

# API Information and Installation Process

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## Purpose

The purpose of this document is to help explain what the API is, what applications require it to connect to SedonaOffice, and how to schedule installation.

## What is an API

The API is the middleman that allows SedonaOffice add-on modules to push or pull data to/from SedonaOffice databases. A user is set up in the API and is linked to a specific company/database. Based on the user login, the add-on module then knows which SedonaOffice database to interact with.

The following products are examples of those that use the API to integrate with SedonaOffice:

- Time and Attendance
- Sales Automation
- eForms
- Sedona-X Mobile
- SedonaWeb

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## API Types

There have been many variations of the API sold under many names:

- API 1.0 - Legacy API that works with SedonaOffice On-Prem or Hosted Customers
  - Also known as SedonaWeb 1.0

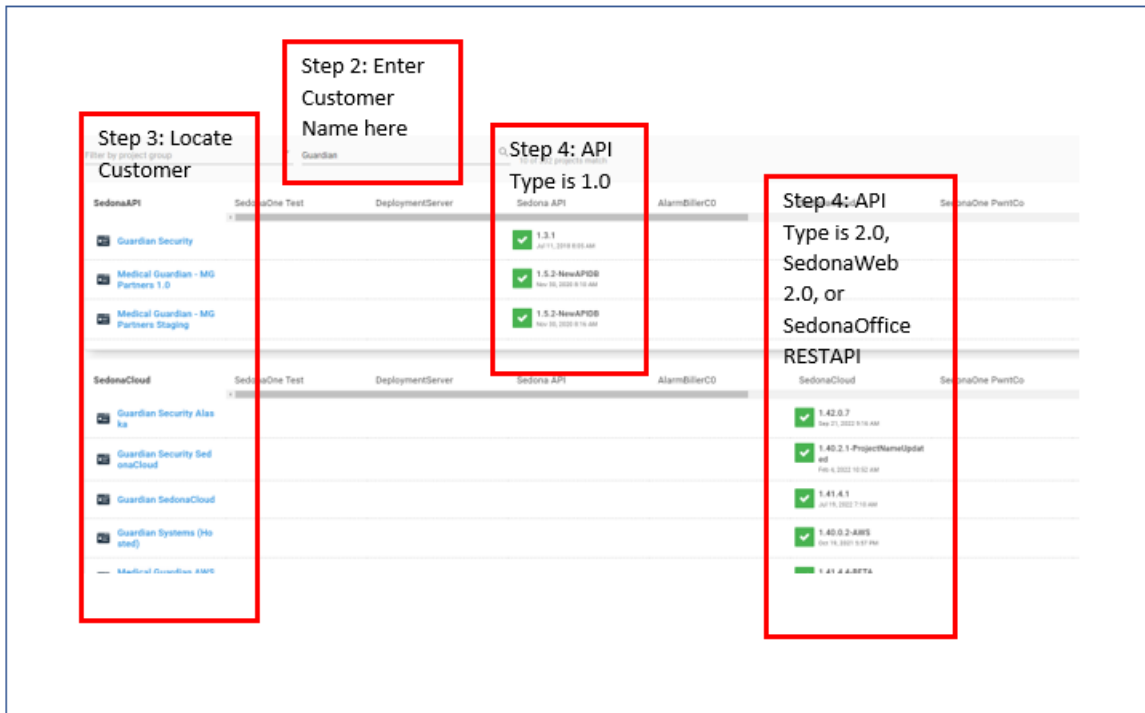
- In Octopus - shown as SedonaAPI
- Is no longer sold
- API 2.0 Limited Version - allows connection between SedonaOffice and add-on modules only
  - Also sold as SedonaWeb 2.0 if the customer is deploying a customer portal
- API 2.0 Full - has the same functionality as the Limited version, however, also allows customers to build 3rd party integrations to push/pull data
  - Also sold as SedonaWeb 2.0 if the customer is deploying a customer portal
  - Also sold as SedonaOffice REST API
  - in Octopus - shown as SedonaCloud

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## Viewing the Customer's API

To confirm which version the customer may have if any, follow the steps below

1. Open Octopus
2. Enter the Customer Name in the 'Filter by Project Name' field
3. Look for records for the customer
  - a. Note that common customer names may require further research to confirm the correct customer API
4. Determine API Type



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## Locating the API URL

To find the API URL, from the screen shown above:

1. Click the Customer's name
2. Click 'Variables'
3. Scroll to the bottom of the screen and locate 'Urls: URL'
4. Copy the URL

**Step 2: Click Variables**

- Triggers
- Operations
- Variables
- Project
- Library Sets
- All
- Preview
- Tasks
- Settings
- Guardian Security&Technologies SedonaCloud

### Project Variables ⊙

Name	Value
Enter new variable	Enter value
Config.SignalAppName	SedonaCloud
Config.UseSignalRedis	true
Config.UseSubdomains	false
ConnectionStrings:DistributedCache	Server=SQLWSMNT1\GUARDECTECHSQL.Database-SedonaCloud;Trusted_Connection=False;
ConnectionStrings:SedonaCloudContext	Server=SQLWSMNT1\GUARDECTECHSQL.Database-SedonaCloud;Trusted_Connection=False;
ConnectionStrings:SedonaDocumentContext	Server=SQLWSMNT1\GUARDECTECHSQL.Database-SedonaDocuments;Trusted_Connection=I
ConnectionStrings:SedonaMasterContext	Server=GUARDECTECHTSP.Database-SedonaMaster;Trusted_Connection=False;Integrated se
ConnectionStrings:SedonaOfficeContext	Server=SQLWSMNT1\GUARDECTECHSQL.Database-gsslive;Trusted_Connection=False;Integri
ConnectionStrings:TempData	Server=SQLWSMNT1\GUARDECTECHSQL.Database-SedonaCloud;Trusted_Connection=False;
License	<License> <Id>bc8e8d20-29f7-4763-9763-52f099b33cab</Id> <Type>Standard</Type> <Expin
LicensePublicKey	MiIBKjCB4wYHkoZlZjOCATCB1wIBATAsBgcqhKJOPQEBAIEA/////wAAAAEAAAAAAAAAAAAAAAAAD/
Urls.IdentityServerUrl	https://GuardianSecurity.SedonaASP.com
Urls.Url	https://GuardianSecurity.SedonaASP.com

**Step 4: Copy URL**

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## API Internal Login Information

To access a customer's API to view the setup of companies and users, the following login information can be used:

Username: automatedjob

Password: Perennial\$0ftware

**IMPORTANT NOTE:** Do NOT give this login information to any customer! It is internal only. Please be careful logging in, incorrect attempts may require a reset and notification to all internal users of any updated information.

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## API Limited vs API Full

In regards to the installation of the API Limited vs Full versions, there is no difference between the API or installation. For the Full version, the customer is just given additional information post-installation:

- ClientID
- ClientSecret
- [Swagger Documentation](#)

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# New Installation

For customers without an API, your project should include a task to install the API:

1. Confirm customer's SedonaOffice version is compatible with the latest release of API
2. Confirm if the customer's API will be installed On-Prem or Cloud
3. Kick-off - send customer Kick off Email
  - a. Use Template "API Install"
    - i. Preinstall checklists will be attached
      - i. On Prem: Preinstall Checklist - SEdonaWeb (Limited API) On-Prem
      - ii. Cloud: Preinstall Checklist - SEdonaWeb (Limited API) - Cloud
      - iii. Backup copies are available in [Implementation and Installation Forms](#)
4. Confirm preinstall information is received (from Kick off email)
5. From the project task, update the Description field to include "Install API Type" (where the type matches what was sold on the contract) installation
6. Estimated Time field:
  - a. Hosted Customer - 2 hours
    - i. Can be combined with other module installations time permitting
  - b. On-Prem Customer - 8 hours
7. In task Chatter, include information on the type of API to install
  - a. Limited
  - b. Full
    - i. Include a note to provide
      - i. ClientID
      - ii. ClientSecret

8. Installation Completed - Tech will provide API Information
  - a. URL and username/login information
  - b. Full version ClientID and Client Secret (if applicable)
9. Schedule API training - 1 hr (or more if additional sold)
  - a. Can be done in conjunction with other module training time permitting
10. Send information to the customer using a secure email

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## Upgrade Installation

To schedule an API upgrade, follow the steps below:

1. From the project task, update the Description field to include 'Upgrade API'
2. Estimated Time field:
  - a. Hosted Customer - 2 hours
    - i. Can be combined with other module installations time permitting
  - b. On-Prem Customer - 8 hours
3. In task Chatter, include information on the type of API to install
  - a. Limited
  - b. Full
    - i. Include a note to provide
      - i. ClientID
      - ii. ClientSecret
4. Installation Completed - Tech will provide API Information
  - a. URL and username/login information

b. Full version ClientID and Client Secret (if applicable)

5. Send information to the customer using a secure email

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