# Meeting Summary

## \*\*Chaji Analysis\*\*  
  
\*\*Client Requirements:\*\*  
  
\* Chaji data is not suitable for the corporate demographic product.  
\* The Chaji product will be called "Chaji analysis."  
\* Develop use cases for Chaji analysis.  
  
\*\*To-Do List / Action Items:\*\*  
  
\* \*\*KB & Vincent:\*\* Develop use cases for Chaji analysis.  
\* \*\*Optional:\*\* Combine Chaji information with the corporate demographic product and rename if necessary.  
  
\*\*Clarifications & Key Assumptions:\*\*  
  
\* Chaji currently does not have "super lots of data."  
\* Confirm financial analysis and corporate demographic product first before UI development.  
\* The corporate demographic product can be renamed to better suit Chaji information.  
  
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## \*\*Financial Analysis\*\*  
  
\*\*Client Requirements:\*\*  
  
\* Add a filter for specific years or periods to the financial analysis.  
\* Include revenue, expenditure, profit, and cash flow information.  
\* Show comparison of the company data with the average industry value.  
\* Include financial ratio values, including liquidity and liability ratios.  
\* Provide a raw view of the data.  
  
\*\*To-Do List / Action Items:\*\*  
  
\* \*\*UI/UX Team:\*\* Implement the finalized financial analysis changes into the UI/UX design.  
  
\*\*Clarifications & Key Assumptions:\*\*  
  
\* The financial analysis dashboard contains approximately 10 ratios.  
\* The dashboard displays four key financial information indices.  
\* Data in the dashboard will be updated monthly from the data warehouse.  
\* The "select sector" function operates in an "either/or" manner because some companies exist in multiple sectors simultaneously.  
\* Consider how the "select sector" function will be displayed when printed to PDF.  
\* The data warehouse used for this project is the same one used for the management dashboard.  
\* The data warehouse being used is the production server version (Dim Company Info).  
\* The data warehouse is being utilized because connecting to the CRS data is not currently possible.  
  
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## \*\*Financial Analysis - Data Warehouse Discussion\*\*  
  
\*\*Client Requirements:\*\*  
- None apparent.  
  
\*\*To-Do List / Action Items:\*\*  
- None apparent.  
  
\*\*Clarifications & Key Assumptions:\*\*  
  
\* The current implementation is a smaller data mart derived from the larger data warehouse.  
\* The data mart is specifically tailored for the analytics product.  
\* Connections to the CBS data \*are\* possible and have been established.  
  
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## \*\*Financial Analysis - Recommender and Machine Learning\*\*  
  
\*\*Client Requirements:\*\*  
  
\* Include a recommender system within the financial analysis.  
\* The recommender should analyze financial ratios and cash flow to provide recommendations (e.g., indicate if a company is "healthy" or "unhealthy").  
\* Explore machine learning capabilities to enhance the financial analysis.  
\* Consider time series analysis as a potential machine learning application.  
  
\*\*To-Do List / Action Items:\*\*  
  
\* \*\*Vincent & KB:\*\* Explore and implement a recommender system in the financial analysis.  
\* \*\*Vincent & KB:\*\* Investigate the use of machine learning, including time series analysis.  
  
\*\*Clarifications & Key Assumptions:\*\*  
  
\* Recommendations should be carefully considered to avoid potential liability if incorrect.  
\* Machine learning functionalities were previously planned for "manage services" (internal consumption).  
\* The current analysis is intended for the "analytics product" (external subscription).  
\* The prepared analysis is geared towards a subscription product.  
\* Two subscription products exist: a "corporate dashboard" and "analytics."