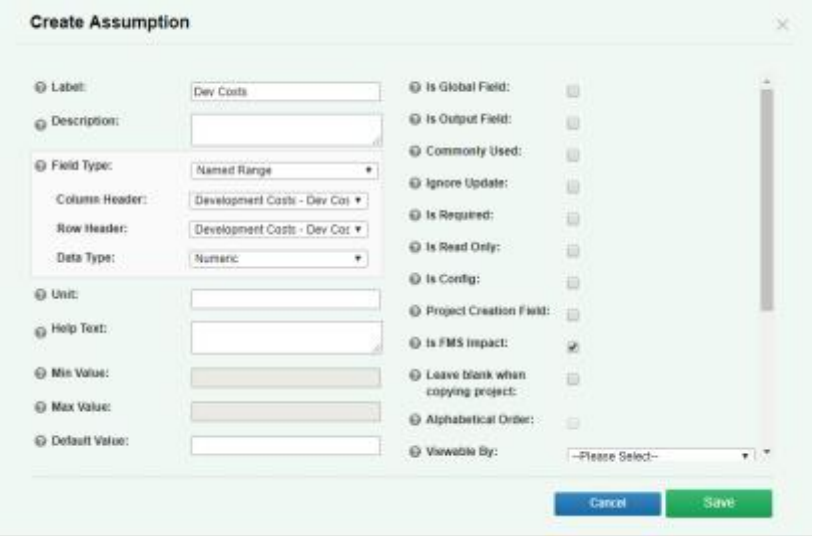


# Mercatus Energy Investment Lifecycle Management Release Notes

## Release 17.8.1

The Mercatus Team will release Mercatus Energy Investment Lifecycle Management 17.8.1 to all environments at 4pm August 18, 2017 PDT. The system will be unavailable for 4 hours. This is a feature release with the following items.

Issue	Description																																							
<b>Named Ranges</b>																																								
<b>Named Range Setup</b>	<p>Customer admins can configure named range assumptions so that users can enter them in project Details and support the databook generation process. A named range is a table that can be mapped to a range of cells in the Model. Here is an example of a Named Range for Development Costs in project Details.</p> <div data-bbox="513 970 919 1446" data-label="Table"> <table border="1"> <caption>Development_Categorised Total Cost Table</caption> <thead> <tr> <th></th> <th>Total Cost (\$)</th> <th>Cost per Wdc (\$)</th> </tr> </thead> <tbody> <tr> <td>Land Costs</td> <td>263383</td> <td>0.0022</td> </tr> <tr> <td>Tax Incentives/A...</td> <td>0</td> <td>0</td> </tr> <tr> <td>Title Costs</td> <td>128035 9731</td> <td>0.0011</td> </tr> <tr> <td>Solar &amp; Energy (...)</td> <td>36900</td> <td>0.0003</td> </tr> <tr> <td>Environmental</td> <td>385000</td> <td>0.0032</td> </tr> <tr> <td>Planning/Permit...</td> <td>200000</td> <td>0.0016</td> </tr> <tr> <td>Interconnection</td> <td>195000</td> <td>0.0016</td> </tr> <tr> <td>Less: Non-Stud...</td> <td>0</td> <td>0</td> </tr> <tr> <td>Legal</td> <td>120000</td> <td>0.001</td> </tr> <tr> <td>Overhead</td> <td>403000</td> <td>0.0033</td> </tr> <tr> <td>Project Acquisib...</td> <td>0</td> <td>0</td> </tr> <tr> <td>Other</td> <td>0</td> <td>0</td> </tr> </tbody> </table> </div> <p>To create this named range, click on <a href="#">/Preferences/Assumptions/Assumptions</a>. Then, create an assumption of type = Named Range. In the assumption edit form, the grey block appears (see screenshot below) containing the Column Header, Row Header and Data Type.</p> <p>The Row and Column Headers are required for named ranges. They represent the values shown as the first column and first row in the table.</p> <p>The Data Type can be set to Numeric, Percentage, Text or Date.</p>		Total Cost (\$)	Cost per Wdc (\$)	Land Costs	263383	0.0022	Tax Incentives/A...	0	0	Title Costs	128035 9731	0.0011	Solar & Energy (...)	36900	0.0003	Environmental	385000	0.0032	Planning/Permit...	200000	0.0016	Interconnection	195000	0.0016	Less: Non-Stud...	0	0	Legal	120000	0.001	Overhead	403000	0.0033	Project Acquisib...	0	0	Other	0	0
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Overhead	403000	0.0033																																						
Project Acquisib...	0	0																																						
Other	0	0																																						

	<p>Other Parameters:</p> <p>IsGlobal - If you select Global, the named range will be configured as a global table.</p> <p>FMSImpact - If you select FMSImpact, the value is pushed from Mercatus ILM to the model.</p> <p>IsOutput - If you select IsOutput, the value is pulled from model during an Upload or Calculate.</p> 
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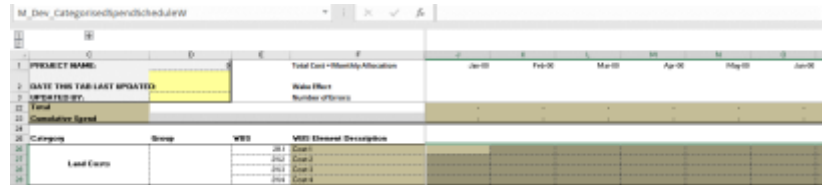
<p><b>Set up headers</b></p>	<p>In the name range edit form, you must associate a named range with a Column Header and a Row Header. Headers can be fixed or dynamic.</p> <p>If you specify the Default values (comma separated), the header is a fixed value.</p> <p>If you specify IsOutput, the values dynamic, as they are retrieved from the model at project creation. They are updated on every Calculate or Upload XLS action.</p>
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**Edit Default Assumption**

<p>Label: <input type="text" value="Dev Cost Summary Column Header"/></p> <p>Description: <input type="text"/></p> <p>Category: <input type="text" value="Development Costs"/></p> <p>Field Type: <input type="text" value="Header"/></p> <p>Unit: <input type="text"/></p> <p>Help Text: <input type="text" value="Shows the Dev Cost Summary Column Header"/></p> <p>Min Value: <input type="text"/></p> <p>Max Value: <input type="text"/></p> <p>Default Value: <input type="text" value="Column 1, Column 2, Column 3"/></p> <p>Select Options: <input type="text"/></p> <p>Notes (Limit 255): <input type="text"/></p>	<p>Is Global Field: <input type="checkbox"/></p> <p>Is Output Field: <input type="checkbox"/></p> <p>Commonly Used: <input type="checkbox"/></p> <p>Ignore Update: <input type="checkbox"/></p> <p>Is Required: <input type="checkbox"/></p> <p>Is Read Only: <input type="checkbox"/></p> <p>Is Config: <input type="checkbox"/></p> <p>Project Creation Field: <input type="checkbox"/></p> <p>Is FMS Impact: <input checked="" type="checkbox"/></p> <p>Leave blank when copying project: <input type="checkbox"/></p> <p>Alphabetical Order: <input type="checkbox"/></p> <p>Viewable By: <input type="text" value="Customer"/></p>
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**Mapping to Model**

Here's how you map to the model. In the Excel example below, create a Named Range to identify a block of cells. This named range is set to the Reference\_Name of the assumption in Mercatus. When you Download XLS, the values in Mercatus will be pushed to this named range in Excel. This is also true for Calculate, RateFinder, PriceFinder and GetInvestment Memo.



PROJECT NAME:	Total Cost - Monthly Allocation	Jan-00	Feb-00	Mar-00	Apr-00	May-00	Jun-00
GATE THIS TAB LAST UPDATED:	Water Effect						
APPROVED BY:	Number of Sites						
DATE:							
Calculator Name:							
Category	Group	WBS	WBS Element	Description			
			207	Cost 1			
			202	Cost 2			
			203	Cost 3			
			204	Cost 4			

**Global Tables**

**Set up Global Table assumption** Customer admins can set up global tables so that they can be viewed in Projects and mapped to Models. In order to create a global table, set the IsGlobal Field to True.

**Create Assumption**

Label:   Is Global Field:

Description:

Field Type:

Column Header:

Row Header:

Data Type:

Unit:

Help Text:

Min Value:

Max Value:

Default Value:

Is Output Field:

Commonly Used:

Ignore Update:

Is Required:

Is Read Only:

Is Config:

Project Creation Field:

Is FMS Impact:

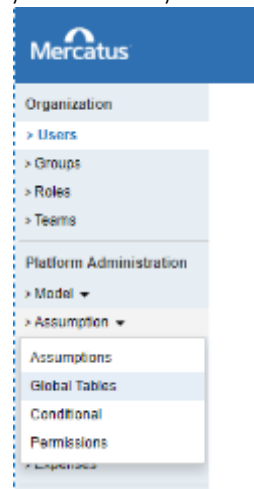
Leave blank when copying project:

Alphabetical Order:

Viewable By:

*Update table*

To view or edit a Global Table choose /Preferences/Assumptions/Global Tables



After selecting the above menu item, The Global Table list appears. The top table contains the list of global tables. The bottom table contains the list of projects where the table is "Overridden".

**GLOBAL TABLES**

Category	Label	Description	Action
Test	Named range		

**Project Overrides**

Project	Action

Click the pencil icon to edit the Global Table. The system displays the table in a grid. Typically, you would copy the data from Excel and Paste into the table. You can also make changes by entering data into a cell.

Named range ✕

	header_1	header_2	header_3	header_4	header_5	header_6
1	100	200	300	400	500	600
2	10	20	30	40	50	60
3	11	21	31	41	51	61
4	12	22	32	42	52	62
5	13	23	33	43	53	63
6	14	24	34	44	54	64
7						

Cancel Save

Right click on a column or row header to enable Insert, Append or Rename.

Named range

	header_1	header_2	header_3	header_4	header_5	header_6
1	100	200	300	400		
2	10	20	30	40		
3	11	21	31	41		
4	12	22	32	42		
5	13	23	33	43	53	63
6	14	24	34	44	54	64
7						

- Insert Column Before
- Append Column After
- Remove Column
- Rename Column

### Named Range Entry

#### Details

Named Ranges appear in project Details as a label and link. The label is the name of the assumption. The “View” is used for opening the grid.

Spend Schedule (W) : [View Named Range](#)

ised Total Cost Table : [View Named Range](#)

Click on the link to open the grid.

Development_Categorised Total Cost Table		
	Total Cost (\$)	Cost per Wdc (\$)
Land Costs	263383	0.0022
Tax Incentives/A...	0	0
Title Costs	128035.9731	0.0011
Solar & Energy I...	36900	0.0003
Environmental	385000	0.0032
Planning/Permt...	200000	0.0016
Interconnection	195000	0.0016
Less: Non-Stud...	0	0
Legal	120000	0.001
Overhead	403000	0.0033
Project Acquisiti...	0	0
Other	0	0

Single click on a cell for navigation model. This allows you to tab or arrow from cell to cell.


Double click for edit mode. This allows you to edit the cell.

Copy and Paste from within – You can copy a block of cells, then paste them into another location.

Copy and Paste from other tool – you can copy a block of cells from Excel, then paste it in.

**Change Log**

Click on /Projects/Details to see all assumptions. See that a Named Range appears as a label and link.



Click the link to see the change log. The system supports viewing the named range and also restoring a historical named range.

Hover to see the change log.

	 <p><b>Change Log - Named range</b></p> <ul style="list-style-type: none"> <li>Aug 11, 2017 @ 0:24 Abhilash Nair <span style="background-color: #f9a825; padding: 2px;">Current Version</span></li> <li>Aug 11, 2017 @ 0:20 Abhilash Nair</li> <li>Aug 11, 2017 @ 0:19 Abhilash Nair</li> <li>Aug 11, 2017 @ 0:04 MercatusQA Users</li> </ul>																																																								
<p><b>Update Global Table</b></p>	<p>In Project Details, if the named range is a global table, you'll see the grid, with the override button.</p>  <p><b>Named range</b></p> <table border="1"> <thead> <tr> <th></th> <th>Header_1</th> <th>Header_2</th> <th>Header_3</th> <th>Header_4</th> <th>Header_5</th> <th>Header_6</th> </tr> </thead> <tbody> <tr><td>1</td><td>100</td><td>200</td><td>300</td><td>400</td><td>500</td><td>600</td></tr> <tr><td>2</td><td>10</td><td>20</td><td>30</td><td>40</td><td>50</td><td>60</td></tr> <tr><td>3</td><td>11</td><td>21</td><td>31</td><td>41</td><td>51</td><td>61</td></tr> <tr><td>4</td><td>12</td><td>22</td><td>32</td><td>42</td><td>52</td><td>62</td></tr> <tr><td>5</td><td>13</td><td>23</td><td>33</td><td>43</td><td>53</td><td>63</td></tr> <tr><td>6</td><td>14</td><td>24</td><td>34</td><td>44</td><td>54</td><td>64</td></tr> <tr><td>7</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table> <p><input type="checkbox"/> Override Global Table <span style="float: right;">Close</span></p> <p>When a project is created, the Override is False. This means, global values will be copied into the project. Changes to global are pushed to all projects that are not overridden.</p> <p>You can click Override. This means the project is now disconnected from the Global Table. Updates to global will not affect this project.</p> <p>You can switch from Not Overriden to Overriden.</p>		Header_1	Header_2	Header_3	Header_4	Header_5	Header_6	1	100	200	300	400	500	600	2	10	20	30	40	50	60	3	11	21	31	41	51	61	4	12	22	32	42	52	62	5	13	23	33	43	53	63	6	14	24	34	44	54	64	7						
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<p><b>Field Permissions</b></p>																																																									
	<p>Customer admins can set Hidden, View or Edit permission for each assumption by role. Based on the permission settings, users can view or edit fields - based on the permission matrix.</p>																																																								

Field level Permissions			
	Lite	Admin	Dev
Set To	Select *	Select *	Select *
<b>Project information</b>			
Project Name	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit
Active Status	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit
Included in Annual Target Year (n...)	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit
Budget Category Acquisition	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit
Date This Tab Last Updated	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit	<input type="radio"/> Hidden <input type="radio"/> View <input checked="" type="radio"/> Edit

The columns in the matrix are roles. The rows in the matrix are assumptions (including named ranges). You can set a cell to Hidden, View or Edit.

If you choose Edit, a user in that role can edit the assumption in details, pipeline and upload XLS

If you choose View, a user in that role can view but not edit the assumption in details, pipeline and upload XLS

If you choose Hidden, a user in that role will not see the assumption in any screen.

<b>Fixes</b>	
EIM-2492	After uploading model, the name of the model didn't appear in the top portion of the UI. This has been corrected in this release.
EIM-6253	If users were already logged in, turning off the turning on system lock would not prevent updates to Tasks. This has been corrected in this release.
EIM-6730	Sometimes deleted projects were appearing in the deal room. This has been corrected in this release. This was a very rare occurrence.
EIM-6849	Sometimes project assumption updates were not reflected in the deal room. This has been corrected in this release. This was a very rare occurrence.
EIM-6857	IE browser issue: Project documents and Global documents page not getting loaded on IE browser. This has been corrected.



EIM-6924	GetInvestment Memo Action did not appear in the Action dropdown on new projects until the screen is refreshed. This has been corrected.
EIM-5215	Sometimes, adding projects to Portfolio during Project creation was not possible. This has been corrected.
EIM-6841	Tasks did not automatically send for approval even though the % completion is 99%. This has been corrected.