

**Date:**

12/03/2018

**Attendance**

- Our Team:
  - Blake, Lee, Kevin, Cole, Nick
- Other:
  - Ben, John Ling

**Questions going into the meeting**

- Class Presentation
- Power BI concerns

**Overview on what was Discussed**

- Class Presentation
- Power BI concerns

**Discussion**

- Went over the final presentation with our client
- Feedback on specific slides
  - Problem Statement
    - Clarified how Costar is used
    - We need to describe what a portfolio is, and what a portfolio manager does
    - We went beyond a technical solution, we had to learn mathematical optimizations for financial investing - maybe worth bringing up Ben thought
  - User Interface
    - Won't cover super in depth on the many slides for it, just showing some mockup ideas
  - Market Survey
    - Agreed that there aren't many tools out there for real estate portfolio optimization
  - Risk and Mitigation (Ben gave us ideas to put down)
    - System too slow and reduce user experience
    - Result not in a format that's easily usable by the PMs
    - Tool not compatible with Principals internal systems
    - System consumes and may leak sensitive data over the internet
  - Resource/Cost Estimate
    - May have to spin up new EC2 clusters (Costs a little)
    - PowerBI, would possibly need a new licence
- Overall Feedback
  - Overall straight forward, good flow
  - Add a few more visuals or pictures, too much white space may cause some people watching to get bored or zone out

- PowerBI
  - Ben has some documentation drafted for us, will send it soon once he cleans it up
  - Can use an internal embedded access token to connect to PowerBI
    - Embed Token
    - URL
    - Token ID
  - Ben made us a temporary user for Azure, tested and made it work
  - Ben played around with it and got it to work. Looks pretty feasible to use it to combine it into our app
    - Can embed it in Dash
  - The limit of 48 times per day only applies to **updating** the data, you can access it many times as you want per day. Ie, uploading the large set of NICIEF data