Oracle Financial Services Analytical Applications Infrastructure

Questionnaire Services Guide

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OFS Analytical Applications Infrastructure Questionnaire Services Guide

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1 Preface

The Oracle Financial Services (OFS) Questionnaire Services Guide describes the concepts and instructions required to use the Questionnaire Representational State Transfer (REST) Services.

1.1 About this Guide

This document provides information for the Services available in Questionnaire and details for the consumption of Questionnaire Services by other internal or external applications.

It also provides details for each data element of the service along with samples for each service.

1.2 Audience

This document is intended for technical staff who are planning to integrate their application with the questionnaire service for their internal process. Users are expected to have working knowledge of REST-based services.

1.3 Finding Related Information

The following documents provide information for the Questionnaire component user-interface and configurations related to it:

- OFS Analytical Applications Infrastructure Administration Guide
- OFS Analytical Applications Infrastructure User Guide

2 Questionnaire Services

Questionnaire REST Service fetches defined Questionnaires and responses in JSON format. Questionnaire is used various instances in financial institutions. It can be used to collect information from internal staff and users, or external users. Presently, there are multiple applications in OFSSA which use Questionnaire internally. However, even external applications can use this functionality.

2.1 Prerequisites

The following are the prerequisites for this service:

- Install a REST client on your local computer.
- User access for authentication on the server. Users must have the required permissions to post requests to the server with appropriate roles.
- Knowledge about posting JSON requests.
- Questionnaire JAR/Service must be deployed on a web server.

2.2 Questionnaire Configurations

OFSSA provides a user interface to define the set of questions and questionnaires that are required for each OFSAA application. You have to create the questionnaire, which you expect to be provided to internal or external users. See the OFS AAI Administration and Configuration Guide for details on how to configure Questionnaire.

2.3 Consumption of the Questionnaire Service

Questionnaire can be consumed as a rest-based service and financial institutions have the following options for how to consume Questionnaire:

Consume the questionnaire as a service and draw your own user-interface - In this option, the Questionnaire is provided in a JSON format and you have to draw your own user-interface (UI) in the consuming application to display the Questionnaire. You have the choice to draw the UI as required using style sheets. All the data elements that you require, the answer options, and the conditions are available in JSON format. See Questionnaire API Data Elements.xls for details of the format.

Consume the Questionnaire respondent user-interface - In this option, the UI is already drawn by the Questionnaire service and you can embed it in the consuming application. This is applicable only if the respondent is an OFSAAI user. The service end points are defined in the table in section Questionnaire Service Endpoints. The output of this service call is the display of the UI for the specific Questionnaire. The UI displays the questions based on the answer options selected.

2.4 Types of services related to Questionnaire

Each type of services related to questionnaire are explained in the following descriptions:

1. **Get Questionnaire** - Call this service when you want the application to receive a Questionnaire as a response. The consuming application will call this service by providing the required values for the expected data elements.

2. **Save Questionnaire** - Call this service when you want the application to save the Questionnaire as an intermediary step before submitting it in the system. This service will allow you to save the Questionnaire for future edits.
3. **Resume Questionnaire** - Call this service when you want the application to resume with the saved Questionnaire. This service will allow you to resume the Questionnaire from where you had saved and you can continue answering further questions.
4. **Submit Questionn**aire - Call this service when you have completed answering the Questionnaire and want to submit it in the application finally. This service will capture all responses answered by you and enters that data in the internal questionnaire tables.
5. **Get Questionnaire Response Status** - Call this service when you want to know the status of the Questionnaire to which a user had responded. For a request ID, the status returned for this service are NEW, SAVE and SUBMIT. The status of the request ID helps the consuming application to decide whether to allow the user to resume with the Questionnaire, or not.
6. **Get Questionnaire Respondent User Interface** - Call this service if you want to use the OFS AAI UI to display the Questionnaire. The OFS AAI UI was developed internally to give consuming applications this option if they do not want to draw their own UIs. If you provide the required parameters in the URL as shown in the table in the Questionnaire Service Endpoints section, the UI will be displayed for the respondent to provide the answers.

2.5 Questionnaire Service Endpoints

The following table provides details of service endpoints for each of the service explained previously:

Table 1: Questionnaire Service Endpoints

No.	Service Name	Method	Format	Service End Point	Request body

1	Get Questionnaire	Post	JSON	http://hostname:portNo/{context}/questionnaire_api/questionnaires/{INFODOM}/{LOCALE}?requestId=?&appCode=?	{
					"QtnrParameters": [{
					"attr_code": "?",
					"attr_val": "?"
					}, {
					}]
					}

2	Save Questionnaire	Post	JSON	http://hostname:portNo/{context}/questionnaire_api/questionnaires/save/{INFODOM}/{LOCALE}?requestId=?&appCode=?	JSON data to be posted.

3	Resume Questionnaire	Post	JSON	http://hostname:portNo/{context}/questionnaire_api/questionnaires/resume/{INFODOM}/{LOCALE}?requestId=?&appCode=?	{
					"requestId": ?
					}

No.	Service Name	Method	Format	Service End Point	Request body
4	Submit Questionnaire	Post	JSON	http://hostname:portNo/{context}/questionnaire_api/questionnaires/submit/{INFODOM}/{LOCALE}?requestId=?&appCode=?	JSON data to be posted.
5	Get Questionnaire Response Status	Post	JSON	http://hostname:portNo/{context}/questionnaire_api/respstatus/{INFODOM}/{LOCALE}?requestId=?&appCode=?	None.
6	Get Questionnaire Respondent User Interface	Post	JSON	http://host:port/ebas/qtnrResponse/qtnr.jsp?infodom=?&appCode=? &requestId=?	None.

2.6 Response of the Get Questionnaire Service Call

The output of the Get Questionnaire call is the Response of the Get Questionnaire Service in JSON format. The Questionnaire, which is provided as a response, is derived based on the attributes sent in the request. All the required details of the Questionnaire, along with the set of sections and questions, and answer options with the decision logic, is provided in JSON format. The consuming application can read the JSON and either draw their UIs or use the Respondent UI. For details on UI, see Consumption of the Questionnaire Service section. For details of each data element of the JSON, see Questionnaire API Data Elements.xls and for sample of a Questionnaire, see Appendix A: Sample of a Questionnaire.

2.7 Success and Error Codes in Questionnaire

You will receive a status message (Success or Failure) in the response for the JSON calls made to the service. The following table provides details for the status message error codes:

Table 2: Success and Error Codes Table

Number	Success and Error Codes	Description
1	1000	Success
2	1001	Authentication failed
3	1002	Invalid request parameters
4	1003	Request ID already exist
5	1004	Cannot resume without save
6	1100	Generic error

3 Appendix A: Sample of a Questionnaire

This appendix provides a sample questionnaire, which is configured to generate a sample JSON for reference. You have to read through the sample Questionnaire and then examine each sample JSON posted to understand the flow.

The following table provides details for the sample Questionnaire:

Table 3: Sample Questionnaire

Questionnaire Name	Questionnaire for Entity
Questionnaire Type	3- Decision Based
Questionnaire ID	1549275526058
Sections	Transaction Based PEP

The following table provides details for sample Questions and Answer Options:

Table 4: Sample Questions and Answer

No.	Section	Questions / Question ID	Answer Options	Option Type
1	Transaction Based	Expected Transaction Per Month 1549274895489	0 to 50 51 to 100 101 t 150 151 to 500	Range
2	Transaction Based	Which Countries do you transact with? 1549275266436	India Russsia Pakistan UK Singapore	Multi Select
3	PEP	Are you associated with PEP? 1549275204587	Yes No	Single Choice
4	PEP	What is your relationship with PEP person? 1549275393207	Beneficial Owner Director Signatory	Single Choice

The following links provide the sample JSONs. These JSONs are derived out of the sample Questionnaire provided in the previous tables. For details of each data element and its description, refer the spreadsheet Questionnaire API Data Elements.xls.

- Get Questionnaire – Sample Get Questionnaire JSON
- Response of Get Questionnaire – Sample Response of Get Questionnaire JSON
- Save Questionnaire – Sample Save Questionnaire JSON
- Resume Questionnaire – Sample Resume Questionnaire JSON

- Submit Questionnaire – Sample Submit Questionnaire JSON

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