

Party Association Data and Services 3.2

# Document Status

status: Request for Comment (valid values are < Request for Comment, Preliminary Review, Public Review, Architectural Review, Final Review, Published, Deprecated)

This version: **Assembla**.com. Files Tag = CUFX\_3.2\_RFC\_Active

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# Authors and Change Log

|  |  |  |
| --- | --- | --- |
| Version | Date | Changes |
| 0.0.01 |  | * Initial Draft |
| 0.0.02 |  | * Updated Overview of Specification |
| 0.0.03 |  | * Updated XSD filenames to PascalCase |
| 0.0.04 |  | * Updated filters to use simple data types |
| 0.0.05 |  | * Fix issue with update URL |
| 0.0.06 |  | * Update Id’s to be consistent with the XSD |
| 3.0 | **10/29/2013** | * Switch to use X-HTTP-METHOD-OVERRIDE standard rather than subMethod non-Standard method for overriding request types * Create a partyAssociationMessage wrapper for every message to increase ability for infrastructure to serialize the data * Versioning and format change with release CUFX 3.0 |
| 3.0 | **12/16/2013** | * Update examples X-API-Version to >=3.0.0 |
| 3.0 | **12/19/2013** | * Cleanup definitions, fix typos and prep for release |
| 3.1 | **07/17/2015** | * Updated to release 3.1 |
| 3.2 | **05/10/2016** | * Updated to release 3.2 |

# Overview of Specification

The CUFX Party Association Data Model and Services defines the Party Association Data object and services for use by all specifications. The party association allows an organization to manage and view if parties work for, are related to, or have a legal responsibility to another party.

# Any knowN Errors in the document

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| **Error Description** | Status of Error |
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# Document Conventions

List any document conventions such as what bold and italics mean and how the document is intended to be read.

Within this specification, the key words "MUST", "MUST NOT", "REQUIRED", "SHALL", "SHALL NOT", "SHOULD", "SHOULD NOT", "RECOMMENDED", "MAY", and "OPTIONAL" are to be interpreted as described in W3 Working Group (W3C). However, for readability, these words do not appear in all uppercase letters in this specification.

At times, this specification recommends good practice for authors and user agents. These recommendations are not normative and conformance with this specification does not depend on their realization. These recommendations contain the expression "We recommend ...", "This specification recommends ...", or some similar wording.

All formatting in this document utilizes Word Styles.

All Citations must utilize Word Citations so that it automatically shows at the end of the document.

All updates after the initial creation must be performed using Tracking Changes turned on and accepted by the Architecture committee.

# Definitions related to the specification

**Party Association**

Any person or entity can be associated to another person or entity through a party association. For instance a party association would identify if a person is an officer of a company or has power of attorney over another party.

# Data Elements

## Filters used when accessing the party association data

Refer to Security Services documentation to understand what may be contained in the header and processed by security procedures. When accessing the data include **MessageContext.xsd** so that the service can determine the scope of the request. Refer to recent CUFX messageContext Data and CUFX Security Services for use of MessageContext.xsd. Include any filter variables related to the request. See **PartyAssociationFilter.xsd.**

## Party Data attributes

All CUFX fields related to a party are defined in PartyAssociation.xsd.

Note: Fields not listed in the calling specification are not to be returned to the calling specification. That is, if the field transaction type is not listed in the calling specification, then do not return the data field to alleviate issues with unexpected information and a bloat of information being returned to lightweight applications.

# Party Services

## Overview

|  |  |
| --- | --- |
| Definition | Collection of services to manage a party association |
| Overview of Capabilities | Create, read, update and delete a party associations. You can programmatically filter party associations using the filter object for read, update and delete. It is assumed that the parties already exist on the back end system and can be connected through two party Id’s. It is possible to use the services to define more than one association. |
| Dependencies | Security Services, messageContext, partyAssociation |
| Sample CUFX REST LINK | https://api.dataprovider.com/partyAssociation |
| CUFX SOAP LINK |  |
| CUFX WaDL LINK |  |

## Party Resource based create, read, update, delete services

|  |  |
| --- | --- |
| INPUTS | cufx:partyAssociationMessage (which includes)   * [cufx:MessageContext](file:///\\files2\users\CMarjaniemi\Projects\CUFX\MessageContext.html) * cufx:partyAssociationFilter (for read, update, delete) * cufx:partyAssociation (for create, update) |
| Outputs | cufx:partyAssociation |
| Return Values | cufx: Error |
| Side Effects | Creation, update or deletion of partyAssociation data; read has no side effects |
| Dependencies | Security Services for authentication and security. Both parties already exist on the back end system. |
| Fields used | **Message Headers** : See security services  **messageContext**: See MessageContext.xsd  **Filters**: See PartyAssociationFilter.xsd  **Attributes: party : See PartyAssociation.xsd** |

### REST-JSON CREATE Party Association example

This example shows how to create an association between two parties. One is an individual and one is an organization.

**Required**: messageContext, two parties with the association type between the two parties

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

X-API-Version: >=3.0.0

**POST h**ttps://api.datasource.com/partyAssociation

{

“partyAssociationMessage”:{

“messageContext”: { <see MessageContext.xsd>

},

“partyAssociationList”: [

{“parentPartyId”:”1583471356asdflkj154”,

“childPartyId”:”75834165634n534h”,

“partyAssociationType”:

{“officerManager”:

{“qualifier”:”President”}

}

}

]

}

}

**RESPONSE:**

Headers:

Status Code: 200 Ok

Content-type: application/json; charset=utf-8

Content-Language: en-us

{

“partyAssociationList”: [

{“partyAssociationId”:”153434”,

“parentPartyId”:”1583471356asdflkj154”,

“childPartyId”:”75834165634n534h”,

“partyAssociationType”:

{“officerManager”:

{“qualifier”:”President”}

}

}

]

}

### REST-JSON READ Party Association example

Note: This example reads a party association based on a known party association id.

**Required**: messageContext, at least one valid filter in partyAssociationFilter

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

**X-HTTP-Method-Override: GET**

X-API-Version: >=3.0.0

**POST h**ttps://api.datasource.com/partyAssociation

{

“partyAssociationMessage”:{

“messageContex”: { <see MessageContext.xsd>

},

“partyAssociationFilter”:{

“partyAssociationIdList”:[”153434”]

}

}

}

**RESPONSE:**

Headers:

Status Code: 200 Ok

Content-type: application/json; charset=utf-8

Content-Language: en-us

{

“partyAssociationList”: [

{“partyAssociationId”:”153434”,

“parentPartyId”:”1583471356asdflkj154”,

“childPartyId”:”75834165634n534h”,

“partyAssociationType”:

{“officerManager”:

{“qualifier”:”President”}

}

}

]

}

### REST-JSON UPDATE Party Association example

Note: This example updates a party association as the individual is now CEO of the company.

**Required**: messageContext, at least one valid filter in partyAssociationFilter, the specific partyAssociationId of the partyAssociation to be updated in the message

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

X-API-Version: >=3.0.0

**PUT h**ttps://api.datasource.com/partyAssociation

{

“partyAssociationMessage”:{

“messageContex”: { <see MessageContext.xsd>

},

“partyAssociationFilter”:{

“partyAssociationIdList”:[ ”153434” ]

},

“partyAssociationList”: [

{“partyAssociationId”:”153434”,

“partyAssociationType”:

{“officerManager”:

{“qualifier”:”CEO”}

}

}

]

}

}

**RESPONSE:**

Headers:

Status Code: 200 Ok

Content-type: application/json; charset=utf-8

Content-Language: en-us

{

“partyAssociationList”: [

{“partyAssociationId”:”153434”,

“partyAssociationType”:

{“officerManager”:

{“qualifier”:”CEO”}

}

}

]

}

### REST-JSON DELETE Party Association example

Note: This example deletes a party association.

**Required**: messageContext, at least one valid filter in partyAssociationFilter, the specific partyAssociationid of the partyAssociation to be deleted in the message

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

**X-HTTP-Method-Override: DELETE**

X-API-Version: >=3.0.0

**PUT h**ttps://api.datasource.com/partyAssociation

{

“partyAssociationMessage”:{

“messageContex”: { <see MessageContext.xsd>

},

“partyAssociationFilter”:{

“partyAssociationIdList”:[ ”153434” ]

},

}

}

**RESPONSE**:

Headers:

Status Code: 200 Ok

# General Error handling For All Services

Refer to latest CUFX documentation *Error Mapping*.

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