



**Unity Programme**

**UK - Release 6**

**Sprint 4**

**MDM Manage Party Real-time Services**

**(INT- 32&33)**

**Interface Contract Document**

**Version 3.18**

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**Document Maintenance**

***Document Owners***

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| Technical Owner(s): Venkata S | |
| Current Version: | 3.18 |
| Date Last Updated: | 26th Sep 2017 |

***Version Control***

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date Updated | Revision Author | Summary of Major Changes Made |
| 0.1 | 28-Aug-2014 | Vinoth Srinivasan | Initial draft |
| 0.2 | 02-Sep-2014 | Venkat & Vinoth | Added UpdateParty Service and added WSDLs and XSDs for all services |
| 0.3 | 03-Sep-2014 | Venkat & Vinoth | Updated the Interface specification based on E2E architecture change (Store customer information locally in Pega) |
| 0.4 | 05-Sep-2014 | Vinoth | Reviewed and updated the Interface parameters and examples. |
| 0.5 | 08-Sep-2014 | Venkat | Updated Sample messages, XSD and WSDL files |
| 0.6 | 10-Sep-2014 | Vinoth & Venkat | Included SSID attribute (Source System Identifier) in all service request layout. And WSDLs/XSDs are updated. |
| 0.7 | 11-Sep-2014 | Vinoth & Venkat | Policy has been renamed to Contract and WSDLs and XSDs are updated. |
| 1.0 | 22-Sep-2014 | Suresh Swarna | Based lined version for release 1 after TDA approvals |
| 1.1 | 20-Oct-2014 | Venkat | Included below changes in XSD and ICD  1.Modified max occurrence to 1 for below objects  Email,CustomerAccount,Phonenumber and Operationtype  2.DOB with default data as '1800-01-01'  3.MDMPartyID is optional and SourcePartyId is mandatory in  Update and Get Party services. |
| 1.2 | 12-Jun-2015 | Manoj Kumar | Modified the Create/Update/Get/Search WSDL and Sections 2, 3, 5 as per the R4 requirement enhancements |
| 1.3 | 15-Jun-2015 | Narayana Velaga | Updated attributes definitions with examples and also modified section 3.1.6 |
| 1.4 | 16-Jun-2015 | Manoj Kumar | Updated the Document to include the new changes from the Review Comments |
| 1.5 | 17-June-2015 | Narayana Velaga | Added SOAP Header and WSSecurity information in the NFR section |
| 2.0 | 19-June-2015 | Narayana Velaga | Baseline Version for Release 4 |
| 2.1 | 26-June-2015 | Narayana Velaga | Updated Contract Entity to add SourceAddressID for Create/Update/Get Party services |
| 2.2 | 20-July-2015 | Narayana Velaga | Adding PAF Key in the request and WSDL changes to group the response attributes into Complex Types to align with PEGA design |
| 2.3 | 20-Aug-2015 | Sekhar Karnat | Added DPS and Updated Capscan key name |
| 2.4 | 06-Jan-2016 | Venkat | Updated Operation types and mandatory field’s information for Create and Update Party Services. |
| 2.5 | 13-Jan-2016 | Chethana | Document details included in Create/Update/Get/Search Party services |
| 2.6 | 21-Feb-2016 | Chethana | Data model changes to the document level and wsdl changes of create/update/get/search party services are included |
| 2.7 | 07-Feb-2016 | Kosala Ranatunga | Updated as per the decision to get the UpdateParty service requests from Alfresco instead of PEGA |
| 3.0 | 19-May-2016 | Mohamed Fahmy/Sekhar Karnat | Introduced R6 Sprint 2 changes including MCA (Manage Customer Account) new service, and changes to update party |
| 3.1 | 9th June 2016 | Ashok Vemula | Updated Documents With Mark Buck’s Review Comments |
| 3.2 | 15th June 2016 | Ashok Vemula | Updated the MCA Services WSDL as per Mark’s comments (Removed Complex Type) |
| 3.3 | 12th Aug 2016 | Chethana | Introduced R6 Sprint 3 changes including changes to GetPartyService |
| 3.4 | 26th Aug 2016 | Chethana | Introduced complete document structure and a new operation for ManageDocumentDetails to support ESB in storing document details |
| 3.5 | 16nd Sep 2016 | Chethana | Updated CreatePartyService to support Affinity Prospects to convert to e-serve prospect/customer |
| 3.6 | 22nd Sep 2016 | Ashok Vemula | Removed partner option code from Manage Customer Account Service |
| 3.7 | 6th Oct 2016 | Ashok Vemula | Provided clarifications for Shafiq’s Review comments. |
| 3.8 | 13th Oct 2016 | Manoj Kumar | Included Search party changes as part of R6.3 i.e... updated sections 2.3 ,3.4.3 |
| 3.9 | 18th Oct 2016 | Chethana | Includes changing the document related tables schema |
| 3.10 | 25th Nov 2016 | Chethana | Including new calling system CTI under CR 325 and JAH Incident related WSDL changes. |
| 3.11 | 28th Nov 2016 | Sravani | Updated with Release6.4 drop 1 Requirements. DocumentFormat column is added to Document object.  Section: 2.3 |
| 3.12 | 08-Dec-2016 | Rajesh Srinivasulu | Incorporated changes for CR241 as part of R6.4 (BBDM release). Refer the sections 1.1, 2.2, 2.3, 3.1.3, 3.2.3, 5.1 & 5.5 for updates. |
| 3.13 | 13-Dec-2016 | Rajesh Srinivasulu | Incorporated the review comments from Mark Buck for CR241 i.e. Added MDMAddressID in GetParty response.  Refer sections 2.2, 3.3.4 & 5.1 for updates. |
| 3.14 | 31-Jan-2017 | Venkata S | Updated ICD with Marketing Campaigns requirements. |
| 3.15 | 16-02-2017 | Chethana | Duplicate Cover Requirements |
| 3.16 | 25-02-2017 | Venkata S | Updated ICD with GWA Requirements |
| 3.17 | 17-03-2017 | Venkata S | Updated as per the review comments received from Shafiq |
| 3.18 | 26th Sep 2017 | Ashok V | Updated document for web requirement to consume get party service |

**Note:** These documents are strictly for specific Virtusa/HomeServe use only. They shall not be shared with an external party other than HomeServe. These documents should always be kept securely and employees shall use reasonable care protecting these documents from unauthorized use or disclosure to a third party. This category also covers client intellectual property where Virtusa has a non-disclosure agreement with HomeServe.

**Document Approval**

Virtusa Corporation and HomeServe have reviewed this document and hereby agree that the contents herein are accurate. Any changes to this document must be communicated in writing and signed-off by both parties.

|  |  |
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# Introduction

## Purpose

**Release 5:**

As part of Unity Programme Release5, Pega and Alfresco will feed data to MDM using the Real time services that are available from MDM. Also there are some enhancements required for the existing MDM real-time services designed in the previous releases. Release 4 integration of PEGA and Ensura in to MDM on real time basis will provide duplicate cover check functionality for PEGA/Ensura Center to check in MDM for overlap.

As part of Release 5, Pega and Alfresco will feed the document details of the customer and policies to MDM using Real Time Services like create(Pega only), Update (Pega and Alfresco) and GetPartyService(Pega and Alfresco)

**Release 6, Sprint 2:**

In General, there are additions and changes to the MDM Manage Party Services as part of Unity Release 6 sprint 2. The main theme in this sprint is to be able to support the following functionality on Pega:

* Joint Accounts
* Transfer of Cover process
* Change of Cover process
* Manage Authorized Parties process
* Product Spine versioning
* Deceased process
* Allocation of cash, excess payments
* Refund rejection process
* Suspense account

**Release 6, Sprint 3:**

Below changes done to the MDM Services as a part of Release 6 Sprint 3.

* MDM shall retain the documentation metadata along with the UUID from Alfresco within its Database. GPS (Get Party Service) will be amended to include an additional operation to return required document related details to the calling system. This operation is primarily designed to satisfy eServe 360 degree view, however, other systems may utilize it based on its predefined WSDL definition.
* The new operation is designed such that existing GPS should not be impacted in performance and that its NFR be met. Additionally, calling systems will not need to change the way this service is being invoked.
* A new operation ManageDocumentDetails is created under ManageCustomerAccountService (MCA) such that the existing service is not impacted functionally and the new operation supports ESB in storing document details in MDM.
* CreateParty Service is updated to support the Affinity Partner prospect to be converted as a customer/prospect by e-serve.
* Partner code is removed from Manage customer account service as a part of multi partner/underwriter/excess changes.

As part of CR 325, CTI is an additional calling system included for SearchPartyService (SPS). SPS request with CTI calling system will return the response with the customer/prospect details of other calling systems (Eserve/ensura/MDB prospects). Typically CTI will be calling SPS with a telephone number (mobile / landline) based on which a party(ies) will be searched and if found returned.

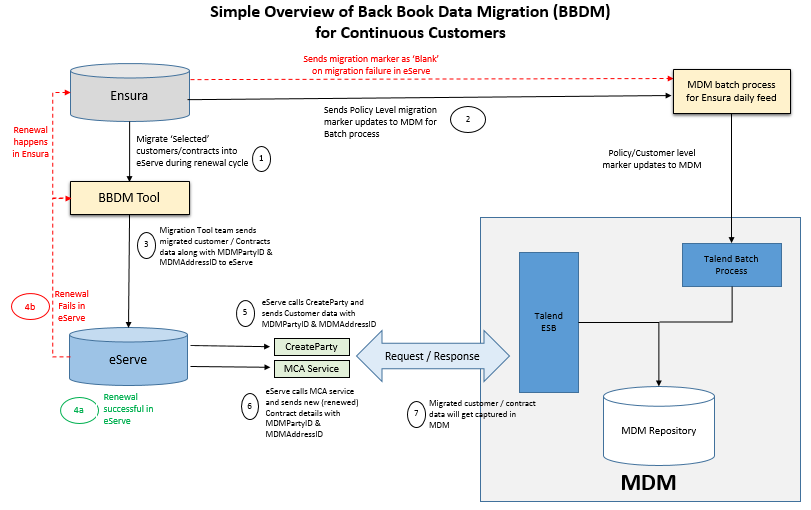
**Release 6, Sprint 4:**

Below changes done to the MDM Services as a part of BBDM CR241.

***CR241 - Change Description:***

* **Include MDM Party ID in the Create Party Service.** When data is passed to eServe, as part of the Data Migration Solution, it should include the MDM Party ID (if available; i.e. optionally) for the customer. Once the Create Party Service has successfully created the record (as part of the Migration Execute Sale), it should pass the MDM Party ID back to MDM so to enable MDM to “link” the Ensura records with the eServe records in MDM. Irrespective of whether a Contract or Quote is created as part of the migration, solution should attempt to link Ensura and eServe records in MDM.
* **Add Migration Flag in Party (Customer) and Contract entities in MDM and manage values for them rules based on the business rules.** MDM should capture migration level markers from Ensura system for the contracts and customers which create a provision that can be used by external systems to determine where in the migration process a customer/policy is (from Ensura to eServe).

Refer [section 2.2](#_Assumptions) for the business rules for them.



**The current system in scope for real time integration are:**

|  |  |  |  |
| --- | --- | --- | --- |
| S. No. | Unity Release | System | Source System ID |
| 1 | 4 | PEGA | 1 |
| 2 | 4 | Ensura | 4 |
| 3 | 5 | Web | 6 |
| 4 | 6.3 | CTI | 9 |
| 5 | 6.4 | MDB | 7 |
| 6 | 6.3 | Alfresco | 5 |
| 7 | 4 | MDM | 2 |
| 8 | 6.4 | BBDM | 8 |

As Part of Release 6.4 Party Role Model and Vulnerable Customers requirements, In Addition to existing document object, new column Document format is added to store format of document from GMC. From Customer 360 view documents will be displayed along with metadata in which format document has sent to customers. Below are list of services which gets impacted due to this requirement.

1. ManageCustomerAccount Service operation MDD (Manage Document Details)
2. Create and Update Party Services
3. GetParty Service

**Release 6, Sprint 4:**

As Part of Release 6.4 Marketing Campaigns requirements, Campaigns details are shown in eServe customer 360. From Customer 360, eServe makes a call to MDM service to get all campaign IDs associated to Party. In response, MDM will return the campaign IDs and then eServe will populate other campaign details by fetching form eServe database then display the details in 360. To support this functionality MDM will provide new operation and do changes to existing operations. Below are list of services which gets impacted due to this requirement.

1. GetParty Service New Operation – GetCampaigns
2. Changes to existing Getparty Operation to add campaigns details in response.

**R6.4 Sprint 4 Duplicate Cover, Renewals Requirements and CTI requirements:**

As part of R6.4 eServe enhanced its functionality to reinstate cancelled and expired contacts within 28days and 60days from date of cancellation and expiry respectively. Due to this change eServe cancelled and expired contracts will be treated as “Active” from external system point of view. Below are list of impacted MDM services.

As party of CTI Acquisition via Dialer requirements, SSID needs to be added at party level in search party response to identify source of party when multiple prospects are return when do search by telephone number.

* SearchPartyService Changes:
* Added SSID in search party response WSDL
* Database view level, include “Cancelled” and “Expired” eServe contract status in the Active contract list.

Please refer section 5.7, 5.8 for more information and design decisions.

**R6.4 Sprint 4 GWA Requirements:** As Part of GWA requirements, eServe creates case against Contract and associates the CaseID with Party Enquiry document and send it to Alfresco and MDM. From 360, CSR able to see these documents in Inbound Correspondence tab and GWA screens.

In order to support this feature in eServe, MDM enhanced the existing GetDocumentDetails in GetPartyService and ManageDocumentDetails operation in MCAService.

1. **ManagementDocumentDetails:** Add CaseID as optional field in Document Object. If its enquiry document against a Contract then only CaseID will be populated else it will be blank.
2. **GetDocumentDetails:** Add optional field CaseID in request and response structures.

From 360, Enquiry document will be available in InboundCorrespondance tab and in GWA screen, when CSR clicks on the CaseID(Pre-populated from eServe databse) then internally eServe calls GetDocumentDetails with SourceCustomerID and CaseID to fetch enquiry related document.

**Release 6, Sprint 4.1:**

In an effort to provide self-service journey to the customers, HomeServe DTS team will use MDM get party service to support eDocs functionality via ESB.

Below are the high level changes as a part of Release 6 Sprint 4.1

* Going forward MDM GetParty Service will support Calls from Web.

## Distribution List

Approval List

|  |  |  |
| --- | --- | --- |
| **Name** | **Organisation** | **Role** |
| Shafiq Ratansi | HomeServe | Senior Design Architect |
| Mark Buck | HomeServe | Solution Architect |

Discussion / Review List

In addition to those on the approval list above comments will be sought from the following people/groups.

|  |  |  |
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| **Name** | **Organisation** | **Role** |
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| Mohamed Fahmy | Virtusa | Data Architect |
| Manu Swami | Vitrusa | Data Head |

## Glossary

|  |  |
| --- | --- |
| **Term** | **Definition** |
| MDM | Master Data Management |
| SOAP | Simple Object Access Protocol |
| XML | eXtended Markup Language |
| WSDL | Web Services Description Language |
| XSD | Xml Schema Definition |
| ICD | Interface Contract Document |
| CA | Customer Account |
| JA | Joint Account |
| JAH | Joint Account Holder |
| ToC | Transfer of Cover |
| DCC | Duplicate Cover Check |
| AP | Authorised Party |
| SPS | Search Party Service |
| GPS | Get Party Service |
| CPS | Create Party Service |
| UPS | Update Party Service |
| MDD | Manage Document Details |
| MCAS | Manage Customer Account Service |
| CTI | Computer Telephony Integration |
| BBDM | Back Book Data Migration |
| GWA | General Work Allocation |

# Interface Static Design

## Overview



*Frequency of interaction* – Realtime.

*Protocol* – Soap over Http/Https

## Assumptions

Below are the assumptions applicable for both the calling systems using the MDM service

* Property can only exist in one system either PEGA or Ensura
* Reference data (LOVs) will be managed at enterprise level. MDM application will subscribe to these metadata and configure it.
* Address stored in MDM are service address and source system will send only service/insured address.
* Asset data will not be cleansed while loading into MDM.
* Both the calling systems will use the same service for Create/Update Request for Creating/Updating the party in MDM
* MDM reference model required for Data Mapping only
* OfferVersion for Ensura will have a value of 1 in the request
* In Search Service, address matching will be done using Postcode and DPS if available, else with CapScanAddressKey if available, else perform exact match as per the next point.
* Address exact match will be based on at least Flat Number and/or Building Number along with Post Code along with other available request attributes.
* No business validations are performed on the document details received from Alfresco or Pega apart from considering the documents with contracts as contract level document and documents without contracts as party level document.
* The data exchange between Source systems and MDM will be based on ICD format agreed. Refer the appendix for more details
* Capability will be built for MDM to accept document details from both Alfresco and Pega through UpdateParty service requests and CreateParty service request for Pega.
* MDM would not receive same document details from both Alfresco and Pega.
* Setting documents to ‘Inactive’ will be done by Pega by sending ‘Inactive’ for DocumentStatus with ‘Delete’ OperationType and status and Inactive for the document
* Document access right information will not be recorded in MDM and will be decided by the calling system.
* All the documents irrespective of their status are sent as the response in GetPartyService
* MDM data fixes might be needed for the Ensura Customer details stored in MDM Hub in case of any data model changes (Entities or relationships).
* Eserve or Ensura hits GetDocumentDetails Operation.
* Partner option code in contract reference table will not be used for any purpose going forward in eServe, it will still be there in MDM model till we eliminate all the dependencies from Ensura.
* Document format is mandatory and it’s calling system responsibility to provide correct document format along with other document details. Agreed Document Formats are “PDF/Audio/Braille/Large Font. Default format is “PDF”.
* For migration customers, eServe first makes a call to CreateParty service to send customer details and then it calls MCA service to send contract details.
* For migrated customers, eServe should send ‘IsMigratedCustomer’ flag as ‘True’ in both CreateParty and MCA services. So that MDM knows that this is a migrated customer and performs validations accordingly. This optional field will not be used by Ensura.
* If ‘IsMigratedCustomer’ flag is ‘True’ then both the fields MDMPartyID and MDMAddressID are mandatory and should exist in MDM else they will get rejected by MDM.

Note: Including MDMAddressID field in CreateParty and MCA services is recommended by MDM for NFR reasons.

* MDM needs not to perform any updates / validations on Customer name and Contact details i.e. data will not be loaded / updated into Party, Address & Contact tables in MDM Hub.

It is the responsibility of ‘Data Migration Tool’ or ‘eServe’ systems to make sure that the customer name and contact details are in sync across all three systems i.e. Ensura, eServe and MDM.

* In UpdateParty service, Ensura should pass the value for ‘policy level migration maker’ whenever it sends customer / contract updates to MDM
* Due to NRF reasons, added the field MDMAddressID in GetParty response so that it can be utilized going forwards with any MDM interactions.
* Campaigns setup is maintained in eServe and based on CampaignInstID(CampaignInstanceID) from MDM eServe will populate complete campaign details like CampaignID, Campaign type, start date etc. in customer 360.
* GWA CaseID is exist only for Enquiry documents and one CaseID can be associated to one or more Enquiry Documents.

## Design Decisions:

The following design decisions are relevant to R6 Sprint 3:

* A Party becomes a customer after being associated to a CA
* JAH is a CA that had been joined by another Party
* Both parties in the JA must have the same service address
* Joint accounts can’t have more than two active associated party at a single point in time
* “All-or-non” is a rule governing transfer of cover where by a party is allowed to transfer the **whole** of their holdings (all contracts under their CA) to either another **eligible** party or **non.** This rule is also prevalent elsewhere such as in the case of a customer who is willing to make another party a joint account holder in part of the CA holdings / portfolio
* Party role will not form part of MDM in this release and therefore create and update parties will not be called upon from Pega in any case other than JAH. In addition, search and get party services will not return any non-JAH party.
* Primary flag in JAH situation is not supported in MDM as part of this release.
* Access account entity will not be included in MDM as part of this release.
* CA Name is a calculated field that stores a concatenation of names of joint account holders.
* In the context of GetDocumentDetails operationif the value of “DocumentFilter” is null, then an “All” filter value will be assumed resulting in a return of all details will be displayed according to the operation.
* Response WSDL for GetDocumentDetails operation will always return only party basic information and document details based on the values from request for “DocumentFilter”
* Only Alfresco uses ManageDocumentDetails through ESB
* E-serve hits CreatePartyService to create a customer/prospect for an existing affinity partner prospect with a new SourceCustomerID and existing MDMPartyID of the partner prospect.
* Partner option code is removed from Manage customer account service.
* If value of ‘SearchMode’ in SearchParty request is ‘CustomersOnly’, then search party response will only return matching Ensura customers (i.e. party records that have an active contract),

If value of ‘SearchMode’ in SearchParty request is ‘ProspectsOnly’, then search party will only return matching prospects (i.e. AP party records) and

If value of ‘SearchMode’ in SearchParty request is ‘All’, then search party will return both matching Ensura customers and AP prospects (i.e. party records that have an active contract and AP party records)

* Document and DocPartyAccountContract tables are moved to Staging 2 schema
* CTI generally makes search with “PhoneNumber”,”SSID” and with “SearchMode” as “All”. No additional logic returned in MDM to restrict CTI to not to call search with other parameters. Its CTI responsibility to do search with agreed fields.
* Vulnerable details not stored in MDM as these details not used for mastering customer data.
* EServe should not pass asset details to MDM and Duplicate Asset check is not required in MDM as long as business agrees not to have an active contract against same Property Address on both eServe and Ensura.
* MDM Internally treats Guardian as “Prospect”. MDM does not keep roles for various parties. Address details are mandatory while sending Guardian details to MDM.
* Party type set to “Prospect” in CreateParty request while sending guardian to MDM unless Guardian has his own contract in EServe. eServe should not call MCA Service while creating Guardian.
* While sending Guardian documents to MDM, eServe sending “CustomerAccountNumber”, SourcePartyID and ContractID. MDM loads these details into Document link staging tables and internally at MDM Hub level guardian will be treated as ‘Prospect’.
* As part of BBDM solution when eServe sends MDMPartyID and MDMAddressID with ‘IsMigratedCustomer’ flag as ‘True’ to MDM in CreateParty or MCA services,

**If a match found (MDMPartyID and MDMAddressID exist) in MDM then**,

* + New records will get created in Xref Party and Xref Address tables
  + EServe contract should be linked to that MDMPartyID. This Contract and Customer Account data will get loaded into ContractReference & CustomerAccountReference tables of MDM Hub.
  + MDM needs not to perform any updates / validations on Customer name and Contact details i.e. data will not be loaded / updated into Party, Address & Contact tables in MDM Hub
  + Irrespective of whether a Contract or Quote is created as part of the migration, MDM should attempt to link Ensura and eServe records in MDM based on MDMPartyID.

**If there is no match found (MDMPartyID or MDMAddressID not exists) in MDM then**,

* + That request will be rejected by MDM by throwing the validation error i.e. business validation rule failure.
  + When prospect calls in eServe performs normal prospect search by passing address and names details to MDM Search Party service. If match found eServe creates prospect with existing MDMPartyID. After enrolling prospect, eServe calls get Party Service to get all campaigns related documents from 360.
  + In case of no campaigns found for party, MDM will return empty response.
  + eServe should pass DocumentFilter as “All” and In/Out bound flag as “O” and SourceCustomerID/MDMPartyID as mandatory when calling GetDocumentDetails Service for Campaign Documents.
  + MDM maintains the Campaign details and link table between party and campaign in staging schema.
  + eServe should pass DocumentFilter as “All” and In/Out bound flag as “I” and CaseID and SourcePartyID as mandatory when calling GetDocumentDetails Service for GWADocuments.
  + MDM Returns Empty response if CaseID related documents are not found in MDM.

MDM will return all inbound documents related to the SourcePartyID if CaseID is not

provided in the input request(existing functionality of service).

* + MDM Getparty Service will support calls from WEB/DTS .
  + There are no specific requirement from WEB to add or remove any attributes in the Getparty Service request/response, Web will use consume the eServe R6.4 service as is available to eServe.
  + There are no changes to Get service operations/wsdl in R6.4.1

# Detailed Interface Specification

## CreatePartyService

## Naming Conventions

Below are the xsd and wsdl file naming conventions. Please refer to Section 5.1 for more details

**Wsdl File Name:**

CreatePartyService.wsdl

**Xsd file names:**

* CreatePartyPayload.xsd
* ObjectTypes.xsd
* Types.xsd
* CommonServiceType.xsd

## WSDL Operations

|  |  |  |  |
| --- | --- | --- | --- |
| **Service** | **Operation** | **Type** | **Associated Schema(s)** |
| CreateParty | CreatePartyRequest | Request | CreatepartyServicePayload.xsd  ObjectTypes.xsd  Types.xsd |
| CreatePartyResponse | Response | CreatepartyServicePayload.xsd  ObjectTypes.xsd  Types.xsd |
| CreatePartyFault | Fault | CreatepartyServicePayload.xsd  ObjectTypes.xsd  Types.xsd |
| ServiceAvailability | ServiceAvailabilityRequest | Request | Global/Common/CommonService/v1/CommonServiceType.xsd |
| ServiceAvailabilityResponse | Response | Global/Common/CommonService/v1/CommonServiceType.xsd |
| ServiceAvailabilityFault | Fault | Global/Common/CommonService/v1/CommonServiceType.xsd |

## Service Request Attribute Definitions



## Service Response Attribute Definitions



## Service Error Attribute Definitions

If system related Exception/error occurs while invoking operation, then standard SOAP fault message will be returned with ‘Error code’ and ‘Error description’.



The type of the error/fault that are expected when using the Create Party service are given as below

**Error Type: Faults that can be handled**

* XSD Schema validation failed
* Mandatory Check on the required fields failed
* Business validation rule failed
* Technical Server/Job/Service error

The above handled response details will be passed to the normal response in the outcome section. Reason code and description will be as per the details provided in the common Error catalogue for the entire Unity Programme.

## Service Availability Service

The service availability is a ping service that is used to check the service from MDM, below are the attributes and it definitions

## Service Request Attribute Definitions



## ServiceAvailability Service Response Attribute Definitions



## ServiceAvailability Service Error Attribute Definitions

If any Exception/error occurs during the operation, ‘Fault code’ and ‘Fault description’ will be returned as the part of SOAP fault.



**Error Type: Faults that can be handled**

* XSD Schema validation failed
* Mandatory Check on the required fields failed

## UpdatePartyService

## Naming Conventions

Below are the xsd and wsdl file naming conventions. Please refer to Section 5.1 for actual wsdl details

**Wsdl File name:**

UpdatePartyService.wsdl

**Xsd file name:**

* UpdatePartyPayload.xsd
* ObjectTypes.xsd
* Types.xsd
* CommonServiceType.xsd

## WSDL Operations

|  |  |  |  |
| --- | --- | --- | --- |
| **Service** | **Operation** | **Type** | **Associated Schema(s)** |
| UpdateParty | UpdatePartyRequest | Request | UpdatePartyServicePayload.xsd  ObjectTypes.xsd  Types.xsd |
| UpdatePartyResponse | Response | UpdatePartyServicePayload.xsd  ObjectTypes.xsd  Types.xsd |
| UpdatePartyFault | Fault | UpdatePartyServicePayload.xsd  ObjectTypes.xsd  Types.xsd |
| ServiceAvailability | ServiceAvailabilityRequest | Request | Global/Common/CommonService/v1/CommonServiceType.xsd |
| ServiceAvailabilityResponse | Response | Global/Common/CommonService/v1/CommonServiceType.xsd |
| ServiceAvailabilityFault | Fault | Global/Common/CommonService/v1/CommonServiceType.xsd |

## Service Request Attribute Definitions

Note: It is expected that only attributes or elements (Apart from Mandatory TAGs) that needs updates are passed and others should not be present in the update request. As MDM will consider the request elements available in xml with tag value as on update to the existing record.



## Service Response Attribute Definitions



## Service Error Attribute Definitions

If system related Exception/error occurs while invoking operation, then standard SOAP fault message will be returned with ‘Error code’ and ‘Error description’.



The type of the error/fault that are expected when using the Update Party service are given as below

**Error Type: Faults that can be handled**

* XSD Schema validation failed
* Mandatory Check on the required fields failed
* Customer/Prospect not found in MDM
* Technical Server/Job/Service error

The above handled response details will be passed to the normal response in the outcome section. Reason code and description will be as per the details provided in the common Error catalogue for the entire Unity Programme.

Note: For Service Availability service details please refer to Section 3.1.6 – 3.1.8

## GetPartyService

This Search will be called in the below scenario:

* GePartyService.GetParty returns the external system Party record from MDM.
* GePartyService.GetDocumentDetails returns the calling system Party document details from MDM.
* GePartyService.GetCampaigns returns the calling system Party Campaigns details from MDM.

|  |  |  |  |
| --- | --- | --- | --- |
| **GetpartyService Operations** | **Calling System** | | |
|  | **eServe(SSID=1)** | **Ensura(SSID=4)** | **Web(SSID=6)** |
| **GetParty** | Returns party Details from Ensura and MDB source systems available in MDM | Returns party Details from eServe and MDB source systems available in MDM | Returns party Details from eServe, MDB and Ensura source systems available in MDM |
| **GetDocumentDetails** | Returns document details of eServe source systems available in MDM | Not applicable\* | Returns document details of eServe source systems available in MDM |
| **GetCampaigns** | Returns Campaign details of eServe source system available in MDM | Not applicable\* | Returns Campaings details of eServe source system available in MDM |

**Not applicable\***: Currently MDM doesn’t hold any documents related to Ensura Customers, Service need to be revisited if there is need.

## Naming Conventions

Below are the xsd and wsdl file naming conventions. Please refer to Section 5.1 for more details

**Wsdl File name:**

GetPartyService. Wsdl

**Xsd file name:**

* GetPartyPayload.xsd
* GetDocumentDetailsPayload.xsd
* ObjectTypes.xsd
* Types.xsd
* CommonServiceType.xsd
* GetCampaignsPayload.xsd

## WSDL Operations

|  |  |  |  |
| --- | --- | --- | --- |
| **Service** | **Operation** | **Type** | **Associated Schema(s)** |
| GetParty | GetpartyRequest | Request | GetPartyPayload.xsd  ObjectTypes.xsd  Types.xsd |
| GetpartyResponse | Response | GetPartyPayload.xsd  ObjectTypes.xsd  Types.xsd |
| GetpartyFault | Fault | GetPartyPayload.xsd  ObjectTypes.xsd  Types.xsd |
| ServiceAvailability | ServiceAvailabilityRequest | Request | Global/Common/CommonService/v1/CommonServiceType.xsd |
|  | ServiceAvailabilityResponse | Response | Global/Common/CommonService/v1/CommonServiceType.xsd |
|  | ServiceAvailabilityFault | Fault | Global/Common/CommonService/v1/CommonServiceType.xsd |
| GetDocumentDetails | GetDocumentDetailsRequest | Request | GetDocumentDetailsPayload.xsd  ObjectTypes.xsd  Types.xsd |
|  | GetDocumentDetailsResponse | Response | GetDocumentDetailsPayload.xsd  ObjectTypes.xsd  Types.xsd |
|  | GetDocumentDetailsFault | Fault | GetDocumentDetailsPayload.xsd  ObjectTypes.xsd  Types.xsd |
| GetCampaigns | GetCampaignsRequest | Request | GetCampaignsPayload.xsd  ObjectTypes.xsd  Types.xsd |
|  | GetCampaignsResponse | Response | GetCampaignsPayload.xsd  ObjectTypes.xsd  Types.xsd |
|  | GetCampaignsFault | Fault | GetCampaignsPayload.xsd  ObjectTypes.xsd  Types.xsd |

* *GetDocumentDetails requests holds a filter named “DocumentFilter”. This filter holds 4 different values based on which the response is structured as follows*

|  |  |
| --- | --- |
| ***Document Filter*** | ***Response Structure*** |
| *All* | *CorepartyDetails, Address, contactpoint, CustomerAccount, Contract, Asset details and all the related documents which includes party, contract and customeraccount documents* |
| *Party* | *CorepartyDetails, Address, contactpoint, CustomerAccount, Contract, Asset details and all the related documents which includes only party documents* |
| *Contract* | *CorepartyDetails, Address, contactpoint, CustomerAccount, Contract, Asset details and all the related documents which includes only contract documents* |
| *CustomerAccount* | *CorepartyDetails, Address, contactpoint, CustomerAccount, Contract, Asset details and all the related documents which includes only customeraccount documents* |

*Please refer section for more details*

## GetParty Service Request Attribute Definitions



## GetParty Service Response Attribute Definitions



## GetParty Service Error Attribute Definitions

If system related Exception/error occurs while invoking operation, then standard SOAP fault message will be returned with ‘Error code’ and ‘Error description’. Refer Section 4.4 Error Handling Section



## GetDocumentDetails Service Request Attribute Definitions



## GetDocumentDetails Service Response Attribute Definitions



## GetDocumentDetails Service Error Attribute Definitions

If system related Exception/error occurs while invoking operation, then standard SOAP fault message will be returned with ‘Error code’ and ‘Error description’. Refer Section 4.4 Error Handling Section



## GetCampaigns Service Request Attribute Definitions



## GetCampaigns Service Response Attribute Definitions



## GetCampaigns Service Error Attribute Definitions



If system related Exception/error occurs while invoking operation, then standard SOAP fault message will be returned with ‘Error code’ and ‘Error description’. Refer Section 4.4 Error Handling Section

The type of the error/fault that are expected when using the Get Party service are given as below

**Error Type: Faults that can be handled**

* XSD Schema validation failed
* Mandatory Check on the required fields failed
* Business validation rule failed
* Technical Server/Job/Service error

The above handled response details will be passed to the normal response in the outcome section. Reason code and description will be as per the details provided in the common Error catalogue for the entire Unity Programme

Note: For Service Availability service details please refer to Section 3.1.6 – 3.1.8

## SearchPartyService

SearchPartyService considers only below list of contract status as “Active” and only these contracts related customers will be displayed in the response for search mode “Customers Only/All".

'Pending Cancellation','Pending In-Force','In-Force','In-Force-PreventPay', 'Suspended', 'Cancelled', 'Expired'

eServe updates MDM if there is any change in the contract status. Due to this assumption for eServe contracts No additional logic is applied on “Cancelled” and “Expired” contracts whereas for Ensura updates MDM for all the contract status changes except for “Cancelled”and “Expired”, below additional logic is maintained for “Cancelled” and “Expired” contracts to treat them as “Active” for 28days, 60days repectively.

1. Ensura Cancelled contract should be treated as “Active” for next 28days from the date of cancelled.
2. Ensura Expired contract should be treated as “Active” for next 60days from the date of expored.

|  |  |  |
| --- | --- | --- |
| **Active  (Contract Status)** | **Date based business Rules** | |
| **Pega** | **Ensura** |
| Pending Cancellation | N/A | N/A |
| Pending In-Force | N/A | N/A |
| In-Force | N/A | N/A |
| In-Force-PreventPay | N/A | N/A |
| Suspended | N/A | N/A |
| Cancelled | N/A | if today is < =28 days  from cancellation date |
| Expired | N/A | if today is <= 60 days  from expiration date/End Date |

## Naming Conventions

Below are the xsd and wsdl file naming conventions. Please refer to Section 5.1 for more details

**Wsdl File Naming Conventions:**

SearchPartyService.wsdl

**Xsd file name format:**

* SearchPartyPayload.xsd
* ObjectTypes.xsd
* Types.xsd
* CommonServiceType.xsd

## WSDL Operations

|  |  |  |  |
| --- | --- | --- | --- |
| **Service** | **Operation** | **Type** | **Associated Schema(s)** |
| Searchparty | SearchpartyRequest | Request | SearchPartyPayload.xsd  ObjectTypes.xsd  Types.xsd |
| SearchpartyResponse | Response | SearchPartyPayload.xsd  ObjectTypes.xsd  Types.xsd |
| SearchpartyFault | Fault | SearchPartyPayload.xsd  ObjectTypes.xsd  Types.xsd |
| ServiceAvailability | ServiceAvailabilityRequest | Request | Global/Common/CommonService/v1/CommonServiceType.xsd |
|  | ServiceAvailabilityResponse | Response | Global/Common/CommonService/v1/CommonServiceType.xsd |
|  | ServiceAvailabilityFault | Fault | Global/Common/CommonService/v1/CommonServiceType.xsd |

## Service Request Attribute Definitions

This service will search for the party details in MDM when at least one of the xml tags is present in the request



## Service Response Attribute Definitions

The response will be based on the exact match of the details being passed in the request. Hence no fuzzy matching is involved here.



## Service Error Attribute Definitions

SarchPartyService Error attributes includes ErrorCode and ErrorDescription. Refer Section 4.4 Error Handling

******

**Error Type: Faults that can be handled**

* XSD Schema validation failed
* Mandatory Check on the required fields failed
* Business validation rule failed
* Technical Server/Job/Service error

The above handled response details will be passed to the normal response in the outcome section. Reason code and description will be as per the details provided in the common Error catalogue for the entire Unity Programme

Note: For Service Availability service details please refer to Section 3.1.6 – 3.1.8

## Manage Customer Account Service:

## High Level Functionality:

Manage Customer Account or MCA is an MDM service designed to fulfil the following function within a set of Joint Account scenarios:

1. Create CA
2. Create Contracts
3. Create assets
4. Link parties to CA creating a JA

## Design Decisions:

* CPS will be used by Pega to create parties if they don’t exist as part of the end to end JAH process
* CPS will be called by Pega to create the following entities only:
  + Party core information
  + Address details
  + Email(s)
  + Phone Number(s)
* It is the responsibility of the calling system to call CPS passing only the above information within a JAH scenario leaving the other contract, assets, etc. blank
* Pega will call the CPS service if a party does not exist
* If the party exist and an update is needed, then Pega will call UPS as normal
* In JAH scenario, Alfresco should send both CH and JAH sourceCustomerIDs while sending document details to MDM. MDM internally links same document to both JAH and CH.

## High Level Request WSDL:

**The following elements should be included in the call of MCAS (for complete list please refer to embedded WSDL):**

1. Customer Account Ref
2. Contract information
3. Asset
4. Party 1 ref
5. Party 2 ref
6. Party 1 Status
7. Party 2 Status

## Naming Conventions

Below are the xsd and wsdl file naming conventions. Please refer to Section 5.1 for actual wsdl details

**Wsdl File name:**

* /wsdl/Europe/GB/Customer/MDM/ManageCustomerAccountService/v1/ManageCustomerAccountService.wsdl

**Xsd file name:**

* /xsd/Europe/GB/Customer/MDM/ManageCustomerAccountServiceOperations/v1/ ManageCustomerAccountServiceOperationsType.xsd
* /xsd/Europe/GB/Customer/MDM/ObjectTypes/v2/ObjectTypes.xsd
* /xsd/Global/Common/CommonService/v1/ CommonServiceType.xsd

## WSDL Operations

|  |  |  |  |
| --- | --- | --- | --- |
| **Service** | **Operation** | **Type** | **Associated Schema(s)** |
| ManageCustomerAccount | ManageCustomerAccountRequest | Request | /xsd/Europe/GB/Customer/MDM/ManageCustomerAccountServiceOperations/v1/ ManageCustomerAccountServiceOperationsType.xsd  /xsd/Europe/GB/Customer/MDM/ObjectTypes/v2/ObjectTypes.xsd |
| ManageCustomerAccountResponse | Response | /xsd/Europe/GB/Customer/MDM/ManageCustomerAccountServiceOperations/v1/ ManageCustomerAccountServiceOperationsType.xsd  /xsd/Global/Common/CommonService/v1/ CommonServiceType.xsd |
| ManageCustomerAccountFault | Fault | Global/Common/CommonService/v1/CommonServiceType.xsd |
| ServiceAvailability | ServiceAvailabilityRequest | Request | Global/Common/CommonService/v1/CommonServiceType.xsd |
| ServiceAvailabilityResponse | Response | Global/Common/CommonService/v1/CommonServiceType.xsd |
| ServiceAvailabilityFault | Fault | Global/Common/CommonService/v1/CommonServiceType.xsd |
| ManageDocumentDetails | ManageDocumentDetails Request | Request | /xsd/Europe/GB/Customer/MDM/ManageCustomerAccountServiceOperations/v1/ ManageDocumentDetailsServiceOperationType.xsd  /xsd/Europe/GB/Customer/MDM/ObjectTypes/v2/ObjectTypes.xsd |
|  | ManageDocumentDetails Response | Response | /xsd/Europe/GB/Customer/MDM/ManageCustomerAccountServiceOperations/v1/ ManageDocumentDetailsServiceOperationType.xsd  /xsd/Global/Common/CommonService/v1/ CommonServiceType.xsd |
|  | ManageDocumentDetails Fault | Fault | Global/Common/CommonService/v1/CommonServiceType.xsd |

## ManageCustomerAccountService Request Attribute Definitions

Note: It is expected that only attributes or elements (Apart from Mandatory TAGs) that needs updates are passed and others should not be present in the update request. As MDM will consider the request elements available in xml with tag value as on update to the existing record.



## ManageCustomerAccountService Response Attribute Definitions



## ManageCustomerAccountService Error Attribute Definitions

If system related Exception/error occurs while invoking operation, then standard SOAP fault message will be returned with ‘Error code’ and ‘Error description’.



The type of the error/fault that are expected when using the Update Party service are given as below

## ManageDocumentDetailsService Request Attribute Definitions

Note: It is expected that only attributes or elements (Apart from Mandatory TAGs) that needs updates are passed and others should not be present in the update request. As MDM will consider the request elements available in xml with tag value as on update to the existing record.



## ManageDocumentDetailsService Response Attribute Definitions



## ManageDocumentDetailsService Error Attribute Definitions

If system related Exception/error occurs while invoking operation, then standard SOAP fault message will be returned with ‘Error code’ and ‘Error description’.



The type of the error/fault that are expected when using the Update Party service are given as below

**Error Type: Faults that can be handled**

* XSD Schema validation failed
* Mandatory Check on the required fields failed
* Customer/Prospect not found in MDM
* Technical Server/Job/Service error

The above handled response details will be passed to the normal response in the outcome section. Reason code and description will be as per the details provided in the common Error catalogue for the entire Unity Programme.

Note: For Service Availability service details please refer to Section 3.1.6 – 3.1.8

## Calling MCAS Scenarios within the context of JAH / ToC:

|  |  |  |  |
| --- | --- | --- | --- |
| Scenario Number | Scenario Story Line | High Level Process | Response |
| 1. | Party 1 is a new customer, he/she progress to sale and add partner (Party2 – also new) to his/her CA, i.e. right from scratch | 1. Call to CPS to create Party 1 2. Call to CPS to create Party 2 3. Call to MCA to:    1. Create CA    2. Create Contract(s)    3. Create Asset    4. Associate Party 1 & Party 2 to CA |  |
| 2. | Party 1 calls in and he/she is an existing customer, he/she asks to **add** party 2 (**new**) to his/her CA | 1. Call to CPS to create Party 2 2. Call to MCA to create JAH    1. Link Party 2 to JA |  |
| 3. | Party 1 calls in and he/she is an existing customer, he/she asks to **add** party 2 (**existing** party) to his/her CA | 1. Call to MCA to create JAH    1. Link Party 2 to JAH |  |
| 4. | Party 1 calls in and he/she is an existing customer, he/she asks to add party 2 (existing customer with an independent CA) to his/her CA | 1. Call to MCA to create JAH    1. Link Party 2 to Party 1’s JAH |  |
| 5. | Party 1 or 2 are both JAHs in the same CA, one of them asks to be removed from the JA but retain one or more contract(s) | Not allowed as this scenario violates the rule of “all-or-non” |  |
| 6. | Party 1 wishes to break a JA with Party 2 | 1. Call to MCA to:    1. delink Party 2. MCA will insert status flag = ‘inactive’ to delink JAH on CA-Party entity | Pega should provide party that will be delinked as party 2 in the request WSDL & CA |
| 7. | Party 1 wishes to reinstate Party 2 into the JAH | 1. Call to MCA to:    1. Update CA-Party Link with Effective Start date and erase Effective End Date | Pega must provide start and end dates in the request WSDL |
| 8. | Party 1 / agent (if deceased) wishes to transfer their holdings to Party 2 - **new** (also in deceased scenario)  ToC | 1. Call CPS to create Party 2 2. Call MCA to link Party 2 as a JAH on the CA 3. Call to MCA to delink Party 1. MCA will insert End Date to delink JAH on CA-Party entity 4. Call UPS to update deceased flag for Party 1 (if deceased) | Not a valid scenario, only existing JAHers |
| 9. | Party 1 / agent (if deceased) wishes to transfer their holdings to Party 2 who is a JAH - **existing** (also in deceased scenario) | 1. Call to MCA to delink Party 1. MCA will insert End Date to delink JAH on CA-Party entity 2. Call UPS to update deceased flag for Party 1 (if deceased) |  |
|  | | | |
| Example Psudo Request WSDL for MCA | 1).ManageCustomerAccount Request would be like this for JAH to link.  2).JAH delink request format. | 1).<CustomerAccountDetails> CA01  <AssociatedParties>  <AssociatedParty>  SC01, Active, Customer, Add  </AssociatedParty>  <AssociatedParty>  SC02, Active, Customer, Add  </AssociatedParty>  </AssociatedParties>  </CustomerAccountDetails>  2).<CustomerAccountDetails> CA01  <AssociatedParties>  <AssociatedParty>  SC02, Inactive, prospect, Update  </AssociatedParty>  </AssociatedParties>  </CustomerAccountDetails> |  |

## Calling CreatePartyService Scenarios within the context of AP-Prospects:

|  |  |  |  |
| --- | --- | --- | --- |
| **S.No** | **Scenario** | **Request Format (WSDL)** | **Functionality** |
| 1. | eServe conduct a search and found the party within the internal prospects/customers database. | CPS will not be called | NA |
| 2. | SPS returns an Ensura active customer | CPS will not be called | NA |
| 3. | CPS is called to insert a new prospect who is not on any of the partners – MDM record doesn’t exist  (So this party is not an eServe, Ensura or AP prospect) | Give value to Source Customer ID | New record is created in Xref and a new record is created in MDM Hub with new MDMPartyID |
| 4. | CPS is called to insert a new prospect that exists in any of the partners. (MDM record exists (MDB source)) | Give value to Source Customer ID and  existing MDMPartyID of the prospect from partner | New record is created in Xref with new SourceCustomer ID and existing MDMpartyID and  MDM Hub is updated for the existing MDMPartyID (if there are any changes to customer details) |
| 5. | Insert a new prospect who is existing in any of the partners | Give value to Source Customer ID and  Invalid MDMPartyID of the prospect from partner | An exception is raised as customer/prospect does not exists |
| 6. | Insert a new prospect who is existing in any of the partners | Give value to existing Source Customer ID and  existing MDMPartyID of the prospect from partner | Duplicate Customer (Customer already exists )-This should go through updateparty service |

## Calling SearchPartyService Scenarios within the context of CTI Calling System:

|  |  |  |  |
| --- | --- | --- | --- |
| **S.No** | **Scenario** | **Request Format (WSDL)** | **Functionality** |
| 1 | Search with “PhoneNumber” | Request with “PhoneNumber” and “SSID” (CTI SSID) with SearchMode “All” | Returns all the customer/prospects irrelevant to SourceSystem(eserve/ensura and MDB prospects) with that particular phone number |
| 2 | Search with “PhoneNumber” which is assigned to 2 different customers/prospects | Request with “PhoneNumber” and “SSID” (CTI SSID) with SearchMode “All” | Returns both the customer/prospects irrelevant to SourceSystem(eserve/ensura and MDB prospects) with that particular phone number |
| 3 | Search with “PhoneNumber” of a customer/prospect who has multiple phonenumbers | Request with “PhoneNumber” and “SSID” (CTI SSID) with SearchMode “All” | Returns the customer/prospect details of that customer with multiple phone numbers |
| 4 | Search with “FisrtName”,”LastName” or “Postcode” of a customer/prospect | Request with “FisrtName”,”LastName” or “Postcode” with “SSID” (CTI SSID) with SearchMode “All” | Returns all the customer/prospects irrelevant to SourceSystem(eserve/ensura and MDB prospects) with the given details |

As per the current scope most frequently calling scenarios are 1, 4 and other scenarios for future use.

## Calling GetDocumentDetailsService Scenarios

|  |  |  |  |
| --- | --- | --- | --- |
| **S.No** | **Scenario** | **Request Format (WSDL)** | **Functionality** |
| 1 | Search for enquiry document | Request with “SourceParty”,“SSID”,”CaseID” and “Inbound\_Outbound” | Returns the documents specific to customer and the CaseID |
| 2 | General search for Customer related documents | Request with “SourceParty”,“SSID@ and “Inbound\_Outbound” | Returns all the customer,contract documents related to that specific customer |

## Calling ManageDocumentDetailsService Scenarios

|  |  |  |  |
| --- | --- | --- | --- |
| **S.No** | **Scenario** | **Request Format (WSDL)** | **Functionality** |
| 1 | Scanner calling MDD to add inbound case document details | Request with “DocumentID”, “DocumentStatus”, “DocumentType”, “DocumentFormat” “SSID”, “Inbound” , “AssociatedParty”, “Operation”, “CaseID” | New record is created in Document and DocPartyAccountContract table |
| 2 | ESB calling MDD to add outbound documents details for Contract holder/JAH/3rd Party | Request with “DocumentID”, “DocumentStatus”, “DocumentType”, “DocumentFormat” “SSID”, “Inbound” , “AssociatedParty”, “Operation”, “ContractID”/”CustomerAccountID” | New record is created in Document and DocPartyAccountContract Link table. MDM will check if the Party is associated with CustomerAccount/Contract |
| 3 | ESB calling MDD to add outbound documents details for 3rd Party | Request with “DocumentID”, “DocumentStatus”, “DocumentType”, “DocumentFormat” “SSID”, “Inbound” , “AssociatedParty”, “Operation”, “ContractID”/”CustomerAccountID” | New record is created in Document and DocPartyAccountContract table. MDM will check if the Party is associated with CustomerAccount/Contract |

# Non-Functional Design

## Service SOAP Headers

HomeServe has specific standards for headers. These headers are detailed in the HomeServe confluence link mentioned in appendix, examples are given for both requests and responses in the wiki. A key component of these headers is the ability to track a message from consumer through to end system and back again using the TransactionReference originated at the consumer.

Refer to “SOAP Header Standards” in wiki here: <http://confluence.hgb.hs.int:8090/display/DEV/SOAP+Messaging+Development+Practices>

## Security

Authentication with syncope will be enabled for this interface, it will be expected for the consuming system to provide the relevant username and password, as defined in SynCope, for any calls to the service.

The protocol will be SOAP over HTTPS, requests will be secured with **Username & Password** as per the Homeserve InfoSec based security policies, namely WS-Security UsernameToken usage in the SOAP headers.

Sample Header

<wsse:Security xmlns:wsse="http://schemas.xmlsoap.org/ws/2003/06/secext">

<wsse:UsernameToken xmlns:wsu="http://schemas.xmlsoap.org/ws/2003/06/utility" wsu:Id="sample">

<wsse:Username>sample</wsse:Username>

<wsse:Password Type="wsse:PasswordText">oracle</wsse:Password>

<wsu:Created>2004-05-19T08:44:51Z</wsu:Created>

</wsse:UsernameToken>

</wssw:Security>

The above sample is predefined basing on the below schema

<http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd>

## Performance

## Volumetric

|  |  |  |
| --- | --- | --- |
| **Service** | **Peak Hour** | **Non-Peak Hour** |
| Create Party Service | <1000 | <100 |
| Update Party Service | <1000 | <100 |
| Get Party Details Service | <1000 | <100 |
| Search Party Service | <1000 | <100 |
| Manage Customer Account | <1000 | <100 |

## SLA (Service Response Time)

At a high level the expected response time for each MDM service is <= 5 seconds. Actual response will depend on the infrastructure provided by Homeserve.

Most frequently Used Search Scenarios: (SearchMode=”Customer”)

* Contract ID, SSID Search
* Postcode, Flat Number, SSID Search
* Postcode, Building Number, SSID Search
* Postcode, SSID Search
* Postcode, Flat Number, Building Number, SSID Search
* Postcode, Surname, SSID Search
* PAF Key, SSID Search

(SearchMode=”All”)

* SSID, TelephoneNumber

Most Frequently Used GetPartyService Scenarios:

* SSID, SourceCustomerID
* SSID, SourceCustomerID,DocFilter,In/OutBound Flag
* SSID, SourceCustomerID, CaseID
* SSID, SourceCustomerID, ContractID, CustomerAccountNumber

Please note that other combination may cause varying response timings.

## Scheduling & Notification

All MDM services will be deployed and monitored using Talend ESB module. The service artefacts will be available in Nexus repository and using Talend Administrator Centre (TAC), these artifacts will be deployed in Talend ESB runtime. Notification will be configured within TAC to send an alert to service delivery team whenever service is not available.

## Error Handling

To assist client systems with exception handling, all functional/business logic related errors will be part of SOAP service response with an appropriate Error code and Error Description will be sent as per the Enterprise Error Catalogue.

## Housekeeping Policies

MDM services actual request and response messages will be logged in Talend Administrator Console (ESB Job Conductor) using Service Activity Monitoring (SAM) feature. This will be used during Integration Testing / UAT to debug the messages. However, in production it can be switched off if any implications on system’s performance or response time.

## Risk

MDM is over riding all the MDB (AP-Prospect) records as per the requirement 704. This leads to risk to MDB data consistency.

# Appendix

## WSDL File

**WSDL of ManageParty Services:**

Zip file attached below has WSDL file for CreateParty/UpdateParty/SearchParty/GetParty/ManageCustomerAccount Service.

File location is ManageParty and WSDL file name is CreatePartyService.wsdl/UpdatePartyService.wsdl/SearchPartyService.wsdl/GetPartyService.wsdl/ManageCustomerAccountService.wsdl respectively.



These WSDLs and corresponding XSDs are source controlled in SharePoint at below location.

https://serveusa.sharepoint.com/sites/HomeServe/GlobalResources/GlobalProjects/Ensura/Programme%20Documentation/WSDL%26XSD.ZIP

## References

**MDM ICD Real time service Release 1**

[**https://serveusa.sharepoint.com/sites/HomeServe/GlobalResources/GlobalProjects/Ensura/Programme%20Documentation/Unity%20MDM%20ICD%20RealtimeServices.docx?d=wdbaddcfbf12e4069bc51db1dc5d79f40**](https://serveusa.sharepoint.com/sites/HomeServe/GlobalResources/GlobalProjects/Ensura/Archive%20%20documents/Release%201/A&D/Unity%20MDM%20ICD%20RealtimeServices.docx?d=wdbaddcfbf12e4069bc51db1dc5d79f40)

**HomeServe SOAP Standards**

<http://confluence.hgb.hs.int:8090/display/DEV/SOAP+Messaging+Development+Practices>

**WS-Security Schema**

<http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd>

**Source Systems Catalogue**

[https://serveusa.sharepoint.com/sites/HomeServe/GlobalResources/GlobalProjects/Ensura/\_layouts/15/WopiFrame.aspx?sourcedoc={F9916697-43F7-4C99-8DFC-523A7AD19D3D}&file=Unity%20Metadata%20Catalogue.xlsx&action=default](https://serveusa.sharepoint.com/sites/HomeServe/GlobalResources/GlobalProjects/Ensura/_layouts/15/WopiFrame.aspx?sourcedoc=%7bF9916697-43F7-4C99-8DFC-523A7AD19D3D%7d&file=Unity%20Metadata%20Catalogue.xlsx&action=default)

**Unity Error Catalogue:**

[https://serveusa.sharepoint.com/sites/HomeServe/GlobalResources/GlobalProjects/Ensura/\_layouts/15/WopiFrame.aspx?sourcedoc={CB592CF8-1159-4741-B2A8-36165F0480BC}&file=Unity%20Error%20Catalogue.xlsx&action=default](https://serveusa.sharepoint.com/sites/HomeServe/GlobalResources/GlobalProjects/Ensura/_layouts/15/WopiFrame.aspx?sourcedoc=%7bCB592CF8-1159-4741-B2A8-36165F0480BC%7d&file=Unity%20Error%20Catalogue.xlsx&action=default)

## PPT for GetDocumentDetails:



## Search Party Scenarios:



## Guardian Requirements

## 

## BBDM CR241 related artifacts:

**CR requirement:**



* 1. **LOVs for Migration Markers:**



**Design discussion email – CR241:**

## 

**Email from Karthic (Ensura team) on CR241 discussion:**



## Email from Mark to include MDMAddressID in GetParty response:



* 1. **Duplicate Cover and Renewals Scenarios:**



* 1. **SearchPartyService Scenarios for CTI:**

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