Interface specification template

A template for specifying one integration flow with Exponential - purpose, parties, surface and endpoints, authentication, data mapping and keys, timing and volume, error handling, security, monitoring, test and...

Source file: doc/eng-us/help/integrators/interface-specification-template.md Last changed 2026-11-04
https://doc.exponential.earth/exphelp/viewer/help/integrators/interface-specification-template.md

This page is for integrators who document an integration flow. One specification per flow is the contract between the teams: developers build from it, testers test against it, operators run it, and the next integrator understands it. Copy the template below; the notes after it say what belongs in each section.

Contents

1. The template
2. Notes per section
3. Keeping it alive

The template

```
INTERFACE SPECIFICATION   <flow name>                    version <n>   date <date>   status draf
t / agreed / live

1  Purpose
   One paragraph: what moves, why, for whom.

2  Parties
   Source system: <name, version, owner, contact>
   Target system: <name, version, owner, contact>
   Exponential installation: <host>, siteaccess <name>, version <6.0.x>

3  Surface and endpoints
   Surface: <REST /api/ezp/v2/... | expservices exp<domain>::<method> | cronjob part <name> | wor
kflow event on <trigger>
            | file via <SFTP/S3/...> | RSS export /rss/feed/<address> | audit webhook>
   Endpoints / paths / files: ...
   Direction and initiator: ...

4  Authentication and authorization
   Credential: <personal API key of svc-... | OAuth application ... | expservices token | basic |
 none>
   Service account and role: <login>, role <name> (policies and limitations)
   Where the secret is stored on each side: ...
   Rotation: every <n> days; next <date>

5  Data
   5.1 Objects / records and the content class: <class identifier>
   5.2 Key: remote_id scheme <prefix>-<type>-<source id>
   5.3 Mapping table: source field | attribute | datatype | transformation | owner | required
   5.4 Removals: <remove | hide | state | keep>
   5.5 Languages, locations, sections, relations: ...
   5.6 Personal data: <none | fields> ; retention ...
```

```
6  Timing and volume
   Schedule / trigger: ...    Acceptable delay: ...
   Volume: total ..., per day ..., peak ...
   Full and delta runs: ...

7  Error handling
   Transient errors: retries <n>, backoff <...>, dead letter <where>
   Invalid records: skipped and reported to <who>
   Fatal conditions: <list>, run stops, alert <who>
   Safety stop: <rule>

8  Security
   Transport: HTTPS / SFTP ...; certificate checks on
   Input validation: ...
   Signatures: <HMAC header, secret location> or n/a

9  Monitoring and operations
   Log: var/log/<file>.log, summary line format
   Checks and thresholds: ...
   Runbook section: ...

10 Tests and acceptance
   Test data: ...
   Acceptance cases: AC-1 ..., AC-2 ...

11 Change history
   <version> <date> <author> <change>
```

Notes per section

Section	Fill in
3 Surface	The exact route, service or part name, so a reader can find the code; why this surface (Choosing an integration surface)
4 Authentication	The credential type and the role; never the secret (Choosing credentials, Service accounts)
5 Data	The mapping table from Mapping classes to external data and the key scheme from Idempotent imports
6 Timing	Agreed with the data owner, not with the developer
7 Errors	The three kinds from Error handling and logging
9 Monitoring	The plan from Monitoring integrations
10 Acceptance	Cases in business language with real records, as on Testing integrations

Keeping it alive

- Store the specification in the integration extension's repository (`doc/`), next to the code it describes.
- Every change of the flow changes the specification in the same pull request.
- Raise the version and add a line to the change history; the statement of work refers to a version.
- At handover, the specifications are part of the package (Handover).

Related pages

- Integration discovery worksheet
- Statements of work for integrations
- Documenting your extension
- Free documentation: this page is free to copy, translate and improve under the GNU FDL 1.3.

> **Become an Exponential Partner**
>
> Partners share their information, provide funding, contribute back and develop the products with us, and that is how Exponential grows. A partner website and dashboard are planned for mid-2027: please become a partner today to speed up our growth rate and land new features faster.
>
> Partners: start here | How to apply

Exponential Copyright © 1998-2026 Exponential Foundation and 7x
Permission is granted to copy, distribute and/or modify this document under the terms of the GNU Free Documentation License, Version 1.3 or any later version published by the Free Software Foundation; with no Invariant Sections, no Front-Cover Texts, and no Back-Cover Texts. A copy of the license is included in the section entitled "GNU Free Documentation License".
This documentation is free documentation, licensed under the GNU Free Documentation License 1.3 or later:
https://www.gnu.org/licenses/fdl-1.3.html.