CIQ Technology Services

Specification Get Company Detail

Version 2.0

Date Created: 1.22.2008
Last Updated: 11.20.2008

Business Owner:	Jay Zachter, Michael Yusko
Technology Owner:	William Murphy (CIQ),
Business Analysts	Shawn West
Version	2.0

Application Framework

The primary technology for this solution is XML Web Services (SOAP). Capital IQ hosts an API that responds to XML requests according to this API, and returns XML structured data in response. These XML requests are encrypted via the standard HTTPS protocol.

A secondary technology for this solution is the integration of CIQ DataFeeds on client database tier. This allows for reduced network traffic for common items that change infrequently.

Capital IQ hosts this data on Windows-based servers, powered by Microsoft SQL Server in an active-passive failover cluster configuration. Data is stored in multiple fully redundant EMC Storage Area Networks (SANs). The servers that run the platform are hosted at Quality Technology Services with a disaster recovery site at XO. At all levels, these environments are redundant, fault tolerant, and backed up to industry standards.

Web Services Description Language (WSDL) documents describe the detailed Services & Ports (Function Calls) available in this specification. See http://www.w3.org/TR/wsdl for more on WSDL.

Please note that all Web Service and WSDL URLs in this document are subject to change based on changing infrastructure requirements. CIQ will provide sufficient advanced notice to the client before changing any URL, hostname, IP address, etc. It is recommended that these URLs be configurable (via config files, etc.) on the client application so that changes can be handled with minimal user downtime. CIQ monitors activity on Production systems and may shut down improper-use processes or user accounts as required to preserve overall system health.

All Web Services requests and responses in this solution are encoded in the UTF-8 character set (http://en.wikipedia.org/wiki/UTF-8). Some string data in this solution is expected to only contain Windows-1252 characters (http://en.wikipedia.org/wiki/Windows-1252); these are labeled with "(W1252)" in this document. Other string data in this solution allows full UTF-8 characters; these are labeled with "(UTF-8)" in this document. Email addresses (labeled "(email)" in this document) and website URLs (labeled "(URL)" in this document) have more limited valid character sets. See http://en.wikipedia.org/wiki/Email_address and http://en.wikipedia.org/wiki/URL for more information.

All the web services have a WSDL definition that external developers will code against and pull in data that is served from the same Capital IQ data repository as our web platform. For a full menu of our Web Services and implementation documentation, please contact your account manager.

Web Service Versioning

Versioning Web Services: Over time, Capital IQ may need to extend the tags or datasets supported by our Web services. As a results we have created a URL based versioning solution provides a scalable framework for the future. Versioning provides a way for to accommodate these enhancements in a graceful manner.

Recommendation: Capital IQ recommends that all users upgrade to version 1.0 if they are using legacy services, to conform to the new URL formats.

How versioning works: Please note in the example below *<ServiceName.asmx>* is replaced with the name of the service and is used for illustration purposes only.

1. Web Service changes are captured as a new version of the file in a new directory.
    a. **Version 1** - https://api.capitaliq.com/ciqdotnet/api/1.0/*<ServiceName.asmx>* - Represents the first release of the service
    b. **Version 2** - https://api.capitaliq.com/ciqdotnet/api/2.0/*<ServiceName.asmx>* - Represents the second release and breaking change or significant enhancement.
    c. Clients have the ability to transition to the new version of the service or stay on the original version until they can transition older code.
2. Latest version of the Service will be located at the following URL. https://api.capitaliq.com/ciqdotnet/api/current/*<ServiceName.asmx>*. Using the example in section i above https://api.capitaliq.com/ciqdotnet/api/2.0/*<ServiceName.asmx>* would be in its own directory and referenced in the current directory.

Service Changes

Get Company Detail

Service	Version	Comments
URL	Current	https://api.capitaliq.com/ciqdotnet/api/Current/GetCompanyInfo.asmx?WSDL
URL	2.0	https://api.capitaliq.com/ciqdotnet/api/2.0/GetCompanyInfo.asmx?WSDL

Release	Version	Comments
11/2008	2.0	Added New Function to Company Summary called Company Details which provides Trading items, which are required for using the Estimates Consensus and Detail Web Service.

GetCompanyDetail

Get Company Information Detail

The function described allows the client application to retrieve basic company information based on the Capital IQ ("CIQ") CompanyID. Basic company information such as name, description, Sector, Primary Industry and trading items are returned by this function.

Capital IQ provides access to text-file-based DataFeeds that contain much of this information. Depending on the implementation, much of this data can be stored locally in a database and looked up on the fly, rather than depending solely on the data returned in this API. Since the DataFeeds are updated daily, it is recommended that this Web Service be used where up-to-the-minute data is required.

GetCompanyInfo (Functions):

```
CompanyInfo() GetCompanyInfo(Integer companyID());
```

Comments:

This function returns basic company information about Companies, given their CIQ Company IDs.

Parameters:

1. `Array of Integer` **`CompanyId ()`** – Each item is a single CIQ CompanyID.

Returns:

1. `An Array of` **`CompanyInfo ()`** `Objects` – Each contains basic profile data about a Company.

CompanyInfo
Attributes:

a. `Integer` **`CompanyId`** – The unique identifier of this Company.
b. `String` **`CompanyName`** – (1-100 characters) The name of a specific Company. (W1252)
c. `Integer` **`CompanyTypeId`** – This identifier denotes the type of the given company:

ID	Name
1	Public Investment Firm
2	Private Investment Firm
3	Assets/Products
4	Public Company
5	Private Company
6	Corporate VC
7	Financial Service VC
8	Index
9	Private Fund
10	Investment Group
11	Fund Family
12	Currency Rate
13	Public Fund
14	Private Standalone Fund
15	Public Standalone Fund
16	Interest Rate
17	Educational Institution
18	Arts Institution
19	Labor Union
20	Government Institution

21	Religious Institution
22	Trade Association
23	Foundation/Charitable Institution
24	Industry

d. String **CompanyTypeName** – (1-50) This is the text describing the companyType (W1252)

e. Integer **CompanyStatusTypeId** – Relates to Company Status Type Ref Data:

ID	Name
1	Operating
2	Operating Subsidiary
4	Reorganizing
5	Out of Business
6	Acquired
7	No Longer Investing
8	Launched
9	First Close
10	Secondary Close
11	Final Close
12	Fully Invested
13	Fully Liquidated
14	Withdrawn
15	Investing
16	Pre-Event Profile
17	Non-Operating Shell Company

f. String **CompanyStatusTypeName** – (0-50 characters): Human readable text describing the CompanyStatusType (W1252)
g. String **PrimaryTickerSymbol** – Ticker symbol of the primary trading item for this Company. (W1252)
h. String **WebSiteURL** – (0-200 characters) The home page of this Company's website. (URL) (W1252)
i. String **BusinessDescription** – (0-8000 characters) Short description of the Company's business; typically includes industry, key products, competitors, etc. (W1252)
j. String **LongBusinessDescription** – (0-8000 characters) Long description of the Company's business; typically includes industry, key products, competitors, etc. (W1252)

    i. **Client Note License:** Long Business requires is a premium data point please consult with your Client Development or Datafeed Representative for further information

k. Integer **PrimaryTradingItemId** – The most important security issued by the Company, listed on the most important exchange. This is determined by CIQ Research according to a combination of automatic rules and individual research.
l. Integer **PrimaryExchangeId** – Exchange where the primary trading item for this Company is listed
m. Integer **PrimaryExchangeName** – (1-100 characters) Primary the exchange the public company trades on
n. Integer **PrimaryExchangeSymbol** - (1-10 characters) The abbreviation for the exchange (e.g. NYSE, NASD, AMEX) (W1252)
o. Integer **SimpleIndustryId** – Identifies the CIQ "simple" industry
p. String **SimpleIndustryName** – (1-500 characters) the text representation of the Simple Industry (W1252).
q. Integer **SectorID** - Identifies the GICS Sector.
r. String **SectorName** – (1-500 characters) The text representation of the GICS Sectors (W1252).
s. Integer **IndustryGroupID** – Identifies the GICS IndustryGroup
t. String **IndustryGroupName** – (1-500 characters) The text representation of the GICS IndustryGroupName (W1252)

u. Integer **IndustryID** – Identifies the GICS Industry
v. String **IndustryName** – (1-500 characters) The text representation of the GICS IndustryName (W1252)
w. Integer **SubIndustryID** – Identifies the GICS SubIndustry
x. String **SubIndustryName** – (1-500 characters) The text representation of the GICS SubIndustry (W1252)

i. **Client Note License:** Industry classifications based on S&P's proprietary Global Industry Classification Standard (GICS) is a premium service that requires and additional license. Please contact your Client Support Representative for further information. For Frequently Asked GICS Questions: http://www2.standardandpoors.com/spf/pdf/index/faq_gics.pdf

ii. **Client Note License:** Industry classifications based on CapitalIQ's "simple" industry does not require additional 3rd party agreements. Please contact your Client Support Representative for further information.

y. Integer **UltimateParentCompanyId** – The top-level corporate parent of the Company for this search result, according to Current Subsidiary, Merged Entity, and Current Investment Arm company relationships. If the search result is for Company A, and Company A is a subsidiary of Company B, which in turn is a subsidiary of Company C, then Company A's ultimateParentCompanyID will be Company C.
z. String **UltimateParentCompanyName** - The top-level corporate parent of the CompanyName
aa. Integer **YearFounded** : Year the company was founded
bb. Integer **NumberOfEmployees** – Number of Employees
cc. Boolean **HasSubsidiariesAndInvestmentsFlag** – Does this company have any current subsidiaries?
dd. Boolean **HasResearchDocumentsFlag** – Has this Company ever had any research documents written about it? (Does not consider entitlements.)
ee. Boolean **HasFinancialsFlag** – Does this Company have Financial data?
ff. Integer **TemplateTypeID** – Relates to the financial template types for a specific company. Output Types below.

ID	Name
1	Standard
2	Banks
3	Insurance
4	Utility
5	REIT
7	Financial Services
8	Brokerage

gg. **PrimaryAddressInfo** (required, one per CompanyInfo) Primary Office Address of the Company. Attributes:
i. Integer **AddressID**– Uniquely identifies this address
ii. String **City** – (0-100 characters) (W1252)
iii. String **ZipCode** – (0-50 characters) (W1252)
iv. String **PhoneNumber** – (0-30 characters) Main office phone number. (W1252)
v. String **FaxNumber** – (0-30 characters) Main office fax number. (W1252)
vi. String **StreetAddress1** – (0-200 characters) (W1252)
vii. String **StreetAddress2** – (0-200 characters) (W1252)
viii. String **StreetAddress3** – (0-200 characters) (W1252)
ix. String **StreetAddress4** – (0-200 characters) (W1252)
x. Integer **StateId** – Relates to State Ref Data
xi. Integer **CountryId** – Relates to Country Ref Data
xii. String **StateName** – (0-100 characters) The text version of the StateId (W1252)
xiii. String **CountryName** – (0-50 characters) The text version of the CountryId (W1252)

hh. **TradingItems** (multiple,optional)
i. Integer **TradingItemId** – Corresponds to a single security listed on a particular exchange.
ii. Integer **ExchangeId** - If the company is public, this is the exchange that it trades on
iii. Boolean **HasEstimatesFlag** - Does this Company have Estimates data?
iv. Boolean **ActiveFlag** – If the trading item is Active True/False/[None]?
v. String **TickerSymbol–(0-150** characters**)** the symbol represented on the Exchange? (W1252)

Exceptions:

1. An exception will be thrown if the request cannot be authenticated via a session cookie.
2. An exception will be thrown if any `companyID` does not exist in the CIQ database. Data will be returned for companies that do exist, if the `companyId ()` array contains some companies that exist and some that don't.

Web Services Description Language (WSDL)

Notwithstanding anything to the contrary in this Agreement, Capital IQ reserves the right to change, expand or modify Web Services Definitions and corresponding Web Services Description Language files (WSDL) at any time. Any such modifications will be done in accordance with industry standards that support backwards compatibility with previous WSDL files. If possible, Clients will be notified in advance of any modifications.

Client Note: Login using the supplied UserName and Password provided by Client Support or your Client Development representative.

Appendices

1. **Windows-1252 A character encoding of the Latin alphabet**, used by default in the legacy components of Microsoft Windows in English and some other Western languages. The encoding is a superset of ISO 8859-1, but differs from the IANA's ISO-8859-1 by using displayable characters rather than control characters in the 0x80 to 0x9F range. It is known to Windows by the code page number 1252, and by the IANA-approved name "windows-1252". This code page also contains all the printable characters that are in ISO 8859-15 (though some are mapped to different code points).

2. **Extensible Markup Language (XML)** is a general-purpose markup language. Its primary purpose is to facilitate the sharing of data across different information systems, particularly via the Internet.

3. **dateTime [Definition:]** values may be viewed as objects with integer-valued year, month, day, hour and minute properties, a decimal-valued second property, and a Boolean timezoned property. Each such object also has one decimal-valued method or computed property, timeOnTimeline, whose value is always a decimal number; the values are dimensioned in seconds, the integer 0 is 0001-01-01T00:00:00 and the value of timeOnTimeline for other dateTime values is computed using the Gregorian algorithm as modified for leap-seconds. The timeOnTimeline values form two related "timelines", one for timezoned values and one for non-timezoned values. Each timeline is a copy of the ·value space· of decimal, with integers given units of seconds.

   The ·value space· of dateTime is closely related to the dates and times described in ISO 8601. For clarity, the text above specifies a particular origin point for the timeline. It should be noted, however, that schema processors need not expose the timeOnTimeline value to schema users, and there is no requirement that a timeline-based implementation use the particular origin described here in its internal representation. Other interpretations of the ·value space· which lead to the same results (i.e., are isomorphic) are of course acceptable.

   All timezoned times are Coordinated Universal Time (UTC, sometimes called "Greenwich Mean Time"). Other timezones indicated in lexical representations are converted to UTC during conversion of literals to values. "Local" or untimezoned times are presumed to be the time in the timezone of some unspecified locality as prescribed by the appropriate legal authority; currently there are no legally prescribed timezones which are durations whose magnitude is greater than 14 hours. The value of each numeric-valued property (other than timeOnTimeline) is limited to the maximum value within the interval determined by the next-higher property. For example, the day value can never be 32, and cannot even be 29 for month 02 and year 2002 (February 2002). For more details http://www.w3.org/TR/xmlschema-2/#dateTime