

# EDT Core API for Maple – WIP Notes

EDT 11

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## Revisions

**May 2022** – Initial draft of document

Updates below:

### API changes

|                    |   |
|--------------------|---|
| 2022               | Exposed endpoints and other changes   |
| 28 Apr             | <p>Exposed API routes:</p> <ul style="list-style-type: none"> <li>POST /api/v1/cases <b>[Update:</b> this route is no longer valid. See <i>5.2.1 Creating a Case</i>]</li> </ul>  |
| 13 May<br>11.3.365 | <p>Exposed API routes:</p> <ul style="list-style-type: none"> <li>POST /api/v1/cases/{caseId}/case-users/sync</li> <li>POST /api/v1/cases/{caseId}/groups/{groupId}/sync</li> <li>GET /api/v1/version</li> <li>GET /api/v1/cases/{caseId}/groups</li> <li>GET /api/v1/cases/{caseId}/groups/{groupId}</li> </ul> <p>The Swagger endpoints have changed to:</p> <ul style="list-style-type: none"> <li>auth: <a href="https://346n1v5oeh.execute-api.ca-central-1.amazonaws.com/swagger/index.html">https://346n1v5oeh.execute-api.ca-central-1.amazonaws.com/swagger/index.html</a></li> <li>open: <a href="https://346n1v5oeh.execute-api.ca-central-1.amazonaws.com/swagger-ui/index.html">https://346n1v5oeh.execute-api.ca-central-1.amazonaws.com/swagger-ui/index.html</a></li> </ul> <p>The start of other routes has changed from "/v1" to "/api/v1" to be consistent with the documentation.</p>   |
| 20 May<br>11.3.403 | <p>Model changed for the CreateCase API:</p> <ul style="list-style-type: none"> <li>Properties removed: Id, IsS3, IsThumbnailsEnabled, ExportTempPath, StagingAreaPath</li> <li>Properties changed: <ul style="list-style-type: none"> <li>int TemplateId is now string TemplateCase. This now accepts either a Case Name or a Case Id</li> <li>TimeZone is now TimeZonId</li> <li>Suffix is now DatabaseFileSuffix</li> </ul> </li> </ul> <p>Documentation below updated to reflect the changes above and add additional information.</p> <p>The implementation of Case creation using a template has been completed.</p> <p>The <i>Add Users to Case</i> scenario now only adds non-administrators to the specified Case. This is now consistent with the EDT UI. (Administrators have access to all cases without being explicitly added)</p> <p>Improvements have been made to the error handling. The most visible change is more meaning error messages and response codes being returned on more occasions.</p> <p>The previously reported technical issue which limited the content available via the Swagger UI has been resolved. Going forward, more detailed information about the individual API routes will be provided via the Swagger UI instead of in this document.</p> |
| 30 May<br>11.3.469 | <p>This build exposes the primary API routes used for the <i>5.2.2 Updating the metadata of a Case</i> scenario:</p> <p>Exposed API routes:</p> <ul style="list-style-type: none"> <li>GET /api/v1/cases/{caseId}</li> <li>PUT /api/v1/cases/{caseId}</li> </ul> <p>Some of the more detailed documentation that was in this document has been removed as it is now available from the Swagger UI. A new section below called <i>Detailed Documentation</i> contains some further information.</p>  |

|                    |   |
|--------------------|---|
| 2022               | Exposed endpoints and other changes   |
| 8 Jun<br>11.5.54   | <p>Scenario: 5.4.1 Adding a Participant [<b>Update</b>: these Person routes have been changed to include OrgUnit]</p> <ul style="list-style-type: none"> <li>• POST /api/v1/persons</li> <li>• GET /api/v1/persons</li> <li>• GET /api/v1/persons/{personId}</li> </ul> <p>Scenario: 5.5.1 Adding a Record</p> <ul style="list-style-type: none"> <li>• POST /api/v1/cases/{caseId}/records</li> <li>• PUT /api/v1/cases/{caseId}/records/{docId}/{fileType}</li> </ul>   |
| 23 Jun<br>11.5.238 | <p>Added some notes about some functionality under consideration. See "[Proposed] Using Keys to as an alternative to EDT IDs"</p> <p>Scenario: 5.4.1 Adding a Participant [<b>Update</b>: this route has changed in include OrgUnit]</p> <ul style="list-style-type: none"> <li>• POST /api/v1/persons. Updated to support Title and Custom Fields</li> </ul> <p>Scenario: 5.4.2 Updating a Participant [<b>Update</b>: this route has changed in include OrgUnit]</p> <ul style="list-style-type: none"> <li>• PUT /api/v1/persons</li> </ul>  |
| 1 Jul<br>11.5.307  | <p>The section describing the proposed introduction of Keys has been revised with a new approach.</p> <p>The following endpoint can be used to lookup a Case ID using a Key:</p> <ul style="list-style-type: none"> <li>• GetByIdByKey /api/v1/cases/{key}/id</li> </ul> <p>Scenario: 5.5.2 Updating a Record</p> <ul style="list-style-type: none"> <li>• PUT /api/v1/cases/{caseId}/records</li> </ul> <p>Scenario: 5.5.4 Deleting a Record</p> <ul style="list-style-type: none"> <li>• DELETE /api/v1/cases/{caseId}/records/{idOrKey}</li> </ul> <p>Added Users endpoints (additional to the scenarios in the DEMS specification):</p> <ul style="list-style-type: none"> <li>• CreateUser: POST /api/v1/users</li> <li>• GetUsers: GET /api/v1/users</li> <li>• GetUser: GET /api/v1/users/{userIdOrKey}</li> </ul> |
| 8 Jul<br>11.5.342  | <p>The proposed introduction of Keys has moved out of the proposal stage. Keys will be introduced to routes and resources in the coming weeks.</p> <p>Participant (Person) APIs updated to support specifying an ID or Key: [<b>Update</b>: these routes have changed in include OrgUnit]</p> <ul style="list-style-type: none"> <li>• GET /api/v1/persons/{idOrKey}</li> <li>• PUT /api/v1/persons/{idOrKey}</li> </ul>  |

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|--------------------|---|
| 2022               | Exposed endpoints and other changes   |
| 4 Aug<br>11.5.558  | <p><b>OrgUnits</b> We have started to make the APIs <i>OrgUnit</i> aware. EDT is currently introducing OrgUnits, whose primary intention is to provide multi-tenancy in EDT. We assume they are of little interest to Maple, so these notes assume there is one OrgUnit, the default one, which has an ID of 1.</p> <p>The following routes have been updated to require/support specifying the OrgUnit.</p> <pre> GetPersons    GET  /api/v1/org-units/{orgUnitId}/persons GetPerson     GET  /api/v1/org-units/{orgUnitId}/persons/{personIdOrKey} CreatePerson  POST  /api/v1/org-units/{orgUnitId}/persons UpdatePerson  PUT   /api/v1/org-units/{orgUnitId}/persons/{personIdOrKey} DeletePerson  DELETE /api/v1/org-units/{orgUnitId}/persons/{personIdOrKey} </pre> <p>Case Endpoints: change to the routes for GetCases and CreateCase to include specifying of the OrgUnit:</p> <pre> CreateCase  POST  /api/v1/org-units/{orgUnitId}/cases GetCases    GET   /api/v1/org-units/{orgUnitId}/cases </pre> <p>Scenario 5.3.1 <i>Adding &amp; Removing Users to a Case</i> updated:</p> <ul style="list-style-type: none"> <li>The CaseUsersSync endpoint now uses arrays of Ids and/or Keys.</li> </ul> <p>Records.</p> <ul style="list-style-type: none"> <li>The way records are identified has changed. See <i>Using Keys with the Record APIs</i> for details.</li> </ul> <p>The CreateCase and UpdateCase endpoints have been updated in the following ways:</p> <ul style="list-style-type: none"> <li>The Key field has been added so the Key value can be set/changed.</li> <li>The way that custom fields are specified has changed.</li> </ul> |
| 19 Aug<br>11.5.633 | <p><b>Case ID Lookup.</b> The topic "Looking up Case ID using a Key" has been changed to "Looking up a Case ID using a key or custom field". The endpoint's route has changed to include the Org Unit.</p> <p><b>DeleteRecords</b> endpoint added to this document. This will be used by the <i>Return Case to Police</i> and <i>Merging an Agency or Court File</i> scenarios.</p> <pre> DELETE /api/v1/cases/{caseId}/records </pre> <p><b>SyncUserCases</b> endpoint added. (Sometimes referred to as 5.3.1c:)</p> <pre> POST /api/v1/org-units/1/users/{userIdOrKey}/cases/sync </pre> <p><b>Persons</b> The naming requirements for Persons have been relaxed. Previously a Name, First Name, Last Name, and Email Address were required, and these had to be unique. Now none of these fields are required and the names fields do not have to be unique. If the Email Address is provided, it must be unique within the Org Unit.</p> <p><b>Corrections:</b></p> <ul style="list-style-type: none"> <li>Removed the notes about "Document+ID" from the RecordUpdate and RecordDelete APIs.</li> <li>In the examples in 5.2.1 <i>Creating a Case</i> and 5.2.2 <i>Updating..a Case</i>, the name of the "timeZone" parameter was changed to "timeZoneld".</li> </ul>  |

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|---------------------|---|
| 2022                | Exposed endpoints and other changes   |
| 23 Sep<br>11.5.887  | <ul style="list-style-type: none"> <li>CaseldLookup <ul style="list-style-type: none"> <li>Added support for "Key:" prefix.</li> <li>If specifying a Key, the endpoint now ensures the returned Case is in the specified OrgUnit.</li> </ul> </li> <li>Implemented the GetCaseParticipants API. Example: <pre>GET /api/v1/cases/{caseId}/participants</pre> <p>The results can also be filtered by person (ID or Key) and/or participant type. See <i>"Supporting endpoint: GetCaseParticipants"</i> for more information and examples.</p> </li> <li>Implemented the GetParticipantTypes API: <pre>GET /api/v1/org-units/{orgUnitId}/participant-types</pre> </li> <li>Added the "ParticipantTypeFilter" option to the SyncCaseParticipants API to support syncing only the persons of a specified Participant Type. For examples, see the updated notes under <i>"5.4.3 Add a Participant to a Case"</i>. [Do not use this API without discussing with Phil H first, as the API may be removed.]</li> <li>Implemented the AddCaseParticipant endpoint as an alternative to SyncCaseParticipants. See the notes for <i>"5.4.3 Add a Participant to a Case"</i></li> <li>Draft notes for <i>5.2.3 Merging an Agency File or a Court File</i></li> </ul> |
| 29 Sep<br>11.5.912  | <ul style="list-style-type: none"> <li>A new DateOnly custom field type is available. Primarily for Cases at this point. Some UI references may now refer to the previous/existing "Date" field type as "Date Time" or similar.</li> <li>Person resources. The ability to get and set custom field values during an Update has been restored. Currently works correctly with Text and DateTime custom fields. Also see additional notes in <i>"5.4.1 Adding a Participant"</i> section.</li> </ul>  |
| 7 Oct<br>11.5.987   | <ul style="list-style-type: none"> <li>Case custom fields. Added the ability to refer to fields and list values by Name. Specifying a list value that doesn't exist automatically adds it.</li> <li>Ability to add and remove a user to/from an Org Unit (site) group.</li> <li>Person resources. Fixed: CreatePerson does not set custom fields. (Only Text and DateTime custom fields are currently supported for Person resources)</li> </ul>  |
| 24 Oct<br>11.5.1051 | <ul style="list-style-type: none"> <li>Duplicate case names allowed in CreateCase and UpdateCase</li> <li>UpdateUser endpoint added.</li> <li>GetOrgUnitFields added: <pre>GET /api/v1/org-units/{orgUnitId}/fields</pre> <p>This replaces the previous route which was:</p> <pre>GET /api/v1/site/fields?organisationalUnitId=1 // DO NOT USE!</pre> </li> <li>The GetVersion API now returns a different version number than what is displayed in the EDT Web UI. This is because the API and UI have been split into separate services with their own development roadmaps. The GetVersion API returns the version of the API.</li> </ul>  |

|   |  |
|---|--|
| 2022  | Exposed endpoints and other changes  |
| 16 Nov<br>11.5.1255<br>API:<br>11.5.234       | <ul style="list-style-type: none"> <li>Added the ability to use custom field names in the CaseldLookup endpoint</li> <li><b>Breaking change:</b> Changed the result of the CaseldLookup endpoint to return a list of case ID/Key values.</li> <li>Added a new GetUserCases endpoint to get a list of the cases a specified user is assigned to.</li> <li>Added the ability to find records using a multiple field values. See the <i>Records &gt; Searching for Records</i> section for more information.</li> <li>The GetUserCases endpoint was returning cases with all statuses. Eg including removed cases. Now it returns Active and Inactive cases only by default, but an optional parameter can be included to return cases with other statuses.</li> </ul>  |
| 1 Dec<br>11.5.1375<br>API:<br>11.5.309        | <ul style="list-style-type: none"> <li>Added GetUserOuGroups endpoint to return a list of the OU (site) Groups that a user belongs to. See <i>Extra scenario: GetUserOuGroups</i>.</li> </ul>  |
| 9 Feb<br>2023<br><br>11.5.1762/<br>11.5.470   | <ul style="list-style-type: none"> <li>The limitation on Participant custom field types has been removed. This change was in 11.5.1762/11.5.470 deployed to POC and Vanilla on 1 Feb</li> </ul>  |
| 8 Mar   | Document update: Clarified the previous note and added an Environment Names section to the Introduction  |
| 23 Mar<br>Web<br>11.5.2146<br>API<br>11.5.628 | <p>Document update:</p> <ul style="list-style-type: none"> <li>Terminology section added</li> <li>Introduction updated</li> <li>Summary of API endpoints section added</li> </ul> <p>New endpoints:</p> <ul style="list-style-type: none"> <li>AddUserToCaseGroup (DIAM, NED-232)</li> </ul> <pre>POST /api/v1/cases/{caseId}/groups/{groupId}/users/{userId}</pre> <ul style="list-style-type: none"> <li>RemoveUserFromCaseGroup (DIAM, NED-232)</li> </ul> <pre>DELETE /api/v1/cases/{caseId}/groups/{groupId}/users/{userId}</pre> <p><b>Note:</b> the endpoint for adding users to groups that Maple reported to EDT as not working is not a published endpoint and should not be used. We have not included the full route of that endpoint here because this document is only for published endpoints. However, to help ensure the correct endpoint is used note that the unpublished/incorrect endpoint includes "case-users" in the route whereas the correct endpoints (shown above) do not.</p> |

## Terminology

| Term      | Definition  |
|-----------|---|
| Published | Published endpoints are those that can be used by 3 <sup>rd</sup> party clients.<br>Published endpoints are supported by EDT. |

In general, published endpoints will not receive breaking changes. However, there may be scenarios where a breaking change is desirable or necessary and in these situations, EDT will discuss the change with any parties using the endpoint.

All endpoints in this document are published. All other endpoints in the EDT Core API are not published and not to be used.

## Introduction

The EDT Core API is in the process of being made available ("published") to external parties. While extensive, many of the endpoints within the API are not ready for use by external parties. This document contains information about the endpoints that are ready to be used. That is, the endpoints in this document are "published". As such, EDT will provide support for these endpoints and will not change these endpoints in a way that would break any clients, at least not without first discussing the proposed change with those using these endpoints.

This document contains notes about the API as it is being developed and progressively being exposed to Maple.

The purpose of this document is to communicate which API routes are ready to be used and to provide information on how to use them.

Much of the detailed content of this document will eventually be available via Swagger. As that happens, the duplicated information will be removed from this document.

**Important:** Any endpoint that appears in the Swagger UI that is not published in this document SHOULD NOT be used.

## Environment Names

There are 4 EDT environments. Some are referred to using different names

| EDT Term               | BCPS            |
|------------------------|-----------------|
| POC (Proof of Concept) | Dev             |
| PreProd                | Test            |
| Production             | Prod/Production |
| Vanilla                | Vanilla         |

## Proof of Concept server

The Proof of Concept (POC) server is an EDT server which exposes the EDT API for the development and testing of the Maple ISL to EDT (DEMS) integration. This server will be updated regularly as more API endpoints relevant to Maple are exposed<sup>1</sup> and ready for testing.

The address of the POC is: <https://346n1v5oeh.execute-api.ca-central-1.amazonaws.com/>

At present the POC server uses a token to restrict access. This token must be included in the Authorization header of requests like this:

---

<sup>1</sup> Only endpoints/routes listed in this document are callable (exposed). Other routes listed in the Swagger UI will return a 404 (Not found) if called.



```
Authorization: Bearer <secret>
```

The "<secret>" shown above is a placeholder for the actual value. This token is available on request from EDT made by relevant BCPS personnel.

Related to this, most of the routes listed by our Swagger page are not currently callable and will return a 404 result. Only the routes we list in the API Notes document have been made callable at this point.

## Testing the API

For testing purposes, the API can be called using custom code or a REST client such as Postman or Visual Studio Code with the "REST Client" extension.

To make a request, include the host at the beginning of the route. For example, to call the route documented as:

```
GET /api/v1/version
```

The request should be:

```
GET https://346n1v5oeh.execute-api.ca-central-1.amazonaws.com/api/v1/version
```

## Detailed Documentation

As we make endpoints available, we will also make detailed documentation available via the Swagger UI. The following graphic shows some of the places where this documentation appears. For example, click on the Schema tab shown below to see notes about the properties of the model to be passed in the request body.

**POST /api/v1/cases** Create a new Case

Sample request:

```
POST /api/v1/cases
Authorization: Bearer <secret>
{
  "name": "Case name goes here",
  "timeZoneID": "Pacific Standard Time"
}
```

**Parameters**

No parameters

**Request body** required

Example Value **Schema**

**CaseCreateModel** {

- waitForCaseCompletion** boolean  
Whether to wait for the new case to be created or return immediately. Default: True.
- name** string  
nullable: true  
The name of the Case. Must be unique.
- description** string  
nullable: true

# Guide to using the API

## Identifying Resources

### EDT IDs

The routes to specific resources require the IDs of the resources to be included. For example, to get the details of a Case, you would use a route like this:

```
GET /api/v1/cases/{caseId}
```

In the example above, the caseId is required in order to get the details of the specified Case.

Typically, these IDs values are the EDT IDs of the resource. EDT IDs are allocated automatically by EDT when the resource is created. These IDs are almost always an integer value such as 12345. The exception are User resources which have string IDs such as "1eb14bb6-7c0f-41d0-ba52-17bb34286aff".

### Using Keys to identify resources

Implementation for the following is underway.

Some routes in the EDT API support the use of Keys as an alternative to using EDT IDs to identify resources. A Key is a standard field on the resource where the value of the key uniquely identifies the resource in a similar way to how the EDT ID uniquely identifies the resource. However, unlike EDT IDs, the Key is set by client code via the API. Setting the Key value is optional.

Since (for most resources) the internal EDT ID is an integer value, the API can determine whether you are passing an ID or a Key by checking to see if the value represents a number or not. For example, given the API endpoint:

```
GET /api/v1/org-units/{orgUnitId}/persons/{personIdOrKey}
```

If you pass:

```
GET /api/v1/org-units/1/persons/1234
```

EDT will interpret "1234" on the end as being the EDT ID of the person, but if you pass:

```
GET /api/v1/org-units/1/persons/abc
```

EDT will interpret "abc" as being a Key value.

For records, specifying a Key would look up the record by Document ID. So, for example:

```
GET /api/v1/cases/{caseId}/records/ABC-123
```

Would mean "Get the record which has the Document ID of "ABC-123".

Key values used to identify resources are not case-sensitive. Specifying a key value of "abc" will match a resource with a Key value of "Abc" or "ABC".

When using Key values in URLs, any spaces within the key value must be replaced with the + (plus) character.

### Issues differentiating IDs and Keys

There are some situations where EDT cannot tell whether the value is an ID or a Key:

- Where the resource type uses strings for IDs. There aren't very many of these, but the User resource is one such example.
- Where your Key value is numeric. In this scenario EDT cannot tell if the value is an ID or Key and will assume it is an ID.
- Where your Key value contains a colon. (We suggest you keep non-alphanumeric characters out of your key values for the time being)

In these situations, you can explicitly tell EDT that the value in the route is a Key value by adding the "key:" prefix to the value. For example, if the key value for a Person is the numeric value 99, then to ensure EDT interprets the value as a key use the prefix:

```
GET /api/v1/org-units/1/persons/key:99
```

In the same way, all User lookups using a key must always include the "key:" prefix since both the ID and Key values are strings.

```
GET /api/v1/users/key:PID1234
```

### Where can Keys currently be used?

It will take some time for all EDT APIs to be updated to support Keys. For resources that can be specified using a key in the URL, the documentation of the endpoint will say "{idOrKey}" rather than just "{id}". The resource's type might also be added as a prefix in situations where the route has multiple ids/keys. Examples:

```
GET /api/v1/cases/{caseId}/records/{idOrKey}
GET /api/v1/cases/{caseId}/records/{recordIdOrKey}
```

### Updating a resource using ID or Key

In some EDT APIs a resource is updated using a route which does not include the resource's identifier. For example, updating a Person previously used the following route and relied on the model in the request body containing the ID of the person resource to be updated.

```
PUT /api/v1/persons
```

This has now been changed so the ID or Key is specified in the route:

```
PUT /api/v1/persons/{idOrKey}
```

This will allow us to:

- Explicitly state whether we want to locate the resource by ID or Key.
- Update the resource's Key by specifying a new Key value in the model/body.
- Error if the ID in the route is different from the one in the model/body.

Over time other update (PUT) routes will be updated in a similar way.

### Supported Characters in Keys

Certain characters cannot be used in URL paths so should not be used in Key values.

Over time we will define and enforce the set of supported characters and also provide approaches on how to include unsupported characters.

For the time being, please limit your key values to alphanumeric characters, space, hyphen, and underscore. When using a key value containing spaces in URL paths, replace the spaces with a plus (+) character.

## Summary of API endpoints

**Important:** All endpoints in the EDT Core API, apart from those listed in this document, are not “published” and should not be used.

### Endpoints published in this document for use by the ISL

|                       |        |  |
|-----------------------|--------|--|
| GetVersion            | GET    | /api/v1/version  |
| GetCases              | GET    | /api/v1/org-units/{orgUnitId}/cases                              |
| GetCustomFields       | GET    | /api/v1/org-units/{orgUnitId}/fields                             |
| CaseIdLookup          | GET    | /api/v1/org-units/{orgUnitId}/cases/{keyOrField}/id              |
| CreateCase            | POST   | /api/v1/org-units/{orgUnitId}/cases                              |
| GetCase               | GET    | /api/v1/cases/{caseId}   |
| UpdateCase            | PUT    | /api/v1/cases/{caseId}   |
| ExportToCase          | POST   | /api/v1/cases/{caseId}/export-to-case/merge-case/{destCaseId}    |
| SyncCaseUsers         | POST   | /api/v1/cases/{caseId}/case-users/sync                           |
| SyncUserCases         | POST   | /api/v1/org-units/{orgUnitId}/users/{userIdOrKey}/cases/sync     |
| GetUserCases          | GET    | /api/v1/org-units/{orgUnitId}/users/{userIdOrKey}/cases          |
| GetCaseGroups         | GET    | /api/v1/cases/{caseId}/groups                                    |
| GetCaseGroup          | GET    | /api/v1/cases/{caseId}/groups/{groupId}                          |
| SyncCaseGroupMembers  | POST   | /api/v1/cases/{caseId}/groups/{groupId}/sync                     |
| CreatePerson          | POST   | /api/v1/org-units/{orgUnitId}/persons                            |
| GetActivePersons      | GET    | /api/v1/org-units/{orgUnitId}/persons                            |
| GetPerson             | GET    | /api/v1/org-units/{orgUnitId}/persons/{personIdOrKey}            |
| UpdatePerson          | PUT    | /api/v1/org-units/{orgUnitId}/persons/{personIdOrKey}            |
| AddCaseParticipant    | POST   | /api/v1/cases/{caseId}/participants                              |
| RemoveCaseParticipant | POST   | Use the deprecated SyncCaseParticipants ??                       |
| SyncCaseParticipants  | POST   | /api/v1/cases/{caseId}/participants/sync [DEPRECATED]            |
| GetCaseParticipants   | GET    | /api/v1/cases/{caseId}/participants                              |
| GetParticipantTypes   | GET    | /api/v1/org-units/{orgUnitId}/participant-types                  |
| GetRecords            | GET    | /api/v1/cases/{caseId}/records                                   |
| CreateRecord          | POST   | /api/v1/cases/{caseId}/records                                   |
| UploadRecordFile      | PUT    | /api/v1/cases/{caseId}/records/{recordId}/Native                 |
| UpdateRecord          | PUT    | /api/v1/cases/{caseId}/records/{idOrKey}                         |
| DeleteRecord          | DELETE | /api/v1/cases/{caseId}/records/{idOrKey}                         |
| DeleteAllRecords      | DELETE | /api/v1/cases/{caseId}/records                                   |
| GetUsers              | GET    | /api/v1/users  |
| CreateUser            | POST   | /api/v1/users  |
| GetUser               | GET    | /api/v1/users/{userId}   |
|                       | GET    | /api/v1/users/key:{key}  |
| UpdateUser            | PUT    | /api/v1/users  |
| GetOuGroups           | GET    | /api/v1/org-units/{orgUnitId}/groups                             |
| AddUserToOuGroup      | POST   | /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users           |
| RemoveUserFromOuGroup | DELETE | /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users/{userId}  |
|                       | DELETE | /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users/key:{key} |
| GetUserOuGroups       | GET    | /api/v1/org-units/{orgUnitId}/users/{userIdOrKey}/groups         |

### Endpoints used by DIAM (Lee/Stanley)

Definition: DIAM = Digital Identity and Access Management

This set was initially provided by Lee via Carl on 8 Mar 2023. This is a work-in-progress and likely to change.

Some endpoints in this list which are not in the ISL list above have not reached “published” status yet. These endpoints are indicated by an asterisk after their name. Items with 2 asterisks were not provided by Maple in their list of APIs, but their inclusion was inferred e.g. from reports from Maple that they (or similar but different endpoints) were not working correctly.

|                           |        |  |
|---------------------------|--------|--|
| GetVersion                | GET    | /api/v1/version  |
| CaseIdLookup              | GET    | /api/v1/org-units/{orgUnitId}/cases/{keyOrField}/id              |
| GetCase                   | GET    | /api/v1/cases/{caseId}   |
| GetCaseUsers*             | GET    | /api/v1/cases/{caseId}/case-users                                |
| GetUserCases              | GET    | /api/v1/org-units/{orgUnitId}/users/{userId}/cases               |
| GetCaseGroups             | GET    | /api/v1/cases/{caseId}/groups                                    |
| GetCaseUserGroups*        | GET    | /api/v1/cases/{caseId}/case-users/{userId}/groups                |
| AddUserToCase*            | POST   | /api/v1/cases/{caseId}/case-users/{userId}                       |
| RemoveUserFromCase*       | DELETE | /api/v1/cases/{caseId}/case-users/remove/{userId}                |
| AddUserToCaseGroup**      | POST   | /api/v1/cases/{caseId}/groups/{groupId}/users/{userId}           |
| RemoveUserFromCaseGroup** | DELETE | /api/v1/cases/{caseId}/groups/{groupId}/users/{userId}           |
| CreateUser                | POST   | /api/v1/users  |
| GetUser                   | GET    | /api/v1/users/key:{userKey}                                      |
| GetOuGroups               | GET    | /api/v1/org-units/{orgUnitId}/groups                             |
| AddUserToOuGroup          | POST   | /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users           |
| RemoveUserFromOuGroup     | DELETE | /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users/{userId}  |
|                           | DELETE | /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users/key:{key} |
| GetUserOuGroups           | GET    | /api/v1/org-units/{orgUnitId}/users/{userIdOrKey}/groups         |

### To be published (for DIAM):

- AddUserToCase
- RemoveUserFromCase
- GetCaseUserGroups
- AddUserToCaseGroup DONE
- RemoveUserFromCaseGroup DONE
- Maybe: GetCaseUsers

### Route changes currently under consideration

This section is a work in progress.

Main aim:

- Remove "case-users" from routes to be consistent. The fact that a case and a user or users are specified in the route indicates that the endpoint is related to users assigned to a case.

### Used by the ISL:

SyncCaseUsers

Deprecated: POST /api/v1/cases/{caseId}/case-users/sync  
New route: POST /api/v1/cases/{caseId}/users/sync

### Used by DIAM

AddUserToCase

Incorrect: POST /api/v1/cases/{caseId}/case-users/{userId}  
Use: POST /api/v1/cases/{caseId}/users/{userId}

RemoveUserFromCase

Incorrect: DELETE /api/v1/cases/{caseId}/case-users/remove/{userId}  
Use: DELETE /api/v1/cases/{caseId}/users/{userId}

GetCaseUsers

Deprecated: GET /api/v1/cases/{caseId}/case-users  
New route: GET /api/v1/cases/{caseId}/users

#### GetCaseUserGroups

Deprecated: GET /api/v1/cases/{caseId}/case-users/{userId}/groups  
New route: GET /api/v1/cases/{caseId}/users/{userId}/groups

## Available API endpoints

The following sections contain notes about the APIs that have been made available to Maple. This information will tend to be high level information, with more detailed information available via the Swagger UI.

### Cases

#### Getting a list of Cases

The following gets a list of the cases in Org Unit 1 (the default OU).

```
GET /api/v1/org-units/1/cases
```

#### Case Custom Fields

To get information about the custom fields defined for Cases, call the following endpoint and then filter the results by objectType = "Case":

```
GET /api/v1/org-units/{orgUnitId}/fields
```

Note: the previous route, `GET /api/v1/site/fields?organisationalUnitId=1` has been deprecated. Do not use. This will be removed.

#### CaseldLookup - Looking up a Case using a key or a custom field

Case IDs are used extensively in EDT APIs. It will take some time for all routes to be updated to support specifying a Case Key instead of an ID. In the meantime, an endpoint has been added which supports efficiently looking up a Case's using its Key or the value of a custom field:

```
GET /api/v1/org-units/1/cases/{keyOrField}/id
```

To search by:

- Key. Use "key:abc" or "key:123" as the keyOrField value. Specifying the "Key:" prefix is optional, so the following are equivalent to the first 2 examples respectively: "abc" or "23"
- Custom field. Specify the field's id or name, a colon, and the value. E.g. to find the Case where the Colour custom field with ID 123 has the value blue, use: "Colour:blue" or "123:blue" as the keyOrField value.

The endpoint returns an array of Case ID/Key values. So, for example, if a single Case is found, the response body is something like:

```
[
  {
    "id": 3,
    "key": "ABC",
  }
]
```

8 Nov 2022: Previously this returned a single case ID. This is a breaking change. Any existing code that uses this endpoint must be updated to handle the changed behaviour. Typically, we would not allow breaking changes and would handle a change like this by issuing a new version of the endpoint. However, Maple requested this change and is currently the only client of this endpoint, and since the API has not officially been published yet, we believe it is reasonable to have a breaking change at this time.

If no cases are found that match, an empty array is returned.

The lookup using a custom field also works for multi-valued custom fields. For example, if there is a MV field called "OtherRccs" which has an ID of 12, then to find which case has the RCC "myRcc55" in the MV field you can use either of the following:

```
GET /api/v1/org-units/1/cases/OtherRccs:myRcc55/id
GET /api/v1/org-units/1/cases/12:myRcc55/id
```

### 5.2.1 Creating a Case

Example:

```
POST /api/v1/org-units/1/cases
Authorization: Bearer <secret>

{
  "name": "Case name goes here",
  "key": "ABC-123",
  "description": "First case creation API test",
  "timeZoneId": "Pacific Standard Time",
  "templateCase": "12"
}
```

For cases, the custom properties are set using the field ID and value (but see update below) <sup>2</sup>.

The following partial example shows how to set custom property values for cases:

```
:
"fields" : [
  { "id": "23", "value": "Returned" },
  { "id": "25", "value": 1234 }
]
```

**Update 7 Oct 2022:** fields can be specified using either the ID or Display Name. The first field in the following example shows how to use a field's name instead of the field ID. The second field specifies both ID and Display Name, and in this scenario the Display Name is ignored and the field is located by ID.

<sup>2</sup> At present, the way custom property values are specified is undergoing change. This is the reason why specifying custom properties for Cases differs from the way it is done for Persons.

```
"fields" : [
  { "name": "My Case Status", "value": "Returned" },
  { "id": "25", "name": "DOB", "value": "2002-05-15" }
]
```

**Update 7 Oct 2022:** list field and MV list field values can be specified using either the value ID or textual value.

This example specifies a MV field and its list values using IDs:

```
{
  "id": 28,
  "value": [ { "id": 12 }, { "id": 16 } ]
}
```

This example uses a MV field's display name and the textual values of its list items:

```
{
  "name": "Flags",
  "value": [ "Indigenous", "Level 5" ]
},
```

If a list item or multi-value list item is specified using text and the value doesn't exist already, a new list item with that value will automatically be created.

### 5.2.2 Updating the metadata of a Case

To update the metadata on a case, you would typically retrieve the existing metadata using a GET:

```
GET /api/v1/cases/4007
```

And then update the JSON as required, and send the changed model using a PUT:



```
PUT /api/v1/cases/4007
content-type: application/json

{
  "name": "API Test Case",
  "key": "ABC-123",
  "caseNumber": "123",
  "description": "This is a test case",
  "category": "API Template",
  "status": "Active",
  "cfsLocationType": 1,
  "exportTempPath": "C:\\Temp",
  "stagingAreaPath": "\\edt-dev-staging\\QA-V10\\Site01_Case67115",
  "useDocIdForDownloads": true,
  "timeZoneId": "E. Australia Standard Time",
  "removeGeneratedFiles": false,
  "searchHistoryRetention": 10,
  "fields": [
    {
      "id": "23", "value": "On hold"
    }
  ],
  "dateFormat": "d MMM yyyy",
  "showMilliseconds": true
}
```

### 5.2.3 Merging an Agency File or a Court File – DRAFT

#### *ExportToCase*

All documents require a Document ID because EDT uses Document IDs in the destination case.

EDT will create all Folders and Locations as needed in the destination case.

A prefix can be specified to use a Case field which can be custom by encapsulating the field with %FieldName% e.g. %CaseId%

```
POST /api/v1/cases/{caseId}/export-to-case/merge-case/{destinationCaseId}
{
  "prefix": "string"
}
```

## Case Users

### 5.3.1 Adding & Removing Users to a Case

Update the users assigned to a Case using the SyncCaseUsers endpoint.

The request body specifies all the users which should be assigned to the Case. Any existing users assigned to the case which are not included in the request body will be removed from the Case. Any users identified in the request body which are not currently assigned to the case will be added.

Example of syncing 5 users to a Case; 2 users using their IDs and 3 users using their Keys:

```
POST /api/v1/cases/{caseId}/case-users/sync
content-type: application/json

{
  "userIds": ["05f8995d-522c-426a-b752-14312d49f7bc", "15a19095-a360-4d7b-ba14-
```

```
edcab7d3a94e"],
"userKeys": [ "PI1234", "PI1235", "PI1236" ]
}
```

For each user, specify either their id or key (if they have one).

|          |  |
|----------|--|
| UserIds  | <p>An array of string values.</p> <p>The Ids of the Users to be synced.</p> <p>Note: Almost all resources in EDT have numeric IDs. User accounts are one exception that uses string IDs.</p> |
| UserKeys | <p>An array of string values.</p> <p>The keys of the Users to be synced.</p>   |

#### Example:

To remove all user from the Case:

```
POST /api/v1/cases/{caseId}/case-users/sync
content-type: application/json

{
  "userIds": [],
  "userKeys": []
}
```

#### Extra scenario – Add a user to multiple cases - SyncUserCases

Example:

```
POST /api/v1/org-units/1/users/key:PID-1234/cases/sync
content-type: application/json

{
  "caseField": "ID",
  "values": ["2004", "4007"],
  "caseGroups" : ["Reviewers", "Missing", "Case Manager"]
}
```

| Parameter  | Description   |
|------------|---|
| caseField  | Required. Valid values are: "ID", "Key", or "<custom-column-id>".   |
| values     | <p>The values that indicate which cases to sync. The value depends on the caseField parameter. For example, if caseField is "ID" then the values must be an array of case IDs.</p> <p>To remove the user from all cases, make the values parameter an empty array.</p>  |
| caseGroups | <p>Optional. The groups within each case that the user should be added to.</p> <p>The caseGroups parameter is only used when the user is added to a case. That is, if they are already a case member then their existing group membership will not change.</p> <p>If a specified group is not found within a case, it is ignored.</p> |

Removing a user from a case removes them from all the groups in the case.

## Extra scenario – GetUserCases – Get a list of the cases a specified user has access to

Added 11 Oct 2022.

Returns a list of the Active and Inactive cases the specified user can access within the specified OrgUnit.

```
GET /api/v1/org-units/{orgUnitId}/users/{userId}/cases
Or
GET /api/v1/org-units/{orgUnitId}/users/key:{userKey}/cases
```

Examples:

```
### UserCases - using user id
GET {{host}}/api/v1/org-units/1/users/1c34184d-b763-4ebe-b86d-efd2a4b01c29/cases

### UserCases - using user key
GET {{host}}/api/v1/org-units/1/users/key:PID-1234/cases
```

Returns an array of cases. For each case, the case ID and case Key are included. For example, if the specified user belongs to 2 cases the result will be something like:

```
[
  {
    "id": 2004,
    "key": "PCH"
  },
  {
    "id": 8032,
    "key": null
  }
]
```

As mentioned, the GetUserCases endpoint returns Active and Inactive cases by default. An optional caseStatus query string parameter can be included to return cases with a specific status:

```
GET /api/v1/org-units/1/users/key:PID-1234/cases?caseStatus=removed
```

## Case Groups

*Planned change: Include the Key property*

### Supporting endpoint: Get the Groups in a Case

```
GET /api/v1/cases/{caseId}/groups
```

Returns summary information about each Group.

### Supporting endpoint: Get a Group's details

```
GET /api/v1/cases/{caseId}/groups/{groupId}
```

Returns more detailed information about the specified Group, including its members.

### Updating a group's users using the SyncCaseGroupMembers endpoint (ISL)

*Planned change: Revise to support using the Key property*

Replaces all the Users assigned to a Group.

Example using the standard FullName field of User resources:

```
POST /api/v1/cases/4007/groups/1/sync
content-type: application/json

{
  "keyField": "FullName",
  "values": [ "Brian Griffin", "Meg Griffin", "Chris Griffin", "Lois Griffin",
    "Peter Griffin", "Stewie Griffin", "Missing Griffin" ]
}
```

|          |  |
|----------|--|
| KeyField | <p>String. The default is "Id".</p> <p>The name of the User field to use. The field can either be a standard or custom field of the User resource.</p> <p>The value is case-insensitive.</p>   |
| Values   | <p>An array of string values.</p> <p>Case Users who have one of the specified values in their <i>KeyField</i> will be added to the Group, all other users will be removed from the Group.</p> <p>The values are case-insensitive.</p> <p>If a specified value does not match to a Case User, the value is ignored. At this stage no error is raised.</p> |

## Updating a group's users using AddUserToCaseGroup and RemoveUserFromCaseGroup (DIAM)

*This section was added 16 Mar 2023.*

### AddUserToCaseGroup

```
POST /api/v1/cases/{caseId}/groups/{groupId}/users/{userId}
```

### RemoveUserFromCaseGroup

```
DELETE /api/v1/cases/{caseId}/groups/{groupId}/users/{userId}
```

Neither request includes a body. Both return responses of 204 (No content) if successful. See Swagger UI for more information about other possible return values.

These endpoints do not currently support the use of Key fields to identify case or user resources.

## Participants/Persons

All examples assume the Person resources are in the default OrgUnit. That is, the OrgUnit with an ID of 1.

Users and Persons are different. Users are system objects which are used to specify who can access the system. Persons are business objects which can be used to record people of interest who do not have access to the system. For example, prosecutors, defence, and accused persons.

### 5.4.1 Adding a Participant

To add a (DEMS) Participant, you create a *Person* resource in the Persons collection.

Below is an example of the minimum required to create a Person resource.

```
POST /api/v1/org-units/1/persons
content-type: application/json

{
  "address": {
    "email": null
  },
  "fields": []
}
```

Here is a fuller example:

```
POST /api/v1/org-units/1/persons
content-type: application/json

{
  "key": "pid-1234",
  "name": "D Duck",
  "firstName": "Donald",
  "lastName": "Duck",
  "address": {
    "email": "dduck@test.com",
    "mobile": "0413 999 999",
    "phone": "555-123-345",
    "postalAddress": null,
    "postalAddressAsJson": null,
    "isPrivate": false
  },
  "title": {
    "id": 0,
    "title": "Mr."
  },
  "fields": [
    { "name" : "2", "value" : "He/him" },
    { "name" : "PartID", "value" : "abcdef" },
    { "name" : "DOB", "value" : "1 Jan 2000" },
    { "name" : "Priority List", "value" : "High" }
  ],
  "status" : "Active"
}
```

|        |   |
|--------|---|
| Fields | <p>An array of custom fields.</p> <p>Any fields specified must already exist.</p> <p>Each field has a 'name' and 'value'. When setting field values, the "name" can be the display name of the field or the (internal) ID of the field. The value specified must be compatible with the field's type.</p> |
| Title  | <p>If title.id is 0 (or not provided), EDT will look up the title.title (eg "Mr.") and set the ID automatically. If the specified title.title does not exist, EDT will create it.</p>   |
| Status | <p>Optional. Valid values are "Active" and "Inactive". The default is "Active".</p>   |
| Key    | <p>Optional. If provided, it must be unique within the site.</p>  |
| Email  | <p>If the Address.Email value is not null, the value must be unique within the Org Unit.</p>  |

### Using the Fields property

The Fields property is an array of the custom fields of the Person resource.

The Fields property does not work in quite the same way as the Fields properties on some other resources such as Cases. The main difference is that cannot specify an "id" property on a Field, However, you can enter the field's ID in the "name" property as an alternative to the field name. For example, if you have a custom field called "Colour" which has a field ID of 3, you could set its value using either:

```
{ "name": "3", "value": "Red" }
```

or

```
{ "name": "Colour", "value": "Red" }
```

When updating a Person, all custom fields of the resource must be specified, otherwise those not included will be deleted.

### Supporting endpoint: Get all the active Person resources

```
GET /api/v1/org-units/1/persons
```

### Supporting endpoint: Get the details of a Person resource using an ID and using a Key

```
GET /api/v1/org-units/1/persons/8
GET /api/v1/org-units/1/persons/pid-1234
```

## 5.4.2 Updating a Participant

When updating a Person, the highlighted properties below are checked and updated if changed. If you exclude any of the highlighted properties from the request body, they will be changed to null rather than being ignored. For this reason, it is good practice to retrieve the Person details using a GET, change just the relevant properties, then update the resource using the PUT as shown here.

```
PUT {{host}}/api/v1/org-units/1/persons/{personIdOrKey}
content-type: application/json
```

```
{
  "id": 23,
  "key": "KS",
  "name": "K Simpson",
  "title": {
    "id": 8,
    "title": "Mrs."
  },
  "firstName": "K",
  "lastName": "Simpson",
  "address": {
    "id": 1025,
    "email": "k_simpson@test.com",
    "mobile": "0123123123",
    "phone": "98766789",
    "postalAddress": null,
    "postalAddressAsJson": null,
    "isPrivate": false
  },
  "orgs": [
    {
      "organisationId": 23,
```

```

    "personId": 23,
    "organisationTypeId": 1,
    "organisationMemberId": 23,
    "startDateTime": "2022-07-07T03:11:26.29",
    "endDateTime": null
  }
],
"cases": [],
"fields": [
  { "name": "2", "value": "partid-3333" },
  { "name": "Colour", "value": "Red" },
  { "name": "Priority", "value": "High" }
],
"displayName": "K Simpson",
"organisationTypeId": 1,
"permissions": null,
"status": "Active"
}

```

#### Other Notes:

- You cannot change details of a specific organisation using this endpoint, however you can change which organisations the Person belongs to.
- In the example above, the Priority custom field is a List. This illustrates how to set the value of a list.

### 5.4.3 Add a Participant to a Case

#### AddCaseParticipant

Add a Person to a Case. That is, make them a case participant.

Example:

```

POST {{host}}/api/v1/cases/{caseId}/participants
content-type: application/json

{
  "personIdOrKey" : "sgriffen",
  "participantType": "Accused"
}

```

#### SyncCaseParticipants [Deprecated – May be removed]

To add/remove persons to/from a Case, use the SyncCaseParticipants endpoint:

```

POST /api/v1/cases/{caseId}/participants/sync
content-type: application/json

{
  "Participants": [
    { "personIdOrKey": "MS", "participantType": "Adjudicator" },
    { "personIdOrKey": "26", "participantType": "Accused" }
  ]
}

```

#### Notes:

- The specified Case and Persons must belong to the same OrgUnit.

To remove all participants from a case:

```
POST /api/v1/cases/1/participants/sync
content-type: application/json

{
  "Participants": [ ]
}
```

Added functionality 19 Sep 2022:

The SyncCaseParticipants endpoint can also take an optional "ParticipantTypeFilter" setting. This can be used to sync just the participants of the specified type, with all the other participants on the case remaining untouched.

So, the API can now sync the participants in one of 2 modes:

- All (individual) participants on the case. Specify each person and their participant type.
- Participants of a specified type on the case. Use the *participantTypeFilter* to specify the type of participants to sync. If provided, all participants listed in the participants collection of the request must also specify the same type.

Example 1: Set two *Accused* participants on the case. All other types of participants on the case remain untouched:

```
POST {{host}}/api/v1/cases/1/participants/sync
content-type: application/json

{
  "ParticipantTypeFilter" : "Accused",
  "Participants": [
    { "personIdOrKey": "KS", "participantType": "Accused" },
    { "personIdOrKey": "26", "participantType": "Accused" }
  ]
}
```

Example 2. Remove all *Accused* participants on the case. All other types of participants on the case remain untouched:

```
POST {{host}}/api/v1/cases/1/participants/sync
content-type: application/json

{
  "ParticipantTypeFilter" : "Accused",
  "Participants": [ ]
}
```

#### 5.4.4 Remove a Participant from a Case

Use the SyncCaseParticipants endpoint as described above in 5.4.3 *Add a Participant to a Case*.

*To be reviewed since SyncCaseParticipants is (maybe) deprecated*

#### Supporting endpoint: GetCaseParticipants

```
GET /api/v1/cases/{caseId}/participants
```

Optional filters can be added to limit the results to a specific Person (ID or Key) and/or ParticipantType.

Examples of filtering the Case Participants:



```
GET /api/v1/cases/1/participants?person=1234&participantType=Accused
GET /api/v1/cases/1/participants?person=key:NS&participantType=Accused
GET /api/v1/cases/1/participants?participantType=Accused
```

### Supporting endpoint: GetParticipantTypes

```
GET /api/v1/org-units/{orgUnitId}/participant-types
```

## Records

### Searching for Records

New – 11 Nov 2022.

The GetRecords endpoint returns the records in the case:

```
GET /api/v1/cases/2004/records
```

The results of the GetRecords endpoint can be controlled using 5 optional query string parameters:

| Parameter | Description  |
|-----------|--|
| filter    | <p>A filter to apply to the records in the case. The syntax matches that of the Search Bar in the UI. E.g.</p> <pre>DocKind:Email AND EDTID:&gt;=200000 AND DocumentID:NOT []</pre> <p>The example returns Emails where the EDT ID is greater or equal to 200,000 and where the DocumentID has a value i.e. is not null.</p> <p>Field names: fields in the filter are specified using their display names.</p>   |
| fields    | <p>Additional fields to return for each record. If not specified, a set of standard fields plus Title are returned.</p> <p>Field names: Some fields must be specified using their back-end name rather than their display name. See <i>Using field names in filter, sort, and fields parameters</i> below.</p>   |
| sort      | <p>The sort order and direction of the results. Multiple sort fields can be specified and the sort direction ("asc" or "desc") can be specified for each one.</p> <p>The following example sorts by results by Title ascending, then by EDT ID in descending order.</p> <pre>sort=title,edtid desc</pre> <p>The following are identical because ascending order is the default sort order.</p> <pre>sort=title,edtid sort=title asc,edtid asc</pre> <p>Field names: Some fields must be specified using their back-end name rather than their display name. See <i>Using field names in filter, sort, and fields parameters</i> below.</p> |
| page      | <p>The page of results to display. The default is 1.</p>   |

**pagesize** The number of documents per page of results. The default is 50 records per page.

### Using field names in filter, sort, and fields parameters

Some fields must be referred to differently, depending on whether they are specified in the Filter or Sort/Fields parameters. The display name of fields is required in the Filter parameter whereas the back-end name of fields is often required in the Sort/Fields parameters. Custom fields are a prime example. For example, the "Relevant" custom field is specified as 'Relevant' in the Filter parameter, but as 'cc\_Relevant' in the Sort and Fields parameters, and in the results.

### Examples

Get "all" the records in case 2004. This actually returns the first 50 records, because the default page size is 50.

```
GET /api/v1/cases/2004/records
```

Example 1 of explicitly specifying some search parameters:

```
GET /api/v1/cases/2004/records?filter=DocKind:Email AND EDTID:>=2000000&sort=Title desc&fields=Title,cc_Relevant
```

Example 2 of explicitly specifying some search parameters:

```
GET /api/v1/cases/2004/records?filter=Title:(edt trial)&sort=title desc&pagesize=1000&page=4
```

### Using Keys with the Record APIs

The Key for records is the "DocumentID" property. That is, unlike other types of resources which have a dedicated "Key" property, the record's DocumentID property is used when referencing the record resource by key.

The Record endpoints can specify a record by ID or Key. The following are examples of how to specify a record using its key:

```
DELETE /api/v1/cases/{caseId}/records/key:API-001
DELETE /api/v1/cases/{caseId}/records/API-001
```

(The 2<sup>nd</sup> example can be used because the shown DocumentID's value is not all digits and therefore will not be mistaken for an EDT ID.)

#### 5.5.1 Adding a Record

Adding a record requires two API calls, one to create the Record resource and a second to upload the Record's *native* file. The native file is original file in its native format. For example, a DOCX or PDF file.

#### Part 1 - Create the record:

```
POST /api/v1/cases/{caseId}/records
content-type: application/json
```

```
{
  "title": "Share trades",
  "custodian": "Donald Duck",
  "location": "DDuck laptop - Deleted Items",
  "folder": "D Duck",
  "documentId": "API-001",
  "fileExtension": ".pdf",
  "primaryDateUtc": "2022-06-01T07:03:07.089Z",
  "fields": [
    { "name": "Custom Text", "value": "Custom text data" },
    { "name": "Custom Boolean", "value": "True" },
    { "name": "Custom Date", "value": "2022-04-22 14:00:00.000" },
    { "name": "Custom List", "value": "One" },
    { "name": "Custom MVL", "value": "One;Three" }
  ]
}
```

Notes about the above example:

- The specified Custodian, Location, Folder, and custom fields must exist on the case before creating the record.
- Custodian and Location are properties that can be used to specify where the record originally came from. Eg the record was collected from Donald Duck and the location was the Deleted items directory on his laptop.
- The Folder property indicates the folder within EDT where the record should be put.

## Part 2 – Upload the native file:

```
PUT /api/v1/cases/{caseId}/records/{recordId}/Native
content-type: multipart/form-data
```

```
[bytes]
```

Notes:

- The route will eventually support 3 types of content: Native, Pdf, and Text. Only “Native”, as shown in the example above, is currently supported.

### 5.5.2 Updating a Record

Note: To update the file content, use the API described in Part 2 of the previous topic.

To update the metadata of a record, use the PUT method:

```
PUT /api/v1/cases/{caseId}/records/{idOrKey}
content-type: application/json
```

```
{
  "title": "NewTitle",
  "body": "New Body keep as null to not update",
  "location": "Record Upload",
  "folder": "Other Documents",
  "custodian": "Andrea Ring",
  "documentId": "ACDC.321",
  "fileExtension": ".pdf",
  "primaryDateUtc": "2022-06-01T07:03:07.089Z",
  "fields": [
    { "name": "Custom Text", "value": "Hello wOrld" }
  ]
}
```

Note:

- If you don't provide a field in request body, it will not be updated. This is somewhat different behaviour than other Update APIs, and may be revised to be more consistent.
- If using a Key, use the "Key:" prefix. The prefix can be omitted if the value is not a number. Eg `../Key:API-001` or `../API-001`

#### 5.5.4 Deleting a Record

```
DELETE /api/v1/cases/{caseId}/records/{idOrKey}
```

#### Extra - Deleting all records in a Case

This will be used by the ISL as part of:

- 5.2.3 Merging an Agency File or a Court File
- 5.2.5 Returning a Case to the Police

```
DELETE /api/v1/cases/{caseId}/records
```

## User Accounts

#### Extra Scenario - Creating a User

The CreateUser endpoint:

```
POST /api/v1/users
content-type: application/json

{
  "key" : "PID-12345",
  "username" : "buzer",
  "email" : "buzer@test.com",
  "fullname" : "Bob Uzer",
  "accountType": "Saml",
  "role" : "User"
}
```

|             |  |
|-------------|--|
| Key         | Optional.<br><br>Must be a unique value for all users.<br><br>The Key provides an alternative way to specify a User account. It is often used when the user to create a mapping between a User account in EDT and a user identifier from an external system. |
| AccountType | Valid values are "Saml" or "EDT"   |
| Password    | (not shown in the example above),<br><br>Required if the AccountType is "EDT".<br><br>Optional and ignored if the AccountType is "Saml" since the user will log in via the SAML Identity provider and not into EDT directly.                                 |

Notes:

- Setting custom properties is not currently implemented.

## Supporting User endpoints

GetUsers:

```
GET /api/v1/users
```

GetUser using the user's ID:

```
GET /api/v1/users/1c34184d-b763-4ebe-b86d-efd2a4b01c29
```

GetUser by Key (the "key:" prefix must be specified when using a Key for Users):

```
GET /api/v1/users/key:PID-1234
```

## Extra scenario: UpdateUser

Example:

```
PUT /api/v1/users
content-type: application/json

{
  "id": "05f8995d-522c-426a-b752-14312d49f7bc",
  "key": "ABC",
  "email": "quagmire@test.com",
  "password": null,
  "phone": null,
  "accountType": "EDT",
  "role": "User",
  "fullName": "Glen Quagmire",
  "isActive": true
}
```

|          |  |
|----------|--|
| Id       | Must be passed to indicate which user resource to update   |
| Password | Optional and ignored if the AccountType is "Saml" since the user will log in via the SAML Identity provider and not into EDT directly.<br><br>If the AccountType is "EDT", pass null to leave the password unchanged. Provide a password to change the password. |

## Extra scenario: Add and remove user to/from OU Group

OU Groups are also referred to as Site Groups. These are groups at the Site/Org Unit level, not at the Case level.

Get a list of Org Unit Groups within an Org Unit:

```
GET /api/v1/org-units/{orgUnitId}/groups
```

Adding a user to an Org Unit Group. The following example shows adding the user using their User Id. Alternatively the user can be specified using their Key. If using the Key, ensure the "key:" prefix is included.

```
### AddUserToOuGroup - Using User Id.
POST /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users
Content-Type: application/json

{
  "userIdOrKey": "1c34184d-b763-4ebe-b86d-efd2a4b01c29"
}
```

Removing a user from an Org Unit Group:

```
DELETE /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users/{userId}
```

Or

```
DELETE /api/v1/org-units/{orgUnitId}/groups/{ouGroupId}/users/key:{user key}
```

Examples of removing a user from group 2 in org unit 1:

```
# RemoveUserFromOuGroup - By User Id
DELETE {{host}}/api/v1/org-units/1/groups/2/users/1c34184d-b763-4ebe-b86d-efd2a4b01c29

# RemoveUserFromOuGroup - by User Key
DELETE {{host}}/api/v1/org-units/1/groups/2/users/Key:PID-1234
```

### Extra scenario: GetUserOuGroups

(OU Groups are also referred to as Site Groups. These are groups at the Site/Org Unit level, not at the Case level.)

Get the OU Groups that a user is a member of:

```
GET /api/v1/org-units/{orgUnitId}/users/{userIdOrKey}/groups
```

Examples (Authorization not shown. The IDs/Keys shown are not from the POC/PreProd environments):

```
### GetUserOuGroups - using User Key
GET /api/v1/org-units/1/users/key:PID-1234/groups

### GetUserOuGroups - using User ID
GET /api/v1/org-units/1/users/1c34184d-b763-4ebe-b86d-efd2a4b01c29/groups

### GetUserOuGroups - User who is in no OU groups
GET /api/v1/org-units/1/users/32cd4b27-f2ef-411a-812c-55b57436479c/groups

### GetUserOuGroups - User does not exist. Should return 404 (Not found).
GET /api/v1/org-units/1/users/key:xxxxx/groups

### GetUserOuGroups - Specified user is an admin, which should return 400 (Bad Request)
error
GET /api/v1/org-units/1/users/4BC1C746-6D23-4267-91C7-FACFDA03622B/groups
```

## Other

### Get the Version

As of 24 Oct 2022, this returns the version of the EDT API, not the EDT (Web) version

GET /api/v1/version

## Appendix – TimeZones in EDT

When the API references TimeZones or TimeZoneIDs, it is referring to a defined set of IDS provided by Microsoft in Windows.

When creating a case, the TimeZone parameter must be a valid Microsoft TimeZone ID. The list of TimeZone IDs is provided below.

The TimeZone ID is used by EDT to look up information about the TimeZone which includes all sorts of details about the specified timezone, including the rules for when DST starts and ends.

The timeZone parameter must be entered exactly as shown in the list, otherwise a 500 series error will occur.

Other ways to get the list of valid TimeZone IDs include:

- The TimeZone column at <https://docs.microsoft.com/en-us/windows-hardware/manufacture/desktop/default-time-zones?view=windows-10>
- FYI apart from the list below and the Microsoft webpage sent through the other day, another way of seeing the available TimeZones on your machine is to run the system utility TZUTIL from a command line with the /l switch:  

```
C:> tzutil /l
```

The 2nd line of each listed timezone is the TimeZone ID.
- The EDT API endpoint (currently not accessible)

### TimeZone IDs:

|                                 |                                 |                               |
|---------------------------------|---------------------------------|-------------------------------|
| Dateline Standard Time          | Cape Verde Standard Time        | Central Asia Standard Time    |
| UTC-11                          | Sao Tome Standard Time          | Bangladesh Standard Time      |
| Aleutian Standard Time          | Morocco Standard Time           | Omsk Standard Time            |
| Hawaiian Standard Time          | W. Europe Standard Time         | Myanmar Standard Time         |
| Marquesas Standard Time         | Central Europe Standard Time    | SE Asia Standard Time         |
| Alaskan Standard Time           | Romance Standard Time           | Altai Standard Time           |
| UTC-09                          | Central European Standard Time  | W. Mongolia Standard Time     |
| Pacific Standard Time (Mexico)  | W. Central Africa Standard Time | North Asia Standard Time      |
| UTC-08                          | Jordan Standard Time            | N. Central Asia Standard Time |
| Pacific Standard Time           | GTB Standard Time               | Tomsk Standard Time           |
| US Mountain Standard Time       | Middle East Standard Time       | China Standard Time           |
| Mountain Standard Time (Mexico) | Egypt Standard Time             | North Asia East Standard Time |
| Mountain Standard Time          | E. Europe Standard Time         | Singapore Standard Time       |
| Yukon Standard Time             | Syria Standard Time             | W. Australia Standard Time    |
| Central America Standard Time   | West Bank Standard Time         | Taipei Standard Time          |
| Central Standard Time           | South Africa Standard Time      | Ulaanbaatar Standard Time     |
| Easter Island Standard Time     | FLE Standard Time               | Aus Central W. Standard Time  |
| Central Standard Time (Mexico)  | Israel Standard Time            | Transbaikal Standard Time     |
| Canada Central Standard Time    | South Sudan Standard Time       | Tokyo Standard Time           |
| SA Pacific Standard Time        | Kaliningrad Standard Time       | North Korea Standard Time     |
| Eastern Standard Time (Mexico)  | Sudan Standard Time             | Korea Standard Time           |
| Eastern Standard Time           | Libya Standard Time             | Yakutsk Standard Time         |
| Haiti Standard Time             | Namibia Standard Time           | Cen. Australia Standard Time  |
| Cuba Standard Time              | Arabic Standard Time            | AUS Central Standard Time     |
| US Eastern Standard Time        | Turkey Standard Time            | E. Australia Standard Time    |
| Turks And Caicos Standard Time  | Arab Standard Time              | AUS Eastern Standard Time     |
| Paraguay Standard Time          | Belarus Standard Time           | West Pacific Standard Time    |
| Atlantic Standard Time          | Russian Standard Time           | Tasmania Standard Time        |
| Venezuela Standard Time         | E. Africa Standard Time         | Vladivostok Standard Time     |

Central Brazilian Standard Time  
 SA Western Standard Time  
 Pacific SA Standard Time  
 Newfoundland Standard Time  
 Tocantins Standard Time  
 E. South America Standard Time  
 SA Eastern Standard Time  
 Argentina Standard Time  
 Greenland Standard Time  
 Montevideo Standard Time  
 Magallanes Standard Time  
 Saint Pierre Standard Time  
 Bahia Standard Time  
 UTC-02  
 UTC  
 GMT Standard Time  
 Greenwich Standard Time  
 Azores Standard Time

Volgograd Standard Time  
 Iran Standard Time  
 Arabian Standard Time  
 Astrakhan Standard Time  
 Azerbaijan Standard Time  
 Russia Time Zone 3  
 Mauritius Standard Time  
 Saratov Standard Time  
 Georgian Standard Time  
 Caucasus Standard Time  
 Afghanistan Standard Time  
 West Asia Standard Time  
 Ekaterinburg Standard Time  
 Pakistan Standard Time  
 Qyzylorda Standard Time  
 India Standard Time  
 Sri Lanka Standard Time  
 Nepal Standard Time

Lord Howe Standard Time  
 Bougainville Standard Time  
 Russia Time Zone 10  
 Magadan Standard Time  
 Norfolk Standard Time  
 Sakhalin Standard Time  
 Central Pacific Standard Time  
 Russia Time Zone 11  
 New Zealand Standard Time  
 UTC+12  
 Fiji Standard Time  
 Chatham Islands Standard Time  
 UTC+13  
 Tonga Standard Time  
 Samoa Standard Time  
 Line Islands Standard Time