Release Notes

Last updated by | Ross Tappin | Dec 21, 2022 at 2:51 AM MST

Release to PROD (Deployment on:)

Admin.APP	CarbonAlpha.APP	Dart
0.1.	0.1.	0.1.

Admin UI

- Bug fix new plan updating correctly
- Save button always visible on permissions

Carbon Alpha

- Changes to stocks in the large index
-

Release to PROD (Deployment on: 2022-12-05)

Admin.APP	CarbonAlpha.APP	CarbonImpact.APP	Dart	Dart.APP	MarketData
0.1.52	0.1.314	0.1.314	0.1.95	0.1.314	0.1.26

Admin UI

- Create new subscription to CarbonImpact, CarbonAlpha or both with either trial or paid access
- Add a new plan to existing subscription
- Include application name in the plans table
- Give/revoke user permissions to CarbonImpact, CarbonAlpha or both
- Give/revoke subscription plan group level permissions to CarbonImpact, CarbonAlpha or both

CarbonAlpha

- Dashboard
  - Display shortcut buttons to pick an index, upload a portfolio or create a custom universe
  - List of universes uploaded
- Universe Builder
  - Pick an index - select from a dropdown list of indexes
  - Upload portfolio - upload a portfolio
  - Upload portfolio - download a template csv example
  - Create a custom universe - currently disabled (WIP)
- Assumptions - user to select from a list of assumptions for carbon policy, price scenario and model inputs
- Results - display carbon exposure of a universe
  - Update assumptions (CBAM, Cost pass-through, Carbon price forecast and year)

  - Carbon exposure graphs
  - chart showing carbon costs and revenue by company
  - Download carbon exposure calculation results in csv format
  - Company page showing carbon price exposure development
  - Download carbon price exposure development in csv format

Data

- Scope 1 model completed
- Scope 2 model completed
- CBAM model completed

CarbonImpact

- Side bar updated to match common theme with CarbonAlpha
- Branding updated

Data Factory

- Pipelines set up to extract, transform and load data into our databases

Release to PROD (Deployed on: 2022-09-01)

Dart	CarbonImpact.APP	MarketData	Admin.APP
0.1.91	-	-	0.1.45

Admin API

- First iteration of User Rights implementation to allow the use of organisation subscription with multiple applications

Admin UI

- Changes to Subscription table to load and display new subscription implementation
  - Ability to update subscription plan type and expiry date
  - Invitations table moved under User Management tab
  - Users table moved under User Management tab
  - Ability view and edit user application(s) and portfolio(s) permissions
  - Introduction of Groups tab displaying the group(s) that belong to the selected subscription
  - Ability to view and edit group application(s) and portfolio(s) permissions
- Download CSV of any of the tables in Admin UI
- Subscription expiration email now includes application name

Release to PROD (Deployed on: 2022-07-22)

Dart	Dart.APP	MarketData	Admin.APP
0.1.88	0.1.161	0.1.22	0.1.43

CarbonImpact

- Dashboard – Addition of Overview portfolio summary
- Dashboard – Addition of Portfolio Settings tab allowing user to change portfolio name and description
- Dashboard – card showing portfolio name, description and delete portfolio
- Dashboard – card showing EUA positions
- Dashboard – card showing portfolio goal
- Dashboard – Parameters button to show the analysis parameters
- Dashboard – View details button to show further chart details and change specific parameters
- Admin UI – Instruments – Ability to add, edit, filter, delete instruments
- Admin UI – Prices – Display, filter, edit delete prices

Release to PROD (Deployed on: 2022-07-08)

Dart	Dart.APP	MarketData	Admin.APP
0.1.86	0.1.159	–	0.1.37

CarbonImpact

- Portfolio Overview page – Disclaimer added
- Upload portfolio – Future effective dates are not allowed to be provided in the UI or API
- Upload portfolio – Financed emissions methodology can be selected by the user
- Admin UI – Subscriptions status column added showing active/inactive
- Admin UI – improvements to auto scroll on portfolios table
- Admin UI – Generate, list and delete API Keys
- Admin UI – improvement to column width size to fit content
- Email alerts going out to <email group> with a list of subscriptions that are going to expiry in 3 days
- Email alerts going out to <email group> with a list of subscription invites that are going to expiry in 3 days

Bug Fixes

- Admin UI – Subscription expiry calendar tool allow selection of the same day

Release to PROD (Deployed on: 2022-06-17)

Dart	Dart.APP	MarketData	Admin.APP
0.1.77	0.1.157	0.1.20	0.1.30

CarbonImpact

- Portfolio management page listing all portfolios for an organisation
- Improvement to error message copy
- Upload portfolio accepts scientific notations
- Upload portfolio accepts spaces in header
- Upload portfolio accepts empty rows and columns
- Uploading portfolio for which the total weighted percentage would not sum up to 100% now display a warning message on the portfolio summary results
- Asset class label improvements in the portfolio summary results
- Adding effective date to upload portfolio process
- Restricting API user access to endpoints if users subscription has expired
- Admin UI - Clicking on records in the tables highlights the row
- Admin UI - Improvement to subscription and invitation table refresh
- Admin UI - Loader/spinner displayed on table whilst portfolio data being loaded
- Admin UI - Formatting values displayed in the portfolio data tables
- Admin UI - Adding duplicate organisations requests user to confirm entry

Bug Fixes

- Publicly listed companies with unlisted parents now map to lowest public entity
- A/B shares mapping fix to TruCost ISIN
- Minority interest multiplier fix
- Admin UI - adding new invite displays the correct subscription invites
- Admin UI - editing subscriptions updates the expected subscription
- Admin UI - refreshing the users/invites table without selecting a subscription no longer showing loader/spinner indefinitely
- Admin UI - Fixed issue with subscriptions table filter after editing subscription record

Release to PROD (Deployed on: 2022-05-27)

Dart	Dart.APP	MarketData	Admin.APP
0.1.67	0.1.144	0.1.16	0.1.18

Release:

- Sorting of missing constituents by weight
- Sorting of intensity data
- Admin UI - Refresh button on results tables
- Admin UI - display portfolio entries intensity details
- Admin UI - portfolio runs displayed for each portfolio
- Storing portfolio intensity details in SQL database

Bug Fixes:

- Admin UI - intermittent email issue resolved
- Admin UI - portfolio carbon footprint details displayed correctly
- Portfolio growth calculation fix for Paris aligned strategies

- Paris alignment methodology starting year adjustment
- Removing rounding numbers on Excess Emissions chart

Caveats (tickets are raised and are WIP):

- Admin UI - Creating a new subscription causes the subscriptions table to go empty - please use browser refresh button to reset the table
- Admin UI - sending invite to a new user within an existing organisation causes the invites table to point to a different organisation invites list - please use browser refresh button to reset the table
- There is a slight delay in displaying portfolio intensity detail after clicking the portfolio entry - we will add a spinner to indicate results loading

Hotfix to PROD (Deployed on: 2022-05-18)

Dart	Dart.APP	MarketData	Admin.APP
0.0.37-hotfix-18052022	-	-	-

- Invitation email capitalisation fix - allow any capitalisation in email and ignore in code (toLower())

Hotfix to PROD (Deployed on: 2022-05-16)

Dart	Dart.APP	MarketData	Admin.APP
-	-	-	hotfix-16052022

- Fix to updated client id and audience in the admin ui project

Release to PROD (Deployed on: 2022-05-13)

Dart	Dart.APP	MarketData	Admin.APP
0.1.49	0.1.138	0.1.14	0.1.10

- Swagger documentation update
- Upload portfolio constituents added to Swagger
- Default currency selection removed on creating new portfolio
- Currency list order (with EUR and USD at the top)
- Removed restriction on number of characters for ISIN in portfolio upload
- User selected currency (during create portfolio) displayed in decarbonisation results
- Portfolio summary statistics displayed in decarbonisation page (using show/hide button on emissions card)
- Text improvements in create/upload portfolio flow + error messages
- Admin UI - Display list of subscriptions + user emails
- Admin UI - Send email invite to new user
- Admin UI - update user subscription type

- Admin UI – edit user subscription expiry date
- Admin UI – Generate invitation link for a user
- Admin UI – view users carbon footprint details
- Admin UI – view users last login
- Progress indicator timeout on upload portfolio
- Text changes in closing create / upload portfolio modal window
- Behaviour of closing create / upload portfolio modal window if user has not completed the flow
- Allow user to log out if whilst they are logged in their subscription is expired

Release to UAT (Deployed on: 2022-05-12)

Dart	Dart.APP	MarketData	Admin.APP
0.1.49	0.1.138	0.1.14	0.1.10

- Admin UI – Generate invitation link for a user
- Admin UI – view users carbon footprint details
- Admin UI – view users last login
- Progress indicator timeout on upload portfolio
- Text changes in closing create / upload portfolio modal window
- Behaviour of closing create / upload portfolio modal window if user has not completed the flow
- Allow user to log out if whilst they are logged in their subscription is expired

Release to UAT (Deployed on: 2022-04-28 / 2022-04-29)

Dart	Dart.APP	MarketData	Admin.APP
0.1.47	0.1.129	–	0.1.7

- Swagger documentation update
- Upload portfolio constituents added to Swagger
- Default currency selection removed on creating new portfolio
- Currency list order (with EUR and USD at the top)
- Removed restriction on number of characters for ISIN in portfolio upload
- User selected currency (during create portfolio) displayed in decarbonisation results
- Portfolio summary statistics displayed in decarbonisation page (using show/hide button on emissions card)
- Text improvements in create/upload portfolio flow + error messages
- Admin UI – Display list of subscriptions + user emails
- Admin UI – Send email invite to new user
- Admin UI – update user subscription type
- Admin UI – edit user subscription expiry date