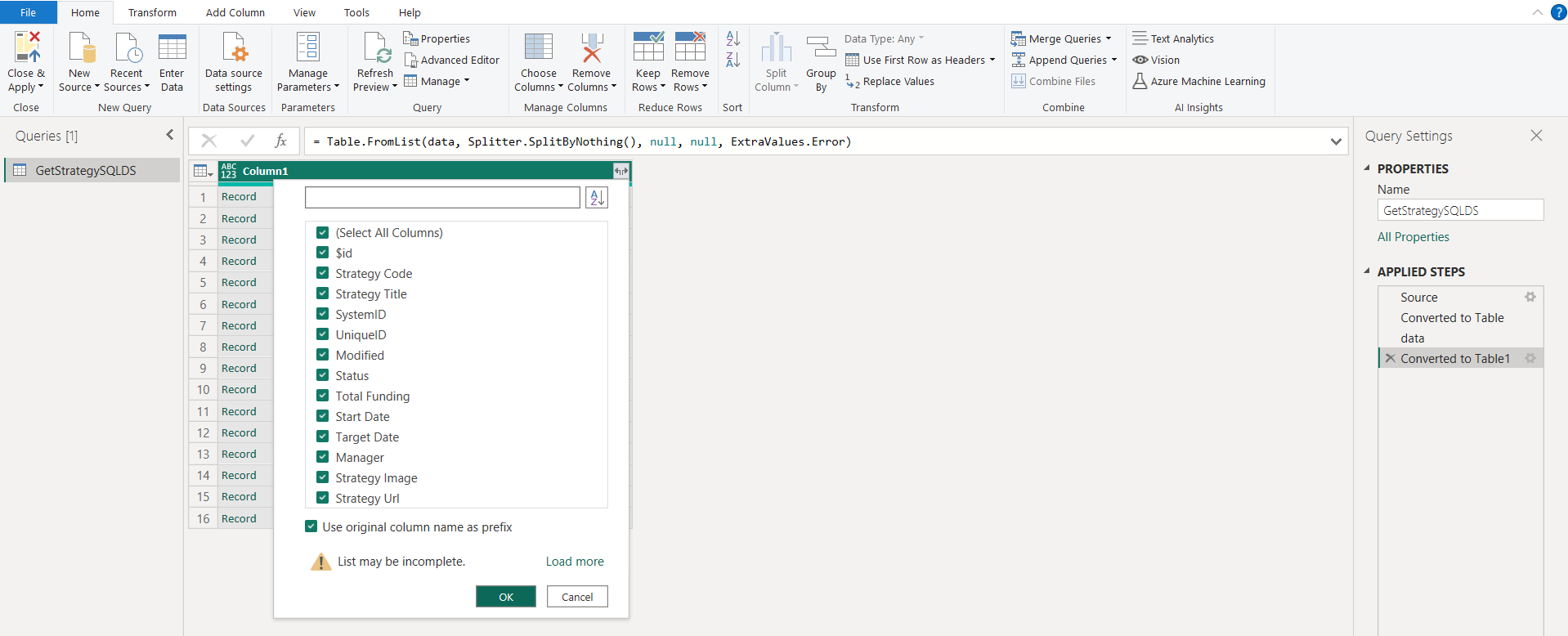


1. Right click over the **list** column select **to table** option.

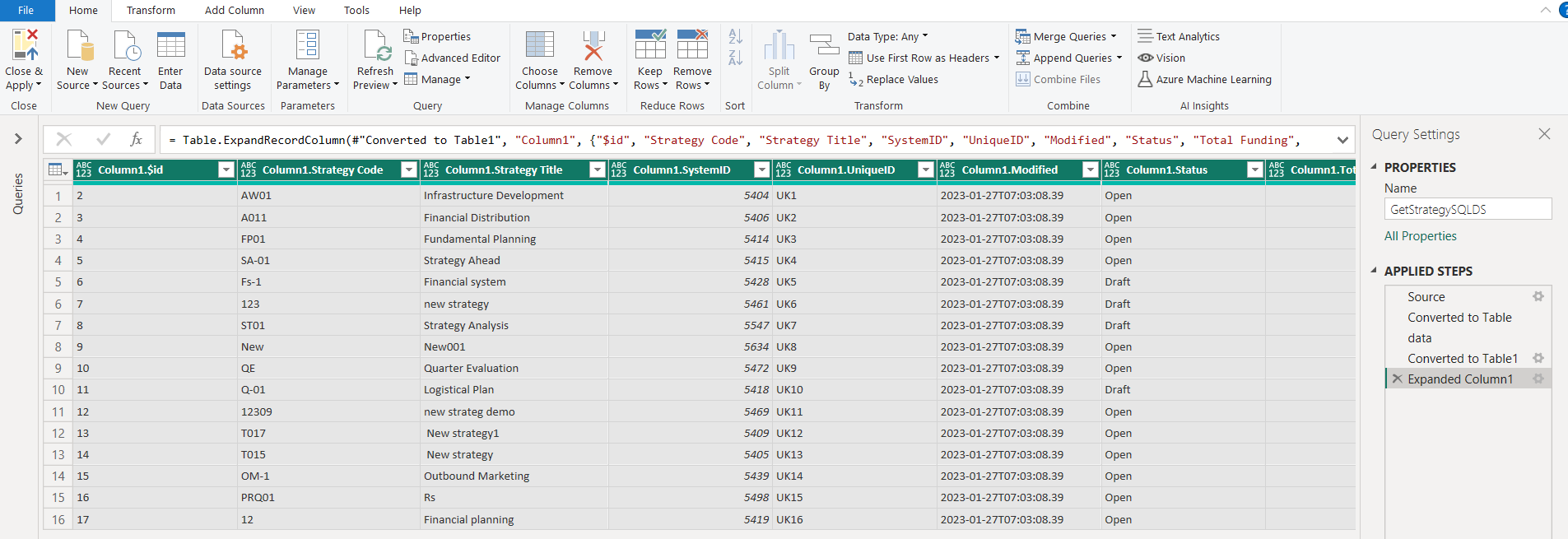
Graphical user interface, application

Description automatically generated with medium confidence

1. Click on the expanded icon on the left side of column, select the columns you want to display and click **ok** button.



1. After expanding the column , you will get your entire details of a record respectively.



# PortfolioRegistersqlds

PortfolioRegisterSQLDS reporting API contains the existing Portfolio’s Details information from the Portfolio module of the application.

Graphical user interface, application

Description automatically generated

**Img –Portfolio Module**

The API contains the below listed fields.

|  |  |  |
| --- | --- | --- |
| **S. No.** | **Field Name** | **Field Description** |
| 1 | Manager | Name of Portfolio Manager |
| 2 | Max ResHrs | Maximum Resource Hours |
| 3 | Max Risk Score | Maximum Risk Score Associated with Portfolio |
| 4 | Max Spending | Maximum Amount With Portfolio |
| 5 | Min NPV | Min Net Present Value Associated with Portfolio |
| 6 | Min ROI | Min Return On Investment Associated with Portfolio |
| 7 | Modified | Portfolio last Modified Date |
| 8 | Portfolio Code | Portfolio Code |
| 9 | Portfolio Title | Title of Portfolio |
| 10 | Process | Portfolio Process Name |
| 11 | Sponsor | Portfolio Sponsor Name |
| 12 | Type | Portfolio Type if Hybrid or Safe |
| 13 | UniqueID | Unique ID |

To get Portfolio Register Details b from SPM Reporting API, GetPortfolioRegisterSQLDS API is called. It is a get request.

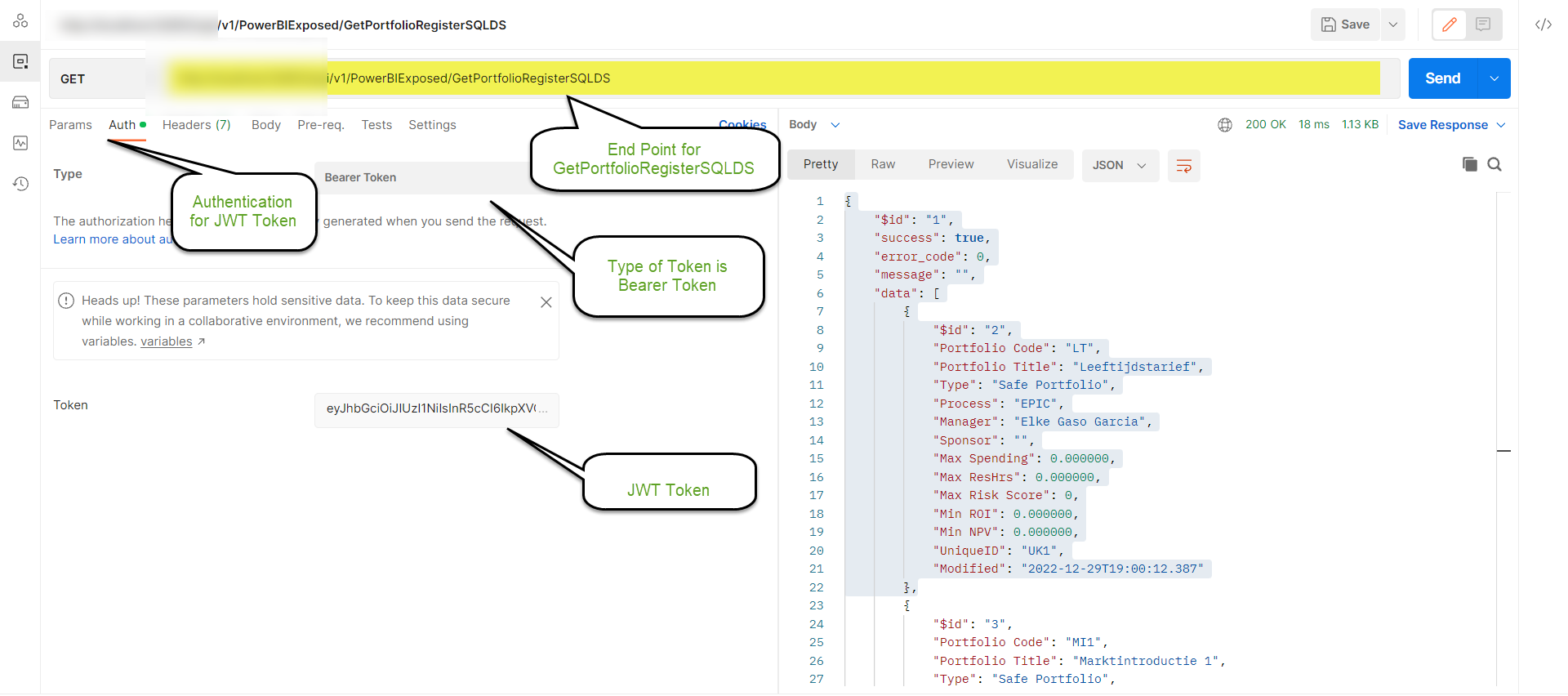
|  |  |
| --- | --- |
| **HTTP Method** | GET |
| **Endpoint** | **<**BaseUrl**>**/ **v1/PowerBIExposed/GetPortfolioRegisterSQLDS** |
| **HTTP Headers** | none |

## Input Parameters

The method accepts a bearer token in auth type for the authentication of the user

* Token- for the authentication to get the exposed data

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Please consider the Default API Parameters Table |



## Output

In the case of successful authentication, the below JSON model is returned

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": [

{

"$id": "2",

"Portfolio Code": "LT",

"Portfolio Title": "Leeftijdstarief",

"Type": "Safe Portfolio",

"Process": "EPIC",

"Manager": "Elke Gaso Garcia",

"Sponsor": "",

"Max Spending": 0.000000,

"Max ResHrs": 0.000000,

"Max Risk Score": 0,

"Min ROI": 0.000000,

"Min NPV": 0.000000,

"UniqueID": "UK1",

"Modified": "2022-12-29T19:00:12.387"

}]}

# PortfolioScenarioSqlds

PortfolioScenario reporting API contains the collection of Projects associated in Scenario’s as per the Portfolios. Every portfolio has a certain number of scenarios created inside them to categorize projects further.

Graphical user interface, application

Description automatically generated**Img – Portfolio Project view**

The API contains the below listed fields.

|  |  |  |
| --- | --- | --- |
| **S.no.** | **Field Name** | **Field Description** |
| 1 | Modified | Table Modified Date |
| 2 | Portfolio Code | Portfolio Code |
| 3 | Nr of Initiatives | Number of Initiatives |
| 4 | Title | Scenario Title |
| 5 | UniqueID | Unique ID |

To get Portfolio Scenario details from SPM Reporting API, GetPortfolioScenarioSQLDS API is called. It is a get request.

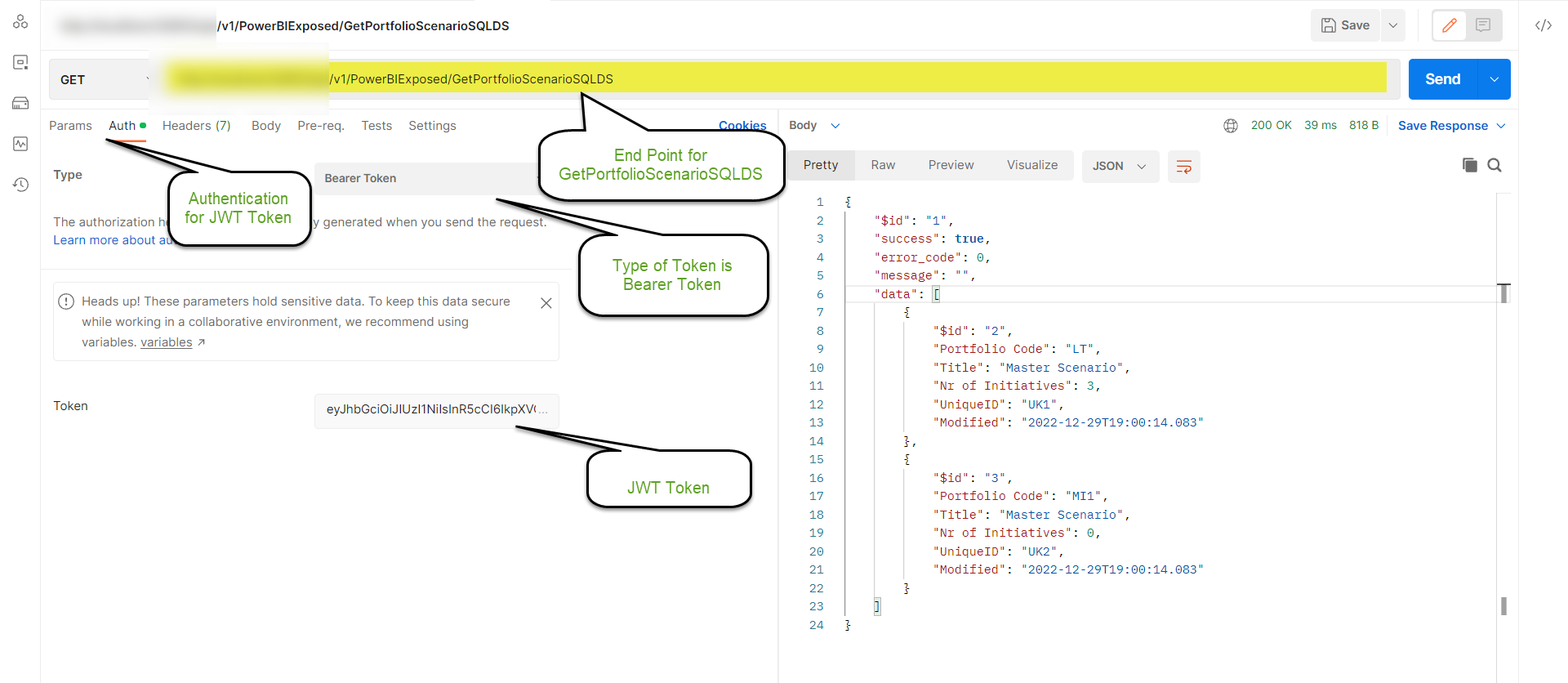
|  |  |
| --- | --- |
| **HTTP Method** | GET |
| **Endpoint** | **<**BaseUrl**>**/ **api/v1/PowerBIExposed/GetPortfolioScenarioSQLDS** |
| **HTTP Headers** | none |

## Input Parameters

The method accepts a bearer token in auth type for the authentication of the user.

* Token- for the authentication to get the exposed data.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Please consider the Default API Parameters Table |



## Output

In the case of successful authentication, the below JSON model is returned.

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": [

{

"$id": "2",

"Portfolio Code": "LT",

"Title": "Master Scenario",

"Nr of Initiatives": 3,

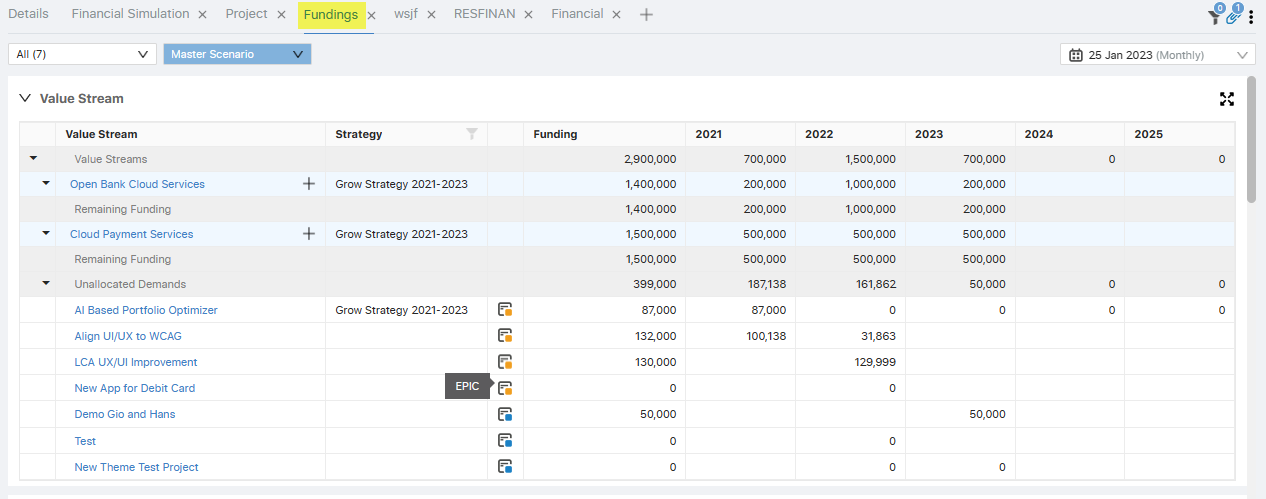
"UniqueID": "UK1",

"Modified": "2022-12-29T19:00:14.083"

}]}

# Portfoliovssqlds

The PortfolioVsSQLDS reporting API is a collection of Portfolio & its associated value streams details. It contains the summarized funding information of each portfolio.



**Img – Portfolio Value Stream view**

The API contains the below listed fields.

|  |  |  |
| --- | --- | --- |
| **S.No.** | **Field Name** | **Field Description** |
| 1 | Allocate Fund | Portfolio Allocated fund |
| 2 | Assigned Fund | Budget Assigned to Portfolio |
| 3 | Modified | Table last Modified Date |
| 4 | Month | Monthly phasing |
| 5 | obj\_id | Object ID |
| 6 | Portfolio Code | Portfolio Code |
| 7 | ProjectId | Project ID |
| 8 | SystemID | System ID |
| 9 | UniqueID | Unique ID |
| 10 | Value Stream Code | Value Stream Code |
| 11 | Year | Annual Phasing |

To get Portfolio details from SPM Reporting API, GetPortfolioVSSQLDS API is called. It is a get request.

|  |  |
| --- | --- |
| **HTTP Method** | GET |
| **Endpoint** | **<**BaseUrl**>**/ **v1/PowerBIExposed/GetPortfolioVSSQLDS** |
| **HTTP Headers** | none |

## Input Parameters

The method accepts a bearer token in auth type for the authentication of the user

* Token- for the authentication to get the exposed data

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Please consider the Default API Parameters Table |



## Output

In the case of successful authentication, the below JSON model is returned.

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": [

{

"$id": "2",

"obj\_id": 0,

"ProjectId": 0,

"Assigned Fund": 0.000000,

"Allocate Fund": 4569000.000000,

"Value Stream Code": "DOC-000327",

"Portfolio Code": "AP01",

"Month": 0,

"Year": 0,

"UniqueID": "UK1",

"Modified": "2023-01-04T06:02:52.833",

"SystemID": 6004.000000,

"Assigned  Fund": 4569000.000000

}]}

# vwportfolioinItiativeSummary

VwPortfolioInitiativeSummary reporting API is summarized view of Project details, Finances, Capacity and risk by Portfolios and scenarios on annual basis.

The API contains listed fields below.

|  |  |  |
| --- | --- | --- |
| **S.No.** | **Field Name** | **Field Description** |
| 1 | Portfolio Code | Portfolio Code |
| 2 | Portfolio Title | Portfolio Title |
| 3 | Porftolio Scenario Title | Porftolio Scenario Title |
| 4 | Manager | Manager Name on Portfolio |
| 5 | Sponsor | Project Sponsor name |
| 6 | Process Name | Epic / Project |
| 7 | ProjectID | Unique ID |
| 8 | Initiative Type | Project Type if Demand or Execution |
| 9 | Start Date | Project Start Date |
| 10 | Finish Date | Project Finish Date |
| 11 | Creation Date | Project Creation Date |
| 12 | Benefit Tracking Period | Project Details view field |
| 13 | Benefits | Project Health Indicator for Benefits |
| 14 | Category | Project Details view field |
| 15 | Code | Project/Epic code from Details view |
| 16 | Total anticipated cost | Project Details view field |
| 17 | Currency | Project Currency |
| 18 | Effort | Total Project Anticipated Efforts |
| 19 | Is Benefit Tracking | Project Details view field |
| 20 | Originating Department | Project Details view field |
| 21 | Owner | Project Details view field |
| 22 | Requested By | Project Requested by |
| 23 | State | Project State |
| 24 | Strategic Priority | Project Details view field |
| 25 | Task Effort | Project Details view field |
| 26 | Title | Project Title |
| 27 | Initiative Manager | Project Manager from Project detail’s view |
| 28 | Initiative Sponser | Project Sponsor from Project detail’s view |
| 29 | Rating | Project rating |
| 30 | WSJF | WSJF rating on Project |
| 31 | Workflow Steps | Project Workflow Step name |
| 32 | COS Node | Company organization Structure Node where project is created |
| 33 | Year | Year of Phasing as per Cost & Capacity |
| 34 | IsBasicCostApplied | Project Details view field |
| 35 | Budget | Project Budget Cost |
| 36 | EAC | Project Forecast Cost (Estimate at completion cost) |
| 37 | Actual | Actual Project Cost |
| 38 | ETC | Project Estimate to Complete cost |
| 39 | Expenditure | Total Project expenditure |
| 40 | Currency Type | Type of currency (project, Company & Optional) for multi-currency projects |
| 41 | Baseline Work By Hours | Baseline Efforts of Resources in Hours invested in Project |
| 42 | Baseline Work By Days | Baseline Efforts of Resources in Days invested in Project |
| 43 | Baseline Work By Months | Baseline Efforts of Resources in Months invested in Project |
| 44 | Forecast Work By Hours | Forecast Efforts of Resources in Hours invested in Project |
| 45 | Forecast Work By Days | Forecast Efforts of Resources in Days invested in Project |
| 46 | Actual Work In Hours | Actual Efforts of Resources in Hours invested in Project |
| 47 | Actual Work In Days | Actual Efforts of Resources in Days invested in Project |
| 48 | Actual Work In Months | Actual Efforts of Resources in Months invested in Project |
| 49 | Orig Risk Score Average | Original Impact Score average of Project Risk |
| 50 | Curr Risk Score Average | Current Risk Score average of Project Risk |

To get view details of Portfolio Initiative Summary from SPM Reporting API, GetvwPortfolioInitiativeSummary API is called. It is a get request.

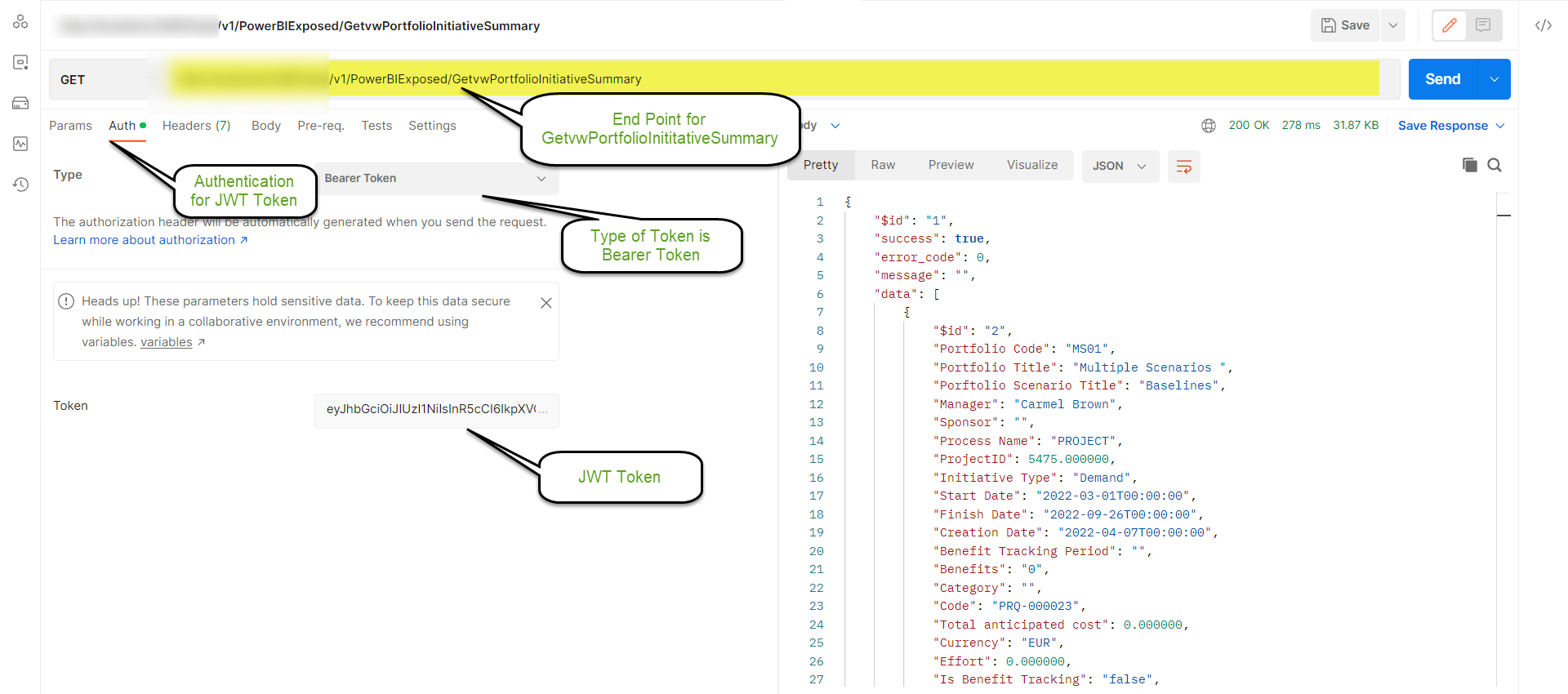
|  |  |
| --- | --- |
| **HTTP Method** | GET |
| **Endpoint** | **<**BaseUrl**>**/ **v1/PowerBIExposed/GetvwPortfolioInitiativeSummary** |
| **HTTP Headers** | none |

## Input Parameters

The method accepts a bearer token in auth type for the authentication of the user

* Token- for the authentication to get the exposed data

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Please consider the Default API Parameters Table |



## Output

In the case of successful authentication, the below JSON model is returned

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": [

{

"$id": "2",

"Portfolio Code": "MS01",

"Portfolio Title": "Multiple Scenarios ",

"Porftolio Scenario Title": "Baselines",

"Manager": "Carmel Brown",

"Sponsor": "",

"Process Name": "PROJECT",

"ProjectID": 5475.000000,

"Initiative Type": "Demand",

"Start Date": "2022-03-01T00:00:00",

"Finish Date": "2022-09-26T00:00:00",

"Creation Date": "2022-04-07T00:00:00",

"Benefit Tracking Period": "",

"Benefits": "0",

"Category": "",

"Code": "PRQ-000023",

"Total anticipated cost": 0.000000,

"Currency": "EUR",

"Effort": 0.000000,

"Is Benefit Tracking": "false",

"Originating Department": "",

"Owner": "Global Administrator",

"Requested By": "Admin",

"State": "Approved",

"Strategic Priority": "",

"Task Effort": 0.000000,

"Title": "Tech Planning",

"Initiative Manager": "",

"Initiative Sponser": "",

"Rating": "0",

"WSJF": 0.000000,

"Workflow Steps": "Ready for Review Verication",

"COS Node": "ITB - ITbank",

"Year": 2022,

"IsBasicCostApplied": "True",

"Budget": 0.000000,

"EAC": 0.000000,

"Actual": 0.000000,

"ETC": 0.000000,

"Expenditure": 0.000000,

"Currency Type": "ConsCurr",

"Baseline Work By Hours": 0.000000,

"Baseline Work By Days": 0.000000,

"Baseline Work By Months": 0.000000,

"Forecast Work By Hours": 860.000000,

"Forecast Work By Days": 107.500000,

"Actual Work In Hours": 860.000000,

"Actual Work In Days": 107.500000,

"Actual Work In Months": 4.833144,

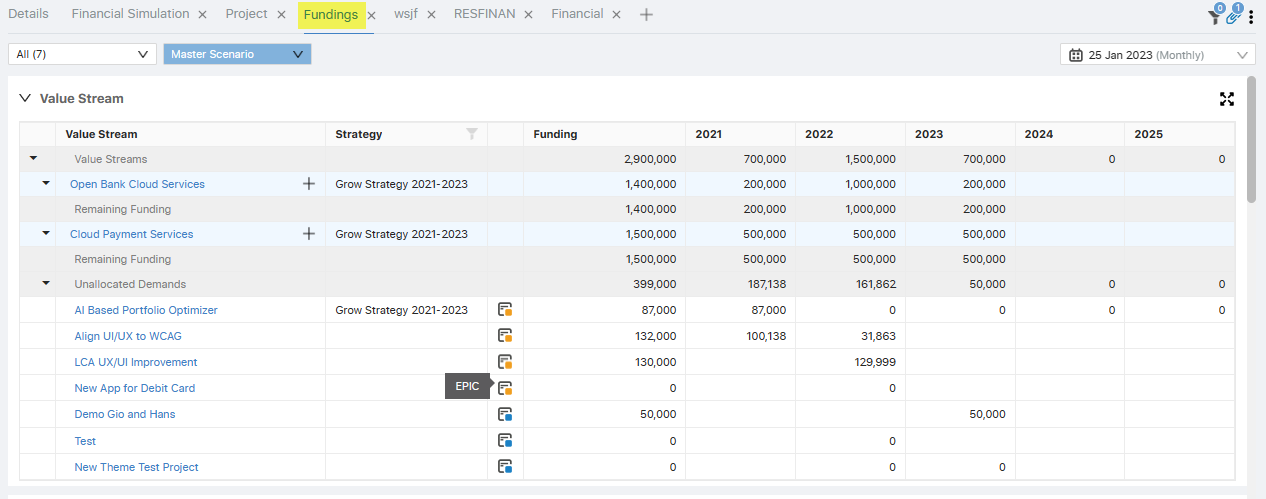
"Orig Risk Score Average": **null**,

"Curr Risk Score Average": **null**

}]}

# portfoliovaluestreamperiodsqlds

The PortfolioValueStreamPeriod reporting API is a collection of Portfolio & its associated value streams details. It contains the funding information of each portfolio in a phasing manner **Quarterly** and **Annually**.



**Img – Portfolio Value Stream view**

The API contains the below listed fields.

|  |  |  |
| --- | --- | --- |
| **S.no.** | **Field Name** | **Field Description** |
| 1 | Allocated | Allocated Budget on Portfolio |
| 2 | Assigned Fund | Assigned Fund on Portfolio |
| 3 | Modified | Modified Date |
| 4 | Portfolio Code | Portfolio Code |
| 5 | Quarter | Quarter of Year |
| 6 | System ID | System ID |
| 7 | Unique ID | Unique ID |
| 8 | Value Stream Code | Value Stream Code |
| 9 | Year | Annual Phasing |

To get Portfolio Value Stream Period details from SPM Reporting API, GetPortfolioValueStreamPeriodSQLDS API is called. It is a get request.

|  |  |
| --- | --- |
| **HTTP Method** | GET |
| **Endpoint** | **<**BaseUrl**>**/ **v1/PowerBIExposed/GetPortfolioValueStreamPeriodSQLDS** |
| **HTTP Headers** | none |

## Input Parameters

The method accepts a bearer token in auth type for the authentication of the user

* Token- for the authentication to get the exposed data

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Please consider the Default API Parameters Table |

## Output

In the case of successful authentication, the below JSON model is returned

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": [

{

"$id": "2",

"Value Stream Code": "DOC-000023",

"SystemID": 5119.000000,

"Quater": 1,

"Year": 2023,

"Allocated": 3750.000000,

"Portfolio Code": "DemoPortfo",

"UniqueID": "UK1",

"Modified": "2023-01-04T06:03:04.7",

"Assigned  Fund": 100000.000000 }]}

# vwportfolioinItiativeriskDetails

VwPortfolioInitiativeRiskDetails reporting API is summarized view of Project details and

risks identified and forecasted over the Projects as per Portfolios and then scenarios.

Graphical user interface, application

Description automatically generated

**Img – Portfolio Risk Register**

The API contains listed fields below.

|  |  |  |
| --- | --- | --- |
| **S.No.** | **Field Name** | **Field Description** |
| 1 | Portfolio Code | Portfolio Code |
| 2 | Portfolio Title | Portfolio Title |
| 3 | Porftolio Scenario Title | Porftolio Scenario Title |
| 4 | Manager | Portfolio Manager Name |
| 5 | Sponsor | Sponsor Name |
| 6 | Process Name | Process Name |
| 7 | ProjectID | ProjectID |
| 8 | Initiative Type | Project Type if Demand or Execution |
| 9 | Start Date | Project Start Date |
| 10 | Finish Date | Project Finish Date |
| 11 | Creation Date | Project Creation Date |
| 12 | Benefit Tracking Period | Project Details view field |
| 13 | Benefits | Project Health Indicator for Benefits |
| 14 | Category | Project Details view field |
| 15 | Code | Project/Epic code from Details view |
| 16 | Total anticipated cost | Project Details view field |
| 17 | Currency | Project Currency |
| 18 | Effort | Total Project Anticipated Efforts |
| 19 | Is Benefit Tracking | Project Details view field |
| 20 | Originating Department | Project Details view field |
| 21 | Owner | Project Details view field |
| 22 | Requested By | Project Requested by |
| 23 | State | Project State |
| 24 | Strategic Priority | Project Details view field |
| 25 | Task Effort | Project Details view field |
| 26 | Title | Project Title |
| 27 | Initiative Manager | Project Manager from Project detail’s view |
| 28 | Initiative Sponser | Project Sponsor from Project detail’s view |
| 29 | Rating | Project rating |
| 30 | WSJF | WSJF rating on Project |
| 31 | Workflow Steps | Project Workflow Step name |
| 32 | COS Node | Company organization Structure Node where project is created |
| 33 | Risk Date | Date associated with Risk |
| 34 | Risk Code | Code associated with Risk |
| 35 | Risk Title | Title associated with Risk |
| 36 | Risk Type | Type associated with Risk |
| 37 | Risk Status | Status associated with Risk |
| 38 | MitigationActions Assigned | Mitigation Actions Assigned |
| 39 | Risk Owner | Owner associated with Risk |
| 40 | Orig Impact Level | Original Impact Level of Project Risk |
| 41 | Orig Impact Score | Original Impact Score of Project Risk |
| 42 | Orig Likelihood Level | Original Likelihood Level of Project Risk |
| 43 | Orig Likelihood Score | Original Likelihood Score of Project Risk |
| 44 | Orig Risk Score | Original Risk Score of Project Risk |
| 45 | Orig Risk Level | Original Risk level of Project Risk |
| 46 | Curr Impact Level | Current Impact Level of Project Risk |
| 47 | Curr Impact Score | Current Impact Score of Project Risk |
| 48 | Curr Likelihood Level | Current Likelihood Level of Project Risk |
| 49 | Curr Likelihood Score | Current Likelihood Score of Project Risk |
| 50 | Curr Risk Score | Current Risk Score of Project |
| 51 | Curr Risk Level | Current Risk Level Of Project Risk |

To get view detail of Portfolio Initiative Risk Detail from SPM Reporting API, GetvwPortfolioInitiativeRiskDetails API is called. It is a get request.

|  |  |
| --- | --- |
| **HTTP Method** | GET |
| **Endpoint** | **<**BaseUrl**>**/ **v1/PowerBIExposed/GetvwPortfolioInitiativeRiskDetails** |
| **HTTP Headers** | none |

## Input Parameters

The method accepts a bearer token in auth type for the authentication of the user

* Token- for the authentication to get the exposed data

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Please consider the Default API Parameters Table |

Graphical user interface

Description automatically generated with medium confidence

## Output

In the case of successful authentication, the below JSON model is returned

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": [

{

"$id": "2",

"Portfolio Code": "PF03",

"Portfolio Title": "Product Maintenance Portfolio",

"Porftolio Scenario Title": "scenario 1",

"Manager": "Paul Santner",

"Sponsor": "Jamie Sason",

"Process Name": "PROJECT",

"ProjectID": 5291.000000,

"Initiative Type": "Execution",

"Start Date": "2021-09-30T00:00:00",

"Finish Date": "2023-03-03T00:00:00",

"Creation Date": "2021-09-30T00:00:00",

"Benefit Tracking Period": "",

"Benefits": "0",

"Category": "",

"Code": "PRQ-000001",

"Total anticipated cost": 0.000000,

"Currency": "EUR",

"Effort": 0.000000,

"Is Benefit Tracking": "false",

"Originating Department": "AI Team",

"Owner": "Not Specified",

"Requested By": "Admin",

"State": "In Progress",

"Strategic Priority": "",

"Task Effort": 0.000000,

"Title": "AI Enablement Studies",

"Initiative Manager": "",

"Initiative Sponser": "Jamie Sason",

"Rating": "100",

"WSJF": 3.000000,

"Workflow Steps": "Project Completion",

"COS Node": "BU6 - Production",

"Risk Date": **null**,

"Risk Code": **null**,

"Risk Title": **null**,

"Risk Type": **null**,

"Risk Status": **null**,

"Mitigation Actions Assigned": **null**,

"Risk Owner": **null**,

"Orig Impact Level": **null**,

"Orig Impact Score": **null**,

"Orig Likelihood Level": **null**,

"Orig Likelihood Score": **null**,

"Orig Risk Score": **null**,

"Orig Risk Level": **null**,

"Curr Impact Level": **null**,

"Curr Impact Score": **null**,

"Curr Likelihood Level": **null**,

"Curr Likelihood Score": **null**,

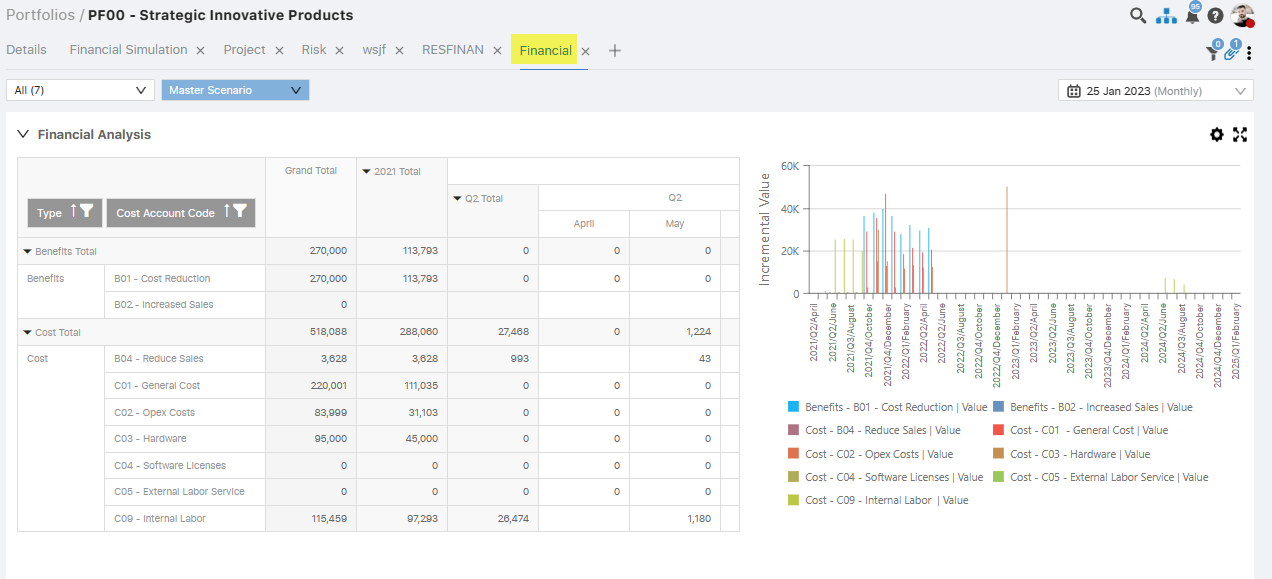
"Curr Risk Score": **null**,

"Curr Risk Level": **null**

}]}

# vwPortfolioinititativecostdetailsbyperiod

The PortfolioInitiativeCostDetailsByPeriod is a summarization of Project details and its financial information Annually as per Portfolios.



**Img – Portfolio Financial Register**

The API contains fields listed below.

|  |  |  |
| --- | --- | --- |
| **S.No.** | **Field Name** | **Field Description** |
| 1 | Activity Name | Activity Name |
| 2 | Actual | Actual Project Cost |
| 3 | Benefit Tracking Period | Project Details view field |
| 4 | Benefits | Benefits |
| 5 | Budget | Project Health Indicator for Benefits |
| 6 | Category | Project Details view field |
| 7 | Code | Project/Epic code from Details view |
| 8 | COS Node | Company organization Structure Node where project is created |
| 9 | Cost Center | Cost Center |
| 10 | Cost Type | CAPEX / OPEX |
| 11 | Creation Date | Project Creation Date |
| 12 | Currency | Project Currency |
| 13 | Currency Type | Type of currency (project, Company & Optional) for multi-currency projects |
| 14 | EAC | Project Forecast Cost (Estimate at completion cost) |
| 15 | Effort | Total Project Anticipated Efforts |
| 16 | Element Code | Element Code |
| 17 | Element Name | Element Name |
| 18 | Element Type | Type of Financial elements is Cost / Benefit |
| 19 | ETC | Project Estimate to Complete cost |
| 20 | Expenditure | Total Project expenditure |
| 21 | Finish Date | Project Finish Date |
| 22 | Initiative Manager | Project Manager from Project detail’s view |
| 23 | Initiative Sponser | Project Sponsor from Project detail’s view |
| 24 | Initiative Type | Project Type if Demand or Execution |
| 25 | Is Benefit Tracking | Project Details view field |
| 26 | IsBasicCostApplied | Project Details view field |
| 27 | Manager | Manager Name |
| 28 | Month | Month |
| 29 | Originating Department | Project Details view field |
| 30 | Owner | Project Details view field |
| 31 | Period | Period |
| 32 | Portfolio Code | Portfolio Code |
| 33 | Portfolio Title | Portfolio Title |
| 34 | Process Name | Process Name |
| 35 | ProjectID | Unique ID |
| 36 | Rating | Project rating |
| 37 | Requested By | Project Requested by |
| 38 | Sponsor | Sponsor |
| 39 | Start Date | Project Start Date |
| 40 | State | Project State |
| 41 | Strategic Priority | Project Details view field |
| 42 | Task Effort | Project Details view field |
| 43 | Title | Project Title |
| 44 | Total anticipated cost | Project Details view field |
| 45 | Workflow Steps | Project Workflow Step name |
| 46 | WSJF | WSJF rating on Project |
| 47 | Year | Year of Phasing as per Cost & Capacity |

To get view detail of Portfolio Initiative By Period from SPM Reporting API, GetvwPortfolioInitiativeCostDetailsbyPeriod API is called. It is a get request.

|  |  |
| --- | --- |
| **HTTP Method** | GET |
| **Endpoint** | **<**BaseUrl**>**/ **v1/PowerBIExposed/GetvwPortfolioInitiativeCostDetailsbyPeriod** |
| **HTTP Headers** | none |

## Input Parameters

The method accepts a bearer token in auth type for the authentication of the user

* Token- for the authentication to get the exposed data

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Please consider the Default API Parameters Table |

Graphical user interface, application

Description automatically generated

## Output

In the case of successful authentication, the below JSON model is returned

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": [

{

"$id": "2",

"Portfolio Code": "AP01",

"Portfolio Title": "Applications Portfolios",

"Manager": "",

"Sponsor": "Adam Grey",

"Currency Type": "ProjCurr",

"Element Code": "B02",

"Element Name": "Increased Sales",

"Cost Center": "t - t",

"Activity Name": "P-Strategy ahead",

"Year": 2022,

"Month": 5,

"Period": "2022-05-31T00:00:00",

"Element Type": "Benefits",

"Cost Type": "Capex",

"IsBasicCostApplied": "True",

"Budget": 0.000000,

"EAC": 0.000000,

"Actual": 0.000000,

"ETC": 0.000000,

"Expenditure": 0.000000,

"Process Name": "PROJECT",

"ProjectID": 5432.000000,

"Initiative Type": "Execution",

"Start Date": "2022-03-01T00:00:00",

"Finish Date": "2022-05-09T00:00:00",

"Creation Date": "2022-03-24T00:00:00",

"Benefit Tracking Period": "",

"Benefits": "0",

"Category": "",

"Code": "PRQ-000013",

"Total anticipated cost": 0.000000,

"Currency": "EUR",

"Effort": 0.000000,

"Is Benefit Tracking": "false",

"Originating Department": "",

"Owner": "Global Administrator",

"Requested By": "Admin",

"State": "In Progress",

"Strategic Priority": "",

"Task Effort": 0.000000,

"Title": "Strategy ahead ",

"Initiative Manager": "",

"Initiative Sponser": "",

"Rating": "0",

"WSJF": 2.770000,

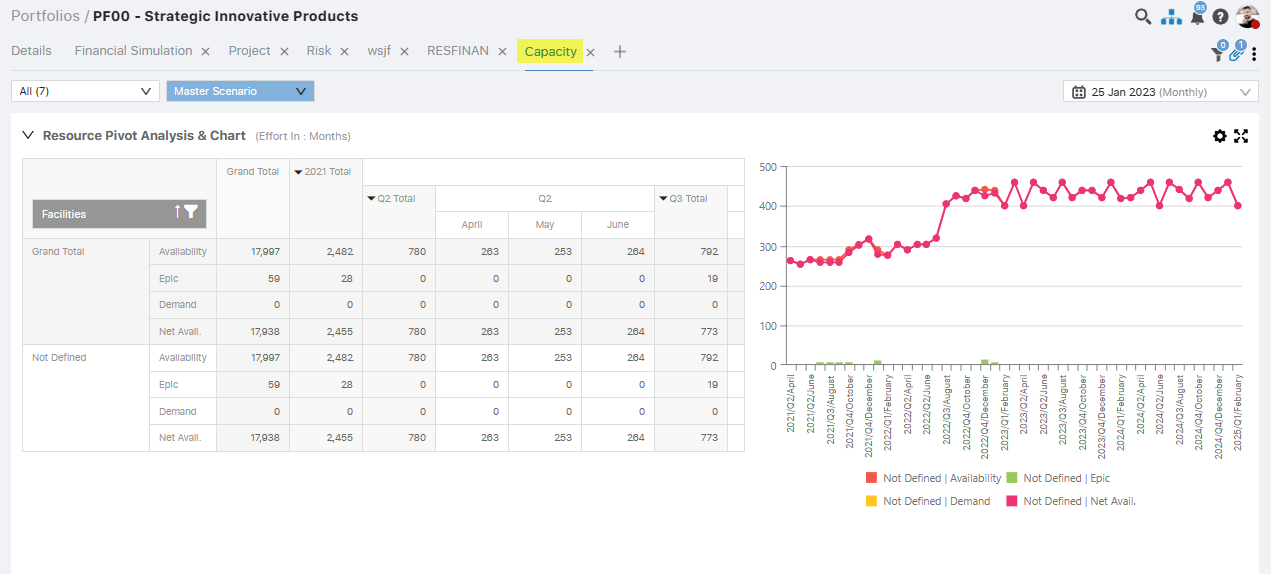
"Workflow Steps": "PPC Committee Review",

"COS Node": "ITB - ITbank"

}]}

# vwportfolioinitiativeeffortdetailsbyperiod

The PortfolioInitiativeCostDetailsByPeriod is a summarization of Project details and its Capacity information Annually as per Portfolios.



**Img – Portfolio Capacity View**

The API Contains the fields as listed below.

|  |  |  |
| --- | --- | --- |
| **S. No.** | **Field Name** | **Field Description** |
| 1 | Actual Work In Days | Actual Efforts of Resources in Days invested in Project |
| 2 | Actual Work In Hours | Actual Efforts of Resources in Hours invested in Project |
| 3 | Actual Work In Months | Actual Efforts of Resources in Months invested in Project |
| 4 | Availability % | Total Availability of Resource as per its Resource calendar |
| 5 | Baseline Work By Days | Baseline Efforts of Resources in Days invested in Project |
| 6 | Baseline Work By Hours | Baseline Efforts of Resources in Hours invested in Project |
| 7 | Baseline Work By Months | Baseline Efforts of Resources in Months invested in Project |
| 8 | Benefit Tracking Period | Project Details view field |
| 9 | Benefits | Project Health Indicator for Benefits |
| 10 | Category | Project Details view field |
| 11 | Code | Project/Epic code from Details view |
| 12 | COS Node | Company organization Structure Node where project is created |
| 13 | Creation Date | Project Creation Date |
| 14 | Currency | Project Currency |
| 15 | Department | Department |
| 16 | Effort | Total Project Anticipated Efforts |
| 17 | Finish Date | Project Finish Date |
| 18 | Forecast Work By Days | Forecast Efforts of Resources in Days invested in Project |
| 19 | Forecast Work By Hours | Forecast Efforts of Resources in Hours invested in Project |
| 20 | Forecast Work By Months | Forecast Efforts of Resources in Month invested in Project |
| 21 | Initiative Manager | Project Manager from Project detail’s view |
| 22 | Initiative Sponser | Project Sponsor from Project detail’s view |
| 23 | Initiative Type | Project Type if Demand or Execution |
| 24 | Internal / External | Internal / External |
| 25 | Is Benefit Tracking | Project Details view field |
| 26 | Manager | Manager |
| 27 | Month | Month |
| 28 | Named / Generic | Type of Resources |
| 29 | Originating Department | Originating Department |
| 30 | Owner | Project Details view field |
| 31 | Period | Period |
| 32 | Porftolio Scenario Title | Porftolio Scenario Title |
| 33 | Portfolio Code | Portfolio Code |
| 34 | Portfolio Title | Portfolio Title |
| 35 | Process Name | Epic / Project |
| 36 | ProjectID | Unique ID |
| 37 | Rating | Project rating |
| 38 | Requested By | Project Requested by |
| 39 | Resource Availability Days Per Month | Availability of Resource Days per Month in Project |
| 40 | Resource Availability Hours Per Month | Availability of Resource Hours per Month in Project |
| 41 | Resource Availability Month Per Month | Availability of Resource Days per Month in Project |
| 42 | Resource Name | Resource Name |
| 43 | Resource Type | Resource Type |
| 44 | Sponsor |  |
| 45 | Start Date | Project Start Date |
| 46 | State | Project State |
| 47 | Strategic Priority | Project Details view field |
| 48 | Task Effort | Project Details view field |
| 49 | Title | Project Title |
| 50 | Total anticipated cost | Project Details view field |
| 51 | Work Type | Type Of work (Unassigned/Normal Time/Research) |
| 52 | Workflow Steps | Project Workflow Step name |
| 53 | Working Hrs / Day | Working Hours per Day of Resource as per Resource Calendar |
| 54 | WSJF | WSJF rating on Project |
| 55 | Year | Annual Phasing |

To get view detail of Portfolio Initiative Effort by Period from SPM Reporting API, GetvwPortfolioInitiativeEffortDetailsbyPeriod API is called. It is a get request.

|  |  |
| --- | --- |
| **HTTP Method** | GET |
| **Endpoint** | **<**BaseUrl**>**/ **v1/PowerBIExposed/GetvwPortfolioInitiativeEffortDetailsbyPeriod** |
| **HTTP Headers** | none |

## Input Parameters

The method accepts a bearer token in auth type for the authentication of the user

* Token- for the authentication to get the exposed data

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Format | Mandatory | Default value |
| {token} | For the authentication to get the exposed data | String | Yes | Please consider the Default API Parameters Table |

Graphical user interface, text, application

Description automatically generated

## Output

In the case of successful authentication, the below JSON model is returned

{

"$id": "1",

"success": **true**,

"error\_code": 0,

"message": "",

"data": [

{

"$id": "2",

"Portfolio Code": "PF03",

"Portfolio Title": "Product Maintenance Portfolio",

"Porftolio Scenario Title": "scenario 1",

"Manager": "Paul Santner",

"Sponsor": "Jamie Sason",

"Process Name": "PROJECT",

"ProjectID": 5291.000000,

"Initiative Type": "Execution",

"Start Date": "2021-09-30T00:00:00",

"Finish Date": "2023-03-03T00:00:00",

"Creation Date": "2021-09-30T00:00:00",

"Benefit Tracking Period": "",

"Benefits": "0",

"Category": "",

"Code": "PRQ-000001",

"Total anticipated cost": 0.000000,

"Currency": "EUR",

"Effort": 0.000000,

"Is Benefit Tracking": "false",

"Originating Department": "AI Team",

"Owner": "Not Specified",

"Requested By": "Admin",

"State": "In Progress",

"Strategic Priority": "",

"Task Effort": 0.000000,

"Title": "AI Enablement Studies",

"Initiative Manager": "",

"Initiative Sponser": "Jamie Sason",

"Rating": "100",

"WSJF": 3.000000,

"Workflow Steps": "Project Completion",

"COS Node": "BU6 - Production",

"Resource Name": "Scrum Master",

"Named / Generic": "Generic",

"Internal / External": "Internal",

"Resource Type": "",

"Year": 2022,

"Month": 10,

"Resource Availability Hours Per Month": 168.000000,

"Resource Availability Days Per Month": 21.000000,

"Resource Availability Month Per Month": 1.000000,

"Work Type": "Unassigned",

"Baseline Work By Hours": 0.000000,

"Baseline Work By Days": 0.000000,

"Baseline Work By Months": 0.000000,

"Forecast Work By Hours": 0.000000,

"Forecast Work By Days": 0.000000,

"Forecast Work By Months": 0.000000,

"Actual Work In Hours": 0.000000,

"Actual Work In Days": 0.000000,

"Actual Work In Months": 0.000000,

"Department": "R&D Team",

"Working Hrs / Day": 8,

"Availability %": 100,

"Period": "01/10/2022 "

}]}