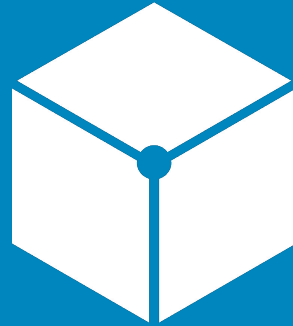


FINOS

Fintech
Open Source
Foundation



FDC³

General Meeting

7th Feb 2023

Meeting notices

- FINOS Project leads are responsible for observing the FINOS guidelines for [running project meetings](#). Project maintainers can find additional resources in the [FINOS Maintainers Cheatsheet](#).
- All participants in FINOS project meetings are subject to the [LF Antitrust Policy](#), the [FINOS Community Code of Conduct](#) and all other [FINOS policies](#).
- FINOS meetings involve participation by industry competitors, and it is the intention of FINOS and the Linux Foundation to conduct all of its activities in accordance with applicable antitrust and competition laws. It is therefore extremely important that attendees adhere to meeting agendas, and be aware of, and not participate in, any activities that are prohibited under applicable US state, federal or foreign antitrust and competition laws. Please contact legal@finos.org with any questions.
- **FINOS project meetings may be recorded for use solely by the FINOS team for administration purposes. In very limited instances, and with explicit approval, recordings may be made more widely available.**
 - **The recording of today's presentation section (but not the Q&A session) may be published and shared. Please hold your questions until the end of the session**

Please add your name and affiliation to agenda

Meeting agenda: <https://github.com/finos/FDC3/issues/906>

The screenshot shows a GitHub issue page for "General Meeting - Nov 1st, 2022 #840". The issue is open and has 5 tasks. It was opened by kriswest and has 0 comments. The issue content includes a section titled "Untracked attendees" with a table for recording names and affiliations.

Full name	Affiliation	GitHub username
-----------	-------------	-----------------

Below the table, a comment by kriswest is visible, showing they added "meeting" and "General meeting" labels. At the bottom, there is a comment input field with a rich text editor. The text "Kris / Cosaic" has been entered. The input field also includes a "Close with comment" dropdown and a "Comment" button. A footer note states: "Remember, contributions to this repository should follow its contributing guidelines and code of conduct."

FINOS Updates + announcements

- Conformance Testing update
- FDC3 Training
- Meetups
- FDC3 Workbench update

Agent Conformance Testing

Reach out to
rob.moffat@finos.org
to get certified

Goal: Provide FDC3 consumers a way to easily and reliably understand compatibility of an agent with an FDC3 version.

Target audience: FDC3 container vendors, single dealer portals

Status:

1.2

- 3 FDC3 1.2 Desktop Agents Certified
- Certification app live on directory.fdc3.finos.org
- Run the tests yourself at <https://github.com/finos/FDC3-conformance-framework>

2.0

- FDC3 2.0 Test Specifications need sign-off
- FDC3 2.0 Tests written (in branch)

FDC3 Training

Contribution issue: <https://github.com/finos/FDC3/issues/895>

Description: Refresh of FDC3 course on Linux Foundation Training platform:

- Update course content to include 2.0 Standard - focused towards Business/Technical Exec audience
- Covering Philosophy of FDC3, The Landscape and Getting Involved
- Make course interactive so people can run also run demos to see 'FDC3 in action'
- Second course, similar content but added module for Developing with FDC3 focused for developers

Status:

- Draft Table-of-Contents currently being worked on, link [here](#)
- Met with LF Educational Team to understand course publication process
- Working with FDC3 Maintainers to determine effort required to author course content (Volunteers are also welcomed)

Next step: Finalise course content and identify authors

FDC3 Meetups

Contribution issue: <https://github.com/finos/FDC3/issues/895>

Description: Establishment of first EU chapter of FDC3 Sweden Project Meetup:

- First-ever federated meetup dedicated to FDC3 in partnership with FINOS
- FDC3 Sweden Meetup aims to expand contributions to and consumption of FDC3
- Focused on promoting and improving open standards in financial desktop technologies and fostering a thriving community

Status:

- Group has been officially established and has a homepage on meetup.com ([link here](#))
- Currently the group has 31 members
- Date for the first meeting is yet to be announced

Next step: Welcome our new members and look out for their first event

FDC3 Workbench update(s)

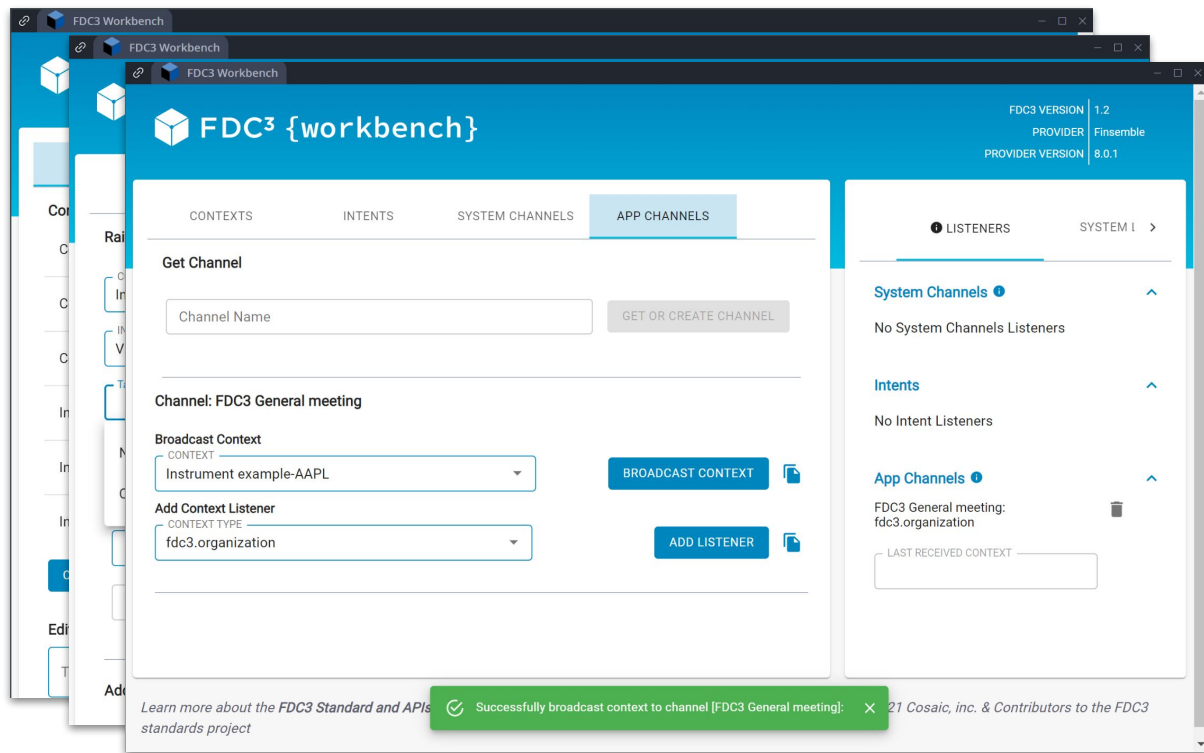
<https://fdc3.finos.org/toolbox/fdc3-workbench/>

New features (1.2 support):

- Create context -> Manage context templates with persistence via localStorage
- Intents Can be targeted, options provided by `fdc3.findIntent()`
- App Channels support

Coming soon (2.0 version):

- New build system (Vite.js)
- Version detection
- Intent results: Context, App Channel, Private Channel
- Set-up single or streams of responses



FDC3 2.1 Roadmap

FDC3 2.1 Roadmap

FDC3 2.0

- adopted July 2022,
- released August 2022

A roadmap for FDC3 2.1 has yet to be agreed, but is due.

Proposed dates:

- Raise issues by Feb SWG meeting: **23rd February 2023**
- Submit PRs by April SWG meeting: **27th April 2023**
- Adoption vote between May & June SWG meetings: **25th May - 22nd June 2023**
- Open Source in Finance Forum (OSFF) London: **June 2023**

Candidates:

Contexts & Intents:

CreateInteraction, TransactionResult, ChatRoom, ChatMessage, ViewMessages, ViewChat, Action, Notification, Create/Get/UpdateNotification, Basic Order/Trade/Position contexts & intents

Desktop Agent Bridging:

DA Bridge definition and wire protocol

AppD:

Deprecate name field & intent display names, error samples, /intents and /contexts endpoints

API

Clarify malformed context handling & timeouts, deprecate intent display names, FDC3 for the Web

Desktop Agent Bridging

Latest Updates

Discussion Group: Desktop Agent Bridging

Purpose: To create bridges between FDC3 Desktop Agents (DAs), allowing apps running in different DAs to interoperate with each other:

Status:

- Connection and Messaging protocols complete
- Message exchanges complete - in need of reviewers!
- Implementation work started: <https://backplane.finos.org/>
- Check out the proposal (#861) @ <https://github.com/finos/FDC3/pull/861>

Next step: AsyncAPI or JSONSchema definitions for message exchanges + docs PR

BackPlane

A Desktop Agent Bridging Implementation

<https://backplane.finos.org/> <https://github.com/finos/backplane>

Description:

- ✓ Workflows can be spanned to multiple desktop agents (DAs) on desktop.
- ✓ Workflows can be spanned across multiple machines, operated by same user.

Project includes:

- Backplane desktop service (message bus)
- .NET client code for bridging legacy .Net applications (modeled as a Desktop Agent)
- Javascript Client code (to ease implementation by Desktop Agents)

Status:

- Implemented user channels, Working on further message exchanges, Seeking adopters & contributors,

FDC3 For the Web

Join the Debate

Confidential

FDC3 for the Web (#896)

- Significant interest in enabling FDC3 in a browser (without an extension or container)
- But...
 - FDC3 2.0 requires `window.fdc3` global not provided by browsers
 - Using proprietary modules in apps achieves 'intra-op' rather than 'interop'
- Hence, work needs doing in the FDC3 Standard to achieve:
secure, open, FDC3 interop on the web
- Join the debate!
 - Poll for meeting dates:
<https://github.com/finos/FDC3/issues/896#issuecomment-1419000064>

Context Data & Intents

Latest Updates

Discussion Group: Context Data & Intents

- Defining contexts and use cases for Orders, Trades and Positions ([#904](#))
 - Contributors are welcomed and encouraged
- Provide a UX guideline for FDC3 ([#899](#))
 - Launching FDC3 actions within an application. Consistent theme across apps.
- 2.1 Milestone PR's
 - Collection of Symphony chat capabilities
 - New contexts for Interaction and Transaction result
 - Context for Order & OrderLeg
 - Proposed use of experimental label

Standards Working Group

Latest Updates

Recent meetings:

- [November 30th, 2022 #867](#)
 - [Are you ready yet? Adding defined \(or at least bounded\) timeouts to the FDC3 Desktop Agent API #866](#) (adding recommended timeouts)
 - [Allow Desktop Agent To Join Multiple Channels #242](#) (parked to revisit)
 - [Reset context #301](#) (closed, use fdc3.nothing or empty message of specific type)

Recent meetings:

- [January 26th, 2023 #899](#)
 - (new) [Provide a UX guideline for FDC3 #889](#) (Discussion group)
 - (conformance/docs) [Clarify differences between App and User Channel behaviour \(in docs for FDC3 versions 1.1, 1.2, 2.0 and next\) #871](#)
 - (conformance/docs) [Clarify handling of malformed context objects by Desktop Agents #872](#)
 - [Upgrade exposure of originating app identity to a requirement \(MUST\) from recommended \(SHOULD\) #735](#) (Only as trustworthy as your DA, more to discuss)
 - (new) [FDC3 For the Web #896](#) (more to discuss)

Upcoming FDC3 meetings

- 13th, 15th or 16th Feb (TBC, poll open)
FDC3 for the Web
- Wed 22nd Feb @ 9am **EST** / 2pm **GMT**
Desktop Agent Bridging discussion Group
- Thu 23rd Feb @ 10am **EST** / 3pm **GMT**
Standard WG Meeting
- Thu 2nd Mar @ 9am **EDT** / 2pm **GMT**
Context Data & Intents discussion group
- Thu 22nd Mar @ 9am **EST** / 1pm **GMT**
Standard WG Meeting

- For all meeting details see the [FINOS Community Calendar](#) or email help@finos.org to be added to future meeting invites
- OSFF NYC: Prod use-case demos

FDC3
Connectifi democratizes FDC3 by implementing interop as a cloud service requiring no installs and working seamlessly across client technologies and devices.
connectifi

FDC3
FDC3 drives interoperability of Citi Velocity, an institutional web-based analytics platform. FDC3 powers federated contextual search to bring key insights to clients and provides connected experience.
citi

FDC3
JPMC has integrated market data vendor tools like FactSet directly into their Financial Desktop Platform and uses FDC3 to intercommunicate between applications. This allows JPMC to seamlessly and quickly create applications with interoperability.
J.P.Morgan

FDC3
FDC3 helps build an interoperable, multi-asset product delivery platform covering the entire investment lifecycle.
STATE STREET **Finsemble**

OPEN SOURCE FINANCE FORUM NEW YORK

FINOS
Fintech Open Source Foundation

Q&A

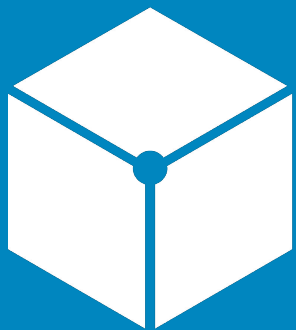
(not recorded)

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FDC³

Thank you!

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