

FINOS

Fintech
Open Source
Foundation

2020Q3 - All Community Call

FINOS team
FINOS Project Leads

Virtually held on September 10th 2020



Today's Agenda

8:00

State of the Community

- **Unprecedented times, unprecedented momentum**
- **What you need to know about the rest of the year**

8:10

Q3 Focus Projects Update

- **DevOps Mutualization**
- **Alloy**
- **Morphir**
- **DataHub / DataHelix**
- **Security Reference Data**

8:40

Governance and infrastructure updates

- **Simplified Governance Walkthrough**
- **Project maintainers governance cheatsheet**

8:50

Q/A

9:00

AOB / Meeting is adjourned

Calls to Action

[Pick a project](#) to contribute to by EOY

Star and join the action in the [Community repo](#)

Write to the [Community Mailing list](#) or join [FINOS office hours](#) if you don't know where to start!

And sign up for our [Newsletter](#) if you aren't already.

If you are a maintainer, and need extra help, consider becoming a [quarterly focus project](#)

State of the Community

Gabriele Columbro,
Executive Director

FINOS Community by the Numbers

PLATINUM



GOLD



SILVER



21

Active Open Source Projects

20

Incubating Open Source Projects

348

YTD Contributors

33

Member Organizations

Inclusion is not a nice to have...

*It's imperative we **act now** to create a true **level playing field** in our Community*

What can we concretely do as a Community:

- A. First and foremost, respect our [Code of Conduct](#)
- B. **Board:** Board approved a [D&I SIG](#) to drive concrete commitment and action. Everyone is welcome to join
- C. **Community:** Your input would be fundamental as we plan 2021 (e.g. mentorship)

...but we have an unprecedented opportunity!

Projects continue to grow in the Foundation...



DataHub

Contributed
By Citi



WALTZ

Activated
By Deutsche Bank

Glue

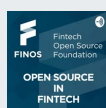
Contributed
By EPAM

morphir

Contributed
By Morgan Stanley



Officially onboard as of July 1st 2020!
Smooth transition with no (known!) disruptions
OSSF 2020 virtual produced by LF + FINOS on Nov 12/13 as of July 1st 2020! [Register today!](#)
~30% **increase** in new contacts
~200% increase in social interactions
Event, Training & Mentorship on the radar



Virtual Meetups 1000+ registered/attended 15+ meetups/webinars. [Check out recordings!](#)
Launched Podcast 10+ available on popular venues including Apple Podcast. [Rate us now!](#)
OSR Guest Speakers included Google, Microsoft, Fidelity, CNCF, Accenture
Quarterly All Community Call highlighting focus projects and foundation wide updates



Landscape v1 version showcasing FINOS projects
Open Source FinReg initiative kicked off.
Alloy nearing [open sourcing](#) & successful pilots
Regulated DevOps mutualization [SIG forming](#).
Training, Learning & Certification (TLC) ramping up. [Contact Rob](#) if you are interested.
Exploring Retail Banking expansion. [Contact Gab](#).
Associate Membership program rolled out

... and keep growing open source in financial services footprint in the news

waterstechnology



BUSINESS INSIDER

IBSintelligence

Finextra



Introducing The Open Fintech Landscape

Our beta version of the FINOS landscape is live. It highlights our many projects solving challenges across the financial services industry. Beyond v1 we want to map “open” (API, standard, source) efforts in FSI. **We’d love your help!**

Visit

landscape.finos.org

Contribute



github.com/finos/finos-landscape



An update on the Open FinReg initiative

Strong initial interest from **Members** and **broader Community** to **mutualize regulatory implementation**. A Special Interest Group is being formed, add your input today!

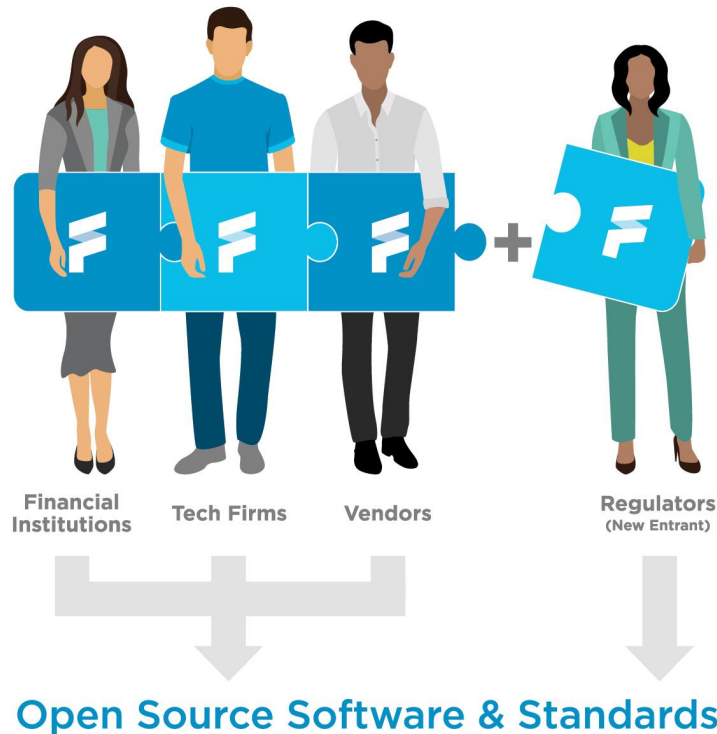
Stay tuned

<https://www.finos.org/en/open-source-finreg>

Join
the SIG

<https://github.com/finos/community/issues/66>

Financial Services Ecosystem



...and there so much more going on!

Large prospective collaborations



Potential LF / upstream synergies



And more workstreams in Formation...

[Symphony Java Libraries](#) (by Deutsche Bank), [Git Proxy](#) (by Citi), [Reg SIG](#) (by AIR and ING), [CDM Extensions](#), [Currency & Commodity Reference Data](#), [Regulated DevOps mutualization](#)

How can you help fuel our growth?

- **Evangelism** (Reach out to [Marketing for help](#)):
Produce, with FINOS support, a quarterly blog post / event / podcast on Open Source in the industry, or if you are a project maintainer, on your project
- **Community Growth** (Reach out [Rob for help](#))
Refer upstream & downstream projects for FINOS contribution
OR
Refer three people to subscribe to [our Community list](#)
- **Community Mgmt** (Reach out [James for help](#))
Maintain a public task list and list of "good first issues"
AND
Projects always "builds"
AND
Produce frequent releases, SDKs and samples
- **Be vocal!**
Star our [Community repository](#) and propose new ideas or join the [conversation on existing proposals](#).

Q3 Focus Projects Update

FINOS Team & Project Leads

Q3 Focus Projects Report

Every quarter we identify **4 to 6 Projects** for the FINOS team to focus on per [Project Support Guidelines](#).
Q3 focus projects are:

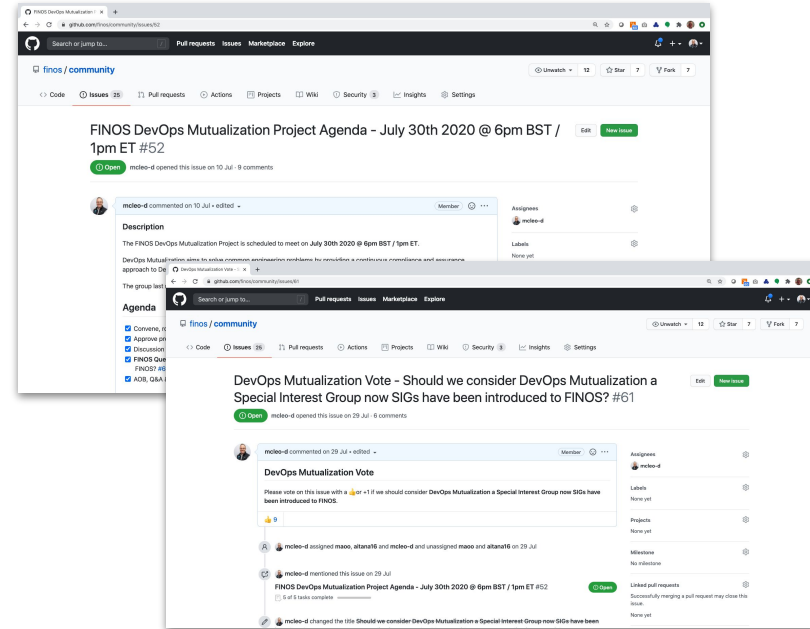
STAGE	Q3 FOCUS	Q3 GOAL
Formation	Alloy	<u>Phase 2, "Wave 1" Code Contribution Milestone: SDLC, Execution, Studio, PURE System (see ROADMAP.md for more context)</u>
	Morphir	Garner existing Community consensus to house in FINOS Evaluate Member interest Bring proposal for Board in Q4
Incubating	DataHelix / DataHub	Define FINOS Synthetic Data Project Synergies #31 , #28 Grow Project(s) Consumers and Contributors #27 , #32 , #1684 Projects Utilized by 2 Banks
	DevOps Mutualization	Take DevOps Mutualization to Group Consensus, First Project Contribution and First Technology Consumer #44 #52
	Security Reference Data	First release of mapping framework

Q3 Focus Project: DevOps Mutualization

Goal of Quarterly focus: Agree group consensus and establish as FINOS Special Interest Group.

Q3 Status and Accomplishments

- 2nd group session held on 30th July 2020.
- Chaired by FINOS members including Deutsche Bank, Citi, CloudBees, GitHub and Morgan Stanley.
- Topics included SDLC, Regulatory Evidence, Banking DevOps, Group Communication.
- Next Session - [How are banks orchestrating DevOps and the 'Glue' to create workflows?](#)
- Successful vote to [Propose DevOps Mutualization as a Special Interest Group](#)



Q3 Focus Project: Alloy

- **Pilot: FX Options and CommodRef Data**
 - Changes contributed and accepted into **Alloy version** of CDM. Next step is to propose into canonical **CDM** (in **Rosetta**)
- **Open sourcing:** late September
- **Upcoming meetings:**
 - Office Hours
 - General meeting (Oct 15th)
 - Developer-focused recurring meeting
- **Presentations:**
 - OSS-EU (October 29)
 - OSSF (November 12-13)
- **Get involved:**
 - Request an account at finos.org/alloy
 - Read the docs: alloy.finos.org
 - Prepare to make pull requests!
 - Adopt the models

The screenshot displays the Alloy project dashboard on the Fintech Open Source Foundation (www.finos.org) website. The dashboard is organized into several sections:

- Phase 1 (In Progress):** This section is highlighted in pink and contains the following information:
 - Phase 1 Goals:** Evaluate shared modeling using Alloy and define collaboration model for further model development.
 - Phase 1 Goal 1:** Evaluate how shared modeling can work using Alloy and define the best process to work together, by assessing:
 - Governance process
 - Collaboration amongst banks
 - Technical solution
 - Success Criteria:**
- Navigation:** A sidebar on the left lists various project areas, with 'ROADMAP' circled in red.
- Project Overview:** The main content area shows the project name 'The Fintech Open Source Foundation (www.finos.org)', repository statistics (54 Repositories, 8 Packages, 81 People, 82 Teams), and a progress bar for the 'Alloy Project - All Workstreams'.
- Kanban Board:** The board is divided into three columns: 'In progress', 'Done', and 'Icebox'. Each column contains task cards with details such as task names, assignees, and progress indicators.

Q3 Focus Project: Morphir

Goal of Quarterly Focus: Complete Morgan Stanley contribution of Morphir into FINOS.

Project Status:

- Morphir has been successfully contributed into FINOS.

Morphir Contribution Opportunities:

- Multi-Language Support
- Application Modeling
- Unified Stream & Batch Data Processing
- Visualization Tools
- We anticipate applicability to the FINOS Alloy and FinReg initiatives.

Engaging with Morphir: Morphir is a multi-language system that captures domain model and business logic in a technology agnostic manner.

1. Explore the Morphir Project:

- <https://github.com/finos/morphir>

2. Explore Morphir Examples:

- <https://github.com/finos/morphir-examples>

3. Explore Morphir Technologies:

- <https://github.com/finos/morphir-elm>
- <https://github.com/finos/morphir-jvm>
- <https://github.com/finos/morphir-dotnet>
- <https://github.com/finos/morphir-dapr>
- <https://github.com/finos/morphir-bosque>

Q3 Focus Project: DataHub / DataHelix

<https://github.com/finos/datahub> / <https://github.com/finos/datahelix>



DataHub

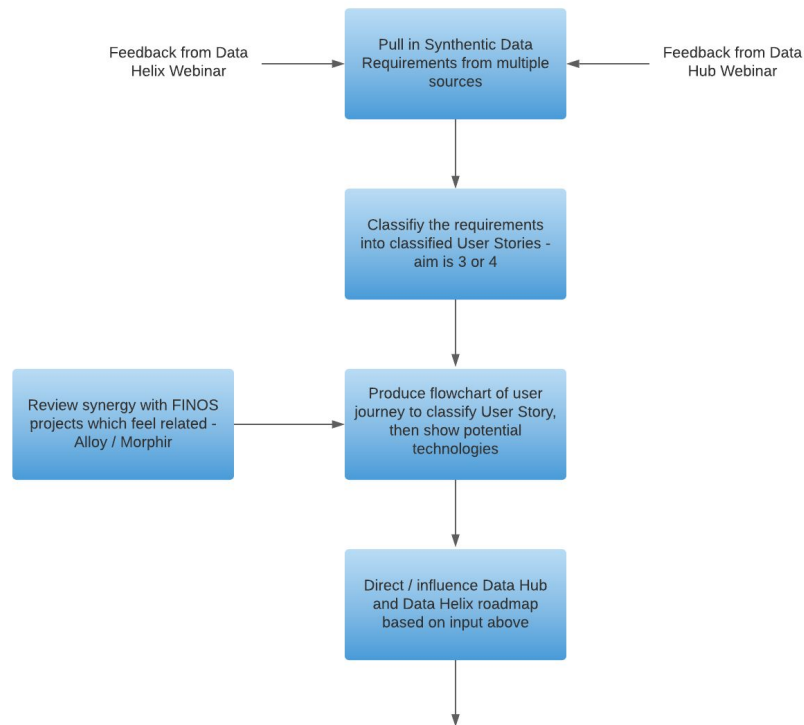


DataHelix

Goal of Quarterly focus: Unifying the Synthetic Data approach of DataHelix and DataHub.

Q3 Status and Accomplishments

- UBS and Gensyn have joined the team!
- Team priorities on [DataHub GitHub Issues](#)
- Weekly Monday updates established.
- Gathering further Synthetic Data industry requirements. Your input welcome.
- Establishing approach for unifying Synthetic Data requirements.
- Began exploring neural network synthesis.
- Would like to explore synergies with related FINOS projects, such as Alloy and Morphir.



Q3 Focus Project: Security Reference Data

<https://github.com/finos/sec-ref-data> [Wiki](#)



Goal of Quarterly focus: Initiate work on Securities & Issuer ID mapping tool

Q3 Focus and Accomplishments

- Defined, shared and distributed proposal to develop a Securities & Issuer ID open mapping
- Next steps are to create a detailed project plan, define the workflow and recruit additional contributors.
- Extending scope to cover currency reference data; defining a currency object and building an open dataset
- Migrating to GitHub to actively manage all workstream meetings, documentation and code
- **Email data-tech-sec-ref@finos.org to get involved**

Reference Data Challenges and Project Scope

There are a range of financial asset identifiers used across the industry, which are often fully or partially “closed”. This project is working to provide tools and open data sets to address this.

Originally focused on securities the project scope is extending to include workstreams on currency and commodity reference data, thanks to work initiated in the Alloy project.

Corporate & Governance update

Gabriele Columbro,
Executive Director

Habemus governance...

Why:

1. Foster innovation over bureaucracy and over-engineering
2. Harmonize our operations under the Linux Foundation
3. Reduce systems and information fragmentation

How:

- **Q1:** [RFC](#) circulate to the Community to remove / deprecate Programs
- **4/22:** [Board approved](#) deprecation of Programs and authorized FINOS team to make necessary cleanup changes
- **May:** All Programs [decided to disband](#) and continue as top level projects
- **June/July:** A [simplified, concise & extensible version of our governance](#) was [produced in Github](#)
- **In progress:** [Cleanup of web properties and deprecation of old documentation](#)

5 items you definitely want to know

1. All Governance documents are now stored in the [FINOS Community Github repo](#)
 - *And you are more than welcome to propose changes / fixes via PR*
2. We introduced the construct of Governing Board approved [Special Interest Groups](#)
 - *Allow to coalesce interest where the value is in the conversation*
3. The At-Large Membership is now referred to as [Individual Supporter Program](#)
 - *Please reach out if you qualify or you'd like to be considered*
4. We offer simple default templates for [Software Projects](#) and [Standard Projects](#)
 - *Fits in a CONTRIBUTING.md and can be modified by a majority of maintainers*
5. We formally introduced the [Formation Lifecycle stage](#)
 - *And recognize [Quarterly Focus Projects](#) for additional visibility and accountability*

Open items

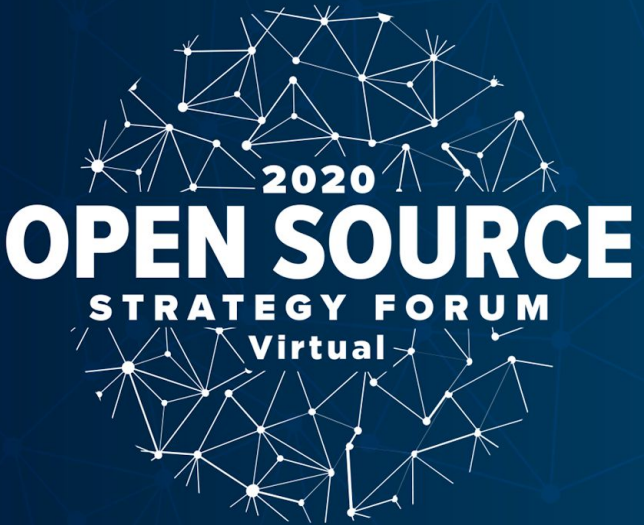
- [Work with Projects](#) to formally adopt new simplified governance (via Pull Request :P)
- Consolidated [project metrics](#) & reporting process
 - Consolidated project reporting dimensions and make it largely automated (opt-in)

FINOS Maintainers Cheatsheet



The following table guides FINOS Lead Maintainers on key responsibilities and where to find helpful resources. For everything else, refer to odp.finos.org or reach out at help@finos.org.

Maintainer Responsibility	How FINOS supports you
Integrate Continuous Integration and Deployment into FINOS Project Builds.	Use the FINOS Open Developer Platform for Continuous Integration and Deployment https://odp.finos.org/docs/development-infrastructure/continuous-integration/intro/
Publish Documentation from GitHub Repositories to FINOS Project Websites.	Use Docusaurus and GitHub Actions for Publishing Project Documentation. https://odp.finos.org/docs/development-infrastructure/project-documentation#docusaurus
Run Project Meetings, Including Creating Agendas, Recording Attendance and Publishing Minutes.	Follow FINOS Meeting Procedures from the FINOS Community Governance Repository. https://github.com/finos/community/blob/master/governance/Meeting-Procedures.md Run Project Meetings from GitHub Issues using the Meeting Attendee Tracker Action. https://odp.finos.org/docs/project-collaboration#meeting-minutes
Prevent, discover and responsibly disclose Security Vulnerability Issues	Use the FINOS Open Developer Platform for Project Security Vulnerability Scanning. https://odp.finos.org/docs/development-infrastructure/code-validation/whitesource Follow the FINOS responsible disclosure policy: https://finosfoundation.atlassian.net/l/c/qTEPn6Jl
Grow maturity, viability and value of your project	Learn about the project lifecycle and drive your project toward activation: https://github.com/finos/community/blob/master/governance/Software-Projects/Project-Lifecycle.md



12 & 13 NOVEMBER 2020