

Package ‘secfile’

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Type Package

Title SEC 'EDGAR' APIs

Version 0.1.1

Description Simple and efficient access to the SEC's 'EDGAR' APIs <<https://www.sec.gov/search-filings>> for querying and retrieving filings. The 'secfile' package abstracts the complexities of interacting with SEC EDGAR APIs, such as session management, user agent declaration, rate limiting, index parsing, pagination of filing metadata, URL construction, document caching, and inline XBRL parsing. This abstraction allows users to focus on retrieving data rather than managing API details. Use cases include retrieving filings across a range of workflows such as indexes, tenures, submissions, and facts. The package supports flexible query capabilities, including customizable form types, date ranges, and dimensions, and automatic data validation. It handles the SEC's fair access requirements automatically, such as user agent declaration and rate limiting between requests, and caches downloaded documents for efficient retrieval of large datasets. The implementation uses standard HTTP libraries to handle API interactions efficiently and is available in both R and 'Python' for accessibility to a broad audience.

License GPL (>= 2)

URL <https://github.com/jasonjfoster/file>

BugReports <https://github.com/jasonjfoster/file/issues>

Depends R (>= 3.5.0)

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secfile-package	SEC 'EDGAR' APIs
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Description

Simple and efficient access to the SEC's 'EDGAR' APIs <<https://www.sec.gov/search-filings>> for querying and retrieving filings. The 'secfile' package abstracts the complexities of interacting with SEC EDGAR APIs, such as session management, user agent declaration, rate limiting, index parsing, pagination of filing metadata, URL construction, document caching, and inline XBRL parsing. This abstraction allows users to focus on retrieving data rather than managing API details. Use cases include retrieving filings across a range of workflows such as indexes, tenures, submissions, and facts. The package supports flexible query capabilities, including customizable form types, date ranges, and dimensions, and automatic data validation. It handles the SEC's fair access requirements automatically, such as user agent declaration and rate limiting between requests, and caches downloaded documents for efficient retrieval of large datasets. The implementation uses standard HTTP libraries to handle API interactions efficiently and is available in both R and 'Python' for accessibility to a broad audience.

Details

secfile is a package that provides simple and efficient access to the SEC's EDGAR functionality for querying and retrieving filings.

The core functionality of the secfile package abstracts the complexities of interacting with SEC EDGAR APIs, such as session management, user agent declaration, rate limiting, index parsing, pagination of filing metadata, URL construction, document caching, and inline XBRL parsing. This abstraction allows users to focus on retrieving data rather than managing API details. Use cases include retrieving filings across a range of workflows:

- **Indexes:** master index of all filings by form type and date for universe construction
- **Tenures:** status windows built by pairing entry and exit form filings
- **Submissions:** filing metadata for any filer with form type and date range filters
- **Facts:** investment-level or company-level facts extracted from inline XBRL filings

The implementation leverages standard HTTP libraries to handle API interactions efficiently and provides support for both R and Python to ensure accessibility for a broad audience.

Author(s)

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create_tenures

Create Tenures for the SEC EDGAR APIs

Description

A function to create status windows ("tenures") by pairing entry and exit form filings for each filer (e.g., exchange listing registration and removal).

Usage

```
create_tenures(data, entry_form, exit_form)
```

Arguments

data	data frame. Data that contains the company, CIK, form, date, and link for each filing created using the get_index function.
entry_form	string. Form type that starts a tenure (e.g., "8-A12B").
exit_form	string. Form type that ends a tenure (e.g., "25").

Value

A data frame that contains the company, CIK, start date, end date, start link, and end link for each tenure. The end date is missing for active tenures.

Examples

```
## Not run:
index <- get_index(forms = c("8-A12B", "25"), user_agent = "username@domain.com")

tenures <- create_tenures(index, "8-A12B", "25")

## End(Not run)
```

`data_forms`*Forms Data for the SEC EDGAR APIs*

Description

A data frame with the available forms data for the SEC EDGAR APIs sourced from <https://www.sec.gov/Archives/edgar/lookup-data.js>. Amendments are filed with an "/A" suffix (e.g., "10-K/A").

Usage`data_forms`**Format**

A data frame.

`data_items`*Items Data for the SEC EDGAR APIs*

Description

A data frame with the available items data for the SEC EDGAR APIs sourced from <https://www.sec.gov/Archives/edgar/lookup-data.js> and supplemented with items adopted after the source was last updated (e.g., "1.05"). Dotted item numbers (e.g., "2.02") apply to current report ("8-K") filings after August 2004 and un-dotted item numbers (e.g., "12") apply to earlier filings.

Usage`data_items`**Format**

A data frame.

`get_ciks`*Get CIKs from the SEC EDGAR APIs*

Description

A function to get the Central Index Key ("CIK") for one or more tickers from the SEC EDGAR APIs sourced from https://www.sec.gov/files/company_tickers.json. The result can be passed to the `get_submissions` function. Filers with multiple share classes have one row for each ticker.

Usage

```
get_ciks(tickers = NULL, user_agent = NULL, session = NULL)
```

Arguments

<code>tickers</code>	string. Ticker or vector of tickers to filter or NULL for all tickers.
<code>user_agent</code>	string. User agent with contact information.
<code>session</code>	list. Session created using the <code>get_session</code> function. When a session is provided, the <code>user_agent</code> argument is ignored.

Value

A data frame that contains the company, CIK, and ticker for each filer.

Examples

```
## Not run:  
ciks <- get_ciks(c("AAPL", "MSFT"), user_agent = "username@domain.com")  
  
## End(Not run)
```

`get_data`*Get Data from the SEC EDGAR APIs*

Description

A function to get facts from inline XBRL filings from the SEC EDGAR APIs using the specified filing metadata.

Usage

```
get_data(data, dimension = NULL, date = NULL, cache_dir = NULL,  
  user_agent = NULL, session = NULL)
```

Arguments

data	data frame. Filing metadata that contains the CIK, accession number, primary document, and report date for each filing created using the get_submissions function.
dimension	string. Dimension of contexts to match (i.e., "typed", "explicit", or an axis name such as "InvestmentIdentifierAxis") or NULL for all contexts.
date	string. Date in "YYYY-MM-DD" format to match context periods or NULL for the report date of each filing. Instant contexts match when the instant equals the date and duration contexts match when the end date equals the date.
cache_dir	string. Directory to cache downloaded XBRL instance documents or NULL to disable caching.
user_agent	string. User agent with contact information.
session	list. Session created using the get_session function. When a session is provided, the user_agent argument is ignored.

Value

A data frame that contains facts from the SEC EDGAR APIs for the specified filing metadata with the period type, start and end dates, and dimension axes and members for each context.

Examples

```
## Not run:
ciks <- get_ciks("AAPL", user_agent = "username@domain.com")

submissions <- get_submissions(ciks, user_agent = "username@domain.com")

data <- get_data(submissions, user_agent = "username@domain.com")

## End(Not run)
```

get_index	<i>Get Index from the SEC EDGAR APIs</i>
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Description

A function to get the master index of filings from the SEC EDGAR APIs for a range of years with optional form types.

Usage

```
get_index(from_year = 1993, to_year = NULL, forms = c("10-K", "10-Q"),
  user_agent = NULL, session = NULL)
```

Arguments

from_year	integer. Start year (e.g., 1993).
to_year	integer. End year.
forms	string. Form type or vector of form types to filter (see "data_forms") or NULL for all form types.
user_agent	string. User agent with contact information.
session	list. Session created using the get_session function. When a session is provided, the user_agent argument is ignored.

Value

A data frame that contains the company, CIK, form, date, and link for each filing.

Examples

```
## Not run:
index <- get_index(user_agent = "username@domain.com")

## End(Not run)
```

get_session

Get the Handle for the SEC EDGAR APIs

Description

A function to get the handle required to interact with the SEC EDGAR APIs. The SEC requires a user agent that declares contact information (e.g., "username@domain.com") for fair access. Sessions are cached by user agent and reused across subsequent calls.

Usage

```
get_session(user_agent = NULL)
```

Arguments

user_agent	string. User agent with contact information.
------------	--

Value

A list containing the following elements:

handle	A curl handle object for subsequent requests.
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Examples

```
session <- get_session("username@domain.com")
```

get_submissions	<i>Get Submissions from the SEC EDGAR APIs</i>
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Description

A function to get the filing metadata ("submissions") from the SEC EDGAR APIs for filers with optional form types and date range.

Usage

```
get_submissions(ciks, forms = c("10-K", "10-Q"), from_date = NULL,
  to_date = NULL, user_agent = NULL, session = NULL)
```

Arguments

ciks	string, numeric, or data frame. CIK or vector of CIKs, or a data frame that contains a cik column with optional start_date and end_date columns created using the get_ciks or create_tenures functions.
forms	string. Form type or vector of form types to filter (see "data_forms") or NULL for all form types.
from_date	string. Start date in "YYYY-MM-DD" format.
to_date	string. End date in "YYYY-MM-DD" format.
user_agent	string. User agent with contact information.
session	list. Session created using the get_session function. When a session is provided, the user_agent argument is ignored.

Value

A data frame that contains the filing metadata for the specified filer(s) with the archives URL for each filing.

Examples

```
## Not run:
ciks <- get_ciks("AAPL", user_agent = "username@domain.com")

submissions <- get_submissions(ciks, user_agent = "username@domain.com")

## End(Not run)
```

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