



DATA SERVICES API

2.9 RELEASE NOTES

INSTALL TO PRODUCTION ENVIRONMENT: APRIL 14, 2017



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Overview

The 2.9 release will be pushed to production on April 14th, 2017. Following is a high-level overview of the changes in this release.

New Features

- Added Aggregation Level for portrait documents to matchMetadata bundle
- Added new flag in matchMetadata bundle called “nameMatchIntegrity” to indicate strength of name match
- Added Matching enhancement logic

Changes and Improvements

- Changed valid values for **selfDirectedInvestor**

Data

- Added new attributes to the **matchMetadata** bundle

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New Features

Aggregation Level for Portrait Documents

The aggregationLevel is now available for portrait documents in the matchMetadata bundle. This attribute indicates the geographical level at which the data was aggregated for return.

Valid values for this attribute include:

- COUNTRY
- STATE
- COUNTY
- PLACE
- ZIPCODE
- TRACT
- BLOCKGROUP
- BLOCK

Impact to delivery

- N/A

Name Match Integrity Attribute

The nameMatchIntegrity attribute is now available in the matchMetadata bundle. This attribute indicates the strength of the name match.

Valid values for this attribute include:

- Partial
- Complete

Impact to delivery

- N/A

Added Matching Logic Enhancements

Enhancements were made to our matching algorithms to improve overall match accuracy and to achieve additional matches. Overall the change impact was less than .02%.

Changes & Improvements

Changed Valid Values for selfDirectedInvestor

The valid values for the **selfDirectedInvestor** attribute in the **investmentsAndAssets** bundle have been changed from the likelihood range of **very likely - very unlikely** to:

- Soloist
- Validator
- Delegator

Impact to delivery

- All available valid values are accurate and current.

New Data

The following table shows the data changes for the 2.9 release. All additions and changes are external.

General Category	Doc Type	Bundle	Element	Add/ Change/ Remove	Description of Change
Metadata	All	matchMetadata	nameMatchIntegrity	a	Added a new attribute
Metadata	All	matchMetadata	aggregationLevel	a	Added a new attribute