

# EE / CprE / SE 491 – sdmay19-07

## Real Estate Portfolio Optimization

### Weekly Report 18

Monday, April 8 – Sunday, April 14

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
  - We got results from our first round of user testing.
- Dash
  - Reports are showing dynamically - Leelabari.
- Power BI reports
  - Efficient frontier graph was updated.
- Optimization Engine
  - Updated asset model to include holdings and weight
  - Updated portfolio to include total value
  - Added delete rows Power BI API call

#### Individual Contributions

Team Member	Contribution	Week Hours	Total Hours
Blake Roberts	Updated asset and portfolio models for efficiency frontier data. Updated project dependency requirements for clean install.	6	118
Colton Goode	Power BI Datasets and debugging	3	119
Kevin Johnson	Added efficient frontier lines	4	112
Leelabari Fulbel	Got the PBI reports showing dynamically based on user data	8	120

Nickolas Moeller	Coordinated User Tests with Principal and Compiled results	6	120
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## Pending Issues

- Need to find Report ID for the main report
- Power BI Pro licenses running out

## Plans for Coming Week

- Leelabari will work on iterating on the UI concerns
- Blake - Work on Dash tab redirects on events
- Kevin - Continue improving efficient frontier

## 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:

4/8/2019	Team Members					Principal Team				
Task	Blake	Cole	Kevin	Lee	Nick	Ben	Jonathan Ling	Jonathan Frank	Action	Notes
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

Next Week RASIC:

4/15/2019								
	Team Members					Principal Team		
Task	Blake	Cole	Kevin	Lee	Nick	Ben	Jonathan Ling	Jonathan Frank
Work on UI updates based on survey				R		C	C	C
Update Power BI dataset schema	R							
Efficient Frontier Report			R					
Power BI Pro License					R			
Integrating Power BI report with Power BI dataset		R	S					