

**Date:**

03/11/2019

**Attendance**

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

**Questions going into the meeting**

**Overview on what was Discussed**

- Talked about the progress on the project and the plan leading into spring break

**Discussion**

- Blake is skiing over spring break
  - Avalanche rates are high right now, be safe Mr. Blake
- Power BI
  - Still having issues with auto authentication
    - Able to authenticate on backend, but browser frontend not able to use authentication token due to a still unknown reason
  - Users can currently manually log in with no issue
    - For the time being this is what we will use moving forward since its functional and the amount of users won't be large anyways
- User testing
  - Nick will lead the charge on this
  - Jonathan Ling will be the best point of contact to set this up
    - He will help coordinate principal users to demo the app and provide feedback
    - [Ling.Jonathan@principal.com](mailto:Ling.Jonathan@principal.com)
- This week goals will cover both this week and spring break
  - Spring break likely will not have a meeting
- Application so far
  - Working
    - Basic navigation of app
    - Constraint buttons
    - Manual Authentication
      - With embedding
  - Not fully functional but plan to have done by next week
    - Run optimization on frontend triggering the backend optimization
    - Uploading new/updated/optimized data to powerbi bi via the rest api
- Dashboard
  - Little "busy" right now for the default view
    - Could not decide on the change, will come back to this next meeting

- Fix some small consistency details
  - Percentages rounded the same (2 decimals)
  - Proper capitalization
  - Make labels for region/property type actual names
  - Get rid of weight label
  - Add tooltips for market value as well as weight
  - Etc.
  - Efficient Frontier [ Requirement ]
    - Needs to be made
    - Can be done with an embedded script if need be
      - Python in powerbi
  - Split report into multiple pages
- Constraint Page
  - The bar doesn't need to stretch the whole page
    - Then you might be able to utilize the right side
  - Functionality is key, that's more of a design idea