

2019-05-20 Meeting notes

Date

20 May 2019

Attendees

- [Richard Beatch](#)
- [Robert Trypuz](#)
- [Elisa Kendall](#)
- [John Gemski](#)
- [Liju Fan](#)
- [Pete Rivett](#)

Agenda

- 1) Use Case reminder
- 2) Where we are on our road map.
- 3) Open Action Items
- 4) JIRA Issues Review - <https://jira.edmcouncil.org/projects/SEC/issues/SEC-7?filter=allopenissues>
- 5) Todays content discussion.
 - SMIF OWL-UML
 - SKOS
 - RDF/S
- 6) For next week.

Proceedings:

The discussion today focused on the starting point umbrella (meaning all Securities) use case that Tony Coates and Elisa Kendall started working on last week. We did some wordsmithing, and then the discussion focused on sources of data that we could use to identify gaps in the existing ontologies and as the basis for example mapping efforts.

Details from the chat log:

Richard Beatch (to Everyone): 8:33 AM: Use cases are the priority coming out of large group meeting.

Richard Beatch (to Everyone): 8:33 AM: EK working with Tony Coates began on 5/16/19

Richard Beatch (to Everyone): 8:40 AM: Looking at draft use case that lays out fundamental use case around the metadata needed for a securities master file.

Richard Beatch (to Everyone): 8:41 AM: coverage of the most important (top 50/75?) concepts as well as a sufficiently robust model to enable schema interface.

Richard Beatch (to Everyone): 8:55 AM: Editing use case file on the fly.

Richard Beatch (to Everyone): 9:06 AM: discussion of collections of use cases, which might be what we are looking at. Is this a collection of use cases? Do we need to drive this down to user stories? (yes) Do we want to identify user stories now and work up? Is this tying us to bottom up development of the ontology? (maybe)

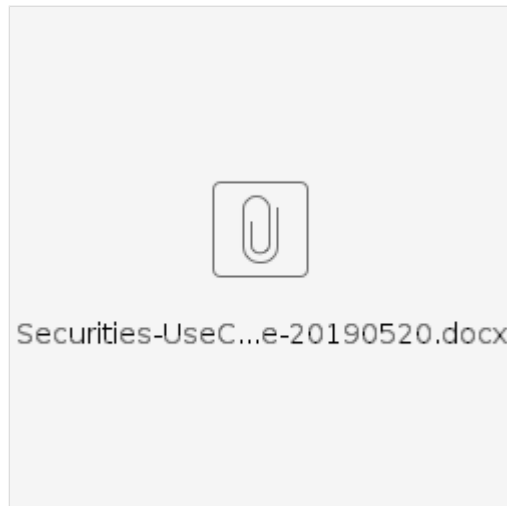
Richard Beatch (to Everyone): 9:12 AM: Looking at DTCC as possible anchor reference point

Richard Beatch (to Everyone): 9:13 AM: <https://dtcclearing.com/documents/dtcc-dataservices/announcement-security-reference/security-masterfile-data/2657-security-master-file-data-service-mmi-intraday-file-file-specification/file.html>

Richard Beatch (to Everyone): 9:16 AM: <https://dtcclearing.com/documents/dtcc-dataservices/announcement-security-reference/security-masterfile-data/2803-security-master-file-data-service-premium-master-file-service/file.html>

Richard Beatch (to Everyone): 9:20 AM: DTCC docs: are they publicly available?

There was additional discussion of using data / schemas from CME, who may be willing to work with us on a PoC, and use of the examples from Golden Source that John Gemski has shared with us. We will also ask the various banks that participate from time to time in the SEC and other calls. Richard will investigate what Bloomberg might allow, but was not optimistic.



The current draft use case is available here:

Members of the FCT agreed to review it and provide comments on what we have so far by the end of the week. We will use this as the basis for developing a subordinate use case for equities, and a second one for bonds, so that we can (1) get more concrete about the concepts and data, and (2) bring the insights from working at the lower levels back up to revise the higher level use case.

Decisions:

Action items

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