Note: In this work sample from Donnelley Financial Solutions, I wrote reference documentation for a new REST API endpoint.

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Taxonomy Resource

For more information, see the following sections:

Overview

You can call the Taxonomy resources to fetch information that provides important context to the full financials and core financials reported in filings. After you fetch the Taxonomy resources, you can then apply these resources to the core financials you fetch from DataFied's Core Financials API or to full financials you fetch from DataFied's Full Financials data API. You can fetch the following Taxonomy resources for each supported taxonomy and then apply the resources to financial data your application key is entitled to.

Resource	Description
Calculation	Returns parent/child calculation relationships between numeric fields in the data to validate the consistency of the data and accurately roll up the data. The calculation resource only applies to full financials reported in filings and does not apply to core financials reported in filings.

Fieldlabel	Returns the standard label and definition for each field in the data.
Fieldproperty	Returns the field properties of each field in the data including data type, period type, and natural balance type.
Presentation	Returns parent/child presentation relationships between sections and fields in the data to apply a human-readable hierarchy and logical ordering of the data.
Taxonomy	Returns the following summary information for each supported taxonomy: taxonomy name, taxonomy ID, and data set to which the taxonomy applies.

You can fetch the Taxonomy resources in .json or .xml format.

Note: The taxonomy resource is not applicable to data retrieved from the Insider Trades and Institutional Ownership data APIs.

Which taxonomies are supported?

Seven taxonomies are supported. One taxonomy (Core Financials) applies to all core financials retrieved from the Core Financials data API. The correct taxonomy to apply to full financials retrieved from the Full Financials data API depends on the industry under which the reporting company is classified, as described in the table below.

Data API	Taxonomy ID	Taxonomy Name	Description
Core Financials	50	Core Financials	Applies to core financials reported in filings.
Full Financials	18	Commercial and Industrial (CI)	Applies to full financials reported in filings of companies classified under the Commercial and Industrial (CI) industry—for example, Microsoft.
Full Financials	19	Banks and Savings Institutions (BASI)	Applies to full financials reported in filings of companies classified under the Banks and Savings Institutions (BASI) industry—for example, Bank of America.
Full Financials	20	Insurance	Applies to full financials reported in filings of companies classified under the Insurance industry—for example, Marsh and McLennan Companies.

Full Financials	27	Real Estate	Applies to full financials reported in filings of companies classified under the Real Estate industry—for example, The Howard Hughes Corporation.
Full Financials	28	Broker Dealer	Applies to full financials reported in filings of companies classified under the Broker Dealer industry—for example, Charles Schwab.
Full Financials	30	Oil & Gas	Applies to full financials reported in filings of companies classified under the Oil & Gas industry—for example, Exxon Mobil.

When you call the Taxonomy resource, you specify in the call the taxonomy ID of the respective taxonomy whose resources you want to fetch. For example, 18 is the taxonomy ID you would specify in the call to fetch the calculation, field label, field property, and presentation resources of the Commercial and Industrial (CI) taxonomy. You could then apply these CI taxonomy resources to full financials reported in filings by companies classified under the Commercial and Industrial (CI) industry--for example, Microsoft.

To see an example call to each Taxonomy resource, see the resources' documentation below. You can also use the Make Live API Calls page in the DataFied portal to test the Taxonomy resources. To do this, sign into the portal using the Sign In link above, select 'Taxonomy' from the drop-down list, and then expand a menu below for the Taxonomy resource you want to test and set up the call. Then click **Try It** to call the Taxonomy resource. The response is returned at the bottom of the Make Live API Calls page.

Which taxonomy do I apply to the financial data I fetched?

- **Core Financials**
- **Full Finanials**

Core Financials

When you call the Core Financials data API to fetch core financials data, you can set up the call such that the taxonomy ID of the correct taxonomy to apply to the core financials data is included in the response (50). This taxonomy ID is returned in the response as the value of the taxonomyID field.

To do this, you can either fetch all fields to which your app key is entitled which includes the taxonomy ID field (an app key is always entitled to the taxonomyID field) or specify in the call each entitled field you want to fetch, including the TaxonomyID field. Examples of each technique are shown below.

Example 1: **Fetch all entitled fields including taxonomy ID when calling the Core Financials data API**

In the following example, the call fetches all fields in the core financials data set. This call returns all core financials reported by Microsoft in the second quarter of 2015 and includes with the response the taxonomy ID of the correct taxonomy to apply to the data.

https://datafied.api.edgar-online.com/v2/corefinancials/qtr.json?primarysymbols=msft&fiscalperiod=2015q2&fields=all&appkey={APPKEY}

Note: If your app key is not entitled to all fields in the core financials data set, you must modify the example call above by listing all restricted fields to which your app key is not entitled as negated values. To do this, list in the 'fields' parameter each restricted field or concept group (separated by a comma) and include an exclamation point in front of each field or concept group you want to negate. If you do not do this, an error returns, listing each field to which your app key is not entitled.

In the following example demonstrating negation, the app key specified in the call is entitled to all fields except Price Revenue (Fiscal Year) and Price (Previous Close):

https://datafied.api.edgar-online.com/v2/corefinancials/qtr.json?primarysymbols=msft&fiscalperiod=2015q2&fields=all,!pricerevenuefy,!pricepreviousclose&appkey={APPKEY}

Example 2: Specify the taxonomy ID in the request when calling the Core Financials data API

In the following simple example, the call fetches the company name and period end date reported by Microsoft in core financials for the second quarter of 2015 and in addition, the taxonomy ID of the correct taxonomy to apply to the data.

https://datafied.api.edgar-online.com/v2/corefinancials/qtr.json?primarysymbols=msft&fiscalperiod=2015q2&fields=companyname,periodenddate,taxonomyid&appkey={APPKEY}

Response


```
{
  "result": {
    "totalrows": 1,
    "rows": [
      {
        "rownum": 1,
        "values": [
```

```
          {
            "field": "companyname",
            "value": "MICROSOFT CORP"
          },
          {
            "field": "periodenddate",
            "value": "12/31/2014 12:00 AM"
          },
          {
            "field": "taxonomyid",
            "value": "50"
          }
        ]
      }
    ]
  }
}
```


To fetch additional fields, you would specify each additional field in the value for the 'fields' parameter and separate each additional field with a comma.

After you retrieve the taxonomy ID, you can then specify the taxonomy ID in calls to the Taxonomy resource to fetch the correct taxonomy resources to apply to the core financials data.

Full Financials

When you call the Full Financials data API to fetch full financials data, you can set up the call to also retrieve the taxonomy ID of the correct taxonomy to apply to the data (TaxonomyID field).

To do this, you can either fetch all fields to which your app key is entitled which includes the taxonomy ID field (an app key is always entitled to the taxonomyID field) or you can specify in the call each field you want to fetch, including the TaxonomyID field. Examples of each technique are shown below.

Example 1: **Fetch all entitled full financials fields including taxonomy ID when calling the Full Financials data API**

In the following example, the call fetches all fields in the full financials data set including the taxonomy ID. The response returns all full financials reported by Microsoft in the second quarter of 2015 and includes the taxonomy ID of the correct taxonomy to apply to the data.

https://datafied.api.edgar-online.com/v2/financials/qtr.json?primarysymbols=msft&fiscalperiod=2015q2&fields=defaultfieldgroup,!cusip&appkey={APPKEY}

Note: If your app key is also entitled to CUSIP, remove the negated CUSIP from the value specified for the 'fields' parameter to also fetch CUSIPs (fields=defaultfieldgroup). If you remove the negated CUSIP but your app key is not entitled to CUSIPs, an error will return.

Example 2: Specify the taxonomy ID in the request when calling the Full Financials data API

In the following simple example, the call fetches the company name and period end date reported by Microsoft in full financials for the second quarter of 2015 and in addition, the taxonomy ID of the correct taxonomy to apply to the data.

https://datafied.api.edgar-online.com/v2/financials/qtr.json?primarysymbols=msft&fiscalperiod=2015q2&fields=companyname,periodenddate,taxonomyid&appkey={APPKEY}

Response


```
{
  "result": {
    "totalrows": 1,
    "rows": [
      {
        "rownum": 1,
        "values": [
          {
            "field": "companyname",
            "value": "MICROSOFT CORP"
          },
          {
            "field": "periodenddate",
            "value": "12/31/2014 12:00 AM"
          },
          {
            "field": "taxonomyid",
            "value": "18"
          }
```

```
        ]
      }
    ]
  }
}
```

To return additional fields in the response, you would specify each additional field in the value for the 'fields' parameter and separate each additional field with a comma.

After you retrieve the taxonomy ID, you can then specify this taxonomy ID in calls to the Taxonomy resource to fetch the correct taxonomy resources for the industry under which the reporting company is classified and then apply the resources to the full financials data.

How to check if a new version of a taxonomy is available (ETags)

An HTTP entity tag (ETag) is a unique identifier that is assigned to each new version of a Taxonomy's resources. The purpose of using the ETags mechanism is to avoid unnecessary taxonomy processing time by checking whether a new version of a resource is available to be retrieved from the server. If you've built a cache mechanism for your application, you can use ETags to always fetch the resource from cache instead of the server when you've cached the current version of the resource.

When you call a Taxonomy resource, the unique ETag identifier returns in the resource's response as the value of the 'etag' response header field. When you call the Taxonomy resource again, you can specify in the call the ETag value included in the resource's previous response to compare it with the ETag value associated with the current version of the resource on the server.

If the ETags do not match, this means that a new version of the resource is available. As a result, the server returns a payload containing the new version of the resource. However, if the ETags match, this means that you've already retrieved the current version of the resource and the server returns a 304 Not Modified response (with an empty payload). When the 304 Not Modified response returns in the response because you've already fetched the current version of the resource, you can then fetch the resource from the cache using the cache mechanism you've built because the cache contains the latest version.

The following Taxonomy resources support HTTP ETags: Calculation, Fieldlabel, Fieldproperty, and Presentation resources. The high-level process for using ETags is as follows:

1. Call a Taxonomy resource for a respective taxonomy for the first time to retrieve the resource—for example, the CI taxonomy's Fieldlabel resource (taxonomyID=18):
   https://datafied.api.edgar-online.com/taxonomy/18/fieldlabel?appkey={APPKEY}
2. The server returns in the payload the resource you called in step 1. This response includes the 'etag' response header field with a corresponding value that uniquely identifies the current version of the resource.

   

3. Cache this current version of the resource returned by the server in Step 2 using a cache mechanism you've built for your application and store the ETag value uniquely identifies the current version of the resource.
4. The next time you call the resource from step 1, specify in the call the ETag value that you stored in Step 3. You can specify the ETag value in the call in the following ways:
   - As a value of the http_etag query parameter. Example:
     https://datafied.api.edgar-online.com/taxonomy/18/fieldlabel?http_etag=asdfasdfdab28c180a38a8b0618f25a598478afa075ba7a1_json_utf-8&appkey={APPKEY}
   - As a value of the If-None-Match HTTP request header. Example:
     GET https://datafied.api.edgar-online.com/taxonomy/18/fieldlabel?appkey={APPKEY}
     Accept: application/json
     If-None-Match: asdfasdfdab28c180a38a8b0618f25a598478afa075ba7a1_json_utf-8

     Note: If the http_etag query parameter and If-None-Match HTTP request header are both specified in a call, the ETag value specified for the http_etag query parameter overrides the ETag value specified for the If-None-Match HTTP request header (the value specified for the If-None-Match HTTP request header is ignored by the server).
5. The response of the resource you called in step 4 is returned in one of the following ways, depending on whether a new version of the resource is available:
   - A new version is not available. When the ETag value you specified in the call matches the ETag value assigned to the current version of the resource, this means that the resource has not changed (you already fetched the current version of the resource) and the server returns a 304 Not Modified response with an empty payload. When a new version of the resource is not available, you can then use the cache mechanism you've built to fetch the current version of the resource that is stored in the cache.

     Note: Each API call that returns a 304 Not Modified response counts toward your plan's quota.

- A new version is available. When the ETag value you specified in the call does not match the ETag value assigned to the current version of the resource, this means that a new version of the resource is available, the resource is fetched from the server, and the response includes a new ETag value as the value of the 'etag' response header field that uniquely identifies the latest version of the resource. You should then cache this new version of the resource using your cache mechanism and store this new ETag value that uniquely identifies the latest version of the resource.

GET /taxonomy

Retrieves the taxonomy name, taxonomy ID, and corresponding data set of each supported taxonomy.

URL

https://datafied.api.edgar-online.com/taxonomy/?appkey={APPKEY}

Headers

Header	Description	Required	Notes
Accept	Returns the response in xml or json format. Valid values: application/json application/xml	optional	Default: application/json

Sample Request

https://datafied.api.edgar-online.com/taxonomy/?appkey={APPKEY}

Response (JSON and XML)

Represents summary information about the supported taxonomies.

Element			Description	Type	Notes
taxonomies			Top level	array of taxonomy objects	
	taxonomy		Describes a taxonomy	object	
		id	Taxonomy ID	integer	**XML response**: Returns as an

					attribute of the taxonomy element
		name	Taxonomy name	string	**XML response**: Returns as an attribute of the taxonomy element
		dataset	Corresponding data set to which the taxonomy applies	string	**XML response**: Returns as an attribute of the taxonomy element
	taxonomy		*Next taxonomy in the response*		

GET taxonomy/{Taxonomy ID}/calculation

Returns parent/child calculation relationships between fields of the specified taxonomy. Documentation for this resource's response is provided in .json and .xml format.

URL

https://datafied.api.edgar-online.com/taxonomy/{TaxonomyID}/calculation?appkey={APPKEY}

Request Headers

Header	Description	Type	Required	Notes
Accept	Formats the response in XML or JSON.	string	optional	Values: application/json, application/xml Default: application/json
If-None-Match	Specifies the ETag value that was returned in the "ETag" response header field in the resource's previous response to check if a new version of the resource is available to be retrieved from the server. For more information, see ETags.	string	optional	Default: None

Query Parameters

Parameter	Description	Type	Required	Notes
http_etag	Specifies the ETag value that was returned in the "ETag" response header field in the resource's previous response to check if a new version of the resource is available to be retrieved from the server. For more information, see ETags.	string	optional	Default: None
TaxonomyID	Specifies a taxonomy ID to return the calculation relationships of the specified taxonomy.	integer	required	Valid taxonomy IDs: 18, 19, 20, 27, 28, 30 **Note**: There is no Calculation resource for the Core taxonomy. For a description of the taxonomy IDs, see Which taxonomies are supported?

Sample Request

The following sample request returns the calculation relationships for the Commercial and Industrial taxonomy (TaxonomyID=18).

```
https://datafied.api.edgar-online.com/taxonomy/18/calculation?appkey={APPKEY}
```

JSON Response

Represents calculation relationships between fields of a taxonomy in JSON format.

Element					Description	Type	Notes
result					Top level	calculation relationships data object	
	section				Describes sections of the financial	array of objects where each	Examples of section names:

					data	object describes a section in the financial data containing calculation relationships and the section's calculation relationships	Statement of Financial Position, Income Statement, Period Information, Statement of Cash Flows - Indirect Method
		id			Section ID	integer	
		title			Name of the section	string	
		relativeorder			Specifies the order of the section, relative to the other sections in the financial data.	float	The order increases by increments of 100
		fieldhierarchy			Specifies the parent/child calculation relationships between fields belonging to the section	array of objects where each object describes the parent and a child addend of a calculation relationship	
			parentfield		Describes the	object	The parent field

					parent field of the calculation relationship		in a calculation relationship is not the same parent field in a presentation relationship. This is because in a visual presentation relationship, the parent field is an abstract field that corresponds to a report heading and does not contain a value. In a mathematical calculation relationship, the parent field represents the total for a calculation relationship and contains a value (total line item).
				id	Parent field ID	integer	
				value	Name of the parent field	string	
			childfield		Describes a child field of the	object	

					calculation relationship		
				id	Child field ID	integer	
				value	Name of the child field	string	
			weight		Specifies a multiplication factor to apply to the relationship. The multiplication factor is determined by the balance type (Debit or Credit) of the parent and child fields	float	Possible values: 1.0000 -1.0000
			relativeorder		Specifies the order of the child field relative to the other child fields included in the calculation relationship.	float	The order increases by increments of 100.
			childlevel		Specifies the level of the calculation relationship in relation to the overall calculation relationship	integer	A higher child level number indicates a deeper nesting in the hierarchy

					hierarchy.		of calculation relationships for the financial data. For example, when the child level increases by 1, a field that was the parent field in a calculation relationship of child level = n can potentially be included as a child field in another calculation relationship where child level = n + 1.
		----------			*...the section's next parent/child calculation relationship in the response.*		
		id			*...next section in the response.*		

JSON Sample Response (TaxonomyID=18)

Represents the beginning of the response of the calculation resource when TaxonomyID=18.

```
{
  "result": {
    "section": {
      {
        "id": "297640",
        "title": "Statement of Financial Position",
        "relativeorder": "100",
        "fieldhierarchy": [
         {
           "parentfield": {
          "id": "288634",
          "value": "Assets"
          },
          "childfield": {
          "id": "294253"
          "value": "CashCashEquivalentsFederalFunds"
          },
          "weight": "1.0000",
          "relativeorder": 100.0000",
          "childlevel": "1"
          },
            ...the rest of the parent/child calculation relationships for the section return here.
        ]
          ...the rest of the sections return here.
      }
    ]
  }
}
```


XML Response

Represents calculation relationships between fields of a taxonomy in XML format.

Element				Attribute	Description	Type
result					Calculation relationships data object	array of section

					(top level).	elements where each element describes a section in the financial data with calculation relationships and the section's calculation relationships Examples of sections: Statement of Financial Position, Income Statement, Period Information, Statement of Cash Flows - Indirect Method
	section				Describes a section in the financial data.	Includes an array of fieldhierarchy elements where each fieldhierarchy element describes the parent and a child addend of a calculation relationship
				id	Section ID	integer
		title			Name of the section.	string
		relativeorder			Specifies the order of the section, relative to the other sections in the financial data. The order increases by increments of 100.	float

		fieldhierearchy			Specifies the parent/child calculation relationships between fields belonging to the section	
			parentfield		Name of the parent field. The parent field in a calculation relationship is not the same parent field in a presentation relationship. This is because in a visual presentation relationship, the parent field is an abstract field that corresponds to a report heading and does not contain a value. In a mathematical calculation relationship, the parent field represents the total for a calculation relationship and visually in the financial data, this value appears at the bottom of a visual presentation relationship (line item total).	string
				id	Parent field ID	integer
			childfield		Name of the child field of the calculation relationship.	string
				id	Child field ID	integer
			weight		Specifies a multiplication factor to apply to the relationship. The multiplication factor is determined by the balance type (Debit or Credit) of the parent and child fields.	float

					Possible values: 1.0000 -1.0000	
			relativeorder		Specifies the order of the child field relative to the other child fields included in the calculation relationship. The order increases by increments of 100.	float
			childlevel		Specifies the level of the calculation relationship in relation to the overall calculation relationship hierarchy. . A higher child level number indicates a deeper nesting in the hierarchy of calculation relationships for the financial data. For example, when the child level increases by 1, a field that was the parent field in a calculation relationship of child level = n can potentially be included as a child field in another calculation relationship where child level = n + 1.	integer
		fieldhierarchy			*The section's next fieldhierarchy element in the response..*	
	section				*The next section in the response.*	

XML Sample Response (TaxonomyID=18)

Represents the beginning of the response of the calculation resource when TaxonomyID=18.

```
<result>
  <section id="297640">
```

```
    <title>Statement of Financial Position</title>
    <relativeorder>100</relativeorder>
    <fieldhierarchy>
      <parentfield id="288634">Assets</parentfield>
      <childfield id="294253" />CashCashEquivalentsFederalFunds</childfield>
      <weight>1.0000</weight>
      <relativeorder>100.0000</relativeorder>
      <childlevel>1</childlevel>
    </fieldhierarchy>
     …the rest of the parent/child calculation relationships for the section return here.
  </section>
   …the rest of the sections return here.
</result>
```

GET taxonomy/{TaxonomyID}/fieldlabel

Returns human-readable labels that describe the fields in the data (Full, Primary, and Terse labels). When a definition is available for a field, the 'fieldlabel' resource returns this definition as the Full label. This definition can provide context for the field.

Documentation for this resource's response is provided in .json and .xml format.

URL

https://datafied.api.edgar-online.com/taxonomy/{TaxonomyID}/fieldlabel?appkey={APPKEY}&fieldID=*field IDs*&fieldname=*field names*

Headers

Header	Description	Type	Required	Notes
Accept	Formats the response in XML or JSON.	string	optional	Values: application/json, application/xml Default: application/json
If-None-Match	Specifies the ETag value that was returned in the "ETag" response header field in the resource's previous response to check if a new version of the resource is	string	optional	Default: None

	available to be retrieved from the server. For more information, see ETags.			

Query Parameters

Parameter	Description	Type	Required	Notes
http_etag	Specifies the ETag value that was returned in the "ETag" response header field in the resource's previous response to check if a new version of the resource is available to be retrieved from the server. For more information, see ETags.	string	optional	Default: None
TaxonomyID	Specifies a taxonomy ID to return the corresponding field labels of the specified taxonomy.	integer	required	Valid IDs: 18, 19, 20, 27, 28, 30, 50 For a description of the taxonomy IDs, see Which taxonomies are supported?
fieldid	Specifies field IDs to only fetch field labels of the fields corresponding to the specified field IDs (see the **field ID** element in the response). Separate each specified field ID with a comma (no space)	integer	optional	If you specify the 'fieldid' query parameter in a call, do not also specify the 'fieldname' parameter in the call. If you specify both the 'fieldid' and 'fieldname' query parameters in a call, the call returns an error. Default: Null (if the fieldid or fieldname parameters are not specified, all available field labels return in the response)
fieldname	Specifies field names to only fetch field labels of the fields corresponding to the specified field names (see the **tag** element in the response). Separate each field name with a comma (no space)	string	optional	If you specify the 'fieldname' query parameter in a call, do not also specify the 'fieldid' parameter in the call. If you specify both the 'fieldname' and 'fieldid' query parameters in a call, the call returns an error. You must specify the name of the field (value of

				the **tag** element). If you specify the name of a label, an error will return. Default: Null (if the fieldid or fieldname parameters are not specified, all available field labels return in the response)

Sample Request

Returns the field labels of the Commercial and Industrial taxonomy (TaxonomyID=18).

https://datafied.api.edgar-online.com/taxonomy/18/fieldlabel?appkey={APPKEY}

JSON Response

Represents the human-readable labels for fields in JSON format.

Element				Description	Type	Notes
result				Top level	Field labels data object	
	total			Number of fields for which field labels are returned	integer	
	field			Describes the field labels.	array of objects where each object describes a field and its labels	
		id		Field ID	integer	
		tag		Name of the field	string	
		rownum		Row number for the field	integer	
		label		Specifies the description and label type ID for the field's labels.	array of up to three labels	

			value	The label's description.	string	
			labeltypeid	Indicates whether the label is the primary, terse, or full label. The primary label is the full name of the field, the terse label is a shortened name of the field with inferred descriptions omitted, and the full label is the definition of the field.	integer	1 = Primary 2 = Terse 3= Full
	field			*Next field in the array*		

JSON Sample Response (TaxonomyID=18)

Represents the beginning of the label file response when TaxonomyID=18.


```
{
  "result": {
    "total": 6121,
    "field": [
      {
        "id": 299404,          "tag": "AcceleratedFiler",
        "rownum": "1",
        "label": [
          {
            "value": "Accelerated Filer",
            "labeltypeid": "1"
          },
         {
            "value": "Accelerated Filer",
            "labeltypeid": "2"
          },                {
            "value": "Accelerated Filer",
            "labeltypeid": "3"
          },
           ...rest of the fields of the response return here.
          ]
```

```
        }
}
```

XML Response

Represents human-readable labels in XML format.

Element			Attribute	Description	Type
result				Top level.	field labels data object
			total	Number of fields for which field labels are returned	integer
	field			Describes a field and its labels.	array of up to three **label**elements (Primary, Terse, Full label)
			id	Field ID	integer
			tag	Name of the field.	
			rownum	Row number for the field.	integer
		label		The label's description.	string
			labeltypeid	Indicates whether the label is the primary, terse, or full label. The primary label is the full name of the field, the terse label is a shortened name of the field with inferred descriptions omitted, and the full label is the definition of the field. 1=Primary label 2=Terse label 3=Full label	integer
	field			*Next field in the array*	

XML Sample Response (TaxonomyID=18)

Represents the beginning of the label file response when TaxonomyID=18.

```
<result total="6121">
  <field id="299404 tag="AcceleratedFiler" rownum="1">
    <label labeltypeid="1">Accelerated Filer</label>
    <label labeltypeid="2">Accelerated Filer</label>
    <label labeltypeid="3">Accelerated Filer</label>
  </field>
  ...the rest of the human-readable labels return here.
</result>
```

GET taxonomy/{TaxonomyID}/fieldproperty

Returns the properties of each field included in the taxonomy. These field properties include data type, period type, balance type, and so forth. Documentation for this resource's response is provided in .json and .xml format.

URL

```
https://datafied.api.edgar-online.com/taxonomy/{TaxonomyID}/fieldproperty?appkey={APPKEY}
```

Headers

Header	Description	Type	Required	Notes
Accept	Formats the response in XML or JSON.	string	optional	Values: application/json, application/xml Default: application/json
If-None-Match	Specifies the ETag value that was returned in the "ETag" response header field in the resource's previous response to check if a new version of the resource is available to be retrieved from the server. For more information, see ETags.	string	optional	Default: None

Query Parameters

Parameter	Description	Type	Required	Notes
http_etag	Specifies the ETag value that was returned in the "ETag" response header field in the resource's previous response to check if a new version of the resource is available to be retrieved from the server. For more information, see ETags.	string	optional	Default: None
TaxonomyID	Specifies a taxonomy ID to return the field properties for the fields of the specified taxonomy	integer	required	Valid IDs: 18, 19, 20, 27, 28, 30, 50 For a description of the taxonomy IDs, see Which taxonomies are supported?

Sample Request

The following sample request returns the field properties for the fields of the Commercial and Industrial (CI) taxonomy (TaxonomyID=18).

```
https://datafied.api.edgar-online.com/taxonomy/18/fieldproperty?appkey={APPKEY}
```

JSON Response

Represents field properties in JSON format.

Element					Description	Type	Notes
result					Top level	Field properties data object	
	total				Number of fields returned.	integer	
	field				Describes fields and	array of objects	

					their properties	where each object describes a field and the field's properties	
		id			Field ID	integer	
		name			Name of the field	string	
		rownum			The field's row number	integer	
		datatype			Describes the field's data type	object	
			id		Data type ID	integer	1 = Abstract 2 = Tuple 3 = DateTime 4 = Decimal 5 = Monetary 6 = Shares 7 = String 8 = Ratio 12 = Boolean 13 = Date 15 = Integer 34 = percentItemType

			description		Name of the field's data type	string	
			extendedproperty		Describes the field's extended properties	object	
				isnumeric	Indicates whether the field is numeric (=1) or not numeric (=0)	integer (0 or 1)	
				ismoney	Indicates whether the field is contains a monetary value (=1) or does not contain a monetary value (=0)	integer (0 or 1)	
				canholdvalue	Indicates whether the field can hold a value (=1) or cannot hold a value (=0)	integer (0 or 1)	A field that cannot hold a value is typically an abstract field. Abstract fields correspond to the headings in a

							financial report.
				issection	Indicates whether the field is a section (=1) or is not a section (=0)	integer (0 or 1)	Examples of sections: Income Statement, Miscellaneous Items, Statement of Cash Flows Direct, Statement of Cash Flows Indirect, Statement of Financial Position, Summary Income Statement, Summary Statement of Cash Flows Indirect, Summary Statement of Financial Position
		periodtype			The field's period type	object	If the field does not have a period type, the periodtype object is excluded from the response. For example, the DepositsByType is an abstract field that does not hold a value (report

							heading) so the periodtype object is not returned for this field.
			id		Period type ID	integer	1 = Duration 2 = Instant
			description		Period type description (Instant or Duration)	string	
		balancetype			The field's balance type	object	If the field does not have a balance type, the balancetype object is excluded from the response. For example, the AcceleratedFiler field indicates whether the company is an accelerated filer so the field does not have a balance type and the balancetype object is excluded from the response

							for this field.
			id		Balance type ID	integer	1 = Credit 2 = Debit
			description		Balance type description (Credit or Debit)	string	
		id			*Next field in the response.*		

JSON Sample Response (TaxonomyID=18)

Represents the field properties of fields when TaxonomyID=18.

Note: The AcceleratedFiler field does not have a balance type as it is neither Debit or Credit so the balancetype object is excluded from the response.


```
{
  "result": {
    "total": 6121,
    "field": [
      {
        "id": 299404,
        "name": "AcceleratedFiler",
        "rownum": "1",
        "datatype": {
          "id": "7",
         "description": "String",
         "extendedproperty": {
            "isnumeric": "0",
            "ismoney": "0",
            "canholdavalue": "1",
            "issection": "0"
```

```
        }
      },
        "periodtype": {
        "id": "2",
            "description": "Instant"
        },
      },
      …the rest of the field properties return here.
     ]
   }
}
```

XML Response

Represents the field properties in XML format.

Element					Attribute	Description	Type
result						Top level	array of **field**elements where each element describes a field and the field's properties
					total	Number of fields returned.	integer
	field					Describes a field and its properties.	
					id	Field ID	integer

					rownum	Row number for the field	integer
		name				Field name	string
		datatype				Describes the field's data type	
					id	Date type ID 1 = Abstract 2 = Tuple 3 = DateTime 4 = Decimal 5 = Monetary 6 = Shares 7 = String 8 = Ratio 12 = Boolean 13 = Date 15 = Integer 34 = percentItemType	integer
			description			Name of the field's data type	string
			extendedproperty			Describes the field's extended properties	
				isnumeric		Indicates whether the field	integer (0 or 1)

						is numeric (=1) or not numeric (=0)	
				ismoney		Indicates whether the field contains a monetary value (=1) or does not contain a monetary value (=0)	integer (0 or 1)
				canholdvalue		Indicates whether the field can hold a value (=1) or cannot hold a value (=0) A field that cannot hold a value is typically an abstract field. Abstract fields correspond to the headings in a financial report.	integer (0 or 1)
				issection		Indicates whether the field is a section (=1) or is not a section (=0) Examples of sections: Income Statement, Miscellaneous	integer (0 or 1)

						Items, Statement of Cash Flows Direct, Statement of Cash Flows Indirect, Statement of Financial Position, Summary Income Statement, Summary Statement of Cash Flows Indirect, Summary Statement of Financial Position	
		period type				Describes the field's period type If the field does not have a period type, the periodtype object is excluded from the response. For example, the DepositsByType is an abstract field that does not hold a value (report heading) so the periodtype object is not returned for this	

						field.	
					id	Period type ID 1 = Duration 2 = Instant	integer
				description		Name of the period type	string
		balanc etype				Describes the field's balance type. If the field does not have a balance type, the balancetype object is excluded from the response. For example, the AcceleratedFiler field indicates whether the company is an accelerated filer so the field does not have a balance type and the balancetype object is excluded from the response for this field.	description element
					id	Balance type ID	integer

						1 = Credit 2 = Debit	
				description		Name of the balance type.	string
	field					*Next field element in the response.*	

XML Sample Response (TaxonomyID=18)

Represents the field properties of fields when TaxonomyID=18.

Note: The AcceleratedFiler field does not have a balance type as it is neither Debit or Credit so the balancetype object is excluded from the response.

```
<result total="6121">
  <field id="299404" rownum="1">
    <name>AcceleratedFiler</name>
    <datatype id="7">
        <description>String</description>
        <extendedproperty>
            <isnumeric>0</isnumeric>
            <ismoney>0</ismoney>
            <canholdavalue>1</canholdavalue>
            <issection>0</issection>
        </extendedproperty>
    </datatype>
    <periodtype id="2">
        <description>Instant</description>
   </periodtype>
 </field>
…the rest of the field properties return here.
</result>
```

GET taxonomy/{TaxonomyID}/presentation

Returns the presentation relationships between fields of the specified taxonomy to apply a human-readable hierarchy and logical organization of rows to the retrieved financial data. The presentation is expressed through parent and child relationships between fields.

These presentation relationships are expressed as a parent abstract field (report heading) and child fields holding values or child report subheadings. The nesting of these presentation relationships are defined by the assigned child level to form the presentation hierarchy.

Documentation for this resource's response is provided in .json and .xml format.

URL

https://datafied.api.edgar-online.com/taxonomy/{TaxonomyID}/presentation?appkey={APPKEY}

Headers

Header	Description	Type	Required	Notes
Accept	Formats the response in XML or JSON.	string	optional	Values: application/json, application/xml Default: application/json
If-None-Match	Specifies the ETag value that was returned in the "ETag" response header field in the resource's previous response to check if a new version of the resource is available to be retrieved from the server. For more information, see ETags.	string	optional	Default: None

Query Parameters

Parameter	Description	Type	Required	Notes
http_etag	Specifies the ETag value that was returned in the "ETag" response header field in the resource's previous response to check if a new version of the resource is available to be retrieved from the server.	string	optional	Default: None

	For more information, see ETags.			
TaxonomyID	Specifies a taxonomy ID to return the presentation relationships for the fields of the specified taxonomy	integer	required	Valid IDs: 18, 19, 20, 27, 28, 30, 50 For a description of the taxonomy IDs, see Which taxonomies are supported?

Sample Request

The following sample request returns the presentation file of the Commercial and Industrial taxonomy (TaxonomyID=18).

```
https://datafied.api.edgar-online.com/taxonomy/18/presentation.json?appkey={APPKEY}
```

JSON Response

Represents presentation relationships between fields.

Element					Description	Type	Notes
result					Top level	object	
	section				Describes the sections appearing in the financial data	array of objects where each object describes a section and the section's presentation relationships	Each section object corresponds to the major, top-level sections of the data set such as Statement of Financial Position and Income Statement.
		id			Section ID	integer	
		title			Name of the section	string	

		relativeorder			Specifies the order of the section in relation to the other sections appearing in the report. This order organizes the data in a logical, intuitive fashion	float	The order increases by increments of 100
		fieldhierarchy			Specifies all parent/child presentation relationships between the fields appearing in the section	array of objects where each object describes a single parent/child presentation relationship	
			parentfield		Describes the parent field of the presentation relationship	object	
				id	Parent field ID	integer	
				value	Name of the	string	This name typically ends in

					parent field		'Abstract' and corresponds to a report heading (an abstract field that does not hold a value).
			childfield		Describes the child field of the presentation relationship	object	
				id	Child field ID	integer	
				value	Name of the child field	string	
			labeltypeid		Label type ID	integer	Specifies the label type ID for the field's field label (see fieldlabel resource) Returns 1 in the response for all fields (Primary field label)
			relativeorder		Specifies the order beneath the parent abstract field at which the child field is located in the presentation. This order organizes the data in a logical,	float	The order increases by increments of 100

					intuitive fashion		
			childlevel		Specifies the level of indentation into the presentation hierarchy at which this parent/child presentation relationship is located within the section	integer	A higher number indicates a further nesting to the right in the section's presentation hierarchy
		fieldhierarchy			*Rest of parent/child presentation relationship for the section.*		
		id			*Next section in the presentation.*		

JSON Sample Response (TaxonomyID=18)

Represents the beginning of the presentation file response when TaxonomyID=18.

Note: The parent 'IMetrix_StatementFinancialPosition' abstract line refers to the balance sheet.


```
{
  "result": {
     "section": [
```

```
      "id": "299537",
      "title": "Company Statistics",
      "relativeorder": "100",
      "fieldhierarchy": [
        {
          "parentfield": {
            "id": "299537",
            "value": "IMetrix_CompanyStatistics"
          },
          "childfield": {
            "id": "299534",
            "value": "CompanyStatisticsAbstract"
          },
          "labeltypeid": "1",
          "relativeorder": "100.0000",
          "childlevel": "0"
        },
       ...the rest of parent/child presentation relationships for the section return here.
]
...rest of the sections of the presentation file return here.
}]}
}
```


XML Response

Represents presentation relationships between fields.

Element				Attribute	Description	Type
result					Top level	array of section elements
	section				Describes a section appearing in the financial data and the section's presentation	**title** and **relativeorder**elements and array

					relationships. Example of sections: Income Statement, Miscellaneous Items, Statement of Cash Flows Direct, Statement of Cash Flows Indirect, Statement of Financial Position, Summary Income Statement, Summary Statement of Cash Flows Indirect, Summary Statement of Financial Position	of **fieldhierarchy**elements
				id	Section ID	integer
		title			Name of the section	string
		relativeorder			Specifies the order of the section in relation to the other sections appearing in the report. This order organizes the data in a logical, intuitive fashion. The order increases by increments of 100.	float
		fieldhierarchy			Describes a parent/child presentation relationship for a section.	
			parentfield		Name of the parent field of the presentation relationship This name typically ends in 'Abstract' and corresponds to a	string

					report heading (an abstract field that does not hold a value).	
				id	Parent field ID	integer
			childfield		Name of the child field of the presentation relationship	N/A
				id	Child field ID	integer
			labeltypeid		Specifies the label type ID for the field's field label (see fieldlabel resource). Returns 1 in the response for all fields (Primary field label)	integer
			relativeorder		Specifies the order beneath the parent abstract field at which the child field is located in the presentation order. This order organizes the data in a logical, intuitive fashion. The order increases by increments of 100.	float
			childlevel		Specifies the level of indentation into the presentation hierarchy at which this parent/child presentation relationship is located within the section. A higher number indicates a	integer

					further nesting to the right in the section's presentation hierarchy.	
		fieldhierarchy			*Rest of parent/child presentation relationship for the section.*	
	section				*Next section in the presentation*	

XML Sample Response (TaxonomyID=18)

Represents the beginning of the presentation file response when TaxonomyID=18.

Note: The parent 'IMetrix_StatementFinancialPosition' abstract line refers to the balance sheet.

```
<result>
   <section id="299537">
      <title>Company Statistics</title>
      <relativeorder>100</relativeorder
      <fieldhierarchy>
         <parentfield id="299537">IMetrix_CompanyStatistics</parentfield>
         <childfield id="299534"/>CompanyStatisticsAbstract</childfield>
         <labeltypeid>1</labeltypeid>
         <relativeorder>100.0000</relativeorder>
         <childlevel>0</childlevel>
         ...rest of the presentation relationships for the section return here.
      </fieldhierarchy>
    ...rest of the sections return here....
    </section>
</result>
```