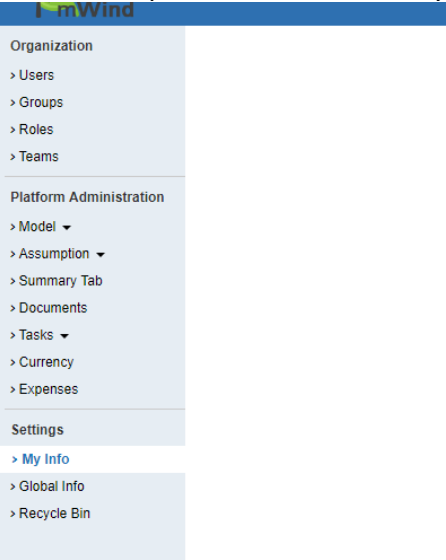





Mercatus Energy Investment Lifecycle Management Release Notes


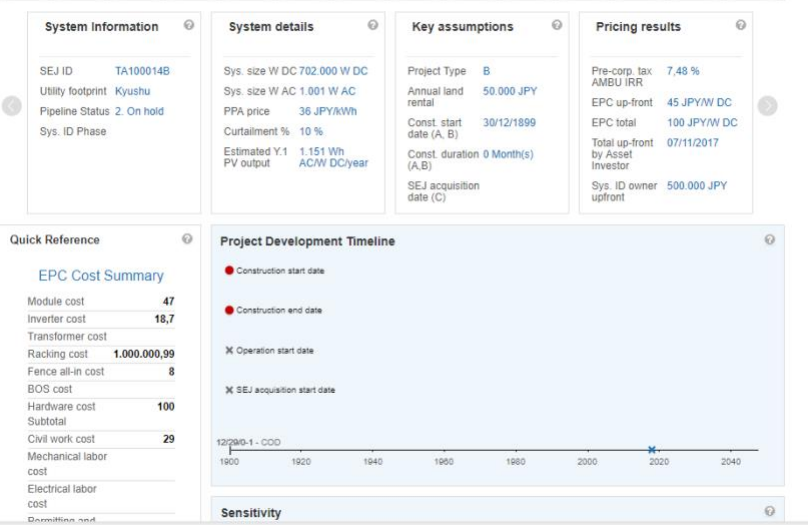
Release 17.12.1

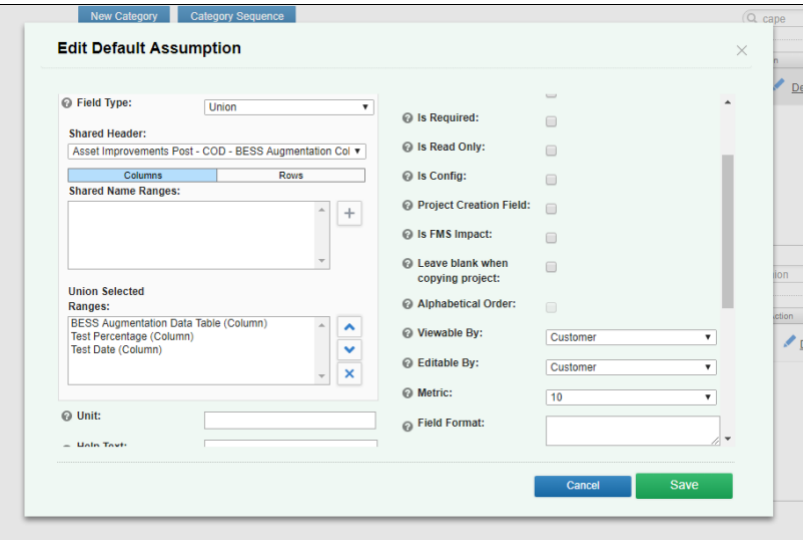
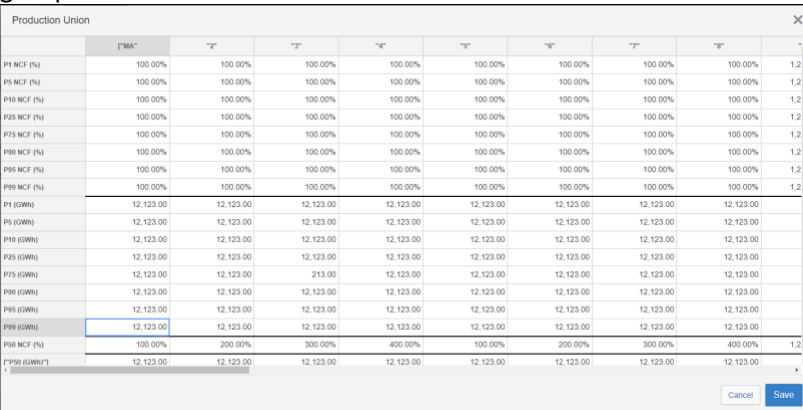
The Mercatus Team will release Mercatus Energy Investment Lifecycle Management 17.12.1 to all production environments on Friday December 15, 2017 at 4pm PST. The system will be unavailable for 4 hours. This is a feature release with the items below.

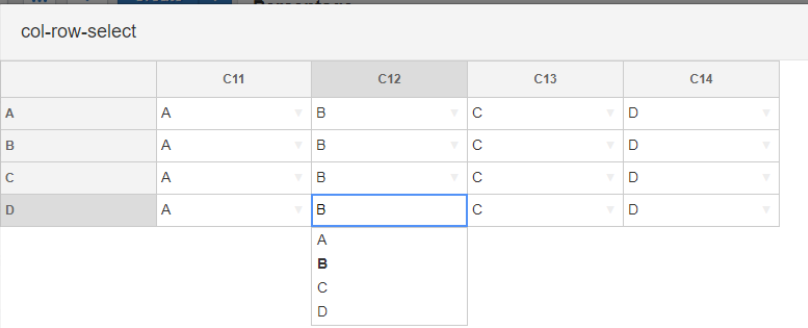
Issue	Description
<p><i>Date and Number format preferences</i></p>	
<p><i>Set preferences in MyInfo</i></p>	<p>Users can set date and number format preferences in the MyInfo page. To access the MyInfo page, click Preferences from the top menu. Then click MyInfo in the left menu bar.</p>  <p>For dates, users can choose whether they want to see days or months first (dd/mm/yyyy or mm/dd/yyyy).</p> <p>For numbers, users can choose whether they want to see Commas as separators or Dots as separators. (1.000.000.99). Users can choose whether they want Comma or Dot as the the Decimal Point. See the last section titled “User Localization Preferences”</p>

	<p>My Basic Info</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 30%;">  <p>Choose File No file chosen</p> </div> <div style="width: 40%;"> <p>First Name <input type="text" value="Mercatus"/></p> <p>Last Name <input type="text" value="Wind"/></p> <p>E-mail Address <input type="text" value="wind@example.com"/></p> <p>Organization <input type="text" value="Mercatus Wind"/></p> <p>Telephone <input type="text" value="1234567890"/></p> <p>Locale <input type="text" value="English"/></p> <p>Password Expiration <input type="text" value="Never"/></p> <p>Save Changes</p> </div> <div style="width: 25%;"> <p>Old Password <input type="text"/></p> <p>New Password <input type="text"/></p> <p>Re-type Password <input type="text"/></p> <p>Change</p> <p><small>Passwords must meet these requirements:</small></p> <ul style="list-style-type: none"> • Minimum length of 8 characters. • At least one upper-case letter. • At least one numeric character. • At least one special character, such as @, #, \$, etc • The user ID and password cannot be the same. </div> </div> <p>Notifications</p> <p>Receive System Notifications via e-mail? <input type="text" value="No"/></p> <p>How often would you like to receive notifications? <input type="text" value="--Please Select--"/></p> <p>Save Changes</p> <p>User Localization Preferences</p> <p>Decimal Symbol <input type="text" value=".(comma)"/></p> <p>Digit Grouping Symbol <input type="text" value=".(dot)"/></p> <p>List Separator <input type="text" value=".(comma)"/></p> <p>Date Format <input type="text" value="DD/MM/YYYY"/></p> <p>Save Changes</p> <p>The format preference will affect the following parts of the application – pipeline, pdf export, csv export, details, change logs, summary.</p> <p>Note: this feature will affect how data is represented on the UI (entry and display). It will not affect how data is stored. That’s good as this will enforce a good interface from the system to any external system. For example, Excel Model integration will work as-is. Salesforce entry will work as-is.</p>												
<p>Pipeline</p>	<p>Before release, numbers would display in the pipeline based on the existing preferences in MyInfo. With this release, they will continue to do so. For example 1.000.001,00 is in the first row. This represents 1 million and 0 cents. Additionally, users will see dates based on their preferences. For example, 21/11/2017 represents November 21, 2017. This would apply to assumptions where the type is date, numeric, percent or currency.</p> <table border="1" data-bbox="560 1591 1369 1879"> <tr> <td>Operation</td> <td>21/11/2017</td> <td>1.000.001,00</td> <td>1. Not viable (Yet)</td> </tr> <tr> <td>Initial</td> <td>07/11/2017</td> <td>1.000.001,00</td> <td>2. On hold</td> </tr> <tr> <td>Initial</td> <td>07/11/2017</td> <td>1.000.001,00</td> <td>2. On hold</td> </tr> </table>	Operation	21/11/2017	1.000.001,00	1. Not viable (Yet)	Initial	07/11/2017	1.000.001,00	2. On hold	Initial	07/11/2017	1.000.001,00	2. On hold
Operation	21/11/2017	1.000.001,00	1. Not viable (Yet)										
Initial	07/11/2017	1.000.001,00	2. On hold										
Initial	07/11/2017	1.000.001,00	2. On hold										

	<p>If a user is entering date into the pipeline using in-line editing, the user can key in the values based on preferences. If the user enters data that's inconsistent with the preference, the system will generate an error. For example, if the date preference is dd/mm/yyyy and the user enters 11/31/2017, the system will not allow it, as 31>12.</p>
PDF Export	<p>Based on the user's preferences, the PDF export from the pipeline will affect assumptions of type date, numeric, percentage or currency.</p>
CSV Export	<p>The CSV export will remain unchanged. That's required because the numbers and dates represented in the CSV export and not human readable. They are used to import to another system (like Excel). So, the date and number representation in the CSV should remain the same.</p>
Details	<p>In Details, data entry will be consistent with the preferences. Like in-line editing, validation will be driven by the preferences. Again, for example, if the user enters 30/12/1899 into a date assumption and the preference is dd/mm/yyyy, the date will be accepted. However, if the user entered 12/30/1899, the system will generate a validation error.</p> <p>If a user pastes the data from Excel, the system will behave as if the user entered the data directly. So, the example above applies.</p> <p>A similar example exists for numbers. Let's say a customer has Dot for separators and Comma for decimal. If they enter 1.000.000,99 the system will accept it. If they enter 1,000,000.99 that's a validation error – as the system will only allow 1 decimal value (,) but the user entered 2.</p> <div data-bbox="560 1396 1372 1785" style="border: 1px solid #ccc; padding: 10px;"> <p>Expected submission date to asset manager : <input type="text" value="08/09/2017"/></p> <p>Actual IC submission date : <input type="text"/></p> <p>IC approval date : <input type="text"/></p> <p>▾ BASIC PRICING INPUTS (Update by Relationship Manager then upon Contract Request update by Strat</p> <p>Operation start date in Financial Model (A,B) : <input type="text" value="30/12/1899"/></p> <p>Construction start date in Financial Model (A, B) : <input type="text" value="30/12/1899"/></p> <p>▾ STM CONFIRMED MODEL INPUTS</p> <p>Estimated year 1 PV output : <input type="text" value="1.150,99"/></p> </div>
Change Log	<p>The change log will reflect the user's preferences. You can see the values in the change log by hovering over the Restore link in a row.</p>

	 <p>Change Log - Probability of Completion</p> <p>Dec 8, 2017 @ 14:02 by Mercatus Wind Current Version</p> <p>Dec 8, 2017 @ 14:01 by Mercatus Wind Restore</p> <p>Restore to: 1,00</p>
<p>Summary</p>	<p>The Summary will reflect the user's preferences.</p>  <p>Summary dashboard showing System Information, System details, Key assumptions, Pricing results, Quick Reference (EPC Cost Summary), and Project Development Timeline.</p>
<p>Reports/Analytics</p>	<p>Reports and Analytics will not be driven by the user's preferences. Reports and Analytics will continue to reflect the US style dates and numbers.</p>
<p>Tasks</p>	<p>Tasks will not be driven by the user's preferences. Reports and Analytics will continue to reflect the US style dates and numbers. This may change in the future, as the team is considering this for the roadmap.</p>
<p>Unions</p>	

<p>Union Admin</p>	 <p>The system allows you to create an assumption of type = union. A union is a collection of named ranges that share a common row or column header. When the user clicks on a Union in Details, the system will display 1 table with the individual named ranges grouped into 1 table.</p>
<p>Union in Details</p>	 <p>This is an example of a union of 3 named ranges.</p>
<p>Permissions</p>	<p>Unions will enforce the permissions described in the permission matrix. For example, if there are 3 named ranges in a union and 1 named range is set for Hidden permission, the user can see the 2 non-hidden named ranges.</p>
<p>Active and Inactive assumptions</p>	<p>Unions will only show active named ranges. For example, if there are 3 named ranges in a union and 1 named range is Inactive, the user can see the 2 active named ranges.</p>
<p>Localization</p>	<p>Date, numeric, percent and currency data types in unions will follow the localization preferences specified in MyInfo.</p>
<p>Select Data Type in a Named Range</p>	

Select Data Type	<p>The system now supports Select data types in a named Range. Here's an example where a named range has A, B, C, D specified as default values in a Select data type. The user can select 1 of the 4 values in each cell.</p> 
Project Creation	
Conditional Fields	Conditional fields were implemented within the Project Creation popup. The conditional logic (for Select and Hidden rules) work in popup.
Fixes	
EIM-7701	The document count in global docs is now consistent with the project doc room. Counts now reflect just documents and not folders.
EIM-7790	For customers using the Box service, if you upload a document, and the document name already exists in the folder, the system will create a new version of the document.
EIM-7761	For any named range that is "View" only, the system will grey the text and disallow editing. In the past, the cells would look editable.

Known Issue

Issue	Description	Workaround
EIM-8236	In EU localization settings, manual entering or pasting data into a numeric named range with "X.XXX,XX" format will get truncated to "X,XX" format. For example, 2.000,00 entered into a numeric named range gets saved as 2,00. Does not affect US localization. Does not affect uploaded files.	Enter or paste without dot for thousands figure. Example: Entering or pasting as "XXXX.XX" or 2000,00 will be saved properly.