MEETING AGENDA

MEETING NAME: PrecISE Weekly Status Meeting	Date:	June 4, 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.	Pre-open and TOB feed will be combined. MDD - Introduce a new Pre-open Binary Depth & add to existing regular Depth Feed.	Any PrecISE impacts?	NEW	
2.	PrecISE FE 5.8 market data grid on right-hand side shows "GE…" instead of GMNI.	Per 9.0 SIR 240601: Exchange names will be kept to a 4-character max to avoid text cut-off in the order ticket market data grid. After discussion with Dev and approval by Business, we will make a change in the RDFE Symbol column for two exchanges: • Gemini to GMNI • BXOptions to BXOP	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	Update: Some S&C alerts came through. Check_mk still has pending issues waiting to be addressed by Dev, tested by ASG. Although the issues are not related to this alert, it could impact the S&N alerts.	Dev, ASG
3.	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.		Team needs more information to help with investigation and guidance to provide the member: 1. Does the user always work from home? 2. If so, does he experience this issue on a daily basis? 3. What is experience now? 4. How does he usually connect – VPN, home internet? 5. How was he connected when he experienced the issue? 6. Did he have any changes on his end?	Bizdev

			The Dev team offered the option to provide him with an updated configuration file that would redirect his logs to his local drive. Not sure if this will resolve it though without knowing more information from the user. Our logs showed no error or delay on our end.	
4.	5/13: Baycrest users reported starting PrecISE and the application disappears from task bar and sits behind all other open apps.	Med	SIR updated with members' login behavior / observations. Dev to look into it after CCC work.	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	Testing in July
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