G2-CR00215-hasInstrument-on-things-other-than-organisations

IPTC G2-Standards: Change Request document
Title: hasInstrument on things other than organisations

Change Request number: G2 CR00215
Standard to be changed: NewsML-G2
Standard version to be changed: 2.30 (change appears in 2.31)

Change Request History			
Version	Date	Author(s)	Notes
1	2022-09-16	Brendan Quinn, Dave Compton	
2	2022-09-19	Dave Compton	Updated standard version to be changed

Typographic note

Changes to existing documents/specifications are highlighted in yellow.

Editing notes for the spec documents are highlighted in cyan.

In drafts only: Text highlighted in magenta needs further discussion

Description of the change: (free-text)

Change EntityGroupDetails definition:

```
<xs:sequence>
  <!-- NewsML v2.31: hasInstrument added to EntityDetailsGroup and deprecated in
organisationDetails -->
  <xs:element ref="hasInstrument" minOccurs="0" maxOccurs="unbounded"/>
  <xs:choice minOccurs="0">
  <xs:element ref="personDetails"/>
  <xs:element ref="organisationDetails"/>
  <xs:element ref="geoAreaDetails"/>
  <xs:element ref="POIDetails"/>
  <xs:element ref="objectDetails"/>
  <xs:element ref="eventDetails"/>
  </xs:choice>
</xs:sequence>
```

The definition of hasInstrument within organisationDetails shall be turned into an element reference:

```
<!-- NewsML v2.31: hasInstrument added to EntityDetailsGroup and deprecated in
organisationDetails -->
<xs:element ref="hasInstrument"/>
<!-- DEPRECATED (but still allowed) in NewsML v2.31 -->
```

The definition that was in organisationDetails shall be moved out to a top-level element definition (not included here as the schema code does not change)

Rationale for the change:
Not all financial instruments are attached to organisations: for example exchange-traded funds, currencies, commodities. Previously, the only way to declare a hasInstrument was to create an organisationDetails entity.

(Technically, creating an assert and including a hasInstrument element did work, but that is only because the definition of assert is very flexible and allows any code via an xs:any declaration.)

Reference to related IPTC discussion(s):

https://github.com/iptc/news-architecture-dev/issues/98 "hasInstrument for things that are not organisations"

https://groups.io/g/iptc-news-architecture-dev/topic/hasinstrument_for/92501917 "hasInstrument for non-Organisation Asserts"

Formalised change request: (spec table etc.)

See above.

Examples:

Example 1: `hasInstrument` as a child of `concept`

```
<concept>
  <conceptId qcode="P:18040196349" />
  <type qcode="cptType:97"/>
  <name>Invesco Capital Appreciation Fund;R6</name>
  <hasInstrument symbol="OPTFX.O" type="symType:RIC" symbolsrc="symSrc:RFT"/>
  <hasInstrument symbol="US00141G7328" symbolsrc="symSrc:ISO" type="symType:ISIN"/>
</concept>
```

Example 2: `hasInstrument` as a child of `assert`

```
<assert qcode="P:18040196349">
  <name>Invesco Capital Appreciation Fund;R6</name>
  <type qcode="cptType:97"/>
  <hasInstrument symbol="OPTFX.O" type="symType:RIC" symbolsrc="symSrc:RFT"/>
  <hasInstrument symbol="US00141G7328" symbolsrc="symSrc:ISO" type="symType:ISIN"/>
</assert>
```

Example 3: `hasInstrument` within `assert/organisationDetails` (now deprecated)

```
<assert qcode="P:18040196349">
  <name>Invesco Capital Appreciation Fund;R6</name>
  <type qcode="cptType:97"/>
  <organisationDetails>
    <hasInstrument symbol="OPTFX.O" type="symType:RIC" symbolsrc="symSrc:RFT"/>
    <hasInstrument symbol="US00141G7328" symbolsrc="symSrc:ISO" type="symType:ISIN"/>
    <rtr:anyOtherElement>
      Other elements in other namespaces allowed here due to xs:any other
    </rtr:anyOtherElement>
  </organisationDetails>
</assert>
```

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