

Party Management Conformance Profile

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Introduction - API description

The following document is the conformance specification of the Async API for Any management.

Resource Model Conformance

API Mandatory Resources

The following table indicates the mandatory resources for this API.

Resource Name	Comment
Individual	
Organization	

General Notes on Resource Attribute Conformance

There are three situations that could occur for an attribute:

- Mandatory attribute,
- Mandatory attribute if the optional parent attribute is present,
- Non-mandatory/Optional attribute. Those are all the other attributes not mentioned in the following subsections. Please refer to the corresponding API REST Specification for more details.
- The tables in the subsections below indicate which attributes are mandatory including mandatory when an optional parent is present.
- Where a resource is an input into an API (e.g. CREATE, PATCH), Mandatory means that the attribute value must be supplied by the API consumer in the input (and must not be blank or null).
- Where a resource is an output from an API (e.g. RETRIEVE, LIST, CREATE), Mandatory means that the attribute value must be supplied by the API provider in the output (and must not be blank or null).
- For a sub-resource that is not an array, Mandatory (cardinality 1..1) means that the sub-resource must be present, while Optional (cardinality 0..1) means that the sub-resource may be absent. Mandatory and Optional on the sub-resource attributes apply to the sub-resource if present.
- For a sub-resource that is an array, Mandatory (cardinality 1..) **means that at least one sub-resource must be present in the array, while Optional (cardinality 0..)** means that the array may be absent. Mandatory and Optional on the sub-resource attributes apply to each of the sub-resources if present.

In this table are listed all mandatory attributes. A mandatory attribute **MUST** be retrieved in resource representation when no attribute selection is used (e.g. retrieveTroubleTicket.commandRequest {id}) without any attribute selection

When an attribute is listed with an indentation (in second column) it means this attribute is mandatory if root (parent) attribute is present.

Individual Resource Mandatory Attributes

Mandatory attribute when parent is present		Rule
@type		M
familyName		M
givenName		M
id		M
topicRef		M
contactMedium (if present)		
	@baseType	M
	contactType	M
	preferred	M
creditRating (if present)		
	@type	M
	creditAgencyName	M
	ratingScore	M
disability (if present)		
	disabilityCode	M
	disabilityName	M
externalReference (if present)		
	@type	M
	externalIdentifierType	M
	id	M
individualIdentification (if present)		
	@type	M
	identificationId	M
	identificationType	M
languageAbility (if present)		
	isFavouriteLanguage	M
	languageCode	M
	languageName	M
partyCharacteristic (if present)		
	@type	M
	name	M
	value	M

Mandatory attribute when parent is present	Rule
valueType	M
partyCharacteristic.characteristicRelationship (if present)	
@type	M
id	M
relationshipType	M
relatedParty (if present)	
@type	M
partyOrPartyRole	M
role	M
skill (if present)	
skillCode	M
skillName	M
taxExemptionCertificate (if present)	
@type	M
id	M
issuingJurisdiction	M
taxExemptionCertificate.taxDefinition (if present)	
@type	M
id	M
jurisdictionName	M
taxType	M

Organization Resource Mandatory Attributes

Mandatory attribute when parent is present	Rule
@type	M
id	M
topicRef	M
tradingName	M
contactMedium (if present)	
@baseType	M
contactType	M
preferred	M
creditRating (if present)	

Mandatory attribute when parent is present		Rule
	@type	M
	creditAgencyName	M
	ratingScore	M
externalReference (if present)		
	@type	M
	externalIdentifierType	M
	id	M
organizationChildRelationship (if present)		
	@type	M
	organization	M
	relationshipType	M
organizationChildRelationship.organization (if present)		
	@referredType	M
	@type	M
	id	M
	name	M
organizationIdentification (if present)		
	@type	M
	identificationId	M
	identificationType	M
organizationParentRelationship (if present)		
	@type	M
	organization	M
	relationshipType	M
organizationParentRelationship.organization (if present)		
	@referredType	M
	@type	M
	id	M
	name	M
otherName (if present)		
	@type	M
partyCharacteristic (if present)		
	@type	M

Mandatory attribute when parent is present		Rule
	name	M
	value	M
	valueType	M
partyCharacteristic.characteristicRelationship (if present)		
	@type	M
	id	M
	relationshipType	M
relatedParty (if present)		
	@type	M
	partyOrPartyRole	M
	role	M
taxExemptionCertificate (if present)		
	@type	M
	id	M
	issuingJurisdiction	M
taxExemptionCertificate.taxDefinition (if present)		
	@type	M
	id	M
	jurisdictionName	M
	taxType	M

Notification Model Conformance

There are no mandatory notifications for this API.

API Operations Conformance

For every single resource, the following tables include mandatory operations.

Operation

Every operation consists of two parts:

- REQUEST: Publish a message on a 'commandRequest' channel.
- RESPONSE: Subscribe to the corresponding 'commandReply' channel to receive the response.

Prefix

All channel names are defined with a "{prefix}" parameter.

Let's take the example of {prefix}.tmfapi.Individual.v5.retrieveIndividual.commandRequest.

This topic name consists of two pieces:

1. a optional prefix **{prefix}**
2. a constant: **tmfapi.Individual.v5.retrieveIndividual.commandRequest**

Your application may support this channel both with and without a prefix, but the constant must always be present.

Without the prefix, the channel name is:

tmfapi.Individual.v5.retrieveIndividual.commandRequest

However, some organisations may prefix the channel name for administrative purposes, say to denote the name of a company, department, etc. When using a prefix, say 'acme' for a company named 'Acme Telecom', the channel name is:

acme.tmfapi.Individual.v5.retrieveIndividual.commandRequest

Individual Mandatory Operations

The following table indicates which ones are mandatory for the Individual resource:

Uniform API Operation	Comment
DELETE	Delete a Individual
RETRIEVE	Retrieve a Individual given it's id
LIST	Retrieve a list of Individuals
CREATE	Create a Individual

Organization Mandatory Operations

The following table indicates which ones are mandatory for the Organization resource:

Uniform API Operation	Comment
DELETE	Delete a Organization
RETRIEVE	Retrieve a Organization given it's id
LIST	Retrieve a list of Organizations
CREATE	Create a Organization

RETRIEVE Operation Conformance

Individual

This operation retrieves a Individual entity.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.retrieveIndividual.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.retrieveIndividual.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The parameters for this operation are to be sent as headers.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Reply-Channel		M
Parameters		M
	id	M
	fields	
Query-Filters		

Response Message Schema

Payload

The Payload is is a Individual resource entity.

Headers

Property	Mandatory/Optional
X-Correlation-Id	M
Status-Code	M

Property	Mandatory/Optional
X-Request-Channel	M

Expected Status Codes:

Status Code	Mandatory/Optional
200 if successful	M
404 if not found	M

Organization

This operation retrieves a Organization entity.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.retrieveOrganization.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.retrieveOrganization.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The parameters for this operation are to be sent as headers.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Reply-Channel		M
Parameters		M
	id	M
	fields	
Query-Filters		

Response Message Schema

Payload

The Payload is is a Organization resource entity.

Headers

Property	Mandatory/Optional
X-Correlation-Id	M
Status-Code	M
X-Request-Channel	M

Expected Status Codes:

Status Code	Mandatory/Optional
200 if successful	M
404 if not found	M

Definitions for Filter

- **Filtered Search:** A filtered search can be applied using query parameters to obtain only the resources that meet the criteria defined by the filtering parameters included in the request. Several elements can be applied to the filtered search as part of the 'filters' parameter. In that case logic, a logical AND is applied to combine the criteria (e.g.severity=<value>&status=<value>).
- **Attribute selection (Limiting Response Data):** In order to limit which attributes are included in the response, the RETRIEVE request payload can include the fields parameter. Only those attributes whose names are supplied in this parameter will be returned. Attribute selection capabilities are the same for collections retrieval and individual resource queries.
- **Level:** The filtering and attribute selection can apply to the top level properties (attributes) and subproperties. The tables below show which attributes need to be supported in top-level or contained resources.

LIST Operation Conformance

Individual

This operation retrieves an array of Individual entities. Attribute selection is enabled for all first level attributes.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.listIndividual.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.listIndividual.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The parameters for this operation are to be sent as headers.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Reply-Channel		M
Parameters		M
	fields	
	offset	
	limit	
Query-Filters		

Response Message Schema

Payload

The Payload is is an array of Individual resource entities.

Headers

Property	Mandatory/Optional
X-Correlation-Id	M
Status-Code	M
X-Total-Count	
X-Result-Count	
X-Request-Channel	M

Expected Status Codes:

Status Code	Mandatory/Optional
200 if successful	M
404 if not found	M

Organization

This operation retrieves an array of Organization entities. Attribute selection is enabled for all first level attributes.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.listOrganization.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.listOrganization.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The parameters for this operation are to be sent as headers.

Headers

Property	Mandatory/Optional
X-Correlation-Id	M
Reply-Channel	M
Parameters	M
	fields
	offset

Property		Mandatory/Optional
	limit	
Query-Filters		

Response Message Schema

Payload

The Payload is is an array of Organization resource entities.

Headers

Property	Mandatory/Optional
X-Correlation-Id	M
Status-Code	M
X-Total-Count	
X-Result-Count	
X-Request-Channel	M

Expected Status Codes:

Status Code	Mandatory/Optional
200 if successful	M
404 if not found	M

Definitions for Filter

- **Filtered Search:** A filtered search can be applied using query parameters to obtain only the resources that meet the criteria defined by the filtering parameters included in the request. Several elements can be applied to the filtered search as part of the 'filters' parameter. In that case logic, a logical AND is applied to combine the criteria (e.g.severity=<value>&status=<value>).
- **Attribute selection (Limiting Response Data):** In order to limit which attributes are included in the response, the RETRIEVE request payload can include the fields parameter. Only those attributes whose names are supplied in this parameter will be returned. Attribute selection capabilities are the same for collections retrieval and individual resource queries.
- **Level:** The filtering and attribute selection can apply to the top level properties (attributes) and subproperties. The tables below show which attributes need to be supported in top-level or contained resources.

CREATE Operation Conformance

Individual

This operation creates a Individual entity.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.createIndividual.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.createIndividual.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The Payload is is a Individual FVO resource entity.

The following table provides the list of mandatory attributes when creating an instance of the Individual resource, including any possible rule, conditions and applicable default values.

Mandatory Attribute	Rule
---------------------	------

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Reply-Channel		M
Parameters		M
	fields	

Response Message Schema

Payload

The Payload is is a Individual resource entity.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M

Property	Mandatory/Optional
Status-Code	M
X-Request-Channel	M

Expected Status Codes:

Status Code	Mandatory/Optional
201 if successful	M

Organization

This operation creates a Organization entity.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.createOrganization.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.createOrganization.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The Payload is is a Organization FVO resource entity.

The following table provides the list of mandatory attributes when creating an instance of the Organization resource, including any possible rule, conditions and applicable default values.

Mandatory Attribute	Rule
---------------------	------

Headers

Property	Mandatory/Optional
X-Correlation-Id	M
Reply-Channel	M
Parameters	M
	fields

Response Message Schema

Payload

The Payload is is a Organization resource entity.

Headers

Property	Mandatory/Optional
X-Correlation-Id	M
Status-Code	M
X-Request-Channel	M

Expected Status Codes:

Status Code	Mandatory/Optional
201 if successful	M

PATCH Operation Conformance

Individual

This operation updates partially a Individual entity.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.patchIndividual.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.patchIndividual.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The Payload is is a Individual MVO resource entity.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Reply-Channel		M
Parameters		M
	id	M
	fields	

Response Message Schema

Payload

The Payload is is a Individual resource entity.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Status-Code		M
X-Request-Channel		M

Expected Status Codes:

Status Code	Mandatory/Optional
200 if successful	M

Patchable and Non Patchable Attributes:

Patchable Attribute	Rule
aristocraticTitle	
birthDate	
contactMedium	
countryOfBirth	
creditRating	
deathDate	
disability	
externalReference	
familyName	
familyNamePrefix	
formattedName	
gender	
generation	
givenName	
individualIdentification	
languageAbility	
legalName	
location	
maritalStatus	
middleName	
name	
nationality	
otherName	
partyCharacteristic	
placeOfBirth	
preferredGivenName	
relatedParty	
skill	

Patchable Attribute	Rule
status	
taxExemptionCertificate	
title	

Organization

This operation updates partially a Organization entity.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.patchOrganization.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.patchOrganization.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The Payload is is a Organization MVO resource entity.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Reply-Channel		M
Parameters		M
	id	M
	fields	

Response Message Schema

Payload

The Payload is is a Organization resource entity.

Headers

Property	Mandatory/Optional
X-Correlation-Id	M
Status-Code	M
X-Request-Channel	M

Expected Status Codes:

Status Code	Mandatory/Optional
200 if successful	M

Patchable and Non Patchable Attributes:

Non Patchable Attribute	Rule
href	
id	

Patchable Attribute	Rule
contactMedium	
creditRating	
existsDuring	
externalReference	
isHeadOffice	
isLegalEntity	
name	
nameType	
organizationChildRelationship	
organizationIdentification	
organizationParentRelationship	
organizationType	
otherName	
partyCharacteristic	
relatedParty	
status	
taxExemptionCertificate	
tradingName	

DELETE Operation Conformance

Individual

This operation deletes a Individual entity.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.deleteIndividual.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.deleteIndividual.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The parameters for this operation are to be sent as headers.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Reply-Channel		M
Parameters		M
	id	M

Response Message Schema

Payload

There is no Payload defined for this channel

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Status-Code		M
X-Request-Channel		M

Expected Status Codes:

Status Code	Mandatory/Optional
204 if successful	M

Organization

This operation deletes a Organization entity.

Channels

REQUEST CHANNEL	{prefix}.partyManagement.v5.deleteOrganization.commandRequest
REPLY CHANNEL	{prefix}.partyManagement.v5.deleteOrganization.commandReply

Note: See the API Operations Conformance section above for more details on the request and reply channels.

Request Message Schema

Payload

The parameters for this operation are to be sent as headers.

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Reply-Channel		M
Parameters		M
	id	M

Response Message Schema

Payload

There is no Payload defined for this channel

Headers

Property		Mandatory/Optional
X-Correlation-Id		M
Status-Code		M

Property	Mandatory/Optional
X-Request-Channel	M

Expected Status Codes:

Status Code	Mandatory/Optional
204 if successful	M

Acknowledgements

Release History

Release Number	Date	Release led by:	Description

Version History

Version Number	Date	Modified by	Description