EE / CprE / SE 491 – sdmay19-07

Real Estate Portfolio Optimization

Weekly Report 17

Monday, April 1 – Sunday, April 7
Client: Principal
Faculty Advisor: Chinmay Hegde

Team Members

> Blake Roberts - Project Manager / Backend
> Colton Goode - Meeting Scribe / Backend
> Kevin Johnson - Quality Control / Frontend
> Leelabari Fulbel - Meeting Facilitator / Frontend
> Nickolas Moeller - Report Manager / Backend

Past Week Accomplishments

- User Testing Plan
    - Finalized how we will run our tests and utilized user responses.
- Dash
    - Got the ability to send optimization data to Power BI from the User Interface
- Power BI reports
    - Created report from data in csv
- Optimization Engine
    - No work for this week

Individual Contributions

Team Member	Contribution	Week Hours	Total Hours
Blake Roberts	Worked on PBI data schema, PBI API interface, and code to pull PBI report data from the database.	6	112
Colton Goode	Continued working on PowerBI API functionality	6	116
Kevin Johnson	Researched how to use a python script to generate efficient frontier graph	5	108
Leelabari Fulbel	Leelabari worked out a way for the data for the unoptimized and optimized assets to be sent to pbi using the pbi api made by Cole.	8	112
Nickolas Moeller	User Testing Plan	6	114

Pending Issues

- Currently not able to get a button callback working on the new layout of a page that was created.
- Need to get a version ready for user testing

Plans for Coming Week

- Leelabari
    - Plans on creating a way for sending the data related to efficiency frontier report.
    - Testing the sending of the data and the showing of the reports will be done more rigorously.
- Blake
    - Finish updating Power BI script to include multiple optimization results (risk levels) for efficient frontier report
- Kevin
    - Use python script to generate efficient frontier graph in power bi

RASIC

R: Responsible
- The team member primarily responsible for the task's completion.

A: Approve
- The team member responsible for approving the task's completion.

S: Supporting
- The team member(s) who support the task's completion.

I: Informed
- The Principal team member(s) who are informed of decisions, progress, and completion associated with the task.

C: Consulted
- The Principal team member(s) who serve as Subject Matter Experts or key stakeholders for the task or project as a whole.

Past Week RASIC:

4/1/2019	Team Members					Principal Team		
Task	Blake	Cole	Kevin	Lee	Nick	Ben	Jonathan Ling	Jonathan Frank
Rework database to Power BI script to output information for efficient frontier	R							
Efficient Frontier in Power BI report			R					
Design and utilize API for sending data to Power BI		S		R				
User Testing					R		S	
Complete functionality of API for sending data to Power BI		R		S				

Next Week RASIC:

4/8/2019	Team Members					Principal Team			Action	Notes
Task	Blake	Cole	Kevin	Lee	Nick	Ben	Jonathan Ling	Jonathan Frank		
Rework database to Power BI script to output information for efficient frontier	R									
Efficient Frontier in Power BI report			R							
"Run Optimization" button needs to pull optimization data from database and send it to Power BI dataset		S		R						We have the code to send data to Power BI. We have the code to pull data from the database. We need the Dash "Run Optimization" button code to call both other code sets.
User Tests					R	S	S			Work with Principal members to gain feedback on features