

Date:

11/26/2018

Attendance

- Our Team:
 - Lee, Kevin, Cole, Nick
- Other:
 - Ben, Art, Jonathan Ling, Jonathan Frank

Questions going into the meeting

- Plotly Offline vs. PowerBI

Overview on what was Discussed

- Plotly Offline vs. PowerBI

Discussion

- Use current holdings and run optimization with NCREIF
 - x% in y market, z property-type
- Ability to update holdings
 - With saving current portfolio in database
- Boca? (another visualization package)
- Check with IT for PowerBI use
 - Cost isn't that big of an issue
- Principal has very strong bias towards PowerBI Embedded
 - PowerBI is future-proof and synchronizes with other Principal projects
 - IT would be more familiar
- Needing specific credentials for Embedded
- Mockup before Winter break if we can get PowerBI working
 - Work with Ben on campus