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Model Documentation

Model Detail

This document provides a complete overview of all element details. For simpler and more focused reports, simply copy this initial template and turn off the sections not required.

Model

Type: **Package**
Status: Proposed. Version . Phase 1.0.
Package:
Detail: *Created on 1/18/2023. Last modified on 1/18/2023*
GUID: {5BF2CACA-87A2-4e98-B65C-B2B4610F2074}

API Model

Type: **Package**
Status: Proposed. Version 1.0. Phase 1.0.
Package: Model
Detail: *Created on 2/2/2022. Last modified on 2/2/2022*
GUID: {D41B12E0-633C-4fae-B640-385868D07E65}

Paths

Type: **Package**
Status: Proposed. Version 1.0. Phase 1.0.
Package: API Model
Detail: *Created on 2/2/2022. Last modified on 4/29/2022*
GUID: {CC9B08FC-4A87-4abd-B2A6-5735AE851E00}

Paths - *(Package diagram)*
Created By: Michael Bica *on 2/2/2022*
Last Modified: 2/2/2022
Version: 1.0. *Locked:* False
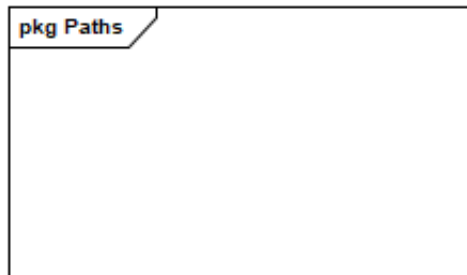*GUID:*   {E7BF4A1C-AC39-47dc-89FD-3FC2C90D8C5E}

pkg Paths

Figure: 1

Party

Type:	**Package**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Paths
Detail:	*Created on 4/22/2022. Last modified on 4/22/2022*
GUID:	{352275E1-C571-4cba-8F61-0535B77C6B78}

Party - *(Logical diagram)*

Created By:	Michael Bica *on* 4/22/2022
Last Modified:	12/31/2022
Version:	1.0. *Locked:* False
GUID:	{87131A31-6911-4489-B2FC-5C19FB893E50}
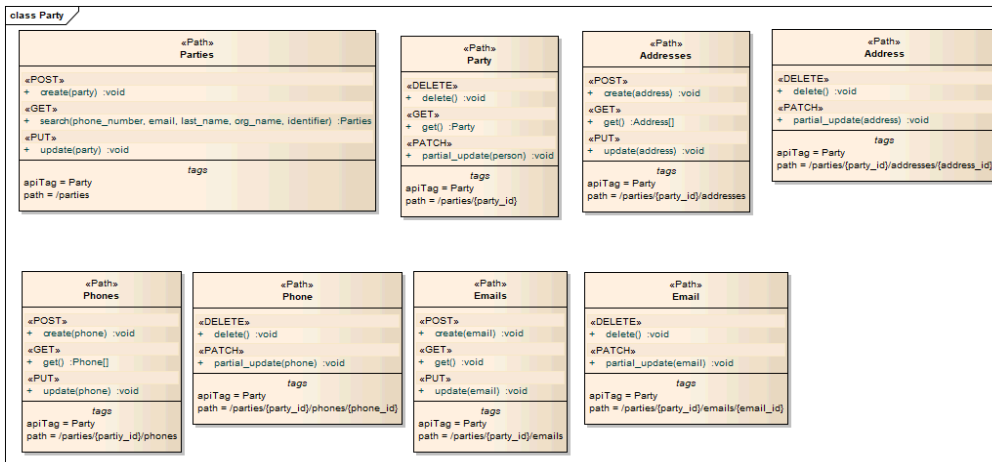
Figure: 2

Parties

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	*Created on 5/18/2022. Last modified on 5/19/2022.*
GUID:	{B1C14347-DE6D-457b-A927-2DB523692D85}

Tagged Values
- apiTag = Party.
  Default: TBD

- path = /parties.
  Default: /

Method	Notes	Parameters
create() void Public		**Party** [in] party
search() Parties Public		**string** [in] phone_number **string** [in] email **string** [in] last_name **string** [in] org_name **string** [in] identifier
update() void Public		**Party** [in] party

Phones

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	*Created on 5/19/2022. Last modified on 5/19/2022.*
GUID:	{83F145BA-086C-47b9-9487-4405B02AC998}

Tagged Values
- apiTag = Party.
  Default: TBD

- path = /parties/{partiy_id}/phones.
  Default: /

Operations

Method	Notes	Parameters
create() void Public		**Phone** [in] phone
get() Phone[]		

Method	Notes	Parameters
Public		
update() void Public		**Phone** [in] phone

Phone

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	*Created on 5/19/2022. Last modified on 5/19/2022.*
GUID:	{E54009D7-81DE-458c-BFD2-C9F1C12E671C}

Tagged Values
- apiTag = Party.
  Default: TBD

- path = /parties/{party_id}/phones/{phone_id}.
  Default: /

Operations

Method	Notes	Parameters
delete() void Public		
partial_update() void Public		**Phone** [in] phone

Emails

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	*Created on 5/19/2022. Last modified on 5/19/2022.*
GUID:	{2B94803B-C769-4002-8E47-7AA42684FBC0}

Tagged Values
- apiTag = Party.
  Default: TBD

- path = /parties/{party_id}/emails.
  Default: /

Operations

Method	Notes	Parameters
create() void Public		**Email** [in] email
get() void Public		
update() void Public		**Email** [in] email

Email

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	Created on 5/19/2022. Last modified on 5/19/2022.
GUID:	{0A9616CA-E6A1-450a-8D24-7D6A93381F0D}

Tagged Values

- apiTag = Party.
  Default: TBD

- path = /parties/{party_id}/emails/{email_id}.
  Default: /

Operations

Method	Notes	Parameters
delete() void Public		
partial_update() void Public		**Email** [in] email

Party

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	Created on 5/18/2022. Last modified on 5/19/2022.
GUID:	{994B50AD-6698-467d-B731-376FDB623B73}

Tagged Values
- apiTag = Party.
  Default: TBD

- path = /parties/{party_id}.
  Default: /

Operations

Method	Notes	Parameters
delete() void Public		
get() Party Public		
partial_update() void Public		**Party** [in] person

Addresses

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	*Created on 5/19/2022. Last modified on 5/19/2022.*
GUID:	{522BDD12-5442-4e00-B69B-32685388AF21}

Tagged Values
- apiTag = Party.
  Default: TBD

- path = /parties/{party_id}/addresses.
  Default: /

Operations

Method	Notes	Parameters
create() void Public		**Address** [in] address
get() Address[] Public		
update() void Public		**Address** [in] address

Address

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	*Created on 5/19/2022. Last modified on 5/19/2022.*
GUID:	{6EFF1806-FDEF-4837-B20F-6B7AE482D869}

Tagged Values
- apiTag = Party.
  Default: TBD

- path = /parties/{party_id}/addresses/{address_id}.
  Default: /

Operations

Method	Notes	Parameters
delete() void Public		
partial_update() void Public		**Address** [in] address

Accounts

Type:	**Package**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Paths
Detail:	*Created on 5/3/2022. Last modified on 5/3/2022*
GUID:	{66B4580D-E3D8-43e0-BE55-6C22C59F24E6}

Accounts - *(Logical diagram)*

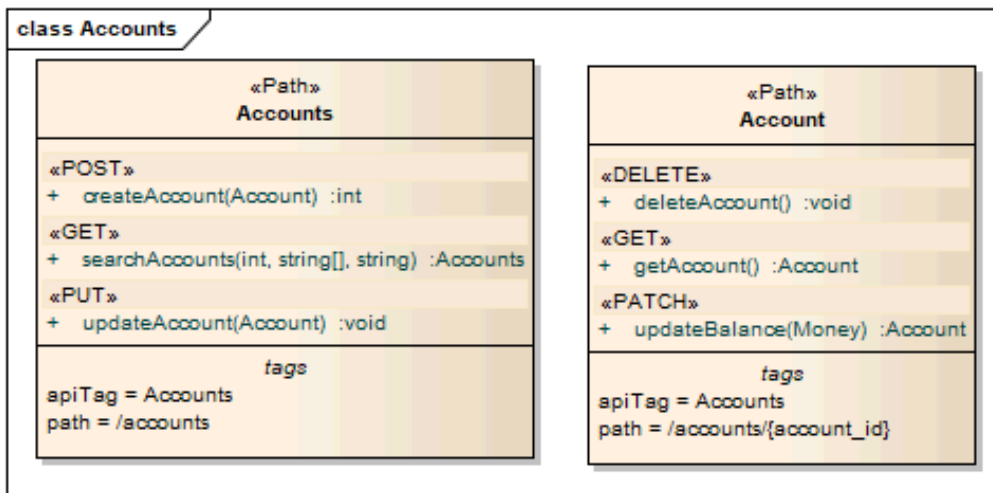|	
Created By:	Michael Bica *on 5/3/2022*
Last Modified:	12/31/2022
Version:	1.0. *Locked:* False
GUID:	{7CBBEA98-032E-4ae8-A9FF-88C58E56F7A3}

Figure: 3

Accounts

Type: **Interface**
Status: Proposed. Version 1.0. Phase 1.0.
Package: Accounts   *Keywords:*
Detail: *Created on 5/18/2022. Last modified on 5/18/2022.*
GUID: {3F9D5C1B-3EE5-4276-B0B3-CCAA33040010}

Tagged Values
- apiTag = Accounts.
  Default: TBD

- path = /accounts.
  Default: /

Operations

Method	Notes	Parameters
createAccount() int Public		**Account** [in] account
searchAccounts() Accounts Public		**int** [in] account_id **string[]** [in] account_type **string** [in] phone_number

Method	Notes	Parameters
updateAccount() void Public		**Account** [in] account

Account

Type:	**Interface**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	Created on 5/18/2022. Last modified on 5/18/2022.
GUID:	{E4CB375B-79D0-461f-BF76-328871E84C24}

Tagged Values
- apiTag = Accounts.
  Default: TBD

- path = /accounts/{account_id}.
  Default: /

Operations

Method	Notes	Parameters
deleteAccount() void Public		
getAccount() Account Public		
updateBalance() Account Public		**Money** [in] balance

Resources

Type:	**Package**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	API Model
Detail:	Created on 2/2/2022. Last modified on 4/4/2022
GUID:	{188ACC39-0861-4c72-A231-DC3A45D0ED5B}

Resources - *(Package diagram)*

Created By:	Michael Bica *on 2/2/2022*
Last Modified:	4/4/2022
Version:	1.0. *Locked:* False
GUID:	{BBAA9B60-94B5-4535-A4C2-29CB9F278A27}
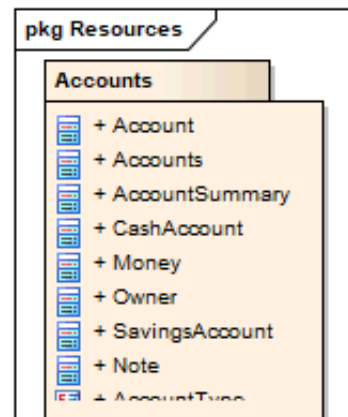
Figure: 4

Party

Type:	**Package**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Resources
Detail:	*Created on 4/22/2022. Last modified on 4/22/2022*
GUID:	{C8DE9DED-7ADE-44f1-A57B-5CA6BB179A81}

Party - *(Logical diagram)*

Created By:	Michael Bica *on* 4/22/2022
Last Modified:	1/11/2023
Version:	1.0. *Locked:* False
GUID:	{A1E10921-03CE-448a-8BAC-E28C2F5AF2EC}
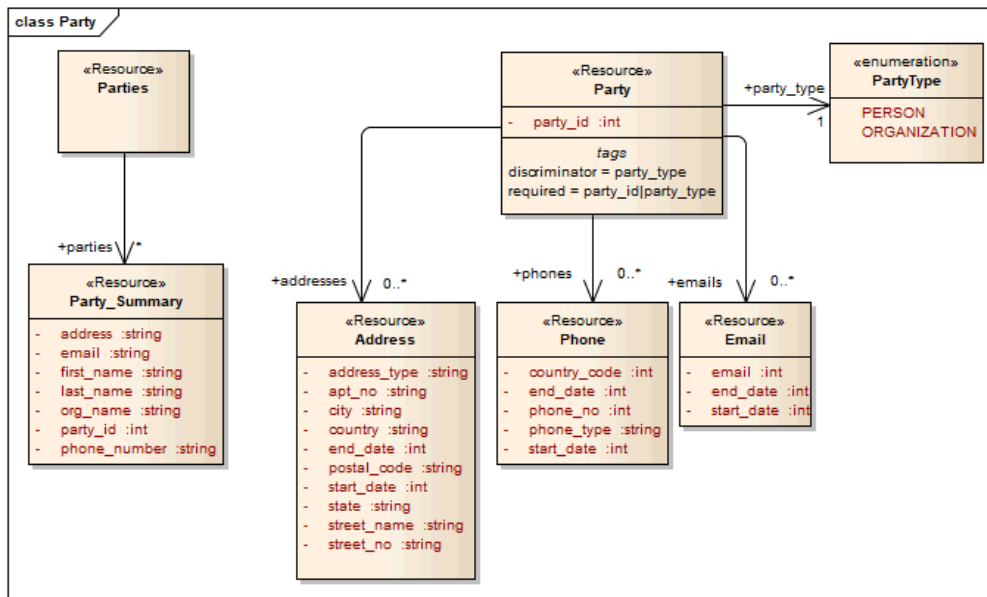
Figure: 5

Party inheritance - *(Logical diagram)*
Created By: DrM *on* 5/18/2022
Last Modified: 12/31/2022
Version: 1.0. *Locked:* False
GUID: {5C784467-F87B-4141-BD53-FB3014DE9445}
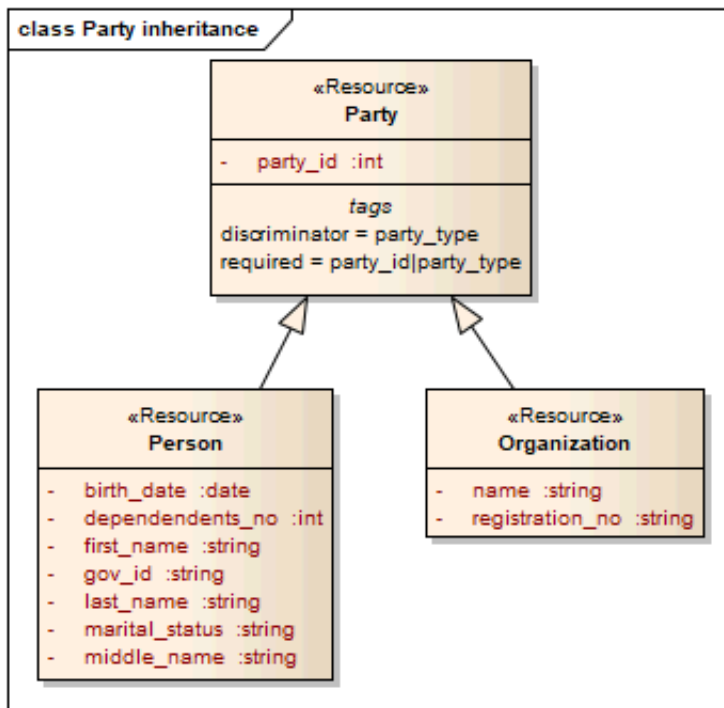
Figure: 6

Parties

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	Created on 5/19/2022. Last modified on 5/19/2022.
GUID:	{7C6994F6-57C5-4506-9EAA-E3A53FB096DE}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association	Public	Public parties	
Source -> Destination	Parties	Party_Summary	

Party_Summary

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	*Created on 5/19/2022. Last modified on 5/19/2022.*
GUID:	{638B7568-ADD7-4ed0-BC1F-D3C7B4DB04E9}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Parties	Public parties Party_Summary	

Attributes

Attribute	Notes	Constraints and tags
address string Private		*Default:*
email string Private		*Default:*
first_name string Private		*Default:*
last_name string Private		*Default:*

Attribute	Notes	Constraints and tags
org_name string Private		*Default:*
party_id int Private		*Default:*
phone_number string Private		*Default:*

Party

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	Created on 5/18/2022. Last modified on 5/18/2022.
GUID:	{4CF1C54E-57F5-4a34-94DA-944DFB3AC547}

Custom Properties
- isActive = False

Tagged Values
- discriminator = party_type.

- required = party_id|party_type.

Connections

Connector	Source	Target	Notes
Generalization Source -> Destination	Public Organization	Public Party	
Generalization Source -> Destination	Public Person	Public Party	
Association Source -> Destination	Public Party	Public addresses Address	
Association Source -> Destination	Public Party	Public phones Phone	
Association Source -> Destination	Public Party	Public emails Email	
Association Source -> Destination	Public Party	Public party_type PartyType	

Attributes

Attribute	Notes	Constraints and tags
party_id int Private		*Default:*

Person

Type:	**Class Party**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	*Created on 5/18/2022. Last modified on 5/18/2022.*
GUID:	{083AA36A-002D-47ff-9634-94484A3B8A55}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Generalization Source -> Destination	Public Person	Public Party	

Connector	Source	Target	Notes

Attributes

Attribute	Notes	Constraints and tags
birth_date date Private		*Default:*
dependendents_no int Private		*Default:*
first_name string Private		*Default:*
gov_id string Private		*Default:*
last_name string Private		*Default:*
marital_status string Private		*Default:* [x-code-set = marital_status]

Attribute	Notes	Constraints and tags
middle_name string Private		*Default:*

Organization

Type:	**Class** **Party**	
Status:	Proposed. Version 1.0. Phase 1.0.	
Package:	Party *Keywords:*	
Detail:	Created on 5/18/2022. Last modified on 5/18/2022.	
GUID:	{7C7EA227-DF22-48c4-93B4-D21F73471944}	

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Generalization Source -> Destination	Public Organization	Public Party	

Attributes

Attribute	Notes	Constraints and tags
name string Private		*Default:*
registration_no string Private		*Default:*

Address

Type: **Class**
Status: Proposed. Version 1.0. Phase 1.0.
Package: Party   *Keywords:*
Detail: *Created on 5/18/2022. Last modified on 5/18/2022.*
GUID: {AD43AA44-EF45-41d6-A593-DF5F278B4D7B}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Party	Public addresses Address	

Attributes

Attribute	Notes	Constraints and tags
address_type string Private		*Default:* [x-code-set = address_type]
apt_no string Private		*Default:*
city string Private		*Default:*
country string Private		*Default:*

Attribute	Notes	Constraints and tags
end_date int Private		*Default:*
postal_code string Private		*Default:*
start_date int Private		*Default:*
state string Private		*Default:*
street_name string Private		*Default:*
street_no string Private		*Default:*

Email

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	Created on 5/18/2022. Last modified on 5/18/2022.
GUID:	{34065B13-9DAF-43bc-8545-C8BDDF1616C9}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Party	Public emails Email	

Attributes

Attribute	Notes	Constraints and tags
email int Private		*Default:*
end_date int Private		*Default:*
start_date int Private		*Default:*

Phone

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	Created on 5/18/2022. Last modified on 5/18/2022.
GUID:	{EBCC5FC6-B2D0-45fd-BF4F-DFDACF590DF3}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Party	Public phones Phone	

Attributes

Attribute	Notes	Constraints and tags
country_code int Private		*Default:*
end_date int Private		*Default:*
phone_no int Private		*Default:*
phone_type string Private		*Default:*

Attribute	Notes	Constraints and tags
start_date int Private		*Default:*

PartyType

Type:	**Enumeration**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Party *Keywords:*
Detail:	Created on 5/18/2022. Last modified on 5/18/2022.
GUID:	{2C625A1B-4407-46df-B135-C396637E84C8}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Party	Public party_type PartyType	

Attributes

Attribute	Notes	Constraints and tags
PERSON Public «enum»		*Default:*
ORGANIZATION Public «enum»		*Default:*

Attribute	Notes	Constraints and tags

Accounts

Type:	**Package**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Resources
Detail:	Created on 2/2/2022. Last modified on 2/2/2022
GUID:	{940B3EDB-36E0-4578-AEEA-99A77AEF26D1}

Accounts - *(Logical diagram)*

Created By:	Michael Bica *on* 2/2/2022
Last Modified:	5/20/2022
Version:	1.0. *Locked:* False
GUID:	{5127CF14-8508-4afe-976B-EA3E3120D747}
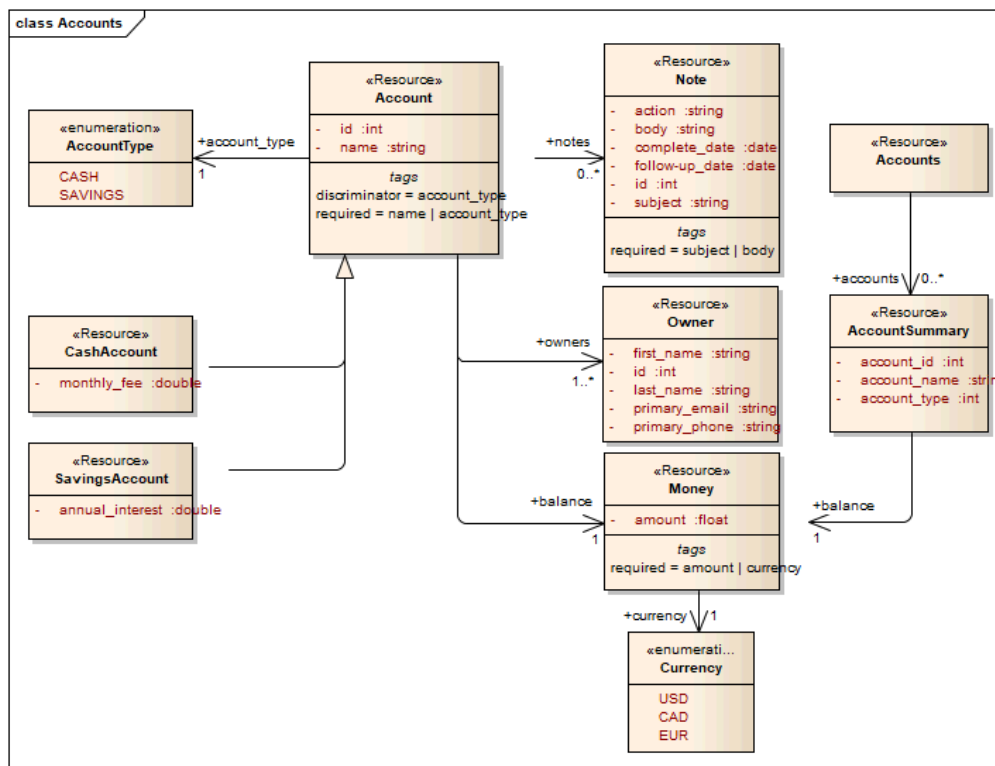
Figure: 7

Account

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	Created on 2/2/2022. Last modified on 5/4/2022.
GUID:	{E486C820-35DA-4493-94DA-288A5D9B98C8}

Custom Properties
- isActive = False

Tagged Values
- discriminator = account_type.

- required = name | account_type.

Connections

Connector	Source	Target	Notes
Generalization Source -> Destination	Public SavingsAccount	Public Account	
Generalization Source -> Destination	Public CashAccount	Public Account	
Association Source -> Destination	Public Account	Public balance Money	
Association Source -> Destination	Public Account	Public account_type AccountType	
Association Source -> Destination	Public Account	Public notes Note	
Association Source -> Destination	Public Account	Public owners Owner	

Attributes

Attribute	Notes	Constraints and tags

Attribute	Notes	Constraints and tags
id int Private		*Default:* [nullable = false] [readOnly = true]
name string Private		*Default:*

AccountSummary

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	Created on 2/2/2022. Last modified on 5/4/2022.
GUID:	{36E5DED1-56B4-4e99-8DFD-63909A59FA2F}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public AccountSummary	Public balance Money	
Association Source -> Destination	Public Accounts	Public accounts AccountSummary	

Attributes

Attribute	Notes	Constraints and tags
account_id int Private		*Default:*

Attribute	Notes	Constraints and tags
account_name string Private		*Default:*
account_type int Private		*Default:*

Accounts

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	*Created on 2/2/2022. Last modified on 5/4/2022.*
GUID:	{36133997-66E0-40bc-8F65-B530EC7C2329}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Accounts	Public accounts AccountSummary	

CashAccount

Type:	**Class** **Account**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	*Created on 2/2/2022. Last modified on 5/4/2022.*
GUID:	{EB08F8AA-19E1-4e28-8706-8FC14B10B1F5}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Generalization Source -> Destination	Public CashAccount	Public Account	

Attributes

Attribute	Notes	Constraints and tags
monthly_fee double Private		*Default:*

Money

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	*Created on 2/2/2022. Last modified on 5/4/2022.*
GUID:	{9EE47064-DC3E-4e9d-A61F-13349B2D97D1}

Custom Properties

- isActive = False

Tagged Values

- required = amount | currency.

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Money	Public currency Currency	
Association Source -> Destination	Public AccountSummary	Public balance Money	

Connector	Source	Target	Notes
Association Source -> Destination	Public Account	Public balance Money	

Attributes

Attribute	Notes	Constraints and tags
amount float Private		*Default:*

Owner

Type: **Class**
Status: Proposed. Version 1.0. Phase 1.0.
Package: Accounts   *Keywords:*
Detail: Created on 4/4/2022. Last modified on 5/4/2022.
GUID: {9A51E335-160E-4326-8A7F-DB1EDE36CCD0}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Account	Public owners Owner	

Attributes

Attribute	Notes	Constraints and tags
first_name string Private		*Default:*
id int		*Default:*

Attribute	Notes	Constraints and tags
Private		[nullable = false] [readOnly = true]
last_name string Private		*Default:*
primary_email string Private		*Default:*
primary_phone string Private		*Default:*

SavingsAccount

Type:	**Class** **Account**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	*Created on 2/2/2022. Last modified on 5/4/2022.*
GUID:	{3558B32F-236D-4cf8-AB8A-6ABB53FBE87C}

Custom Properties
- isActive = False

Connections

Connector	Source	Target	Notes
Generalization	Public	Public	
Source -> Destination	SavingsAccount	Account	

Connector	Source	Target	Notes

Attributes

Attribute	Notes	Constraints and tags
annual_interest double Private		*Default:*

Note

Type:	**Class**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	*Created on 2/2/2022. Last modified on 5/4/2022.*
GUID:	{23710809-26B8-41c0-B870-8F30CF277707}

Custom Properties

- isActive = False

Tagged Values

- required = subject | body.

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Account	Public notes Note	

Attributes

Attribute	Notes	Constraints and tags

Attribute	Notes	Constraints and tags
action string Private		*Default:* [maxLength = 1] [x-code-set = NoteAction]
body string Private		*Default:*
complete_date date Private		*Default:*
follow-up_date date Private		*Default:*
id int Private		*Default:* [nullable = false] [readOnly = true]
subject string Private		*Default:* [maxLength = 3] [x-code-set = NoteSubject]

AccountType

Type:　　　　　**Enumeration**

Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	*Created on 2/2/2022. Last modified on 5/4/2022.*
GUID:	{2CB09B9E-381C-41a2-AF64-FAC5CB508C3B}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Account	Public account_type AccountType	

Attributes

Attribute	Notes	Constraints and tags
CASH Public «enum»		*Default:*
SAVINGS Public «enum»		*Default:*

Currency

Type:	**Enumeration**
Status:	Proposed. Version 1.0. Phase 1.0.
Package:	Accounts *Keywords:*
Detail:	*Created on 4/4/2022. Last modified on 5/4/2022.*
GUID:	{F75228DE-E1D4-4a17-A5FE-5E47274EB96B}

Custom Properties

- isActive = False

Connections

Connector	Source	Target	Notes
Association Source -> Destination	Public Money	Public currency Currency	

Attributes

Attribute	Notes	Constraints and tags
USD Public «enum»		*Default:*
CAD Public «enum»		*Default:*
EUR Public «enum»		*Default:*