Morningstar Add-In (Microsoft Excel®)

Release Notes

MORNINGSTAR®

Release 7.9

New features:

- ✦ View sample Insert Time in the Data Preview section

- ✦ Create Favorite List for frequently-used feeds in Curve

- ✦ Enable favorite feed export and import

- ✦ Auto-complete search suggestions for Curve – beta version

Improvements:

- ✦ Resolve European time format upload issue

- ✦ Increase decimal maximum

- ✦ Various bug fixes

Release 7.8

New features:

- ✦ Auto-complete search suggestions for Time Series

- ✦ Create Favorite List for frequently-used feeds in Time Series

- ✦ New on and off peak average advanced formulas

Improvements:

- ✦ Update time format logic for European users

- ✦ Allow filling end for missing data in advanced formulas

- ✦ Improve user authentication logic

- ✦ Various bug fixes

Release 7.6

New features:

- ✦ Display futures contracts in a continuous format

- ✦ Calculate basic statistics of the data output

- ✦ Specify decimal precision in the basket setting

- ✦ Pull curve expiration

- ✦ Show extra DST value in the Intraday Matrix

Improvements:

- ✦ Display populated metadata columns

- ✦ Include weekend parameters for custom on/off peak calculation

- ✦ View instructions and sample data in upload template

- ✦ Improve symbol loading by supporting continuous scrolling

- ✦ Various bug fixes

Release 7.4

New features:

- ✦ Auto-upload curve metadata using curve's default columns: root, delivery start and delivery end

- ✦ Hide advanced formulas using the eye icon in basket

- ✦ Plot Intraday Matrix for intraday curves

Improvements:

- ✦ Enhanced time zone logic

- ✦ Improved on-peak and off-peak advanced formulas

- ✦ Increased upload speed on processing large data sets

- ✦ Progress bar available when refreshing cell, sheet or workbook

- ✦ Various bug fixes

Release 7.3

New features:

- ✦ Convert units of measure and currency in Curve

- ✦ Support for quarterly and seasonal curve types

- ✦ Display loading progress

Improvements:

- ✦ Improved import and export of Favorites lists

- ✦ Rename Favorites lists via a double click

- ✦ Improved user preference settings

- ✦ Updated Intraday Matrix output as one row per day

- ✦ Stop Request button performance improvement

- ✦ Various bug fixes

Release 7.2

New features:

- ✦ View sample curve and formula values in Data Preview section

- ✦ Create advanced formulas in Curve using type-ahead Formula bar

- ✦ Support for half-hourly curve types

- ✦ Metadata upload templates available per feed with "Export Format" button

- ✦ "Locate in feed" capability when right clicking on a symbol in Curve

- ✦ Symbols in Curve basket can now be easily re-arranged with drag-drop

Improvements:

- ✦ Updated Marketplace User Guide

- ✦ Improved Fill Forward feature when outputs contain formulas

- ✦ Various bug fixes

Release 7.1

New features:

- ✦ Preview sample formula results in Data Preview section

- ✦ Add columns in bulk by selecting multiple symbols and their columns in the drop-down

- ✦ Company administrators can now create proprietary feeds using the "+" button in the Upload UI

Improvements:

- ✦ New color-coded hints when creating advanced formulas

- ✦ Advanced formulas drop-down hints

- ✦ Various bug fixes

Release 7.0

New features:

- ✦ Type-ahead advanced formulas available in Series formula bar

- ✦ Upload templates available per feed via new "Export Format" button in Upload UI

- ✦ Basic computation formulas in Curve with new formula button

- ✦ Intraday Matrix feature now supports minutely table outputs in Series

- ✦ Symbols in basket can now be easily re-arranged with drag-drop

Improvements:

- ✦ Source file list load performance improvement

- ✦ Contract types can now be referenced in Excel

- ✦ Improved sorting for Curve root list

- ✦ Various bug fixes

Release 6.14

New features:

- ✦ Ability to hide formula inputs

- ✦ "Locate in feed" option when right clicking on a symbol in Series

- ✦ Announcement pop-ups for new features

Improvements:

- ✦ Improved basket performance

- ✦ More intuitive error messages for formulas

Release 6.13

New features:

- Units of Measure Conversions in MP Series

- FX Conversions in MP Series

- History tab for archived symbols

- Symbol favorites in Marketplace Curve

Improvements:

- Prioritized default columns in basket

- Expanded basket interface for easier configuration

- Improved curve search algorithm

- Various bug fixes

Release 6.12

New features:

- Data Preview available in Series UI

- Marketplace Upload completion status feedback

✦ Symbol favorites in Marketplace Series

Improvements:

✦ Date range and metadata info available in symbol preview

✦ Various bug fixes

Release 6.7

New features:

✦ **Create a formula through Series:** We have implemented free hand formulas in the Marketplace add-in. This functionality allows users to perform basis formulas (PEMDAS) within the UI and submit it to the spreadsheet.

✦ **Ability to keep history when going back to the UI**: This feature allows users to go back to the UI both in Series and Curve and be taken back to where they left off.

✦ **Add check box in multi select box for data columns only:** After adding a symbol to the basket, users can now chose in the data points dropdown menu, the option to "Select Data columns" (data columns and inserttime) or "Select All" (data columns, inserttime, and meta data).

✦ **Filter on Market and Region:** In series, users can now further filter down the results list by Markets and Regions.

✦ **Support pulling multiple feeds in curve:** Users can now pull multiple curves across multiple feeds.

✦ **Selecting columns in Bulk in Curve:** Users can now select multiple columns data columns at once in the dropdown menu in the Curve dialog.

Improvements:

✦ **Performance improvements:** We are now using "AsOfDate" only when necessary for Marketplace Time Series data retrievals. This will increase performance across the various API calls. As a result of the change, we have made ASOfDate an optional parameter in the calls and unchecked by default in the basket settings.

✦ **Adjusting column size after refreshing:** This change allows users to change the column size and not have them Auto fit after they refresh their spreadsheet.

✦ **Combined Show Corrections and Show All Versions:** We combined these two checkboxes options into one in the basket settings. In this latest version, when the user checks "Show corrections", they will see all corrections including versions.

✦ **Added a counter to the basket:** We added a counter to the basket to allow users to see how many symbols they have added to the basket.

✦ **No Results found:** This feature returns a message in the result list letting users know that no results were found when the search API does not return anything.

✦ **Changes in Marketplace Series and Curve to support duplicates symbols in the basket:** Users can now add duplicate symbols to the basket and get the right output. Adding duplicates through the spreadsheets is also being accurately reflected in the UI.

Release 6.5

New features:

✦ Search in Marketplace Curve with ability to search roots

✦ Filtering options in search/feed results grid

✦ Filtering option on last data point ("Active Since")

✦ Futures rollup when using "Futures Only" filter

Improvements:

- ✦ Revamped look/feel for Marketplace Curve

- ✦ Ability to pull from multiple feeds in single call in Series

- ✦ Ability to multi-select for multiple columns at a symbol level

- ✦ Tabbed view in Marketplace Series allowing to Search or Browse for symbols

- ✦ Various bug fixes

Release 6.4

New features:

- ✦ Search in Marketplace Series

- ✦ Time averages (i.e. yearly, monthly, weekly, daily, hourly) in MP Series

- ✦ MP Seasonal Analysis

Improvements:

- ✦ Revamped look/feel for MP Series, basket, and basket settings

- ✦ Ability to adjust columns per data point

- ✦ Ability to adjust time average in basket

- ✦ Filtering options in search/feed results grid

- ✦ Improved scrolling

✦ Various bug fixes

Release 6.2

New features:

✦ Fill options in Marketplace Series

✦ Ability to set 5 vs. 7-day trading pattern

Improvements:

✦ Various fixes for Marketplace time zones, Curve outputs, and the hourly table in Series.

✦ Support for Configuring Proxy via Websense using .pac or .dat files

Release 6.1

New features:

✦ Support for global time zones via Marketplace Series

Improvements:

✦ New scrollbar for different screen resolutions in Marketplace Curve

Release 5.9

New features:

- ✦ Support for Office 365/Excel 2016

- ✦ Changes to advanced installer to allow for install for all users and silent install

- ✦ Ability to pull arb free curves via Marketplace

- ✦ Insert Times for Curves in Marketplace

Improvements:

- ✦ Addressed out of memory issues with Marketplace curve

- ✦ Resolved issue with pulling Marketplace curves horizontally

- ✦ Better handling for weekends when querying relative ranges in LIMSR

Release 5.6

New features:

- ✦ Compatibility with Windows 10/Excel 2016

- ✦ Quick access to template downloads in Add-In toolbar

Improvements:

- ✦ Ability to pull a series containing a comma in Marketplace

✦ Expanded width for Marketplace feed drop-down

Release 5.4

Improvements:

✦ Added Hourly table to Marketplace Curve

Bug Fixes

✦ Resolved issue where white space at the end of a symbol would return "Relation does not exist"

✦ Resolved issue where trying to upload a value of #N/A would store a value of -2146826246

Release 5.3

Bug Fixes

✦ Resolved issue where Excel would crash if user name was not in Access database or not set up in entitlements database

Release 5.0.0

New Features:

✦ Create Monthly, Daily and Hourly curves

✦ Created feature to refresh current worksheet

✦ Created new icons for the ribbon

Bug Fixes

- ✦ Added milliseconds to file name

- ✦ Resolved European Computer Region Issue in Marketplace