Re: Heroku links to

Leeanna Kohn-Hardy <leeanna.kohn-hardy@finappster.co.nz>

Tue 19/04/2022 5:16 PM

To: Chris Stehlin <prq5006@autuni.ac.nz>

Cc: Barry Dowdeswell <barry.dowdeswell@aut.ac.nz>;John Isaiah Sangalang <jsj6212@autuni.ac.nz>;Peter Scandle <vzp7444@autuni.ac.nz>;Jose Santos <sff4900@autuni.ac.nz>

Heya

As mentioned, be great if you can confirm:

- how the preferences are calculated (as a FYI for me)
- re Peter's suggestion whether there are any limitations to the xlsx (ie no. of rows, file size, data points etc)
- would also be good if the Upload Shares button worked, however, attached are the two .xlsx I've been using to test this.

For the purposes of keeping this moving if you can let me know if there are any xlsx limitations then let's proceed on that basis. You indicated that it didn't matter where the 17x SDG columns went so I'll sort a new "raw data" sheet out.

As mentioned I'm away after tomorrow, for a week, so let me know if you have any other questions? I'll be online but might not be immediately available.

Kind regards

Leeanna

CEO & Founder | <u>finappster</u> m. +6421 284 1172

Check out finappster's climate dashboards - where <u>asset managers</u> and <u>investors</u> view how responsible their investments are.

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From: Chris Stehlin <prq5006@autuni.ac.nz>

Sent: Friday, 15 April 2022 19:39

To: Leeanna Kohn-Hardy < leeanna.kohn-hardy@finappster.co.nz>

Cc: Barry Dowdeswell <a href="mailto:saiah-sai

Subject: Heroku links to

Hi Leeanna,

Please find below two links to the data upload application and the latest finappster version with share and recommendation functionality respectively.

https://finappster-sigma-data-upload.herokuapp.com/ https://finappster-sigma-frontend-stag.herokuapp.com/

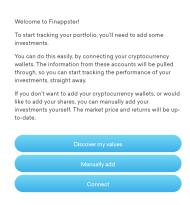
Also find attached the excel file template to be used when uploading/updating shares in the share table. You'll see it currently has the SDG data from the template you sent through to us on the 3p data file – feel free to change the values within the columns as you will. One note on that though, any complete removal or reduction in the number of rows on the template requires selecting the 'Entire row' option via delete when performing such actions on any given rows. The other deletion options or other methods such as 'Clear Contents' will cause issues with subsequent upload attempts so keep that in mind when removing or changing rows within the template.

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The data upload app currently supports share uploading and updating. Fund features are disabled at the moment until we reach a consensus on how to address implementation. Simply click the 'Choose File' button, navigate to the location of the excel file template attached in this email that you have edited as you liked, and click the 'Upload Shares' button.

The finappster frontend link is your current website with navigation to the quiz added as an option on an empty dashboard. You can click 'Discover my values' to take the quiz and then complete it to reach the 'My Values' page with your share recommendations and your quiz 5p score. As it is currently an early proof of concept, we haven't yet added other ways to reach the quiz and recommendation pages currently, so we suggest you only use it for testing the quiz and seeing your results and recommendations for now.



As mentioned in an earlier email, a breakdown on the recommendation algorithm and the SDG to 5p conversion formula will be sent through sometime tonight.

That about covers it for now. Feel free to shoot back with any questions.

Thanks, Chris

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