Uptempo

BI Export API

Documentation

Version 11

EN
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Content

1 Overview

The BI Export API allows customers to gain programmatic access to a set of raw data files that represent their budgeting and plan data. This data includes all columns and rows from all budget/activity plans as well as the mapped purchase orders, invoices, and external campaigns. This document serves as the technical documentation for this API.

The BI Export API consists of two API calls: one to retrieve an individual dataset in the form of a CSV file and one to retrieve all datasets in the form of ZIP of CSV files. The following sections describe these two operations in detail.

Changes To Last Version

This version adds details about the new *lineitem_allocation* dataset.

2 Get Individual Dataset

This operation retrieves a single dataset as a CSV file.

URL: *https://[instance]/allocadia/rest/v1/budgets/[id]/biexports/[dataset].csv*

Part of the URL	Description
[instance]	Server name, normally secure.allocadia.com but could be an alternate name if you're working off of a test instance for example.
[id]	Unique ID of the budget/activity plan or folder that you wish to export. Contact Allocadia for assistance in determining the ID of the budget/activity plan or folder.
[dataset]	One of the following types of datasets. More information can be found in the following section on understanding the contents of the datasets. • folder_budget (Folder Budget) • folder_budgetmeasures (Folder Budget Measures) • category (Category) • lineitem (Line Item) • itemmeasures (Item Measures) • po_actual (PO and Actuals) • fydate (Fiscal Year Date) • currency (Currency) • targettransfers (Target Transfers) • activity (Activities) (new for V11) • activitymeasures (Activity Measures) (new for V11) • activity_hieraracht (Activity Hierarchy) (new for V11) • activity_budget (new for V11) • lineitem_allocation (new for V11 – April 2025)

- HTTP Method: GET
- Response Content Type: text/csv

3 Get All Datasets

This operation retrieves all available datasets as a ZIP file with CSVs embedded.

- URL: https://*[instance]*/allocadia/rest/v1/budgets/*[id]*/biexports/*all.zip*

Part of the URL	Description
[instance]	Server name, normally secure.allocadia.com but could be an alternate name if you're working off of a test instance for example.
[id]	Unique ID of the budget/activity plan or folder that you wish to export. Contact Allocadia for assistance in determining the ID of the budget/activity plan or folder.

- HTTP Method: GET
- Response Content Type: application/zip

4 Authentication and Authorization

The following applies to both API operations:

- Both APIs require Basic Authentication, i.e. an "Authorization: Basic *XXXXX*" HTTP header to be sent with the request.
- Each API is stateless, i.e. the Authorization header must be sent with each request.
- The user account that's being authenticated with must have API access enabled. Contact Allocadia to have this enabled.
- The user must have at least VIEWER access to the budget/activity plan/folder specified by the ID in the URL and also *all* child budgets/activity plans and folders.

5 Dataset Schema

The following describes the schema of the dataset files.

> Note
>
> Some datasets contain dates. In each case, two dates are specified: a *CY Date* (calendar year date) and an *FY Date* (fiscal year date). If a fiscal year offset is specified in the target environment, the separate *FY Date* value will reflect the offset. If there is no offset (fiscal year starts in January), then the two date values will be the same.
>
> While the *campaign* and *campaignmeasures* datasets are included in the *all.zip*, these are legacy datasets that are no longer applicable.

5.1 folder_budget (Folder Budget)

Represents the folder and budget hierarchy and includes fields from the *Rollup* and *Grand Total* panels that are configured for analytics.

Data	Description
Folder_Budget ID	Internal representation that provides a unique ID for a folder or budget
Folder ID	The ID for the folder itself for folders and the ID of the parent folder for budgets/activity plans.
Folder Tier 0 – Folder Tier 10	The names of the parent folders from the top level to the level of the folder or budget/activity plan. Value will be blank when not applicable.
Budget ID	The ID for the budget/activity plan or “T” for folders
Budget Name	The display name for a budget/activity plan or blank for folders
Target Type	Indicates the type of Investment Target for the folder or budget/activity plan, if applicable

Additional fields depend on analytics configuration and may include attributes from the Rollup or Grand Total panels.

5.2 folder_budgetmeasures (Folder Budget Measures)

Provides the metric values from the Rollup and Grand Total panels that are configured for analytics.

Data	Description
Folder_Budget ID	Internal ID that matches the Folder_Budget ID from the folder_budget dataset
Folder and Budget Measure Value	The metric value as entered in the panel for the corresponding measure type and date.
Folder and Budget Measure Type	The internal representation of the type of measurement field.
CY Date (Folder and Budget Measure)	The start date of the period the measure is for, based on calendar year (format: yyyy-mm-dd).
FY Date (Folder and Budget Measure)	The start date of the period the measure is for, based on fiscal year (format: yyyy-mm-dd).
Group and Budget Type	“Folder” if the measure is for a folder or “Budget” if for a budget/activity plan.

5.3 category (Category)

Represents the hierarchy of categories and sub-categories within budgets/activity plans.

Data	Description
Category ID	The internal unique ID of the category or sub-category
Folder_Budget ID	The internal ID of the budget/activity plan that the category belongs to. Matches the Folder_Budget ID from the folder_budget dataset.
Category Tier 1 – Category Tier 10	The names of the categories and sub-categories to represent the hierarchy. Value will be blank when not applicable. If Category Tier 1 is blank then the entry represents the “Grand Total” in the budget/activity plan

5.4 lineitem (Line Item)

Contains the individual line items from the budgets. Does not include category or sub-categories.

Data	Description
Line Item ID	The internal unique ID of the line item. Same value that is displayed on the Details Panel
Category ID	The internal ID of the category or sub-category (or grand total row) that the line item belongs to.
Budget ID	The ID of the budget/activity plan that the line item belongs to
Line Item	The display name for the line item
Campaign ID	Currently unused
Scenario	The scenario tag applied to the line item, if applicable.
Item Type Label	The display terminology for the type of row in the budget/activity plan (e.g. Category, Sub-Category, Placeholder, Line Item)
Item Type	The internal identifier of the type of row. One of CATEGORY, SUBCATEGORY, LINE_ITEM, PLACEHOLDER, HIDDEN_LINE_ITEM.
Fields Completed	Yes or No depending on whether any Details Panel fields that are marked as required are completed. Can only be No for LINE_ITEM and PLACEHOLDER type fields.
Persistent ID	Internal ID used to identify line items that span multiple hierarchies.
Carryover	Yes or No depending on whether the line item is marked for carryover or not.
Objective ID	Currently unused

The remaining fields represent either standard fields from the data model or custom fields enabled for analytics that belong to either the Details Panel or Grid. Standard fields include Activity Type, Activity Type Details, Customer Journey, Persona, Segment, Start Date, End Date, Notes, Objective, Product and Region. If a standard field has been renamed the new name will be displayed in the header row

5.5 itemmeasures (Item Measures)

Provides the metric values from the Details panel and Grid that are configured for analytics.

Data	Description
Line Item ID	Internal ID that matches the Line Item ID from the lineitem dataset
Line Item Measure Value	The metric value as entered for the corresponding measure type and date or blank if no value entered.
Line Item Measure Type	The internal representation of the type of measurement field
Tag	The tag set for the corresponding budget cell value (applicable only to fields of type ‘Currency with Tags’)
CY Date (Item Measure)	The start date of the period the measure is for, based on calendar year (format: yyyy-mm-dd).
FY Date (Item Measure)	The start date of the period the measure is for, based on fiscal year (format: yyyy-mm-dd).
Approval Status	Indicates the approval state for the cell. Only applicable when approval feature is enabled. Default value is Planning.
Pending Change Amount	Applicable to approvals only. Indicates a requested change to an approved amount.

When multi-select fields are configured the four multi-select fields provide additional information about the “split” of the measure value across the different multi-select fields and values. There will always be one entry for each measure type and date period with a Multi-select Field of ‘Total’, a Multi-select Value of ‘Total’, a Multi-select Percentage of ‘100’ and a Multi-select Measured Value equaling the Line Item Measure Value. When multi-select fields are used there are additional entries for each multi-select field and each multi-select value that had a non-zero percentage set for the line item.

5.6 po_actual (PO and Actuals)

Provides the list of all purchase orders and actuals that have been created (mapped). It does not include unmapped POs or actuals.

Data	Description
PO and Actual Unique ID	An internal unique ID across both POs and actuals
PO and Actual ID	An internal ID for POs and actuals (may not be unique between both POs and actuals).
Line Item ID	The ID of the line item that the PO or actual belongs to (matches Line Item ID from the lineitem dataset).
Type (PO or Actual)	"PO" or "Actual" depending on whether the row represents a PO or Actual.
Currency	The master currency for the hierarchy. The PO Amount and Actual Amount values will be in this currency.
Status (Mapped or Unmapped)	Indicates whether the PO or Actual has been mapped to a category or line item or whether remains unmapped at the folder or budget/activity plan level.
Percentage	Indicates the split percentage in the case of POs split across multiple line items
CY PO Start Date, FY PO Start Date, CY PO End Date, FY PO End Date, PO Amount, PO Description, PO Owner	Standard PO fields that may or may not be in use. If a standard field has been renamed the new name will be displayed in the header row.
PO Number	Standard field for both PO and Actuals
Vendor	Standard field for both PO and Actuals
Actual Amount, CY Actual Date, FY Actual Date, Account Code, Description, Invoice #, Actual Notes, Paid (yes/no), Actual Type, CY Actual Paid Date, FY Actual Paid Date	Standard actuals fields that may or may not be in use. If a standard field has been renamed the new name will be displayed in the header row.

If applicable, the remaining fields represent either custom fields enabled for analytics that belong to either the PO Panel or Actuals Panel.

5.7 fydate (Fiscal Year Date)

Provides a list of all dates that the hierarchy is configured for along with various corresponding aggregation values. Typically for internal use only.

5.8 currency (Currency)

Lists the master currency of the hierarchy. If multi-currency reporting has been enabled, then it will also include the currencies that are configured for all Budgets/Activity Plans in the hierarchy.

5.9 targettransfers (Target Transfers)

Provides information on all target transfer requests. Each request of type “TRANSFER” is represented by two rows of the dataset: one for the incoming (“TO”) direction and the other for the outgoing “FROM” direction. A request of type “ADJUSTMENT” is represented by a single row since there is no “FROM” direction.

Data	Description
Folder_Activity Plan ID	Internal representation that provides a unique ID for a budget/activity plan or folder.
Request ID	The original request id. Since each request of type “TRANSFER” is broken down into two rows, this id does not uniquely identify a row in the dataset.
Unique Request ID	A unique ID for each row in the dataset. It combines the original request id with the request direction.
To CY Date	The CY Date for the target column listed in the “To Column Name”
To FY Date	The FY Date for the target column listed in the “To Column Name”
Request Type	The request type, either “TRANSFER” or “ADJUSTMENT”
Request Amount	The request amount in the currency of the root folder. The amount is negated for the “FROM” direction when a “TRANSFER” request is broken down into two rows.
Request Direction	The request direction. Either “FROM” (outgoing) or “TO” (incoming).
From Activity Plan Name	Name of the budget/activity plan or folder from which the requested amount is coming from. This takes into account the request direction when a “TRANSFER” is broken down into two rows.
From Column Name	Name of the target column from which the requested amount is coming from. This takes into account the request direction when a “TRANSFER” is broken down into two rows.
To Activity Plan Name	Name of the budget/activity plan or folder that receives the requested amount. This takes into account the request direction when a “TRANSFER” is broken down into two rows.
To Column Name	Name of the target column that receives the requested amount. This takes into account the request direction when a “TRANSFER” is broken down into two rows.
Request Status	Status of the request. One of “PENDING”, “APPROVED”, or “DENIED”
Requestor	Email of the requestor

Data	Description
Approvers	A comma-separated list of approvers who have responded to the request.
Decision Date	The date the request was definitively approved or denied. Empty if the request is still pending.
Description	Description text that was entered when making the request.

If applicable, the remaining fields represent custom request form fields enabled for analytics.

5.10 activity (Activities)

Contains the individual activities from the Uptempo Plan, including assigned and inherited attribute values. Does not include measures, such as Planned Spend, Planned Projected Revenue etc.

Data	Description
Activity ID	The internal unique ID of the activity. Same value that is displayed in the URL and on the Details Panel *(in progress).*
Activity Hierarchy ID	This ID represents a connection point from the activity dataset to the activity_hierarchy dataset.
Activity Name	The display name for the activity
Parent Activity ID	The internal ID of the parent activity
Parent Activity Name	The display name for the parent activity
CY In Market Date Start	The activity start date from the Details (format: yyyy-mm-dd)
CY In Market Date End	The activity end date from the Details (format: yyyy-mm-dd)
FY In Market Date Start	The activity start date corresponding to the Fiscal Year (format: yyyy-mm-dd)
FY In Market Date End	The activity end date corresponding to the Fiscal Year (format: yyyy-mm-dd)
Workflow ID	The ID of the connected workflow
Workflow Status	The status of the connected workflow

The remaining fields represent either standard attributes from the data model or custom attributes enabled for analytics. Standard attributes include Activity Type, Activity Type Group, Persona, Segment, Objective, and Region. If a standard field has been renamed the new name will be displayed in the header row.

5.11 activitymeasures (Activity Measures)

Provides the metric values from the Activity Details that are configured for analytics.

Data	Description
Activity ID	Internal ID that matches the activity ID from the activity dataset
Activity Measure Value	The metric value as entered for the corresponding measure type and date or blank if no value is entered.
Activity Measure Type	The internal representation of the type of measurement field
CY Date (Activity Measure)	The start date of the period the measure is for, based on calendar year (format: yyyy-mm-dd)
FY Date (Activity Measure)	The start date of the period the measure is for, based on fiscal year (format: yyyy-mm-dd)

When multi-select fields are configured the four activity multi-select fields provide additional information about the "split" of the measure value across the different multi-select fields and values. There will always be one entry for each measure type and date period with an Activity Multi-select Field of 'Total', an Activity Multi-select Value of 'Total', an Activity Multi-select Percentage of '100', and an Activity Multi-select Measured Value equaling the Measure Value. When multi-select fields are used there are additional entries for each multi-select field and each multi-select value that had a non-zero percentage set for the line item.

5.12 activity_hierarachy (Activity Hierarchy)

Represents the hierarchy of activities based on the Activity rules.

Data	Description
Activity ID	The internal unique ID of the activity
Activity Tier 1 – Tier 10	The names of the activities to represent the hierarchy. The value will be blank when not applicable.

5.13 activity_budget (Activity-Investment Connections)

Contains details of connections between activities and investment items (categories, sub-categories, or line items).

Note

To enable reporting on both connected and unconnected activities, this dataset contains all activities. This means it also includes activities that are not connected to any investment item. For activities that are not connected to an investment item, the *Budget ID*, *Budget Category ID*, and *Budget Line Item ID* fields will be empty.

Data	Description
Activity ID	Internal ID that matches the activity ID from the activity dataset
Budget ID	The ID of the budget/activity plan that the line item belongs to
Budget Category ID	The internal ID of the category or sub-category (or grand total row) that the line item belongs to.
Budget Line Item ID	The internal unique ID of the line item. Same value that is displayed on the Details Panel.

5.14 lineitem_allocation (Multi-Activity Funding)

Contains details of investment line items that are connected to activities, including the funds amounts allocated to connected activities.

If a line item's funds are allocated to multiple activities, there will be multiple entries with the same value under *Line Item ID (MAF)*, but with a different value under *Activity ID (MAF)* in each case.

This dataset does not include values from columns that do not have a Data Category assigned.

Note

To enable reporting on both connected and unconnected investment line items, this dataset contains all line items. This means it also includes line items that are not connected to any activity, as well as line items that are connected to an activity but which have unallocated funds amounts.

Data	Description
Activity ID (MAF)	Internal ID that matches the activity ID from the activity dataset
Line Item ID (MAF)	Internal ID that matches the Line Item ID from the lineitem dataset
Amount (MAF)	The metric value as entered for the corresponding data category and date (empty if no value entered)
Measure Type (MAF)	The internal representation of the type of measurement field
Data Category (MAF)	The Spend Data Category assigned to the corresponding column
CY Date (MAF)	The start date of the period the measure is for, based on calendar year (format: yyyy-mm-dd)
FY Date (MAF)	The start date of the period the measure is for, based on fiscal year (format: yyyy-mm-dd)