MEETING AGENDA

MEETING NAME: **PrecISE** Weekly Status Meeting	Date:	May 28, 2014
Meeting Organizer:	Jamlen Frondoso	
Attendees:	Mike Marinich, Geralyn Endo, Nicholas Piccirillo/Tom Zielinski, Binita Adhikari/Bo Dai, Daniel Sapienza/Andy Lin/Maatra Akbar, Christine Malia, Alex Feldman, Brian Hwang, Laura Loughney, Carlos Bautista, Mikael Avedissian	
Purpose:	Review overall status and health of the PrecISE application	
Desired Outcome:	• Obtain commitment on addressing and prioritizing new and/or existing production issues • New business / concerns are communicated, prioritized, and planned • Discuss and schedule future releases	

MEETING AGENDA

TIME	TOPIC	SPEAKER
15 min	New Production Issues	MOps / SQM / Dev
15 min	Outstanding issues / Open Items & Activities	Team
5 min	Release milestones	Team
5 min	Roadmap	Team
10 min	Roundtable	Team

ISSUES & ACTION ITEMS

#	TOPIC	ACTIONS/PROGRESS	STATUS	TARGET DATE
1.	5/23: Jack from ICTI reported that when he goes to submit an order, it takes about 10 seconds with a rotating hourglass for the order to submit.	Status?	NEW	

NEW / OUTSTANDING / OPEN ITEMS

#	DESCRIPTION	PRIORITY	STATUS/RESOLUTION/RESPONSE	OWNER
1.	PrecISE v5.8 roll out / posting plan	High	All users registered by ASG. Stand-alone posted on internet. Advisor/MIC ETA?	Bizdev
2.	Sweep & Cross alerts still not working	High	The SnC alert is setup properly but we are currently having an issue with check_mk. It is affecting multiple apps, one of which is precise ports so these alerts probably won't be generated at the moment. This is an issue that is being investigated.	ASG
3.	5/13: Baycrest users reported starting PrecISE and the application disappears from task bar and sits behind all other open apps.		1. Tommy and I visited them to observe their login behavior. Details and logs were sent this morning. They did not have a system upgrade. 2. Dev to look into it after CCC work	Bizdev/ Dev
4.	4/8: Fabrice Beivas from TJM – logs show errors when he tried to reload his latest saved desktop. His previous profile settings from 4/4 were restored and user is OK.		SIR 261332 - SIR updated - Prevent desktop/preference saving if the user's profile did not successfully save during startup/login. If the user's profile/desktop did not successfully load at start-up, the user will receive a popup after successful login that says: *There was an issue loading your desktop settings. Please go to File -> Load Desktop -> Load Latest Saved Desktop.*	Dev

PRECISE RELEASE 5.9

Target date: TBD, Note: This release needs to go before or with R10
Status: In Development

#	SIR #	DESCRIPTION	REQMTS	FD
1.	187723	Propagate Custom Categories into Order Status and Clearing Windows	Done	
2.	244914	Custom Client Categories entered in Parent order does not carry over to Child order	N/A	
3.	266657	PrecISE starts but doesn't appear in front of user – *Dev to look at after CCC*	N/A	

Roadmap

BRD	Dev	Completed
DTS	Dev	
Dev/SIT release	Dev	End of May delivery to AT
SQM certification	SQM	
Install / Rollout	ASG	

CORE RELEASE 10.0 / PRECISE RELEASE 5.10

Target date: September 29, 2014 or October 6, 2014
Status: Scope / Requirements Gathering

#	SIR #	DESCRIPTION	REQMTS	FD
1.	256982	PrecISE to support AMR via Linkage – *Member impacting change*	Done	
2.	261385	Discontinue non-persistent feature for GTC/GTD – *Member impacting change*	In SIRE	
3.	188206	PrecISE QCC with Stock Phase 2: Provide Net Price	Done	
4.	260761	Remove the limit in PrecISE for the number of legs a Complex Instrument can have	In SIRE	
5.	252599	Update PrecISE Help File	N/A	N/A
6.	266657	PrecISE starts but doesn't appear in front of user	N/A	
7.	271042	Disable ability to PTA stock leg position in Change Clearing window	In SIRE	

Roadmap

BRD	PMG	BRDs due 3/31/14; Business approval due ; DTS approval due
DTS	Dev	Scope commitment due 4/30/14; DTS due
Dev/SIT release	Dev	Code cutoff 8/1/14; Delivery to AT 7/14/14 for mandatory memb impacting chgs; Delivery to AT 8/15/14 for non-mandatory memb impacting chgs
SQM certification	SQM	ISEApps lockdown 9/19/14 AT complete 9/26/14
Install / Rollout	ASG	9/26/14 for 9/29/14