Date:
10/15/2018

Attendance

- Our Team:
    - Colton, Blake, Lee, Ben, Nick
- Principal:
    - Ben, Jonathan L, Jonathan F, Art

Questions going into the meeting

How will the application be hosted? What sort of infrastructure? Operating system? Do we need to schedule a meeting with the IT department?

- Shouldn't be very system dependant. Try to design it where a user will manually upload a csv file for data

Where did the test data come from? What system? Is it possible to integrate with this system directly?

- Comes in excel format from another group.
- Harder to get it to integrate with the system
    - Because of this, don't rely on any pre built infrastructure

Overview on what was Discussed

- Went over design document turned in on October 12th
    - For future project documents, Ben said Principal would be happy to look over it for us before we turn it it :)
- Presented weekly update to Principal team
    - Overview of work done, mockups, constraints, next RASIC
    - Went well, Ben feels confident going into our Midpoint presentation next week
- Presented our questions on requirements
- Will have future discussions with IT and real estate

Discussion

- Mockup and Constraints
    - Users can add as many constraints as they want.
        - An "Add constraint button" might be good
        - Space wise, might not want it all same page at once (Can overwhelm user)
        - Dedicated page is something to consider
    - Types:
        - Region, Size (Weight in a region or type), Type of Property
    - Benchmarks

        - Should be able to give a range (Ie, the benchmark for Chicago properties may be 10%. However, the user may allow for a 5% deviation, so it can range 5%-15%)
    - Barcharts will be better than pie charts for most things since there are lots of properties. This will vary depending on data type (Barchart, treechart, etc)
        - Separating by region, market, etc will be nice
        - Options to filter data
    - Charts to show differences: Optimal vs. Current portfolio
- Functional requirements
    - Something to consider, this tool may not be put into a system where the infrastructure, database, etc are readily available.
- Dash
    - Python equivalent of shiny in R. Made by plotly
    - Allows for good data visualization
    - Creates interactive dashboards
    - Friendly with other data science packages
    - **Look into this!**
- Numbers will be continuously updating (Benchmarks, expected returns, etc) over time.
    - User can update them as they wish
    - Shouldn't really hard code anything
        - "Saving" data into say a local database (Sqlite for example) might be alright, but the user should be able to update new data.
    - Working with csv or excel file most likely from the user
        - The format of the csv likely will not change much over time. So we can feel confident with it being the same
- User uploaded csv might be faster than pulling from Principals database servers
    - Principal servers have latency
- Web application might be best
    - Due to uncertainty on user computers
        - Users must go through a process to get ANYTHING downloaded on their computers. This is cumbersome especially for non-technical people.
- Might be able to have a future discussion with IT
    - Ben will return back on this
- Weekly tech meeting this week we will meet with ben over the code
    - First meeting is this Wednesday
- Midpoint presentation tentatively on Friday October 26th
    - Vision, how it will benefit the audience
    - Tells a story, give an idea of what we know, what we plan of doing, what end result we are going for
    - Ben will help with our presentation / powerpoint
    - Less technical, more high level
    - Short and simple, let them ask questions. Conversational
        - 20-25 minutes presenting, 15-25 minutes for questions

        - Remember we are presenting for business people
        - 10-15 people maybe?
- Midpoint template in box
- Think of this like a sales pitch in a way
    - *Reminder that we are mainly presenting to business and data scientists.* ***NOT*** *developers.*