Planforge

USING AND MANAGING OAUTH-TOKENS TO ACCESS

THE API OF PLANFORGE

Planforge

Part 1: Creating OAuth-tokens for your user

1. Log into Planforge, click on your username in the top right corner and open the "Preferences"-dialog
2. Switch to the tab „Tokens" in this dialog
3. Create a new token with the corresponding button
4. In the "New Token"-dialog, select „API" as the External App and enter a name for the token. Click OK once you are done
5. Back in the "Preferences"-dialog, you should now see an entry for "API" with the name and token next to it
6. Click OK to confirm the "Preferences"-dialog and save the token

Part 2: Managing tokens of other users

1. Log into Planforge with a "System"-user and click the tool-icon in the top right corner to access the system settings
2. Go to "ADMINISTRATE/Users"
3. Select a user from the list and click "Properties"
4. In the "Edit User"-dialog, switch to the "Tokens"-tab
5. Here, you will see a list of tokens the user created. These tokens are anonymized for security reasons, but can be deleted by clicking the "X"-button next to the tokens. For users with the access levels "System" and "External", you can also create new tokens in this dialog

Part 3: Using the OAuth-token to access the API

1. First, access the Swagger-UI of PLAN, which lists all available API calls, at for example: https://YOURSERVER/planforge/api
2. Select the business object and the call you would like to run
3. Fill the parameter fields if available and click "Try it out"
4. Copy the CURL-command that has been generated, for example:

```
curl -X GET --header 'Accept: application/json'
'https://YOURSERVER/planforge/api/json/v2/users/currentUser'
```

5. Adjust the command to use the OAuth-token by adding "-H "Authorization: Bearer [YOURTOKEN]"", so that your call looks like this:

```
curl -X GET --header 'Accept: application/json'
'https://YOURSERVER/planforge/api/json/v2/users/currentUser' -H
"Authorization: Bearer Slzpb.... "
```

6. Try running the command in a terminal or command line and verify the results
7. Note for Windows-users: Some additional changes are required, if you are using CURL with CMD. In the call, all single quotation marks (') need to be replaced by double quotation marks (") and additional double quotation marks need to be added to existing ones (i.e. " -> "")