

Mandatewire API Overview

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Overview

The Mandatewire API is a GraphQL Endpoint that exposes queries to pull in data from three different entity levels: Institutions, Consultants, and Mandates. Below is a GraphQL playground view of the API

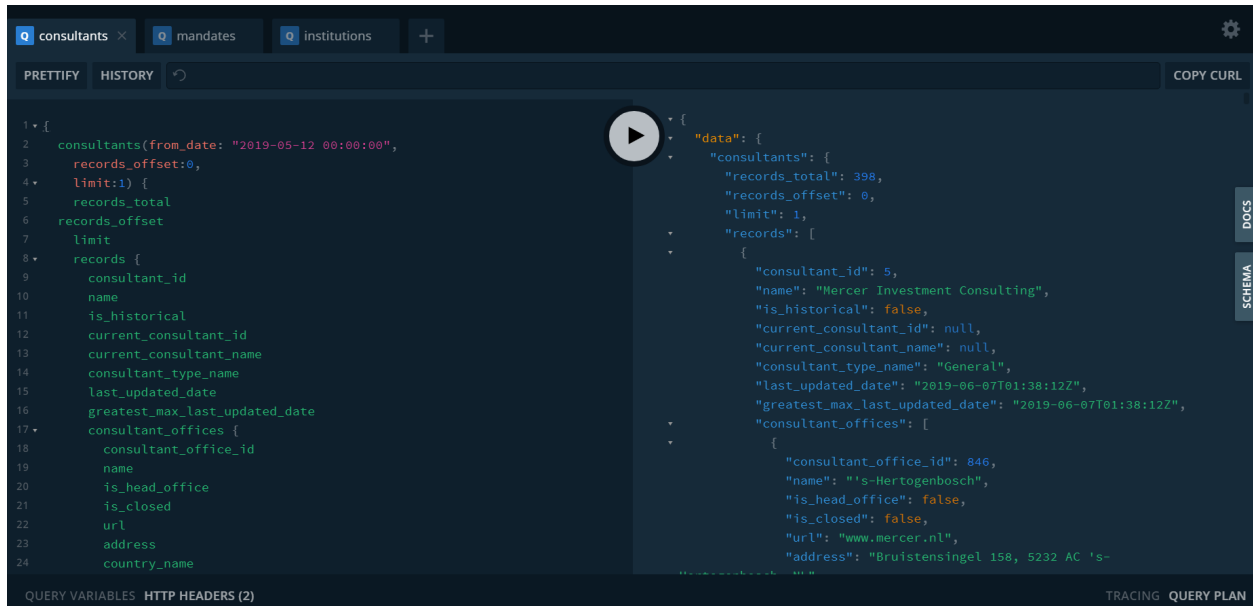


Figure 1 Playground View

Query Instructions

We have three entity query types: Institutions, Consultants, and Mandate (reports).

To query our graphql api, you will first need to add the user and API key which should have been included in the email. Click on the HTTP HEADERS tab at the bottom left (See Figure 1 above) and enter the relevant credentials:

```
{
  "user": "someuser@somedomain.com ",
  "apikey": "licensekey"
}
```

Next, step is to enter the relevant query and parameters. In the query tab, you can try various graphql queries and parameters. Note in graphql you have to specify all the entities and fields that you want returned (Full sample queries for each level of data is attached). To test a small set fields, paste this into a query tab and then press the play icon:

```
{
  institutions (from_date: "2019-05-12 00:00:00",
records_offset:0,
limit:2) {
    records_total
    records_offset
    limit

    records {
      institution_id
      name
      url
      last_updated_date
      greatest_max_last_updated_date
    }
  }
}
```

The **bolded** institutions represents the top level entity. We have three in this api: institutions, consultants, and mandates. Due to the size, right now we limit the number of records returned per query to **100** records. To retrieve additional records, the client will need to page through the rest of the data (details about this later).

The *italicized* section is where you would put the parameters. All of them have the following:

- `records_offset`: the record number to start from. Note: 0 is the first record

- limit:int this limits the number of records that are to be returned e.g two records in the above example. If records_offset is specified will get the number of records starting from the offset. Currently set to a max of 100
- from_date: string which would specify the date/time that all updated times would be greater than. The filter date field would be in the response object as the greatest_max_last_updated_date
 - o All Date/Times default to GMT time
 - o To calculate this, we take the max update date from each level of data associated with the top level and then set it with the greatest of those dates (a max of the maxes). E.g. if there are a set of investor funds and contacts, the API gets the max updated changes for all the funds and the max updated date for all the contacts. After we get these two maxes, we get the greatest of these and that would be the greatest_max_last_updated_date. In the actual endpoint we go through all the different levels like managers, manager assets etc. When getting updates, you would set the date filter parameter with the last date/time you queried the endpoint to get all changes since that query
- An entity specific array of comma separated ids e.g:
 - o institution_ids:[id1,id2,....]
 - o consultant_ids: [id1,id2,....]
 - o mandate_ids:[id1,id2,....]

You should see a response that looks something like this on the right panel:

```
{
  "data": {
    "institutions": {
      "records_total": 5076,
      "records_offset": 0,
      "limit": 2,
      "records": [
        {
          "institution_id": 2,
          "name": "Basellandschaftliche Pensionkasse (BLPK)",
          "url": "www.blpk.ch",
          "last_updated_date": "2019-05-27T03:16:20Z",
          "greatest_max_last_updated_date": "2019-06-06T21:31:58Z"
        },
        {
          "institution_id": 4,
          "name": "Norwegian Government Pension Fund Global",
          "url": "www.norges-bank.no",
          "last_updated_date": "2019-05-29T20:55:32Z",
          "greatest_max_last_updated_date": "2019-06-07T00:01:56Z"
        }
      ]
    }
  }
}
```

```
}
```

To retrieve updates for specific institutions by specifying ids, you can do:

```
{  
  institutions (from_date: "2019-05-12 00:00:00",  
    institution_ids:[2,5]) {  
    records_total  
    records_offset  
    limit  
  
    records {  
      institution_id  
      name  
      url  
      last_updated_date  
      greatest_max_last_updated_date  
    }  
  }  
}
```

Remove the `from_date` if you want to always retrieve the records

The other query types work in a similar way.

Schema

Schema View

On the right of the playground page, there is a DOCS button. You can click on it to get the parameters for each query type, the objects returned by each query type with their field and field type information. Types enclosed in [] indicate an array of that type e.g. mandate_ids:[int]:

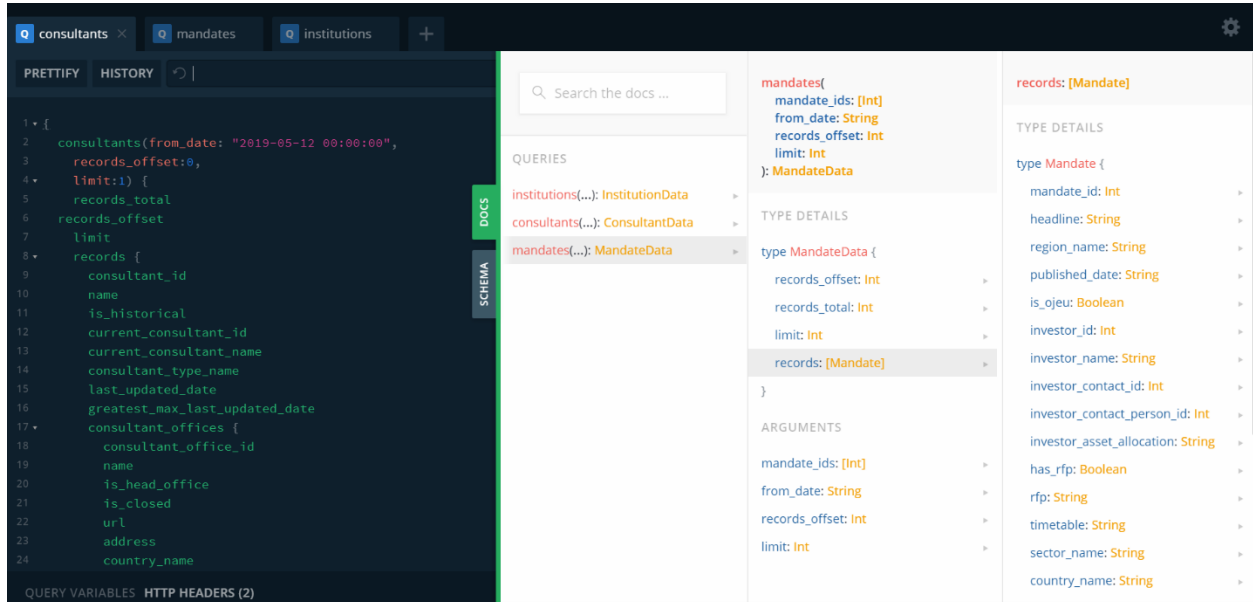


Figure 2 Schema

Sample Clients

We currently have sample Powershell and Python clients. We can create other sample clients depending on how customers plan to integrate with the API

Full Schema Query Samples

Institutions

```
{
  institutions(
    from_date: "2019-05-12 00:00:00",
    limit: 2) {
    records_total
    records_offset
    limit
    records {
```

institution_id
name
url
address
country_name
state_name
city_name
tel
fax
last_updated_date
greatest_max_last_updated_date
investor_funds {
 investor_id
 name
 is_historical
 current_investor_id
 current_investor_name
 investor_type_name
 region_name
 url
 address
 country_name
 state_name
 city_name
 tel
 fax
 scheme_name
 sector_name
 plan_sponsor_id
 currency_code
 fund_size
 asset_allocation_text
 asset_classes {
 investor_asset_id
 asset_id
 name
 asset_type_name
 last_updated_date
 }
 asset_class_allocation {
 asset_class_allocation_id
 asset_type_name
 percentage
 last_updated_date
 }
 investor_contacts {
 investor_contact_id
 person_id

```
is_opted_out
opted_out_date
first_name
last_name
job_title
email
tel
fax
linkedin
is_primary
last_updated_date
}
managers {
  manager_id
  name
  is_historical
  current_manager_id
  current_manager_name
  last_updated_date
  asset_classes {
    investor_manager_asset_id
    asset_id
    name
    asset_type_name
    last_updated_date
    activities {
      mandate_activity_id
      mandate_id
      mandate_content_id
      last_updated_date
      specifications {
        mandate_activity_asset_specification_id
        name
        specification_id
        specification_type_name
        last_updated_date
      }
    }
  }
}
}
consultants {
  consultant_id
  name
  is_historical
  current_consultant_id
  current_consultant_name
  consultant_type_name
  last_updated_date
}
```

```
consultant_offices {
  consultant_office_id
  name
  is_head_office
  is_closed
  url
  address
  country_name
  state_name
  city_name
  tel
  fax
  email
  last_updated_date
  consultant_contacts {
    consultant_contact_id
    person_id
    is_opted_out
    opted_out_date
    first_name
    last_name
    job_title
    email
    tel
    fax
    linkedin
    last_updated_date
    asset_classes {
      investor_consultant_office_contact_asset_id
      asset_id
      asset_type_name
      name
      last_updated_date
    }
  }
}
}
```


Consultants

```
{
  consultants(from_date: "2019-05-12 00:00:00") {
    records_total
    record_offset
    limit
    records {
      consultant_id
      name
      is_historical
      current_consultant_id
      current_consultant_name
      consultant_type_name
      last_updated_date
      greatest_max_last_updated_date
      consultant_offices {
        consultant_office_id
        name
        is_head_office
        is_closed
        url
        address
        country_name
        state_name
        city_name
        tel
        fax
        email
        last_updated_date
      }
      consultant_contacts {
        consultant_contact_id
        person_id
        is_opted_out
        opted_out_date
        first_name
        last_name
        job_title
        email
        tel
        fax
        linkedin
        last_updated_date
      }
    }
  }
}
```

Mandates

```
{
  mandates(
    from_date: "2019-05-01 00:00:00",
    limit: 2) {
  records_total
  records_offset
  limit
  records {
    mandate_id
    content_id
    headline
    region_name
    published_date
    mandate_url
    is_ojeu
    investor_id
    investor_name
    institution_id
    institution_name
    investor_contact_id
    investor_contact_person_id
    investor_asset_allocation
    has_rfp
    rfp
    timetable
    sector_name
    country_name
    state_name
    city_name
    last_updated_date
    greatest_max_last_updated_date
    activities {
      mandate_activity_id
      activity_type_id
      activity_type_name
      manager_name
      quarter
      currency_code
      size
      closing_date_text
      consultant_id
      consultant_name
      consultant_type_name
      consultant_office_id
      consultant_office_name
      consultant_address
    }
  }
}
```

```
consultant_tel
consultant_fax
consultant_contacts {
  consultant_contact_id
  person_id
  is_opted_out
  opted_out_date
  first_name
  last_name
  job_title
  email
  tel
  fax
  linkedin
  last_updated_date
}
activity_assets {
  mandate_activity_asset_id
  asset_id
  name
  size
  currency_code
  specifications {
    mandate_activity_asset_specification_id
    name
    specification_id
    specification_type_name
    last_updated_date
  }
}
}
}
}
```