



OMG Financial Standards Meeting

Ottawa Ontario Canada 24-26 June 2008

Co-Chairs:

Joe Bugajski
Syleum Inc.

Mark Eisner
FireStar Software

The financial industry is implementing ISO20022 (UNIFI), Model Driven Architecture (MDA®), methods for improved message semantics, and Service Oriented Architecture (SOA). The Finance Domain Task Force (Finance DTF) of the OMG provides standards leadership for these undertakings by applying OMG technologies. The Finance DTF will be developing a [UML Profile for XBRL GL](#) and XMI mappings to transform UML M1 models into UNIFI XML ("[XMI Profile for ISO 20022](#)"). Most importantly, financial firms want their legacy message formats to comply with ISO 20022 dictionary models. An new OMG standard elegantly provides the requisite mapping capability, [Conversion Models for Payment Message Protocols \(CM4PM\)](#). It is available for download from OMG.

Highlights of our meeting this June in Ottawa, the capital city of Canada:

- Tuesday afternoon, 24 June 2008, the Finance DTF will set a strategy for new standards; e.g., *Account Opening Reference Models* and *XMI for UNIFI*.
- Wednesday morning, 25 June 2008, features discussions and approval of a Request for Information (RFI) entitled [UML Profile for XBRL GL](#).
- Wednesday mid-morning, 25 June 2008, is an open meeting of the CM4PM Consortium.
- Thursday, 26 June 2008, it is time to rollup sleeves to work on *UML Profile for XBRL GL*, *CM4PM Consortium*, and *XMI for UNIFI*.

We always welcome new participants to the Finance DTF. Please join us.

Time	Agenda Item	Presenter
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UML Profile for XBRL GL: Tuesday 24 June 2008; EDT (UTC -5 hours)

Time	Agenda Item	Presenter
1:00–1:30pm	XMI for M1 Models and XMI for UNIFI – an update	David Johnson
1:30–2:45pm	XMI for M1 models – set the action plan	All
2:45–3:00pm	-- Break	All
3:00–3:15pm	Update on reference models for secure financial processes	Philippe De Smedt
3:15–3:45pm	Liaison reports – FSTC, ISO TC68 WG4, others	Liaison members
3:45–4:45pm	Finance DTF strategic plan	All
4:30–4:45pm	Property & Casualty working group progress report	Harsh Sharma
4:45–5:00pm	Other official business of the Finance DTF	Mark Eisner

CM4PM Consortium: Wednesday 25 June 2008; EDT (UTC -5 hours)

Time	Agenda Item	Presenter
9:00–9:15am	Welcome and agenda review by Finance DTF Co-chair!	Mark Eisner
9:15–10:00am	RFI for XBRL GL UML Profile– presentation and discussion	Eric Cohen
10:00–10:15am	Vote to issue RFI to develop a UML Profile for XBRL GL	Voting members
10:15–10:30pm	-- Break	All
10:30am–12:00pm	CM4PM Consortium – introductions and discussions	Ken Lord
12:00–2:00pm	Lunch and keynote presentation	All

Finance Groups – working sessions: Thursday 26 June 2008; EDT (UTC -5 hours)

Time	Agenda Item	Presenter
9:00–12:00pm	CM4PM Consortium meeting (optional)	Consortium
	UML Profile for XBRL GL working group meeting (optional)	XBRL GL WG
	XMI for M1 Models planning and discussions (optional)	Working group

Object Management Group (OMG)

An open membership, not-for-profit consortium that produces and maintains computer industry specifications for interoperable enterprise applications. Their membership includes virtually every large company in the computer industry, and hundreds of smaller ones.

Standards organizations and other consortia maintain liaison relationships with OMG. OMG is an ISO PAS submitter, able to submit specifications directly into ISO's fast-track adoption process.