

Utilizing APIs to improve the user experience in Unit4 ERP



Learn how to benefit from Unit4 APIs and how to get started



Your speaker today

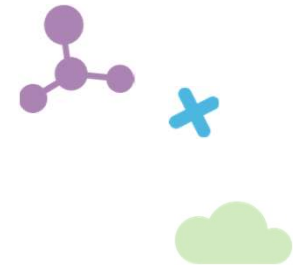


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Unit4



Welcome

Join this **30 min webinar** to learn how to benefit from Unit4 APIs and how to get started.

High level topics for today:

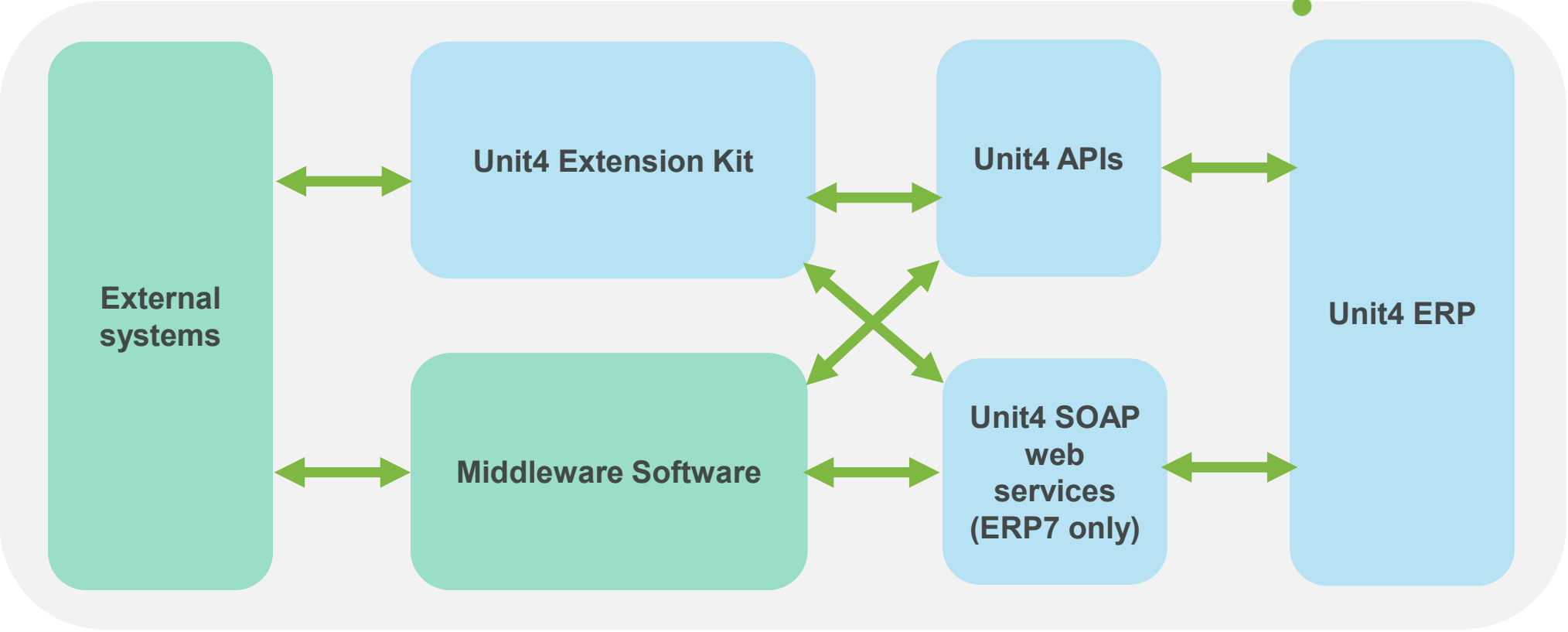
- What is an API, what does it do, and how do we use them?
 - How to grant access to our APIs and how are they secured?
 - What is Swagger, how can you use it, and what benefits it provides?
 - What an API schema looks like and what kind of data can be consumed by APIs?
 - What is the Unit4 Health Check, and how can it help me?
-

What are APIs?

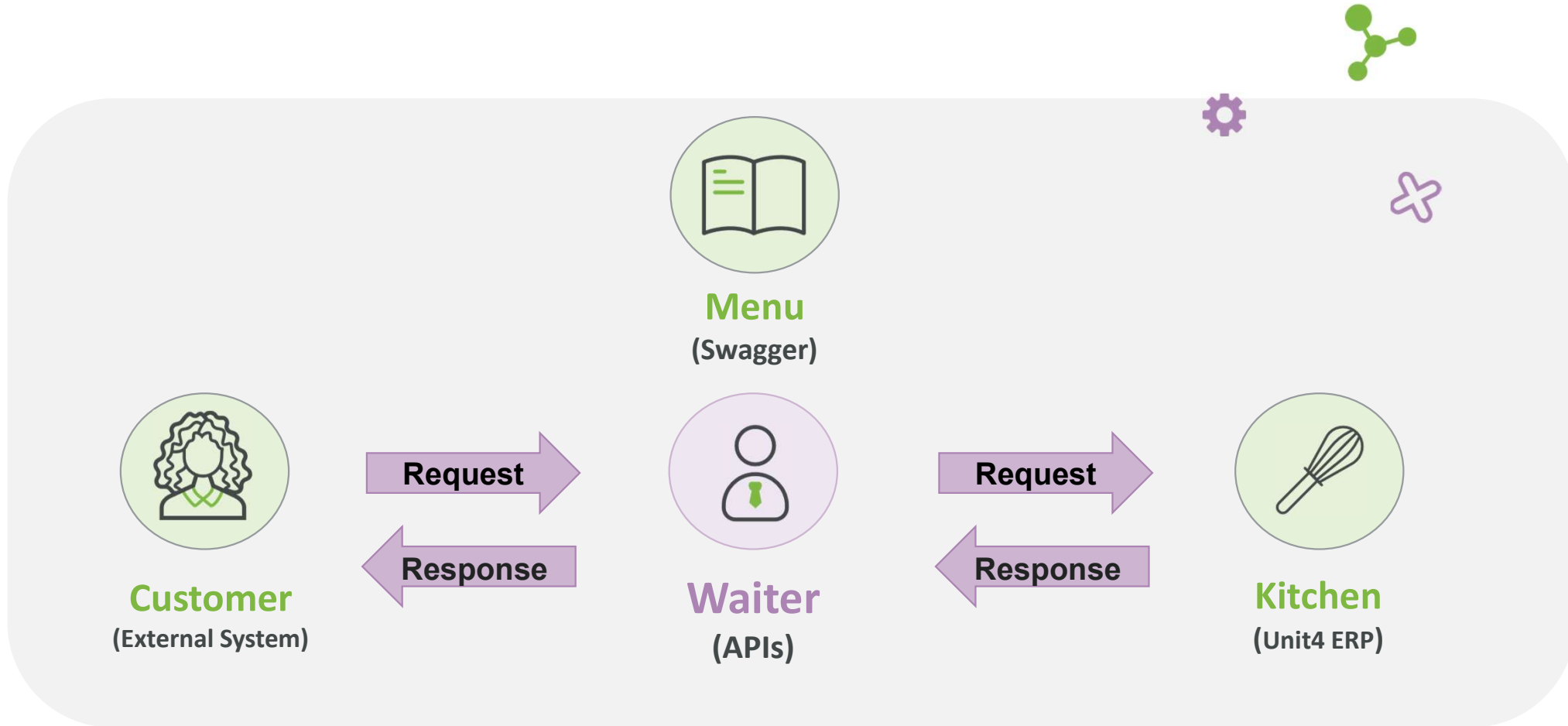
An **application programming interface** is a way for two or more computer programs to communicate with each other



Integration overview



The Restaurant Analogy



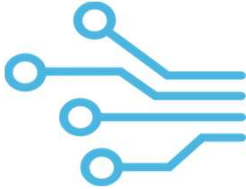
What are the benefits of APIs?



- **Language used is JSON:** Lightweight, easy to use and understand.
- **Increased integration requirements:** Including real time/on demand integrations.
- **Standardised solutions:** Due to their simplicity and ease of use, APIs are key in allowing us to develop standard integrations
- **Lightweight:** Compared to SOAP web services, APIs are much simpler and as a result performance is improved.
- **Simple to create:** As a low code solution, apps are much easier and quicker to develop than legacy customizations.
- **Open Architecture:** APIs are the first step towards an open architecture, which is intended to make adding, upgrading and swapping components easier

Swagger

Directory listing of all our APIs, represented within a browser.



The screenshot shows the Swagger UI for Unit4 WebAPI. The browser address bar displays 'https://indmodsan'. The page title is 'Unit4 WebAPI documentation'. Below the title, there is a list of API endpoints, each with a 'Show/Hide', 'List Operations', and 'Expand Operations' link.

API Endpoint	Show/Hide	List Operations	Expand Operations
Absences	Show/Hide	List Operations	Expand Operations
Adapter configurations	Show/Hide	List Operations	Expand Operations
Attribute Relations	Show/Hide	List Operations	Expand Operations
Attribute Values	Show/Hide	List Operations	Expand Operations
Attributes	Show/Hide	List Operations	Expand Operations
Batch Documents	Show/Hide	List Operations	Expand Operations
Cases	Show/Hide	List Operations	Expand Operations
Companies	Show/Hide	List Operations	Expand Operations
Currency Codes	Show/Hide	List Operations	Expand Operations
Custom fields	Show/Hide	List Operations	Expand Operations
Customers	Show/Hide	List Operations	Expand Operations
Discovery	Show/Hide	List Operations	Expand Operations
Education units	Show/Hide	List Operations	Expand Operations
Electronic Documents	Show/Hide	List Operations	Expand Operations
Employee balance setups	Show/Hide	List Operations	Expand Operations
Employee balances	Show/Hide	List Operations	Expand Operations





API Demo



Enabling Swagger



On-premise customers

- Enable in Management Console
- Go to > **Features/Web Applications/Default Website/Business World/web-api**
- Select the following check boxes
 - **Enable Swagger**
 - **Enable Swagger UI**
- For your Swagger URL go to > **Features/Web Applications/Default Web Site/BusinessWorld/Web-API/Protocol**

Unit4 Cloud Customers

- Raise a request to the Cloud Team via **Community4U**



Granting access to APIs



To provide access to selected API

- Open **Public Access** (menu item **XAG005**) in web client.
 - In the **Menu Items** section, navigate to desired endpoint.
 - In **roles and Users** section, select appropriate user/role and move to **Access** section.
 - Make sure that the **(R)** Read, and **(U)** Update permissions are set (Update permission allows Add, Patch, Put and Delete operations).
 - Click **Save**



To provide access to Objects/Query API

- Open **Object Access** (menu item **XAG002**) in web client.
 - Go to the appropriate item in Menu Items and select relevant object.
 - In **Roles and Users section**, select appropriate user/role and move to **Access** section.
 - Click **Save**

Retrieving Data from ERP



The **Information Browser API** allows you to extract data from your ERP instance that has been tailored to meet your specific business needs.

1

Firstly, you will need to create an **Information Browser Report** within the ERP application. This will be assigned a template ID.

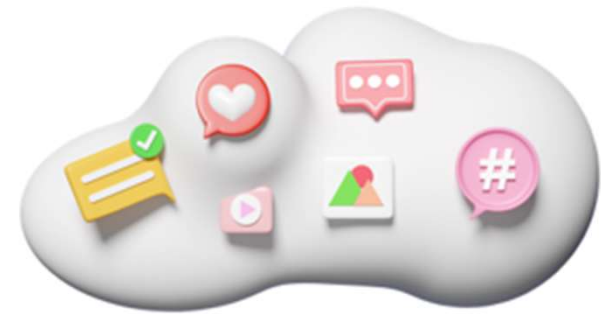


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The data produced by this report is then accessible via the Information Browser report using the template ID.

SOAP web services

The full extensive range of APIs that cover all areas of the platform are only available for our **ERPx customers**.

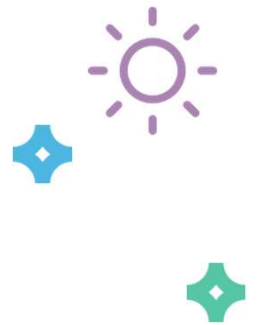


In **ERP7** we have a wide range of APIs available to meet many common integration requirements.

ERP7 customers can also use one of our **SOAP web services** to support their requirements if a suitable API is not available.

Integration ideas

- **Supplier/vendor creation:**
Synchronize external systems with our ERP to streamline the payments process.
- **GL transactions:**
Automatically import batches of GL transactions (API only available in ERPx).
- **Data exports:** Extract any data set from the ERP
- **Employee/user creation:**
Create and update employee records and user profiles
- **Customer creation:** Synchronize external systems with our ERP to streamline the collections process.



Integration Health Check

Are you looking to harness the potential of our APIs but unsure where to start?

- We offer comprehensive integration health check workshops
- Our expert team will thoroughly review your current integrations, identifying any areas for improvement.
- We can provide advice on how our APIs and Extension Kit can be leveraged effectively to improve your business processes
- Detailed report summarizing our findings and recommendations.



Q&A



Want to learn more?

Join also our upcoming webinars:

Nov. 29: [What is possible with Unit4 Industry Mesh?](#)

Dec. 6: [Purpose-built Extensions - How to deliver new capabilities and value](#)

Sign up for your Health check today!

Learn more on [this page](#) and [this factsheet](#)

You will receive the links in an email after this webinar together with the recording.



Thank you
for your time and for
listening.

Reach out to your Account
Manager for next steps.

