

# THOMSON REUTERS OPEN PERMID

## RELEASE NOTES

VERSION R2.1-2

Dec. 8<sup>th</sup>, 2016



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## New and Enhanced Features

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**Note:** R2.2 was released shortly after R2.1; therefore they share the same release notes.

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The releases include the following new features and enhancements:

- New Search & Matching features:
  - [Match Organization by its LEI Code](#)
  - [Organization Search/Match by Ticker and MIC/Exchange](#)
- Enhanced Person support: In the Organization page in the PermID UI, only people from records whose publication Status is “published” are displayed.

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**Note:** Person pages, the Lookup API and bulk download files still retrieve people from records with *all* publication status values.

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## Match Organization by its LEI Code

Record Matching now supports matching by LEI code (R2.0 enabled search by LEI).

**Note:** The new functionality is supported both in the UI and in the Record Matching API.

When performing a match by file, pass the LEI code value you want to search for in the **Standard Identifier** field.

When using the Record Matching API, pass the LEI code as a **Standard Identifier** within the request body or csv..

### Example: Match by File (UI)

Input (from the organization template):

A	B	C	D	E	F	G	H	I
LocalID	Standard Identifier	Name	Country	Street	City	PostalCod	State	Website
7	LEI:INR2EJN1ERAN0W5ZP974							

Output:

A	B	C	D	E	F	G	H	I
Processing	Match OpenPermID	Match OrgName	Match Sc	Match Lev	Match Ord	Original Rc	Input_Loc	Input_Standard Identifier
OK	<a href="https://permid.org/1-4295907168">https://permid.org/1-4295907168</a>	Microsoft Corp	100%	Excellent	1	8	7	LEI:INR2EJN1ERAN0W5ZP974

**Note:** For detailed information about the Legal Entity Identifier (LEI) code, see <https://www.leiroc.org>.



## Organization Search/Match by Ticker and MIC/Exchange

Sometimes it's useful to search for an organization by *both* ticker and MIC/exchange code, in order to produce globally unique results (as the same ticker can be used on different exchanges, usually in different countries).

R2.2 supports this type of compound search in the following products and features:

- PermID UI search
- EntitySearch API
- PermID UI match with file input
- Record Matching API

### Syntax specification:

To search for an organization by both ticker and MIC/exchange, use a query string formatted as follows:

- ticker: msft AND mic:XNGS
- OR -
- ticker: msft AND exchange:NSM

The following table shows where to use the compound search string for each operation:

Product/Feature	Enter search string in:
PermID UI search	Entity search box
EntitySearch API	Q parameter
PermID UI match with file input	Standard Identifier field
Record Matching API	Standard Identifier field

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**Note:** The **spaces** before and after the **AND** operator are **mandatory**. Remember to encode spaces as "%20" when querying via URL.

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## Example 1: Search in PermID UI

The screenshot shows the PermID UI search interface. At the top, there is a navigation bar with links for Home, Entity Search, Record Matching, Tagging, API, Entity Download, What's new?, and Blog. Below the navigation bar is a search bar containing the query "ticker: msft AND mic:XNGS". The search results are displayed under the heading "Results for 'ticker: msft AND mic:XNGS'". There are three tabs: "All Results (3)", "Organization (1)", "Instrument (1)", and "Quote (1)". The "All Results (3)" tab is selected. The results are sorted by "Relevance". The results are grouped into three sections: "Organization", "Instrument", and "Quote". Each section has a "Permid URI" link.

Home Entity Search Record Matching Tagging API Entity Download What's new? Blog

ticker: msft AND mic:XNGS

Results for "ticker: msft AND mic:XNGS" Entity Search API

All Results (3) Organization (1) Instrument (1) Quote (1) Sort by: Relevance

**Organization** < 1 >

Microsoft Corp  
MSFT | Company | publiclyHeld | <https://www.microsoft.com/en-us/> Permid URI: <https://permid.org/1-4295907168>

**Instrument** < 1 >

Microsoft Ord Shs  
MSFT | Microsoft Corp | Ordinary Shares Permid URI: <https://permid.org/1-8590921450>

**Quote** < 1 >

MICROSOFT ORD  
MSFT | Microsoft Ord Shs | MSFT.OQ | Ordinary Shares Permid URI: <https://permid.org/1-55835377165>

**Note:** As an example of how the new compound search narrows down the list of results, note that the compound search above returns **3** results, while searching for "Ticker: msft" (without the exchange) returns **43** results (2 organizations, 3 instruments and 38 quotes).

## Example 2: Search API

### Query:

GET <https://api.thomsonreuters.com/permid/search?q=ticker:MSFT%20AND%20mic:XNGS&format=json&access-token=<token>>

### Response:

```
{
  "result": {
    "organizations": {
      "entityType": "organizations",
      "total": 1,
      "start": 1,
      "num": 1,
      "entities": [
        {
          "@id": "https://permid.org/1-4295907168",
```

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```

    "organizationName": "Microsoft Corp",
    "primaryTicker": "MSFT",
    "orgSubtype": "Company",
    "hasHoldingClassification": "publiclyHeld",
    "hasURL": "https://www.microsoft.com/en-us/"
  }
]
},
"instruments": {
  "entityType": "instruments",
  "total": 1,
  "start": 1,
  "num": 1,
  "entities": [
    {
      "@id": "https://permid.org/1-8590921450",
      "hasName": "Microsoft Ord Shs",
      "assetClass": "Ordinary Shares",
      "isIssuedByName": "Microsoft Corp",
      "isIssuedBy": "https://permid.org/1-4295907168",
      "hasPrimaryQuote": "https://permid.org/1-55835377165",
      "primaryTicker": "MSFT"
    }
  ]
},
"quotes": {
  "entityType": "quotes",
  "total": 1,
  "start": 1,
  "num": 1,
  "entities": [
    {
      "@id": "https://permid.org/1-55835377165",
      "hasName": "MICROSOFT ORD",
      "assetClass": "Ordinary Shares",
      "isQuoteOfInstrumentName": "Microsoft Ord Shs",
      "hasRIC": "MSFT.OQ",
      "hasMic": "XNGS",
      "hasExchangeTicker": "MSFT",
      "isQuoteOf": "https://permid.org/1-8590921450"
    }
  ]
}
}
}
}
}

```



## Example 3: Match by File in PermID UI

Input (from the organization template):

A	B	C	D	E	F	G	H	I
LocalID	Standard Identifier	Name	Country	Street	City	PostalCod	State	Website
8	Ticker:FB&&Exchange:NSM							
9	Ticker:AAPL&&MIC:XNGS							

Output:

A	B	C	D	E	F	G	H	I
Processing	Match OpenPermID	Match OrgName	Match Scc	Match Lev	Match Ord	Original Rc	Input	Local Input Standard Identifier
OK	<a href="https://permid.org/1-4297297477">https://permid.org/1-4297297477</a>	Facebook Inc	100%	Excellent	1	9	8	Ticker:FB&&Exchange:NSM
OK	<a href="https://permid.org/1-4295905573">https://permid.org/1-4295905573</a>	Apple Inc	100%	Excellent	1	10	9	Ticker:AAPL&&MIC:XNGS

## Known Issues

No new known issues.

