

Date:

03/04/2019

Attendance

- Our Team:
 - Blake, Cole, Kevin, Lee, Nick
- Advisor:
 - Chinmay Hegde
- Other:
 - Ben, Jonathan Ling, Jonathan Frank Farshad, Lee Vondrak, Data Science Team

Questions going into the meeting**Overview on what was Discussed**

- Midpoint Presentation - Demonstration

Discussion

- System Block Diagram
 - Q: Why the python data retrieval script?
 - This should eventually be take out as we think it's not necessary anymore
 - Power BI REST API should be enough
 - Q: Will it be webapp or client base?
 - Web app, it will be hosted on principal servers and all that's needed is a browser
- App Demo
 - Q: How can you change a constraint?
 - You just re add it with new numbers and it will overwrite
 - How about deleting?
 - This needs to be easier to user
 - Power BI still having some issues embedding, but the basics work
 - Q: Can the user save their results on different scenarios?
 - You can export data in powerbi by clicking the 3 dots
 - However, Saving parameters still needs to be implemented in the app itself
 - Q: How are we doing error handling with the dataset, is it a strict and rigid format? Or can it dynamically react to different datasets with different formats?
 - It's currently assuming a standard format.
 - In our timeline, it likely won't be dynamic, but it can be added later on
 - Q: How does the app handle errors in the data (Mlsspelling, incorrect data, etc.)
 - Missing data is filled with basic expected returns estimates
 - That's not in the scope of this project
 - Q: What about the efficient frontier?
 - Not currently added, if it would add value to the app
 - Q: You mentioned some issues with certain browsers, do you know why?

- We believe it's bugs with the Power BI Authentication. It works but we occasionally come across some hiccups. This is a current issue we are debugging
- Q: Since the UI still isn't fully functional, can the backend do the optimization?
 - Yes, the backend is functional
- Q: How do we plan on testing the UI and Backend?
 - Plan to have user testing, where future users can try it out and provide feedback on what they like and don't like
 - This needs to be documented as we go