IHS

DataInsight-Web

v4.3

User Manual

February 22, 2012

The Source for Critical Information and Insight™

DataInsight-Web
February 22, 2012

IHS
15 Inverness Way East
Englewood, Colorado 80112
303-736-3000

Contents

Introduction and Overview

DataInsight-Web is browser-based data navigation and retrieval tool, with desktop-class performance.

You can use DataInsight-Web to:

- **Find the data you need.**
- **Browse, view, save, and export from a library of service-specific, pre-defined tables.**
- **Save your data in workbooks.**
- **Share your data with colleagues**
- **View and pivot data on-screen.**
- **Export data to Excel**.
- **Apply Functions to data.**

Additionally, powerful applications and smart datagroups are also available for use in DataInsight-Web, depending on your subscription:

- **Cost Analyzer** allows you to tactically analyze a single buy or strategically evaluate an entire supply chain performance to know if your suppliers' prices are inflated or not.
- **Purchasing Analyzer** provides access to select industry concepts and allows you to break out industry input costs.
- **Smart Datagroups** provide access to multi-dimensional databases of IHS Global Insight data.

Documentation and Support

For the most up-to-date information about DataInsight-Web, and our business in general, check our web site, www.IHS.com.

For telephone support: In the United States, contact the Client Resource Center at 1-800-933-3374. Outside of the United States, please contact your sales representative.

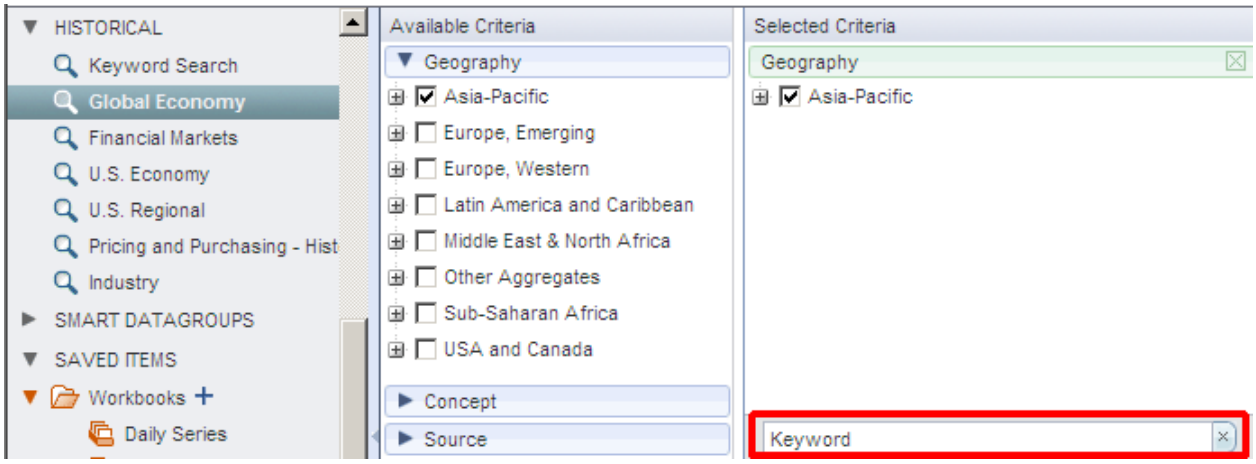
For email support, send your request to CustomerCare@ihs.com.

Finding and Selecting Data

Use keyword and category search to find series to view, export, or store in a workbook.

To begin a keyword search, click on the **Keyword Search** selection under "Forecast" or "Historical" in the left-hand navigation pane. The keyword text box then appears for you to enter your search term or phrase.

There is also a **Keyword Search** under the "Selected Criteria" pane to further filter your results.

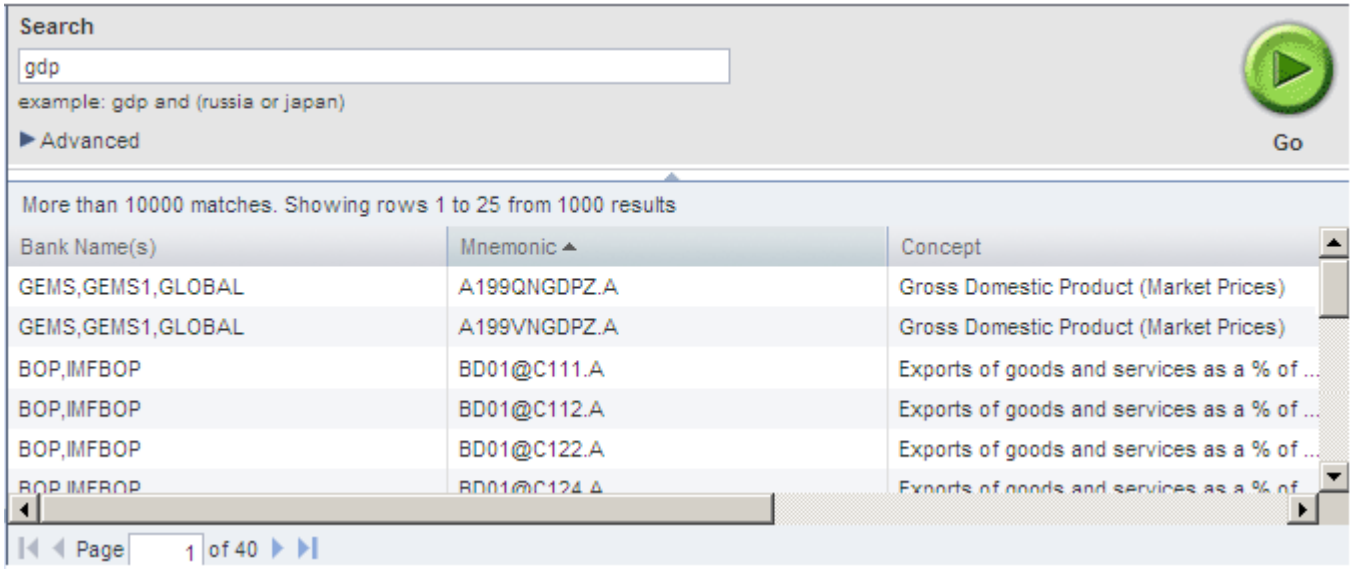


Keyword searching is a technique that allows the search for the occurrence of words in time series documentation. A keyword is a word or phrase found in the documentation that identifies it to you in some way.

Keyword Search

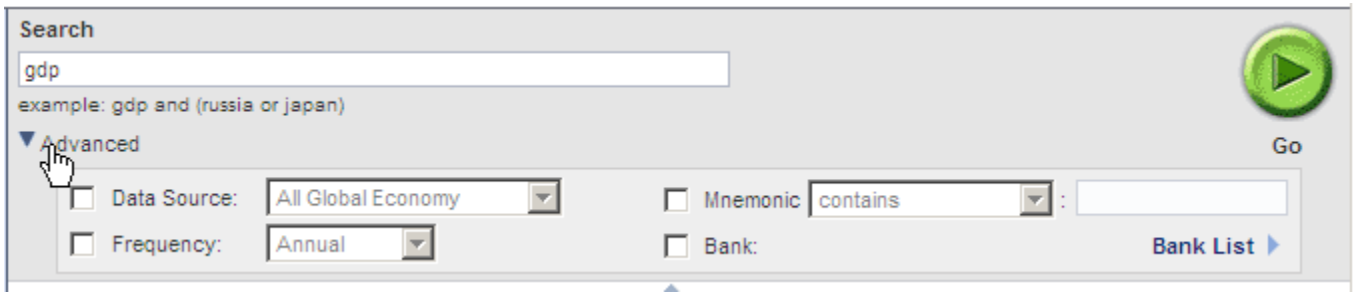
Basic Search

To perform a basic search, enter partial or full words or expressions in the Search field and press "Enter" or click "Go." The search results appear in the columns below.

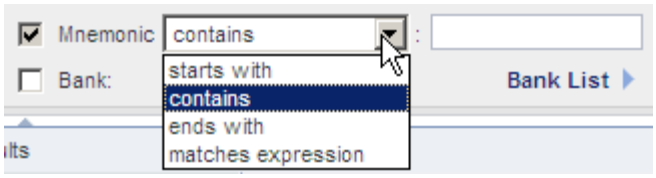


Advanced Search

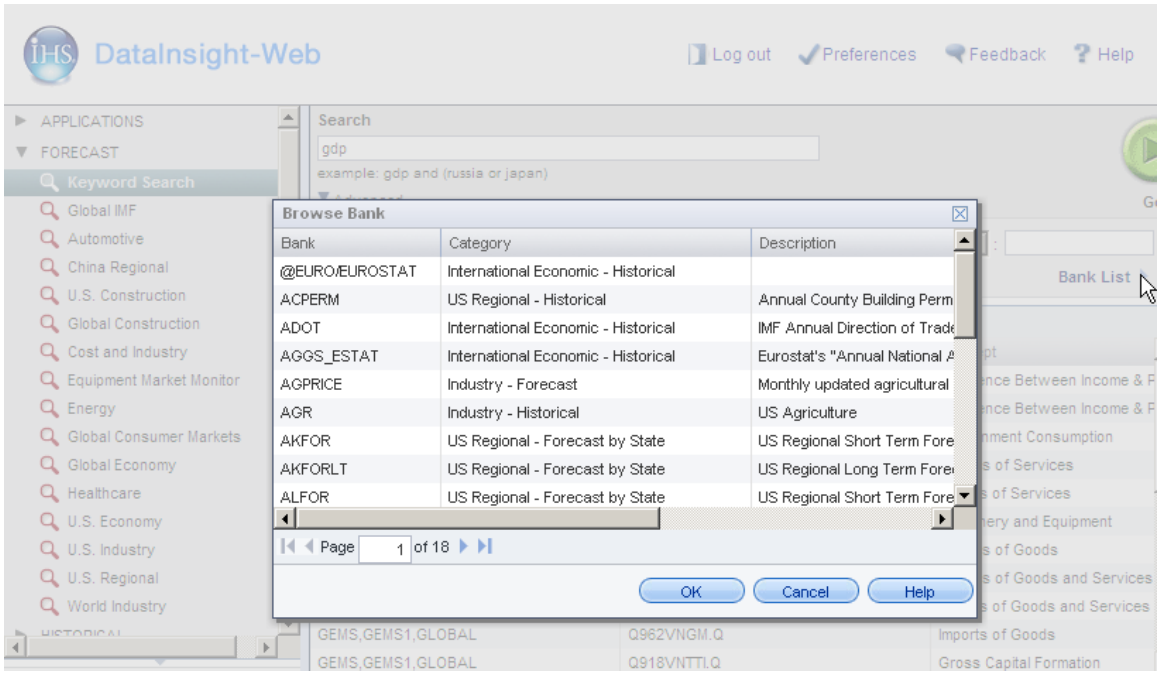
You may add additional criteria to narrow your search by clicking on the "Advanced" link when you select a "Keyword Search" option in the Navigation pane.



Using this feature with a keyword or phrase, you can select a specific Data Source, Mnemonic or partial mnemonic, Frequencies, and one or more banks from a bank list.



Search multiple banks by using Shift-click (to select adjacent banks) and Ctrl-click (to select individual banks).



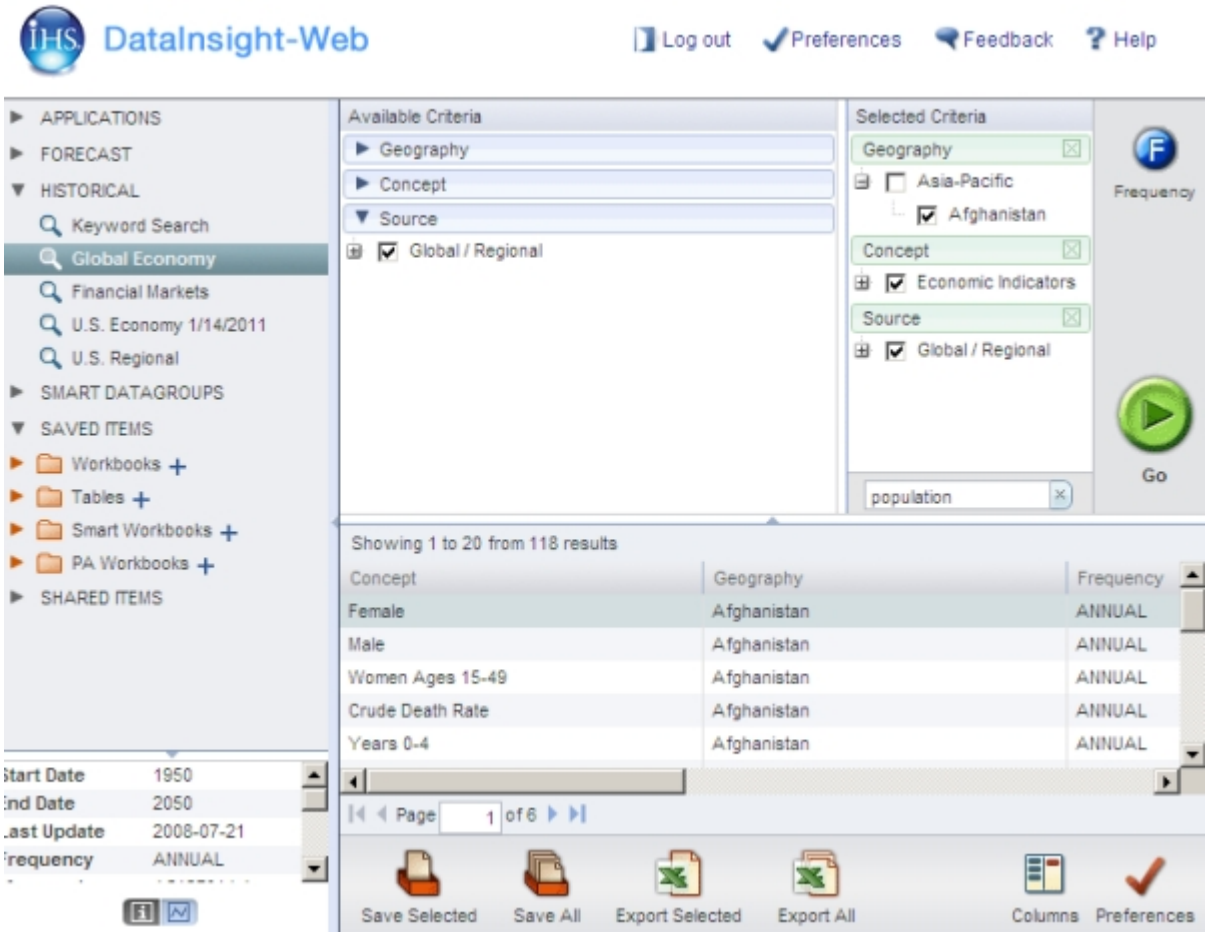
Category Search

Use category search to find series based on specific criteria such country, industry, concept, brand, or vehicle type.

DataInsight-Web Datagroups

Related series are grouped into datagroups, Smart datagroups, or categories such as U.S. Regional, Global Economy, and Financial Markets. The actual categories available to you will depend on your specific IHS Global Insight subscription.

Building a Category Search by Criteria Selection



To retrieve time series data:

1. Pick a **Datagroup**, and the **Available Criteria** drawers will appear for that source.
2. Click on the checkbox in front of your selections, and they will appear in the **Selected Criteria** panel on the right.
3. Optionally, filter frequencies and scenarios by making selections from the corresponding buttons on the right.

and


4. Now click on Go to view the results of your query.

Table Browser

The Table Browser allows you to browse, view, save, and export from a library of service-specific, pre-defined tables.

Using the Table Browser:

1. Make your selections from left to right by clicking on them once. As you click, a list of choices for each selection appears in a new column to the right as you drill down to see available tables.
2. When a table is selected, a new column appears with information specific to the table. This information includes the name of the table, a brief description, the frequencies that are available for the table, and the number of versions available.
3. To view the table on screen, simply press "View Table".

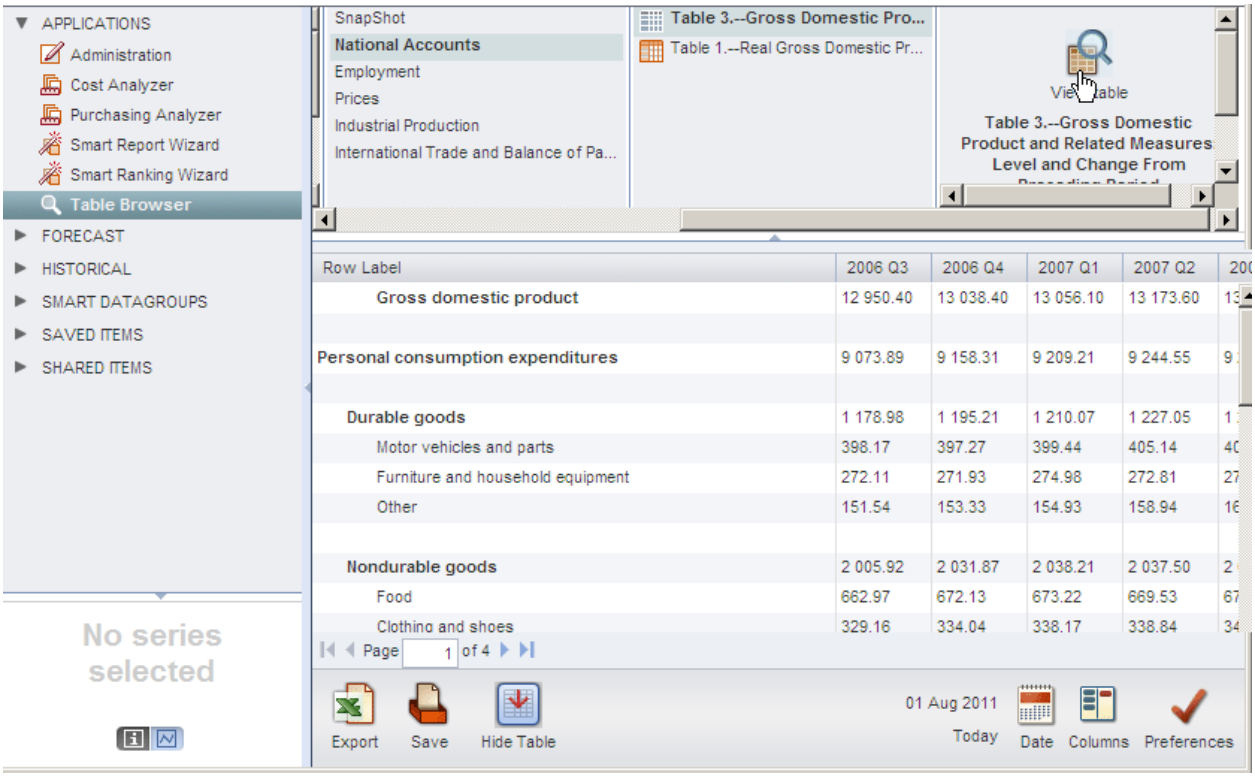
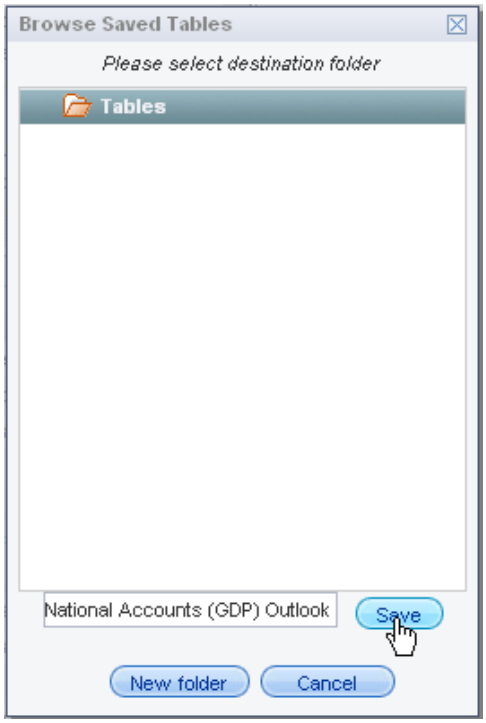


Table Browser Actions

Save

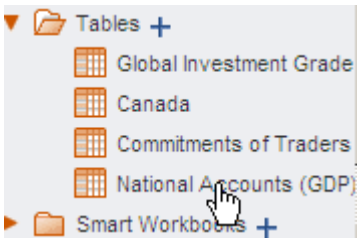
This option saves a table in your "Saved Items" area for quick access in future sessions.

When you click the Save icon, a dialog appears for you to either select a destination folder for your saved table. This dialog also allows you to create new folders.



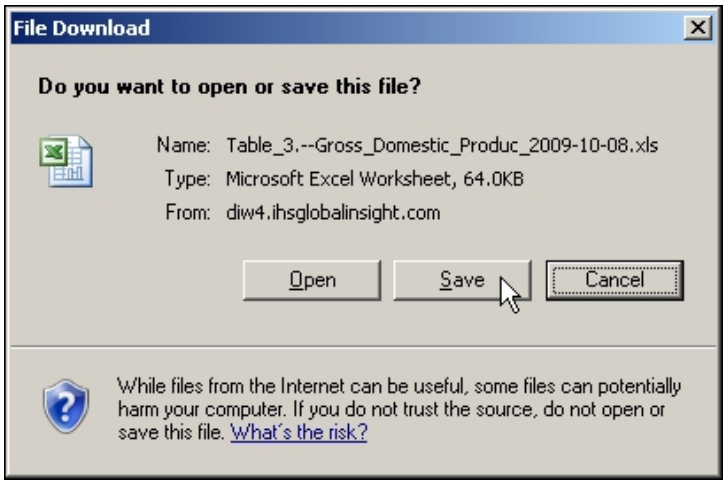
To create a new folder:

1. Click "New Folder."
2. Name the folder in the textbox that appears in the **Tables** list (see above).
3. Click "Save" and your saved table will appear in DataInsight-Web in its new folder.

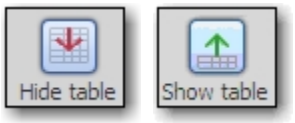


Export

This option allows you to export the current table into an Excel workbook. Depending on your browser configuration, you may be prompted to open or save the Excel document.



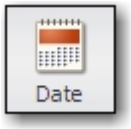
Hide/Show Table



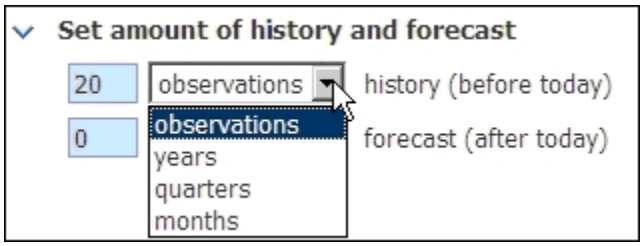
This option alternately hides and shows the current table on your screen.

Note: Hiding the table will give you more space to view the library of available tables.

Date



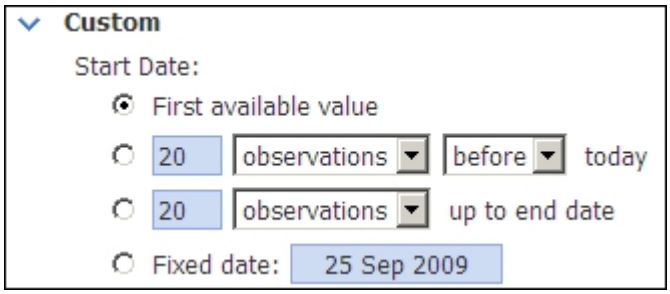
Set amount of history and forecast



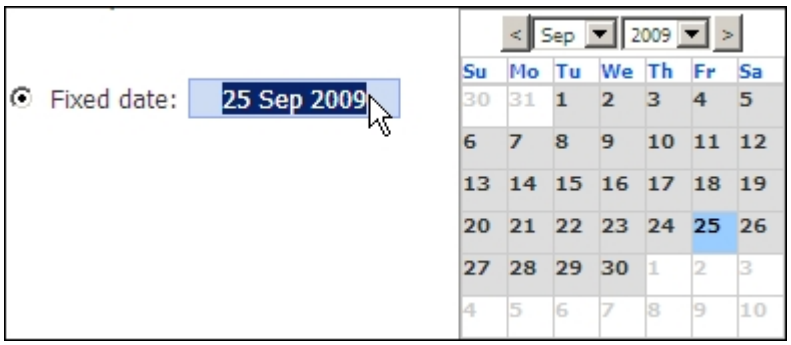
Select the date range in a number of years, quarters, months or observations in the past and in the future. Note: This selects the date range relative to TODAY -- it does not determine the data edge of individual series.

Custom

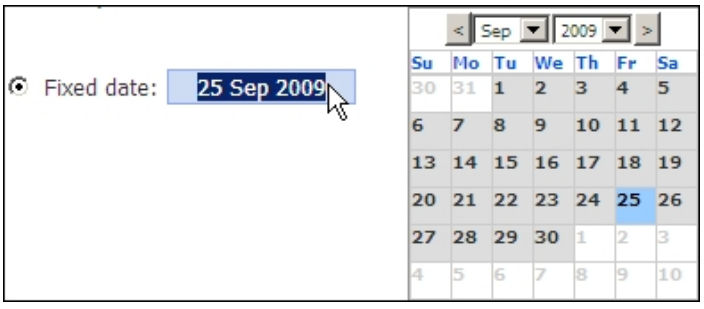
0Start Date



First available value:	Select to export time series data, beginning with the first observation of the data that exists in our database.
Number of values before or after today:	Enter the number of observations, years, quarters, or months to export, starting with today and going back into time for historical data or ahead into the future for forecast data.
Number of values up to end date:	Enter the number of observations, years, quarters, or months to export, going back into time from the end date you specify in the following section.
Fixed Date:	Enter an end date or select it by clicking once on the date and using the calendar tool provided.

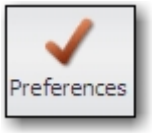
1End Date

Last value:	Select to export time series data, ending with the last observation of the data that exists in our database.
Today:	Select to use today's date as the end date.
Number of values before or after today:	Enter the number of observations, years, quarters, or months to export, starting with today and going back into time for historical data or ahead into the future for forecast data.
Fixed Date:	Enter an end date or select it by clicking once on the date and using the calendar tool provided. 

Columns

Use the “Columns” button, at the bottom of the screen, to display the **Custom Columns** dialog where you can add, remove, and reorder the columns you would like displayed for your series. You can change the selected columns by drag-and-drop, and you can also double-click on a column to flip it from right to left or vice-versa.

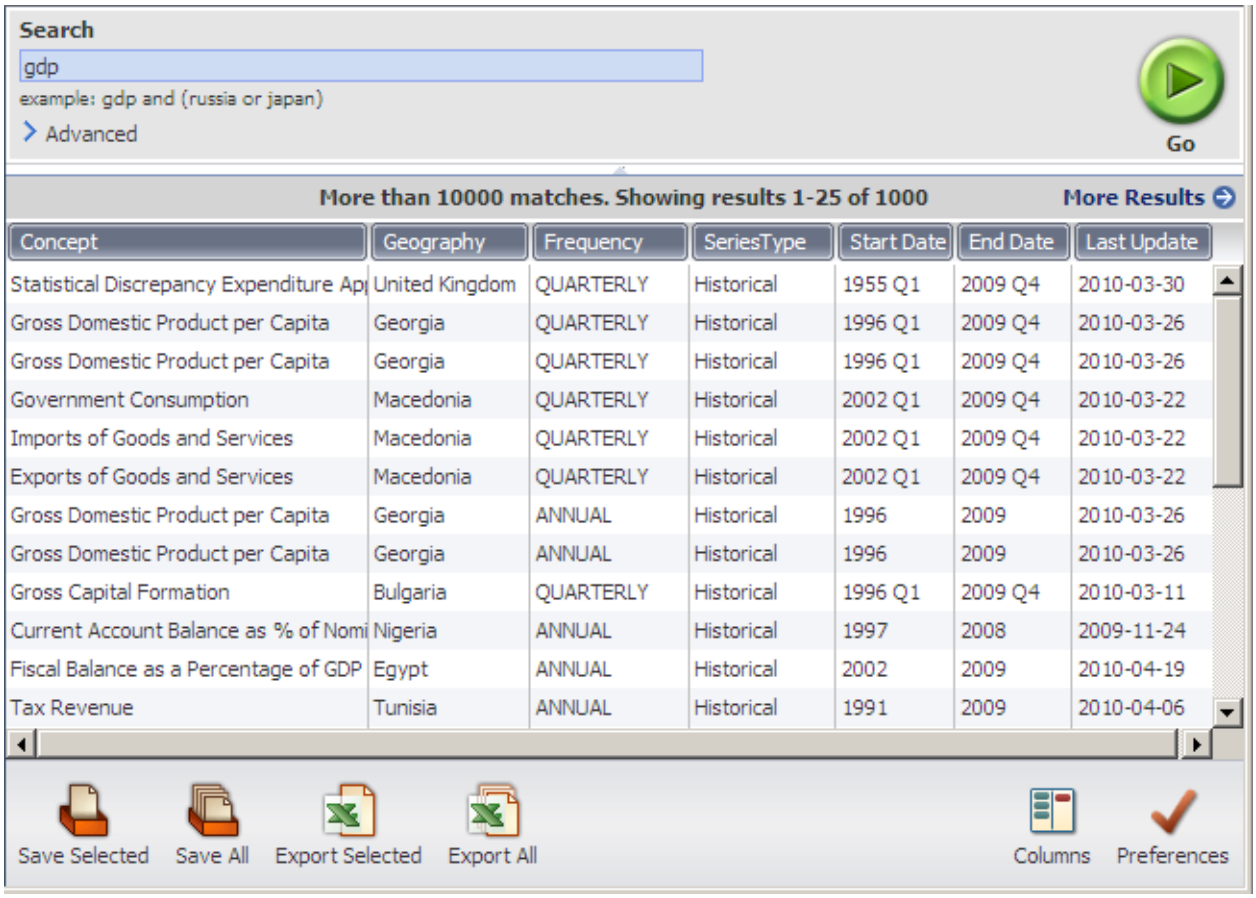
Preferences



DataInsight-Web offers many options to customize the way your data will display and export. Preference options are available at a global level, where defaults can be specified for the entire application, as well as at the workbook level, where an individual workbook may have its own unique settings. (See **Preferences and Settings** for more information.)

Viewing Data

After you click "Go", the results of your category search will appear in the columns in the middle of the page. (See **Keyword Search** for information about keyword searching.



Preferences for Exporting Data

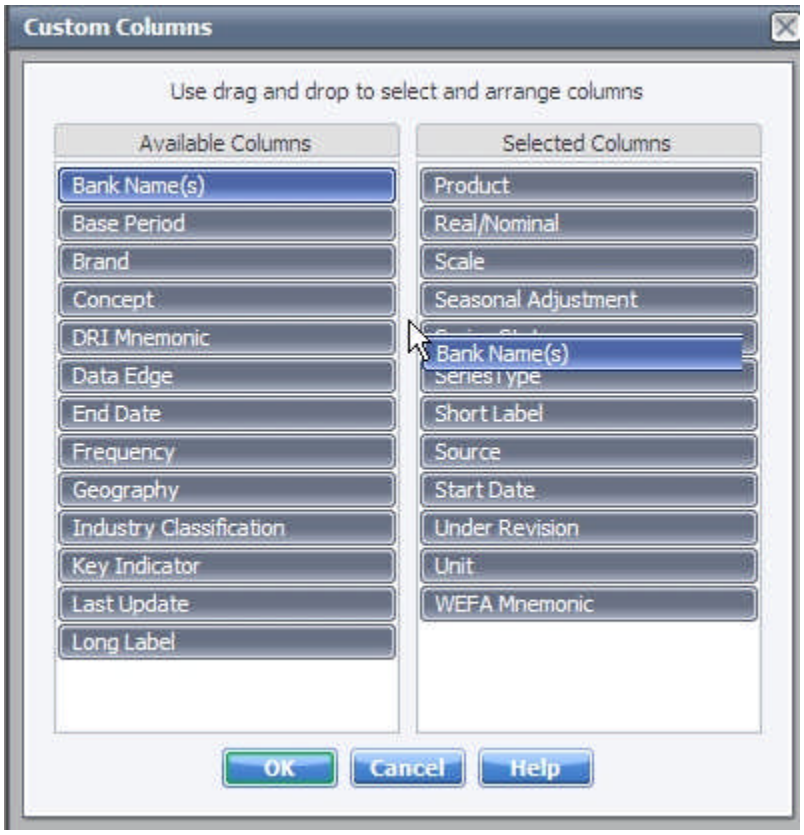
If you want to set your preferred download settings as defaults or customize the settings for a specific workbook, see **Preferences and Settings** for information on customizing these settings.

The following sections will show you how to:

- Rearrange, add, or remove data columns using the Columns button.
- Select series to graph and view the information.
- Switching between the series list and the data table.

Customizing the Results (Data) Columns

Use the Columns button, at the bottom of the page, to display the Custom Columns dialog. There you can drag and drop the buttons to add, remove, and rearrange the result columns before or after you retrieve your results.

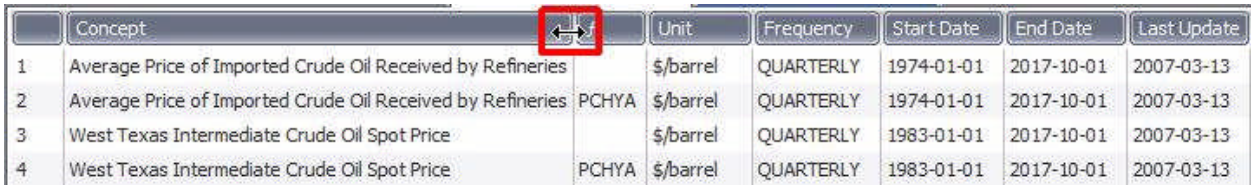


Note: Not all the columns listed below are applicable for all data.

Column	Description
Bank Name(s)	Name of the categorized database associated with the series.
Base Period	Benchmark date for the index calculation.
Brand	Manufacturer or trade name.
Concept	Economic or Financial concept definition of the series.
DRI Mnemonic	Series name assigned using the legacy DRI naming convention.
Data Edge	Last historical data period for forecast data.

End Date	The date of the last observation of time series data.
Frequency	Number of time intervals of the time series expressed as “Daily” through “Annual.”
Geography	Country or defined region for the time series.
Industry Classification	Representation of a specific industry or sector for the series.
Last Update	Date the time series data was last updated with new values and/or revisions.
Long Label	Detailed description of time series.
Real/Nominal	When present, indicates whether a time series is real or nominal. Valid values are “Real,” “Nominal,” or “NA.”
Scale	Denomination of the unit. Indexes are not scaled. For some forecast data, scale and unit are combined in the “Unit” column.
Seasonal Adjustment	When present, indicates whether a time series is seasonally adjusted. Valid values are “SA,” “NSA,” or “NA.”
SeriesType	Indicates whether a time series is historical or forecast. This column often includes forecast details indicating what type of forecast series it is.
Short Label	Abbreviated form of the “Long Label.”
Source	The organization from which the data is obtained.
Start Date	The date of the first observation of time series data.
Unit	Standard of measurement, e.g., currency, percentage, index, and exchange rate. For some forecast data, scale and unit are combined in this column.
WEFA Mnemonic	Series name assigned using the legacy WEFA naming convention.
Key Indicator	No longer applicable. This column will be removed in a future release.
Product	No longer applicable. This column will be removed in a future release.
Series Status	No longer applicable. This column will be removed in a future release.
Under Revision	No longer applicable. This column will be removed in a future release.

To expand a result column's width, place your cursor on the line between the column headings slowly until it displays as a two-sided arrow *(shown in a red box below)*. After that, drag the column to the right until it becomes the desired size.



	Concept		Unit	Frequency	Start Date	End Date	Last Update
1	Average Price of Imported Crude Oil Received by Refineries		$/barrel	QUARTERLY	1974-01-01	2017-10-01	2007-03-13
2	Average Price of Imported Crude Oil Received by Refineries	PCHYA	$/barrel	QUARTERLY	1974-01-01	2017-10-01	2007-03-13
3	West Texas Intermediate Crude Oil Spot Price		$/barrel	QUARTERLY	1983-01-01	2017-10-01	2007-03-13
4	West Texas Intermediate Crude Oil Spot Price	PCHYA	$/barrel	QUARTERLY	1983-01-01	2017-10-01	2007-03-13

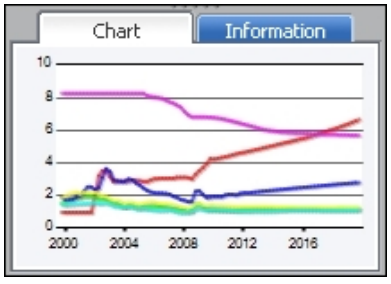
Series Graph/Information Display

At the bottom left of your screen, there is a dual-purpose panel for displaying a graph or information for one or more series that you select in the results area.

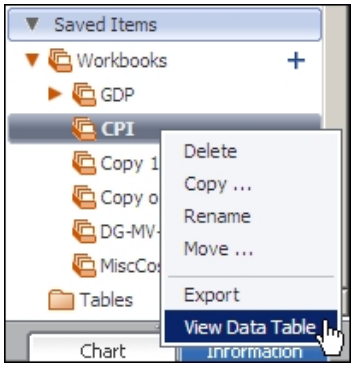
Chart	Displays a graph of the selected series (you can choose up to 5 series for your graph).
Information	Displays time series information for the most recent time series you have selected.

To graph series:

1. Select a series by clicking on it. (Use **Shift-click** or **Ctrl-click** to select multiple series.)
2. Each series (up to 5) will appear as a different line color in the chart.

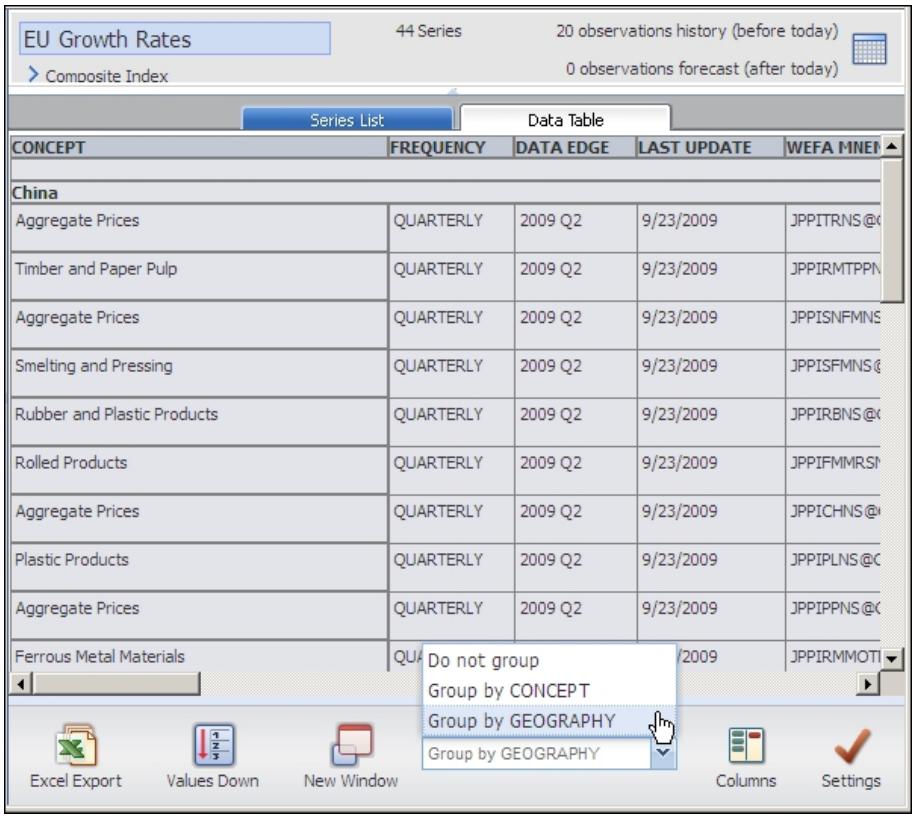


Switching from the Series List to a Data Table On-screen

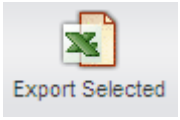
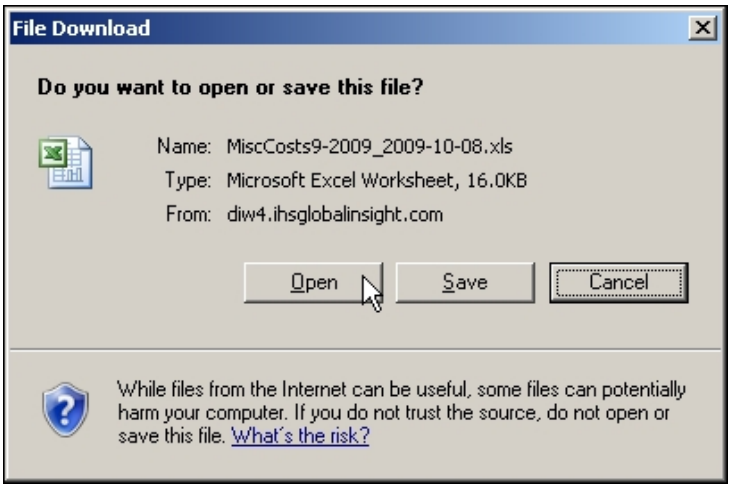
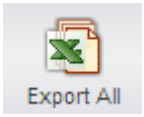
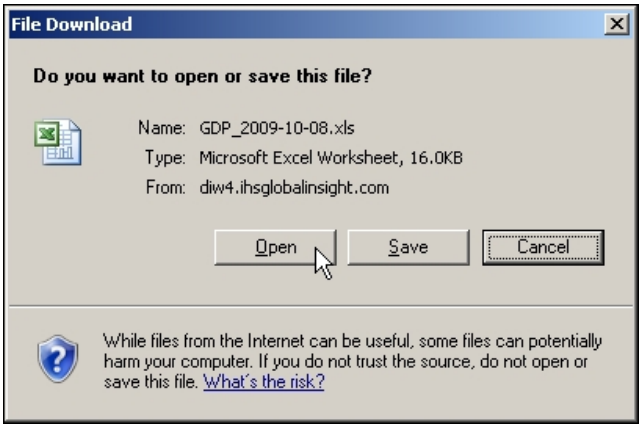


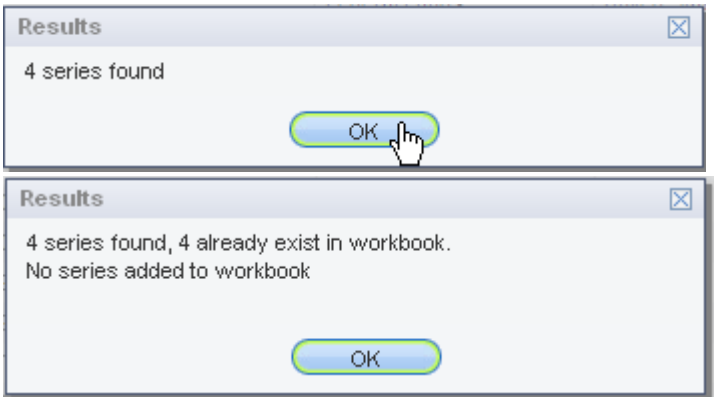
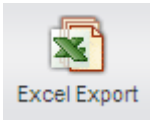
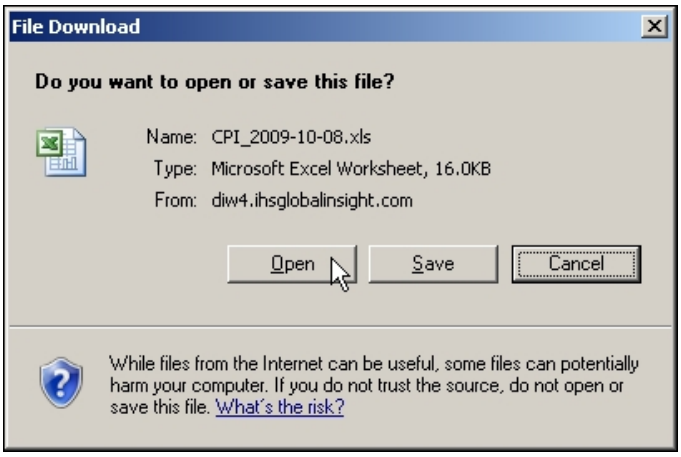
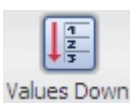
The **View Data Table** option of the workbook context menu displays the **Data Table** within the *selected workbook* with the series data in it. Alternately, you can click on the **Data Table** tab above the column headers of the series list to display the table.

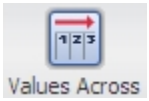
On the **Data Table** tab, the series in the table can be grouped by using the drop-down list at the bottom of the screen.



Option Icons for the Series List and the Data Table Views

Tab	Icon	Description
Series List		
		Depending on your browser configuration, you may be prompted to open or save the Excel document. Exports the selected series of the open workbook to Excel and opens Excel when you choose the Open button. If you choose the Save button, you will be asked to select the location for naming and saving the workbook. 
		Depending on your browser configuration, you may be prompted to open or save the Excel document. Exports all series of the open workbook to Excel and opens Excel when you choose the Open button. If you choose the Save button, you will be asked to select the location for naming and saving the workbook. 

		Allows you to apply functions to selected time series and to replace the line item or add an additional line to the table containing the function. See **Applying Functions to Data** for more information.
		Allows you to add new series to the series list. This feature opens the **Add Series by Mnemonic** dialog and allows you to type or paste series mnemonics into it. This feature also verifies that the mnemonics that you add are correct by looking for them in our database and in the series list before added them there.  See **Applying Series to Workbooks by Mnemonic** for more information.
Data Table		
		Depending on your browser configuration, you may be prompted to open or save the Excel document. Exports the series of the open workbook to Excel and opens Excel when you choose the Open button. 
		Toggles the orientation of the table. Values Down:

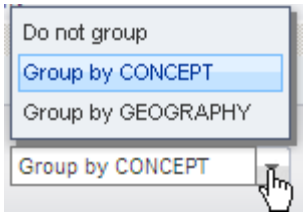


WEFA BANK NAME (S)	CEIC_ASIA
SERIESTYPE	Historical
START DATE	Aug 2004
END DATE	Apr 2007
LAST UPDATE	6/8/2007
WEFA SERIES NAME	CEICJBQDDSB.M
DRI SERIES NAME	CEIC_ASIA_D:CEICJBQDDSB.M
FREQUENCY	MONTHLY
SHORT LABEL	Japan, Crude Oil Shipment: Non-refining Use: South East Asia (SE), Kilolitre th
AUG 2004	354.00
SEP 2004	234.00
OCT 2004	146.00
NOV 2004	157.00
DEC 2004	179.00

Values Across:

WEFA BANK NAME(S)	SERIESTYPE	START DATE	END DATE	LAST UPDATE
CEIC_ASIA	Historical	Aug 2004	Apr 2007	6/8/2007

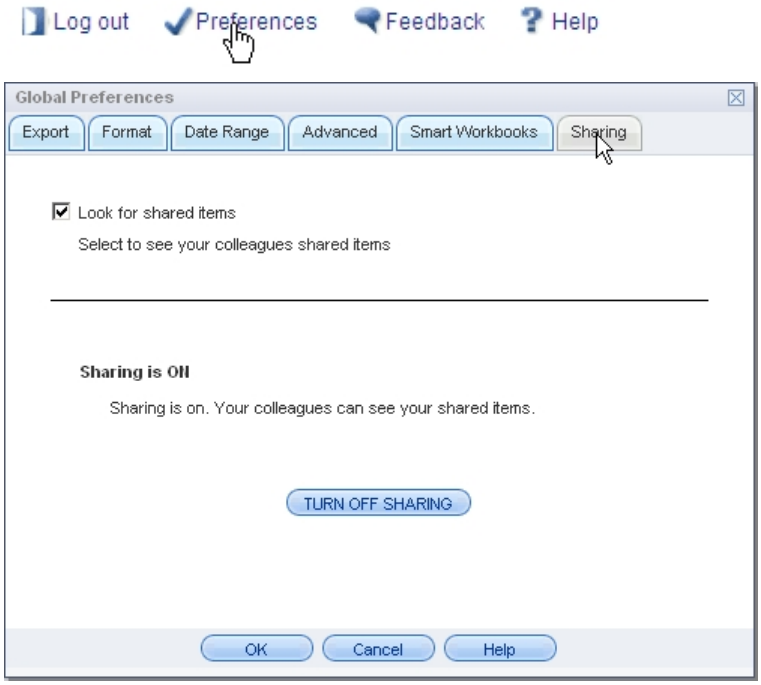
Displays the table in a new window without the browser menu or toolbars.



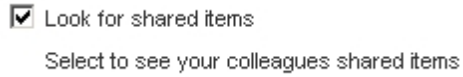
When available will group or ungroup the data values on the **Data Table** tab.

Sharing Items

The "Sharing" options under **Global Preferences** allow you to share your saved Items with your colleagues. Sharing workbooks is only possible if your global preferences are set correctly.



Look for Shared Items



When you select the check box in this pane, shared items appear as branches under the names of your colleagues at the bottom of the navigation pane. You can view shared items even if you have your own sharing off.

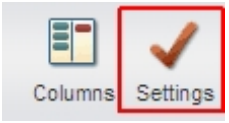
When you clear the check box in this pane, no shared items appear in the navigation pane.

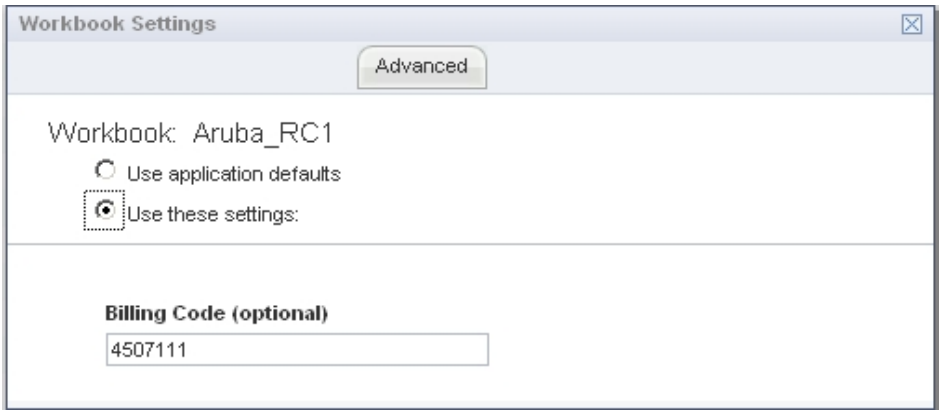
Note about Billing Codes and Sharing: The billing code comes from the source workbook when the source workbook has a *workbook-level billing code* specified, using the button at the bottom of the screen.

Examples:

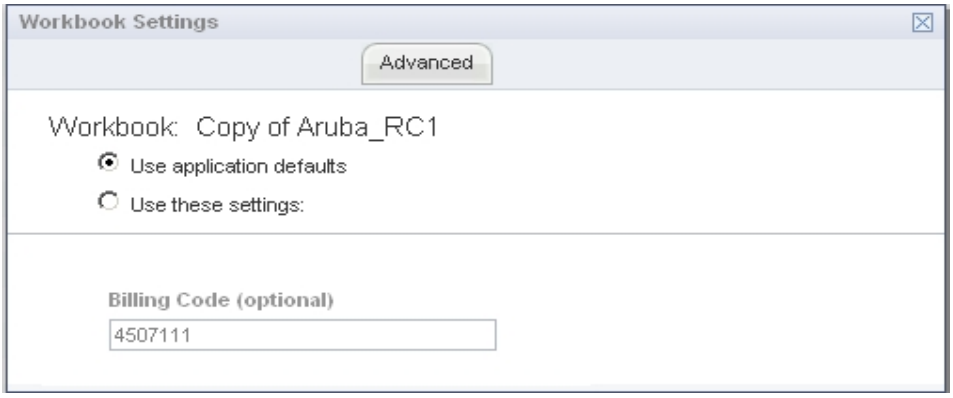
Scenario 1

You set the billing code at the workbook level and the billing code appears on the "Advanced" tab for workbook settings.



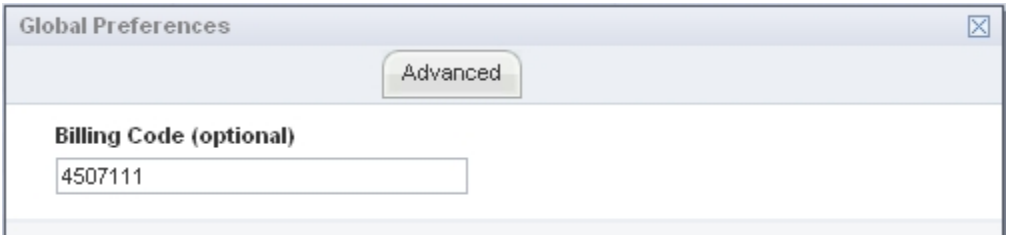


Users that share this workbook with you will see your billing code on its "Advanced" tab for workbook settings:

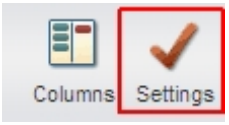


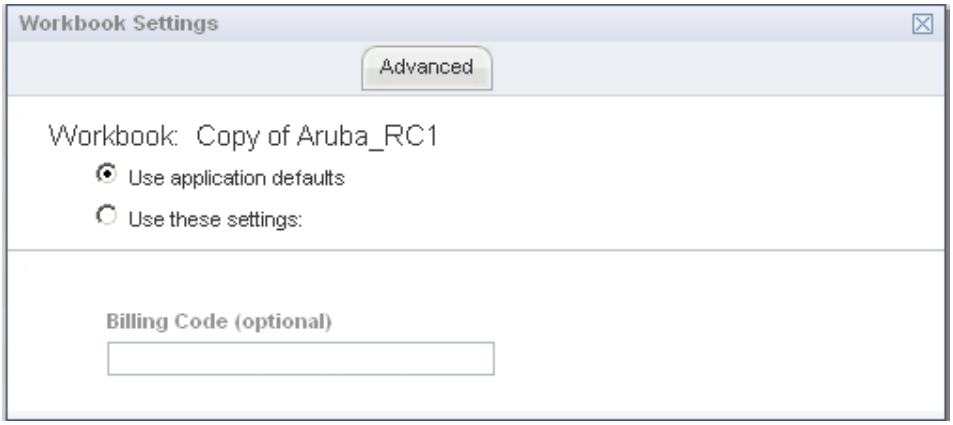
Scenario 2

You assign a billing code to all your workbooks as a default, using global preferences, and the billing code appears on the "Advanced" tab.

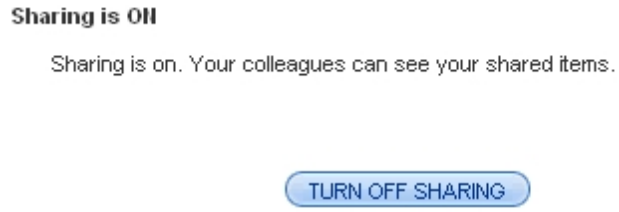


When you share this workbook, other users will see nothing in the "Billing Code" field when they look at the workbook settings.



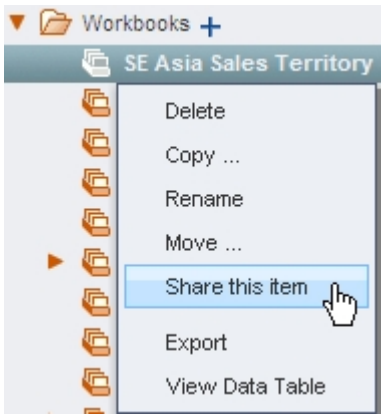


Sharing is ON/OFF

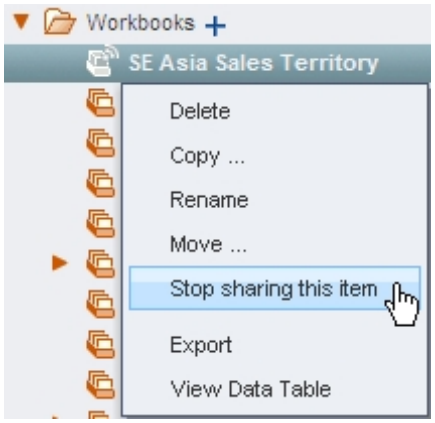


When you turn sharing on in this pane, your colleagues will see the items that you have marked for sharing.

To mark a workbook for sharing, right click on it in the navigation pane and select “Share this item” from the context menu that appears. Your shared items will appear in the lists of your colleagues.



To stop sharing, right click on the item again and select “Stop sharing this item.”



When you turn sharing off in this pane, your colleagues cannot see the items that you have marked for sharing.

Saving Data

Workbooks

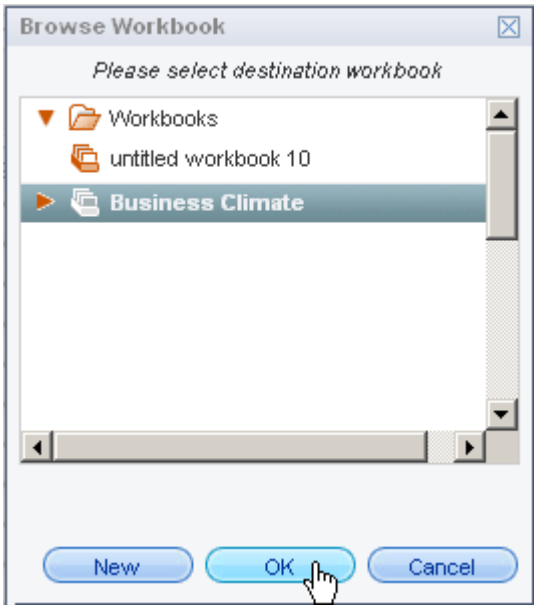
Workbooks are containers you can create to save, organize, and manage time series.

To create a workbook manually:

1. Once you find the time series you want (see **Finding and Selecting Data** for more information), select one or more of them and click on the “Save Selected” button at the bottom of the webpage.

To save all of your results, click “Save All” without selecting anything. Either action will display a Browse Workbook dialog for you to save a new workbook in the Data Sources pane. The new workbook will appear with the name selected and ready for you to type the workbook name.

(**Hint:** You can also right-click in the workbook area and select "Save" or "Save All" from the menu that appears.)



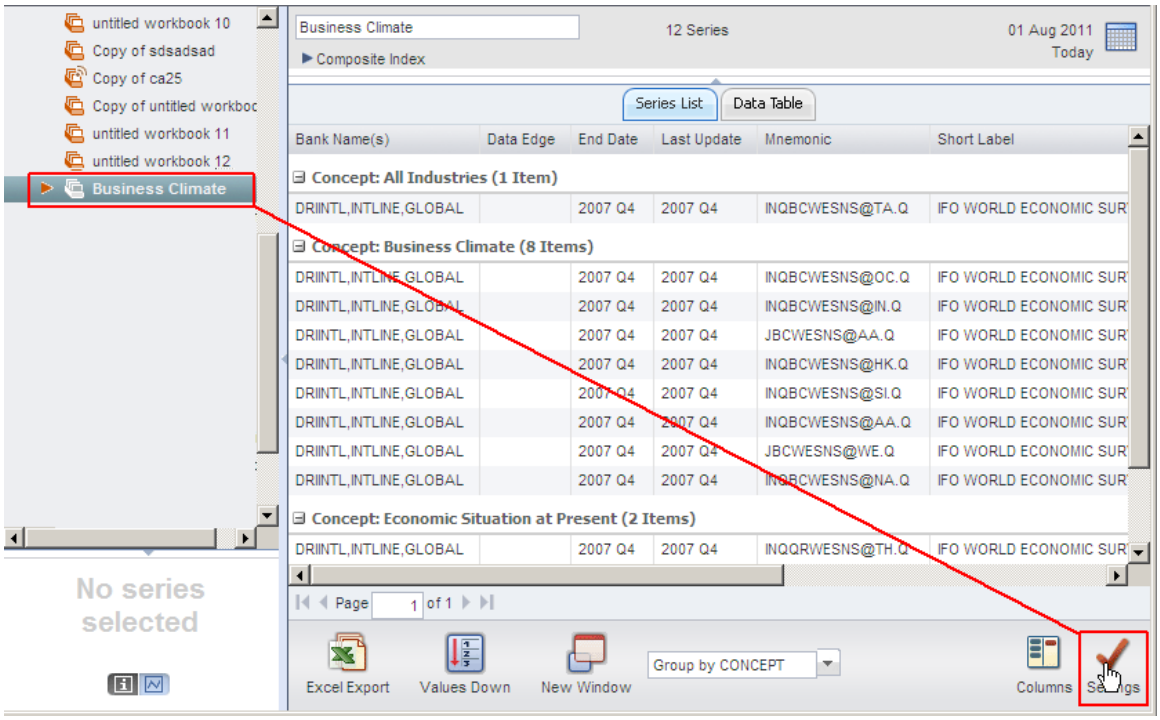
2. To set the name, press Enter. To open the workbook, click once on it in the Workbooks data tree.

Note: The number of series in a workbook will appear in a tool tip as you hover over the workbook's name.

Once the workbook is opened, you can

- Rename it by clicking once on it in the workbook data tree.

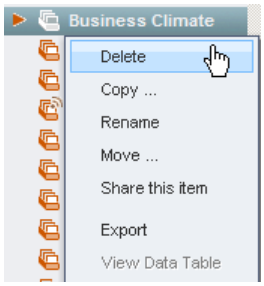
- Use the Settings button to change the settings for a specific (open) workbook, overriding the defaults set on the global Preferences tab.

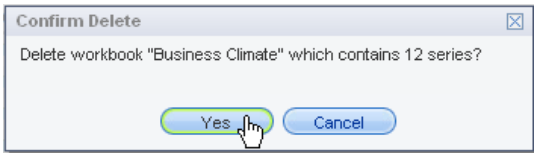
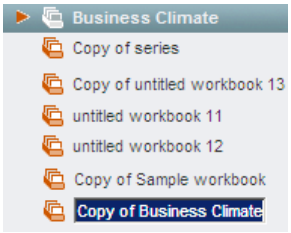


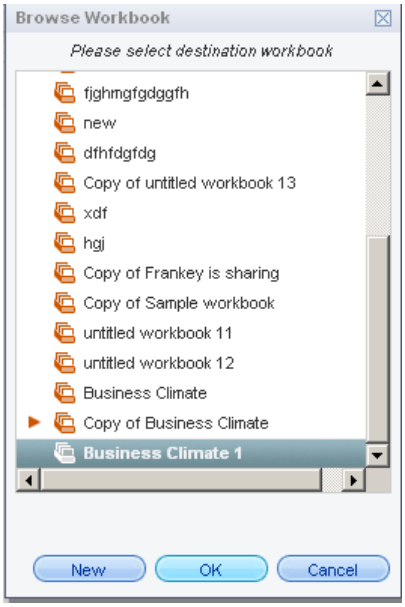
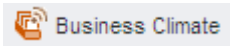
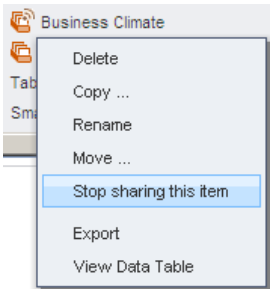
These settings will remain in the workbook until you change them. (See **Preferences and Settings** for more information.)

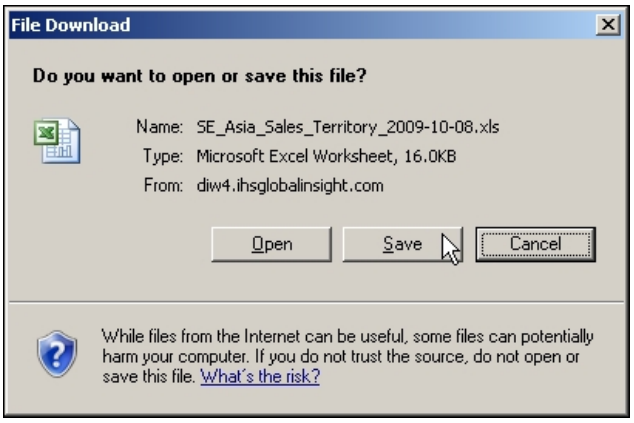
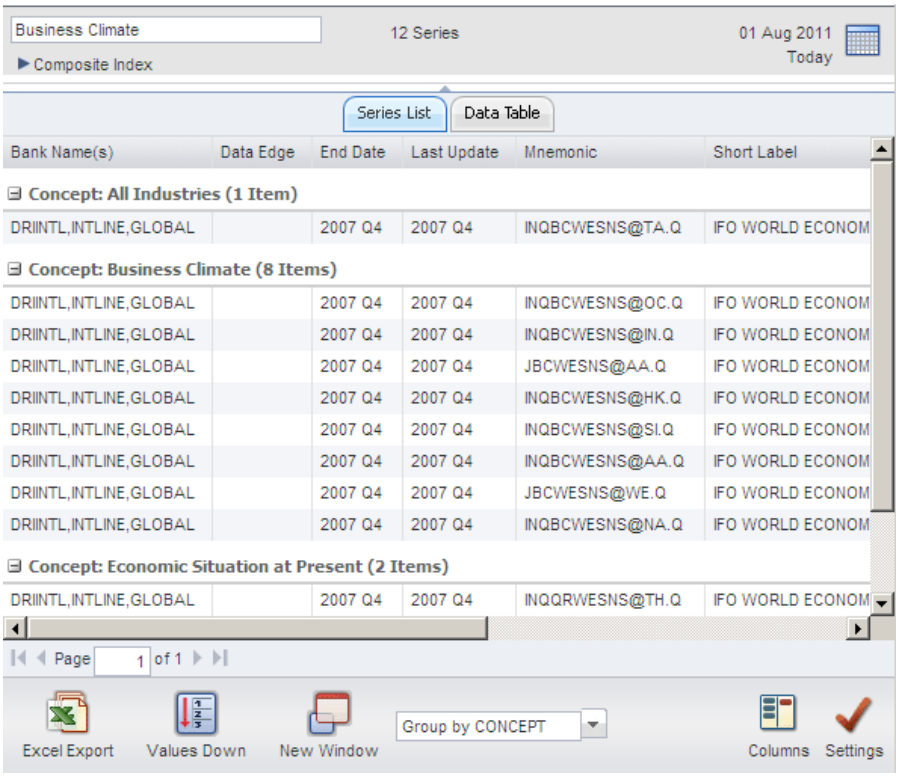
Using the Context Menu for Workbooks

Right click on a workbook in the Workbooks tree to display a context menu of the most often-used commands.



Command	Description
Delete	Removes the workbook and its contents completely. You will receive a confirmation window before removal. Alternately, you can select the workbook and use your delete key. 
Copy	Makes a copy and places it at the bottom of the workbook tree. 
Rename	Displays the name of the selected workbook in an editable field for adjustment. Alternately, you can change the name in the Workbook Name field within the workbook. 

Move	Displays the Browse Workbook dialog box with the workbook tree in it. To move a workbook's position under another, select the workbook that will be immediately above it and then click OK. Alternately, you can drag-and-drop the name into the desired position in the tree, as shown. 
Share this item	Allows you to share a workbook with your entire work group and displays a shared workbook icon in front of it.  To remove sharing, right click the workbook again and select "Stop sharing this item." 

Export	Depending on your browser configuration, you may be prompted to open or save the Excel document.  **Note:** When you click "Save," a "Save as" dialog box will appear for you to save your workbook to your system.
View Data Table	Displays the **Data Table** page with the series data in it. Alternately, you can click on the **Data Table** tab in the workbook to see the table.  Once displayed, the series in the table can be grouped by using the drop-down list at the bottom of the page, as shown.

Working with Series in a Workbook

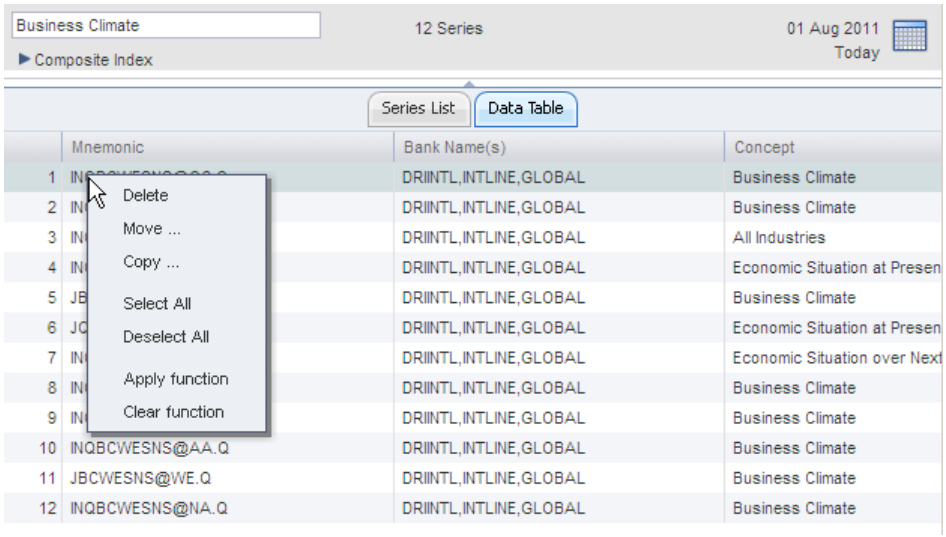
You can copy and delete series in a workbook via a right-click context menu or by drag-and-drop for copying and by using your Delete key for removal. You must use the context menu to move series from one workbook to another.

You can also add series to a workbook manually by using mnemonics. (See **Adding Series to Workbooks by Mnemonic** for more information.)

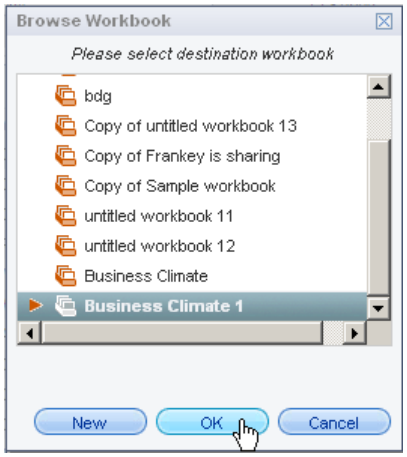
Note: Workbooks can contain a maximum of 1000 series.

Using the Context Menu for Series in a Workbook

To use the context menu for the series in a workbook, select one or more series and then right-click for the menu.



When you move or copy series using this menu, a "Browse Workbooks" dialog box appears for you to choose the target workbook from a list or create a new workbook as the target. After you move or copy, both workbooks in the Workbooks panel display disk icons as they are automatically saved.

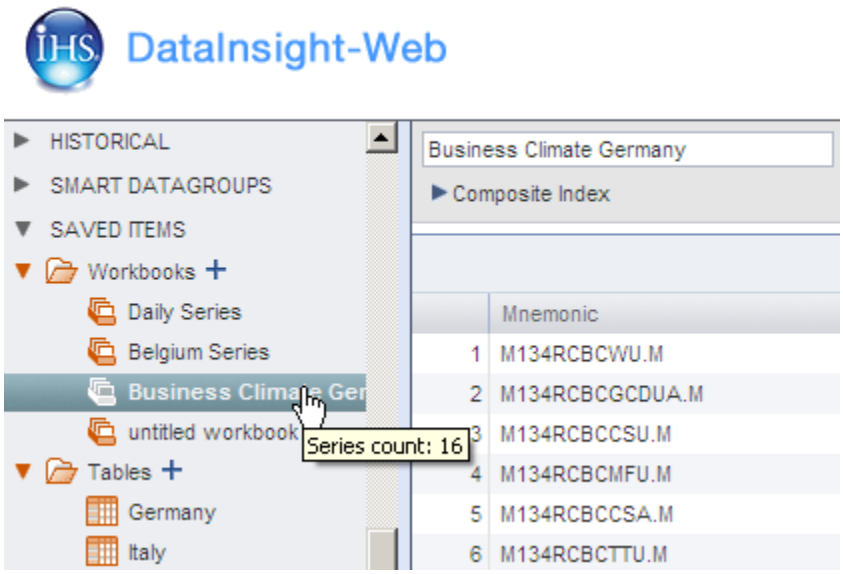


Adding Series to Workbooks by Mnemonic

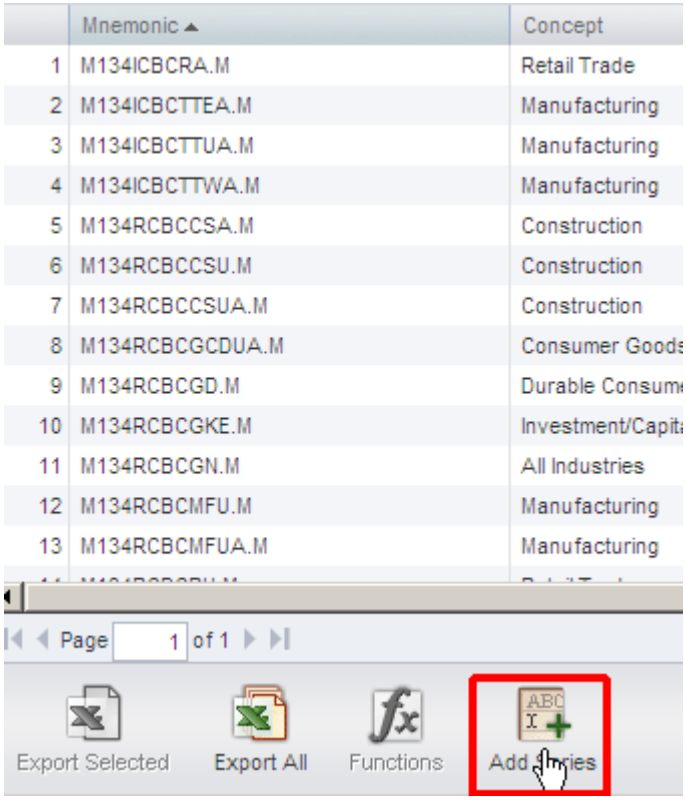
DataInsight-Web has a feature that lets you add series to a workbook using series mnemonics.

To add series by mnemonic to a workbook:

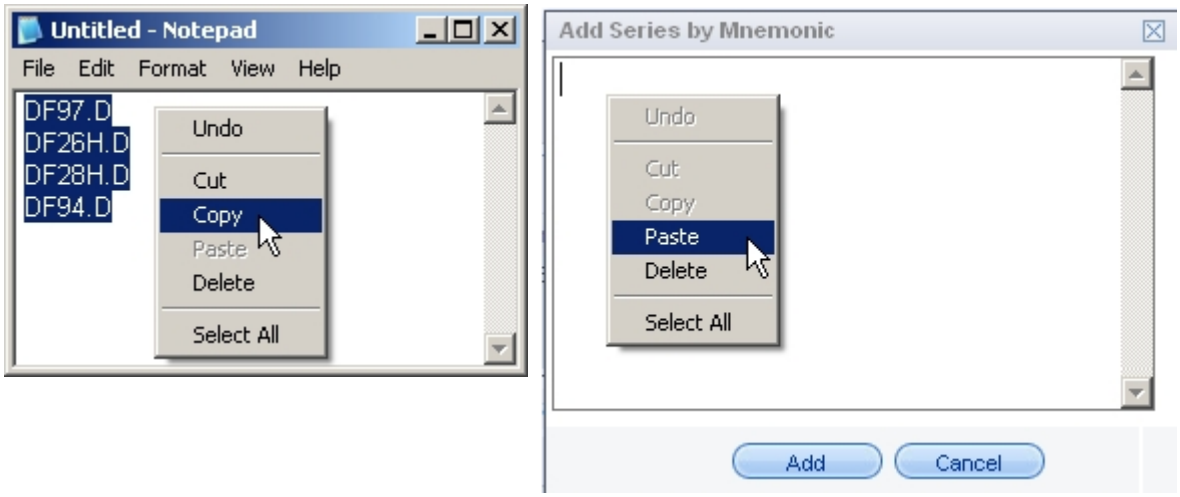
1. Select a workbook on the left and it will open to display the series contained in it.



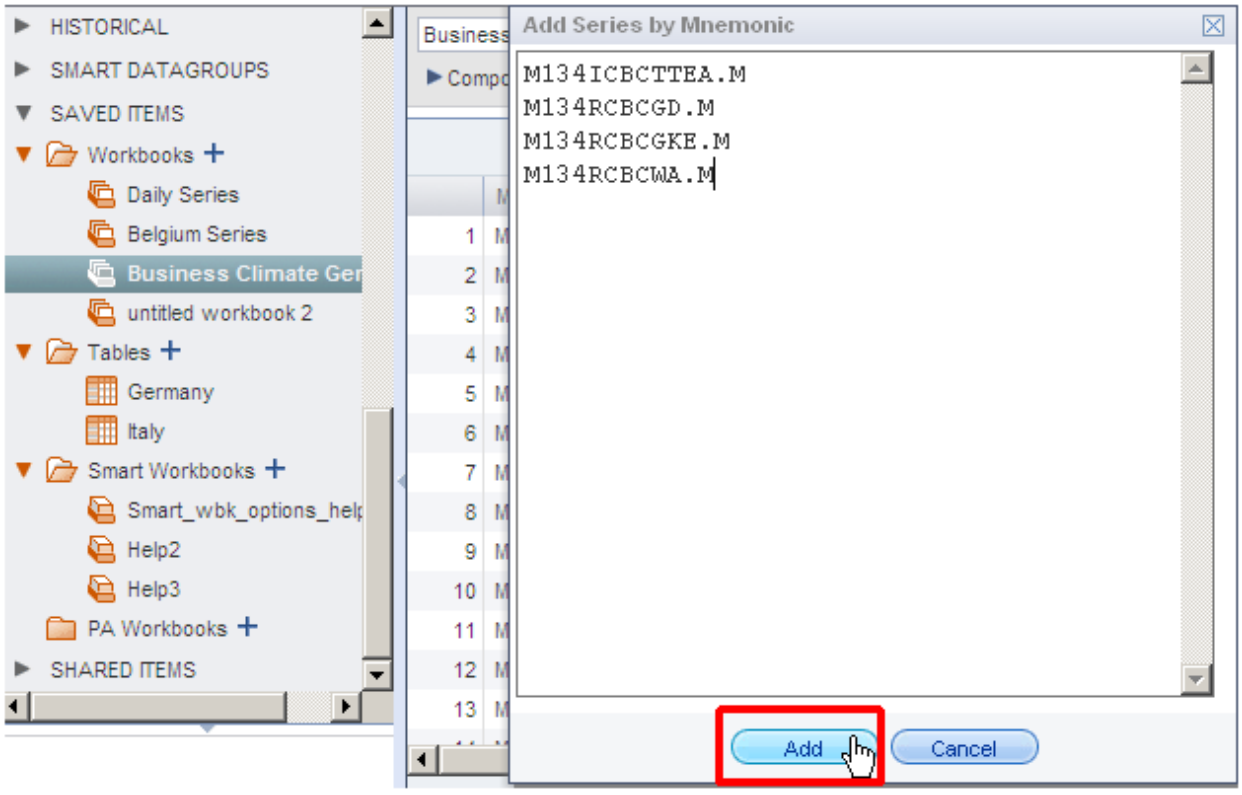
2. Click **Add Series** and a dialog box will open for you to enter the mnemonics of the series to be added to the open workbook. Press **Enter** after typing each series to go to the next line.

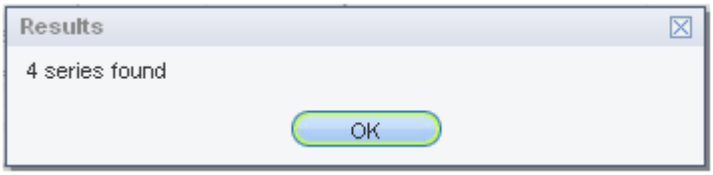


Alternately, you can paste a list of series, copied from a text editor like Windows Notepad, into the dialog by using the right-click context menu available there.

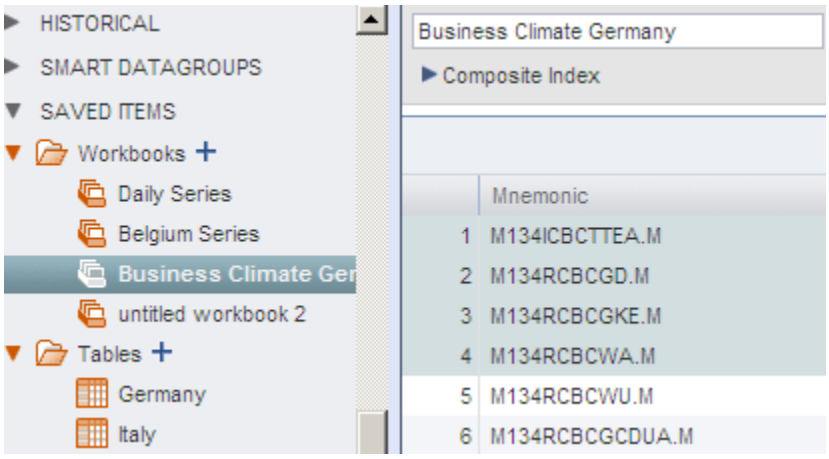


3. After you click on **Add,** a **Results** dialog will appear.





4. Click **OK** to complete the process and the additional series will appear in the workbook.

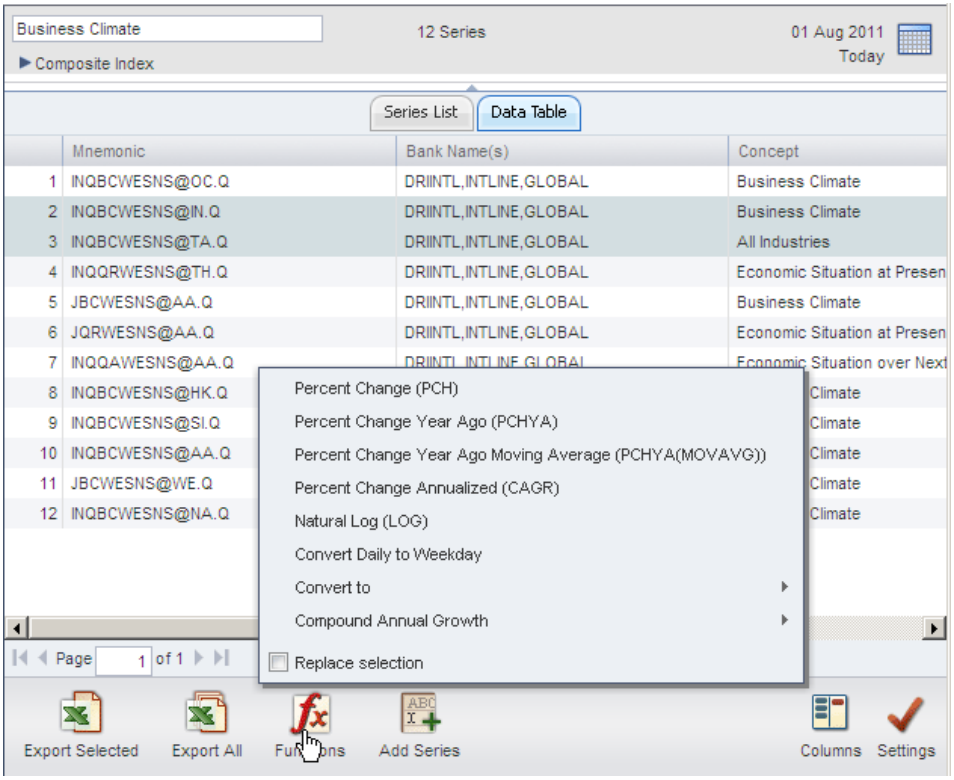


Applying Functions to Data

You can apply a function to a time series and either replace the time series or add a line with the function underneath the target series.

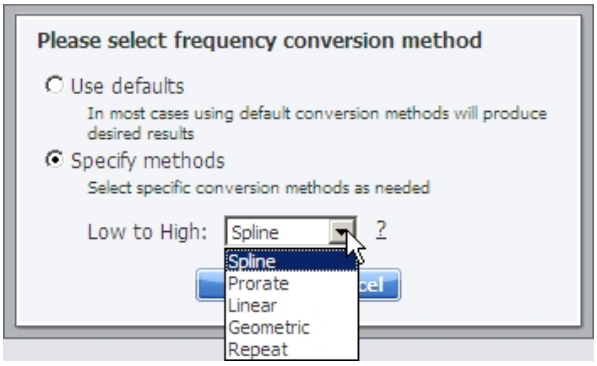
To apply a function to a series:

1. Select one series in the **Series List** by clicking on it or, to select multiple adjacent series, use Shift-click or, to select multiple non-adjacent series, use Ctrl-click.



Function Definitions

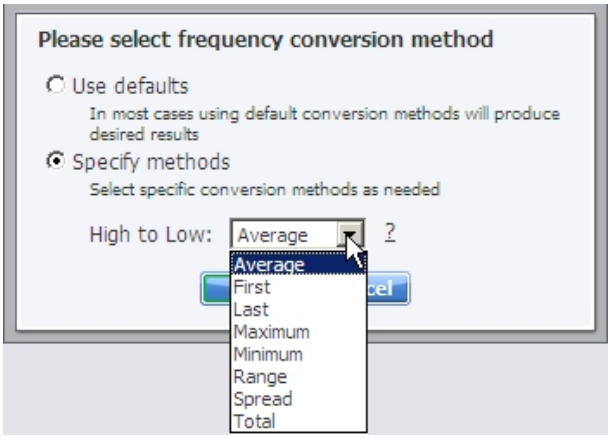
Percent Change:	The change in data, from one period to another, expressed as a percentage of its value in the first of the two periods. PCH(x) Percent change of x lag 1 (x/x.1 - 1)*100
Percent Change Year Ago:	The percentage change in data from a year ago. PCHYA(x)

	Annual percent change of x (x/x.p - 1)*100 p is the number of periods in each year
Percent Change Year Ago Moving Average:	The percent change of a moving average is a method for smoothing data by averaging a fixed number of consecutive years and then calculating the percentage change of the data from the previous year-over-year moving average. PCHYA(MOVAVG(n, x)) Percent change year ago of the moving average of x lag n.
Percent Change Annualized:	The smoothed year-over-year growth rate of a value over a specified period of time (CAGR**).** Compound annual growth rate of x lag 1 ((x/x.1)**p - 1)*100 p is the number of periods in each year.
Natural Log:	Returns the natural logarithm of X, using a base of 2.71. LOG(x)
Convert Daily to Weekday:	Converts seven-day data to five-day data by eliminating the data for the weekend. Daily(Mon - Sun) to Weekday(Mon - Fri)
Convert to:	Annual Quarterly Monthly Convert(series, method) This function can Interpolate a lower current frequency to a higher one, i.e., Annual to Monthly: 

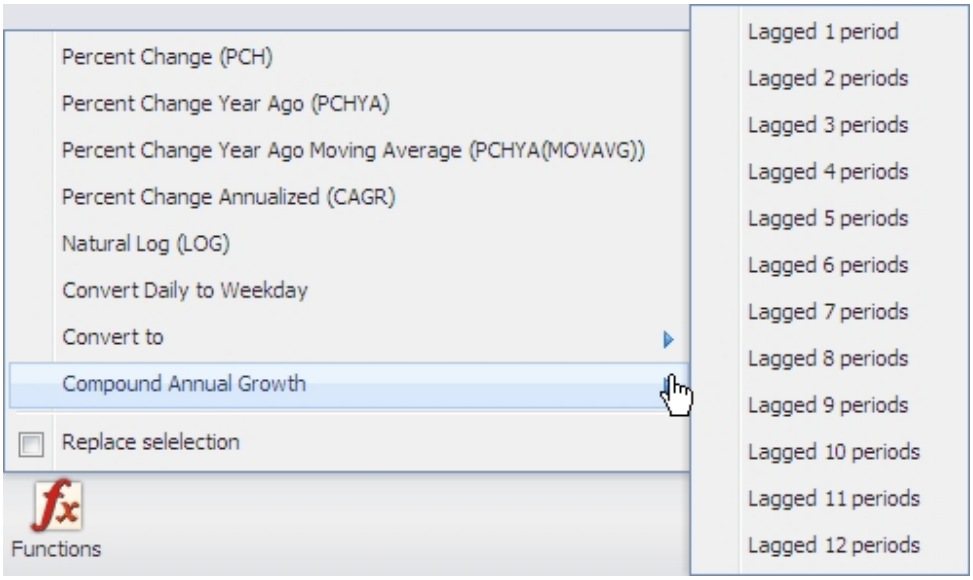
Method	Example
Spline	Convert(GDP.A, Spline)
Prorate	Convert(GDP.A, Prorate)
Linear	Convert(GDP.A, Linear)
Geometric	Convert(GDP.A, Geometric)
Repeat	Convert(GDP.A, Repeat)

AND

This function can Collapse a higher current frequency to a lower one, i.e., Quarterly to Annual:



Method	Example
Average	Convert(GDP.Q, Average)
First	Convert(GDP.Q, First)
Last	Convert(GDP.Q, Last)
Maximum	Convert(GDP.Q, Maximum)
Minimum	Convert(GDP.Q, Minimum)
Range	Convert(GDP.Q, Range)
Spread	Convert(GDP.Q, Spread)
Total	Convert(GDP.Q, Total)

Compound Annual Growth (Lagged n periods):	 CAGR(n, x) Compound annual growth rate of x lag n ((x/x.n)**(p/n) - 1)*100 p is the number of periods in each year

2. Click on the Function button at the bottom of your screen and make your function selection.

3. (Optional) Un-select the Replace selection option if you want to see each series you selected repeated with the function applied to it as a separate row.

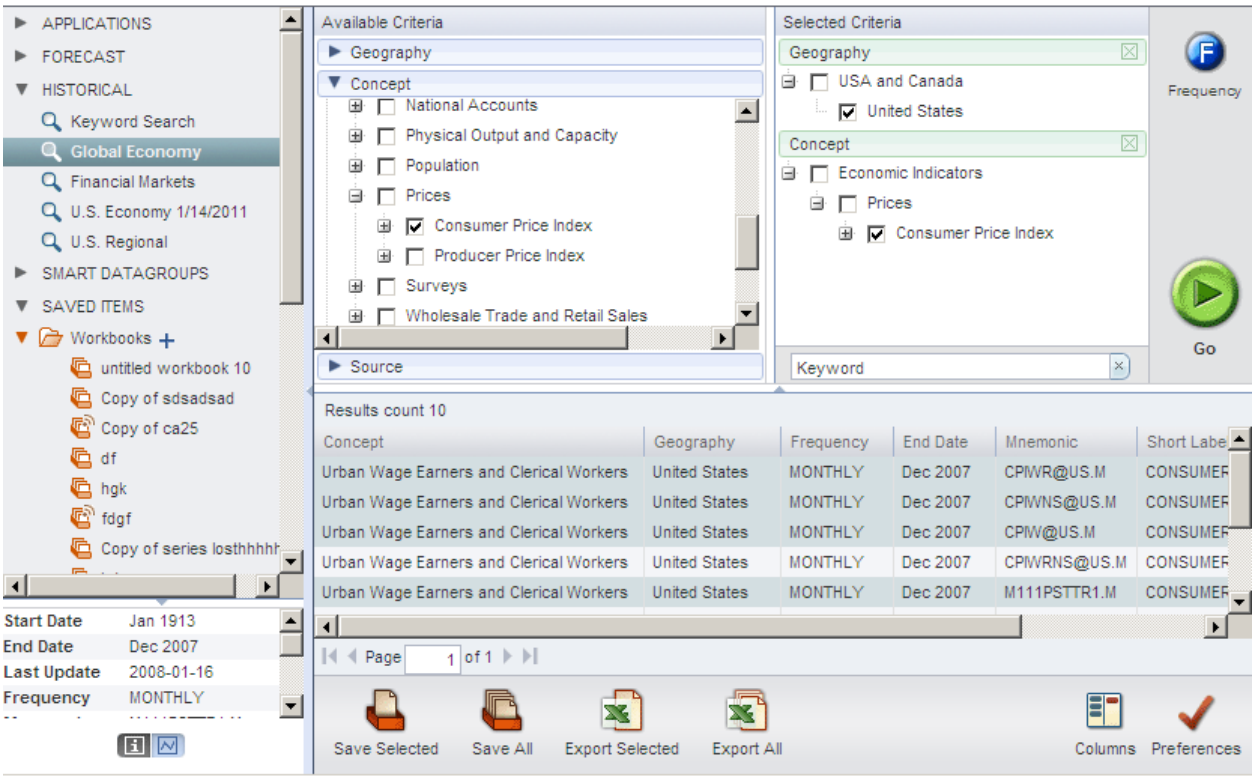
Exporting Data to Excel

You can export category and keyword search results or the contents of a workbook into a Microsoft Excel spreadsheet to open and work with and/or to save on your system for later use.

Exporting Category Search Results

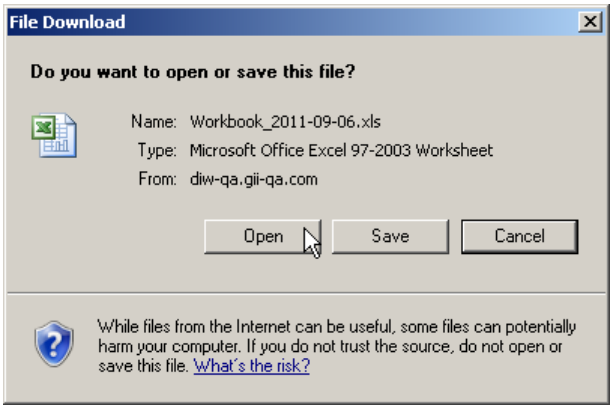
To export category search data or workbook data to Excel:

1. Select one series in the Series List by clicking on it, or to select multiple adjacent series, use Shift-click or, to select multiple non-adjacent series, use Ctrl-click.

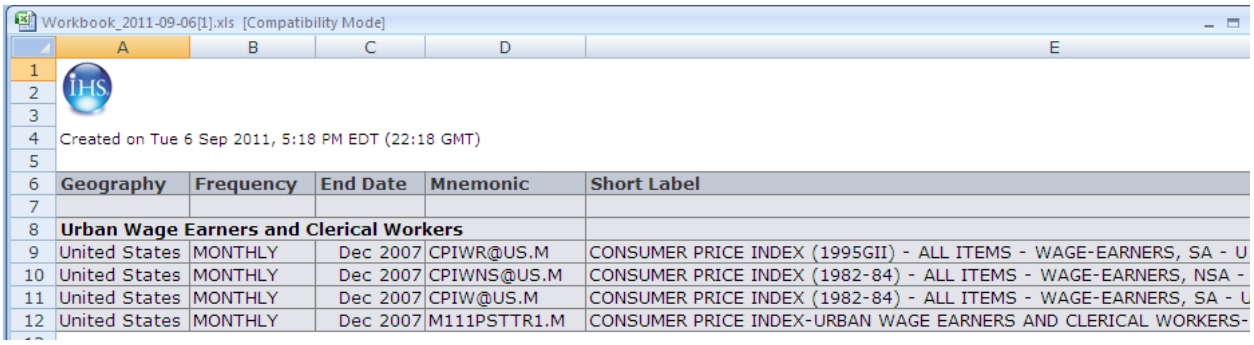


2. Select either the Export Selected or Export All option. Note: when selecting Export All, it is not necessary to make series selections first.

3. Depending on your browser configuration, you may be prompted to open or save the Excel document.

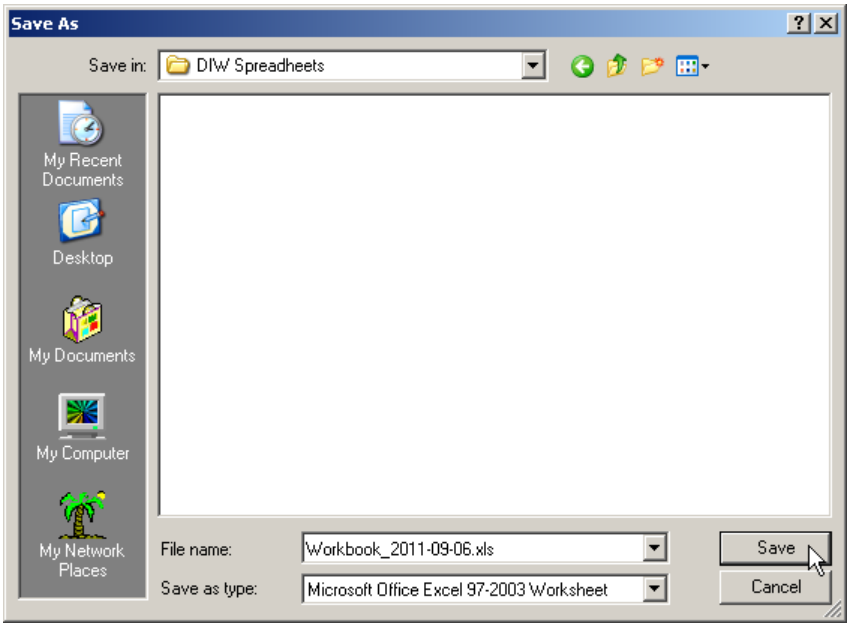


If you select "Open," Excel will display a preformatted table that you can adjust using Excel functionality, and then print or save.



Geography	Frequency	End Date	Mnemonic	Short Label
Urban Wage Earners and Clerical Workers				
United States	MONTHLY	Dec 2007	CPIWR@US.M	CONSUMER PRICE INDEX (1995GII) - ALL ITEMS - WAGE-EARNERS, SA - U
United States	MONTHLY	Dec 2007	CPIWNS@US.M	CONSUMER PRICE INDEX (1982-84) - ALL ITEMS - WAGE-EARNERS, NSA -
United States	MONTHLY	Dec 2007	CPIW@US.M	CONSUMER PRICE INDEX (1982-84) - ALL ITEMS - WAGE-EARNERS, SA - U
United States	MONTHLY	Dec 2007	M111PSTTR1.M	CONSUMER PRICE INDEX-URBAN WAGE EARNERS AND CLERICAL WORKERS-

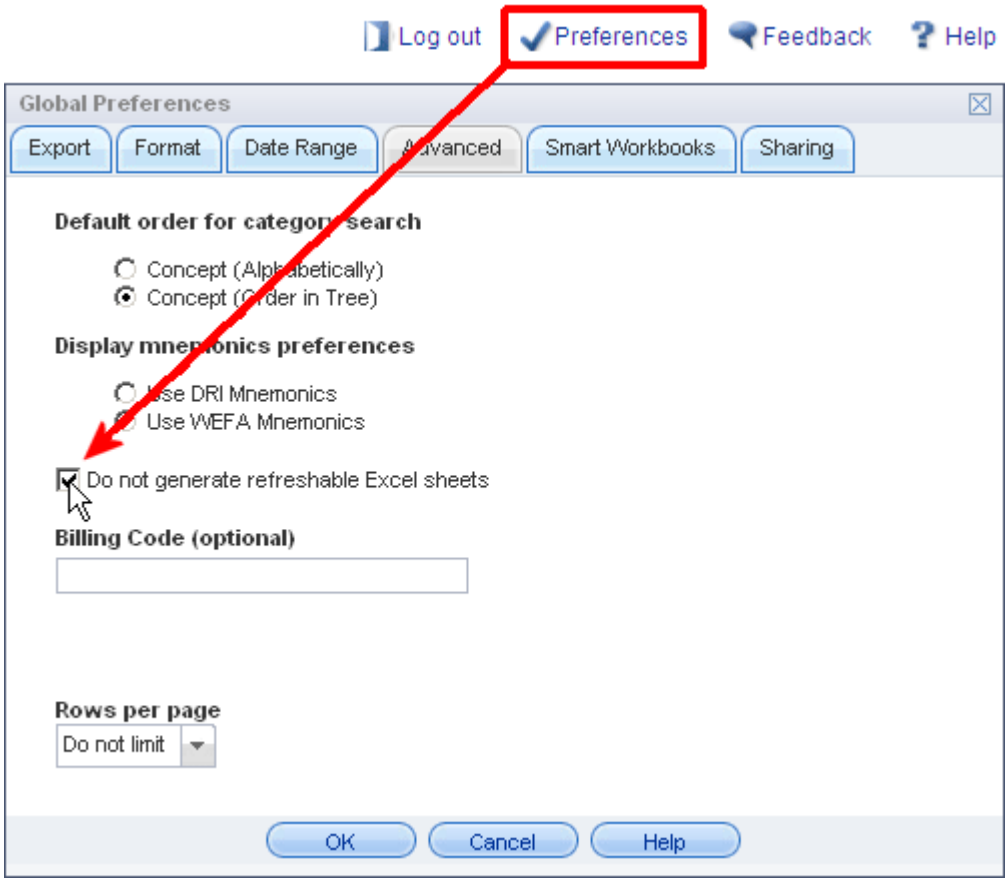
If you select "Save," a **Save As** dialog box appears for you to save the workbook, after renaming it if necessary, to any location on your system.



Refreshing a DataInsight-Web Workbook in Excel

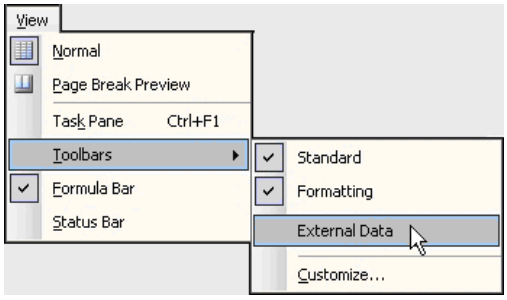
You can update your workbook in Excel 2003 using "External Data" toolbar and in Excel 2007 using the "Data" tab.

You also can disable this feature on the "Advanced" tab under the Preferences menu option.



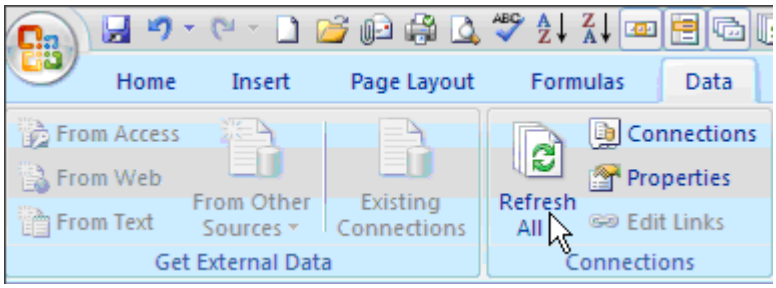
Accessing the External Data toolbar in Excel2003

To display the **External Data** toolbar in Excel 2003, if it does not appear in the Excel toolbar area, use the **View > Toolbars > External Data** menu options.



Accessing the Refresh All Feature in Excel 2007

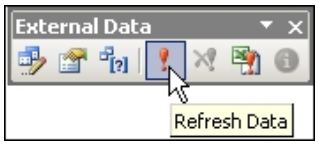
To refresh workbook data in Excel 2007, use the "Refresh All" option on the **Data** tab.



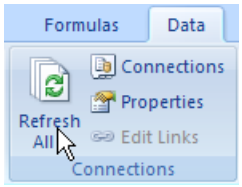
Refreshing Data in Excel 2003 and 2007

To refresh the DataInsight-Web data in an Excel workbook:

1. After making modifications or opening a previously saved DataInsight-Web workbook, click the "Refresh" button on the **External Data** toolbar in Excel 2003, or click on "Refresh All" on the **Data** tab in Excel 2007, to pull in the latest data.

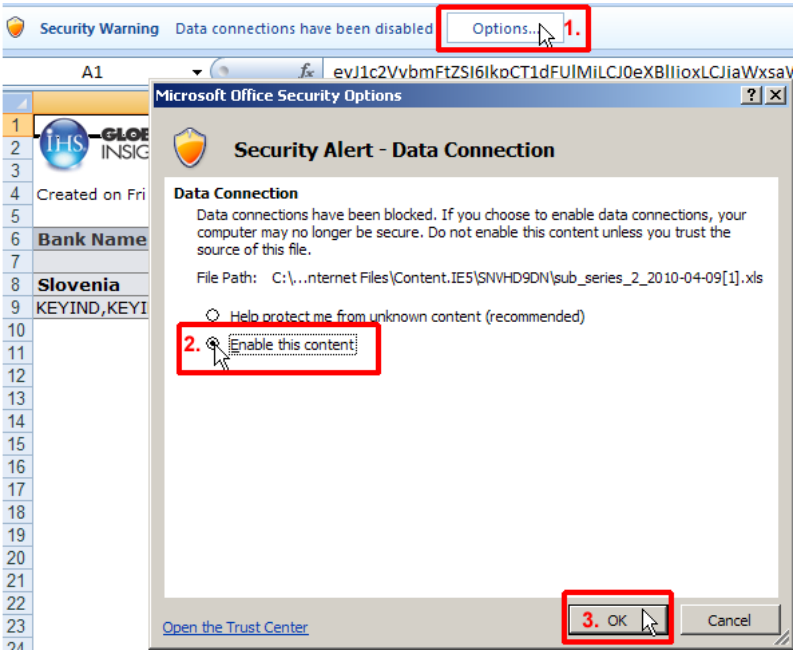


OR



2.

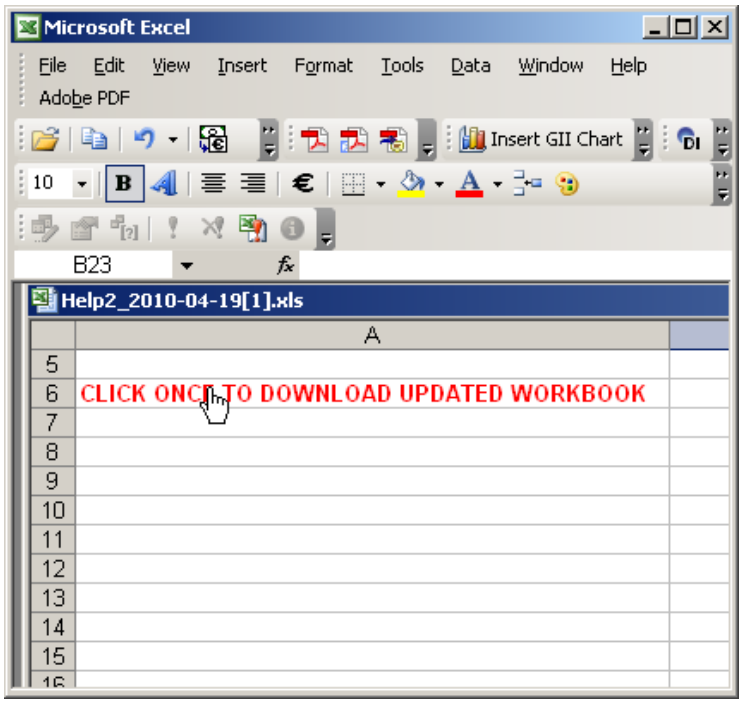
(For Excel 2007 only) When you export a Workbook to Excel 2007 you will see a Security Warning alert. Click "Options," click "Enable this content," and then click "OK."



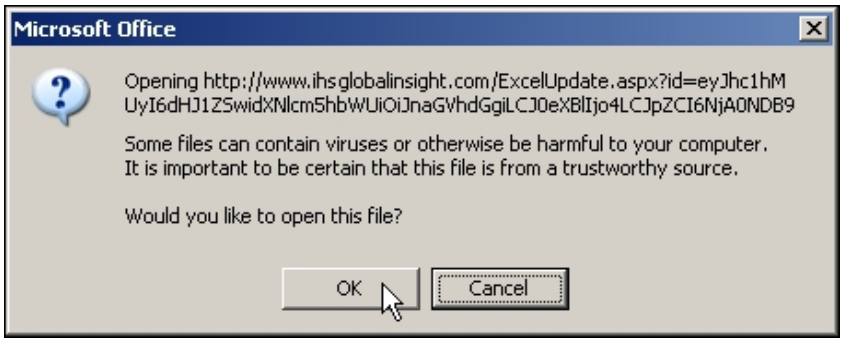
3. Login with your MyInsight credentials. You only have to do this once per Excel 2003 or 2007 session.

4. If you exported a smart workbook containing a single tab, current data will be pulled in and the refresh process will be complete.

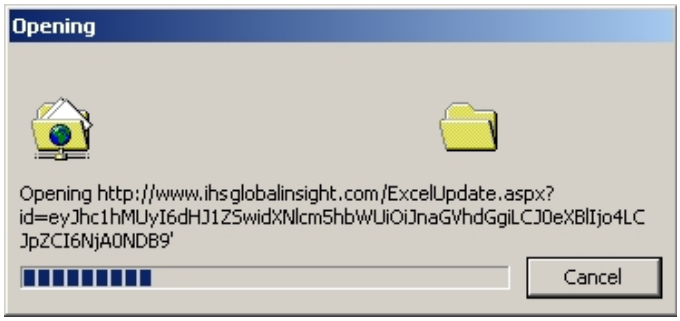
   If you exported a workbook containing multiple tabs, a download link will display. Click it ONCE as it indicates and go on to step 5.



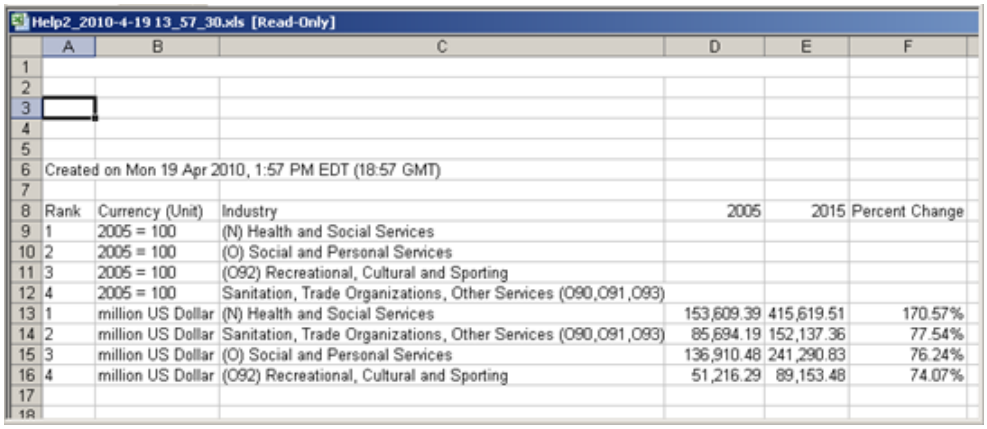
5. Click “OK” to open the refreshed copy of your workbook.



A status screen will appear.



6. Current data will appear in an updated, read-only copy of your workbook (if it has multiple tabs).



Help2_2010-4-19 13_57_30.xls [Read-Only]

	A	B	C	D	E	F
1						
2						
3						
4						
5						
6	Created on Mon 19 Apr 2010, 1:57 PM EDT (18:57 GMT)					
7						
8	Rank	Currency (Unit)	Industry	2005	2015	Percent Change
9	1	2005 = 100	(N) Health and Social Services			
10	2	2005 = 100	(O) Social and Personal Services			
11	3	2005 = 100	(O92) Recreational, Cultural and Sporting			
12	4	2005 = 100	Sanitation, Trade Organizations, Other Services (O90,O91,O93)			
13	1	million US Dollar	(N) Health and Social Services	153,609.39	415,619.51	170.57%
14	2	million US Dollar	Sanitation, Trade Organizations, Other Services (O90,O91,O93)	85,694.19	152,137.36	77.54%
15	3	million US Dollar	(O) Social and Personal Services	136,910.48	241,290.83	76.24%
16	4	million US Dollar	(O92) Recreational, Cultural and Sporting	51,216.29	89,153.48	74.07%
17						
18						

Save the [Read-Only] copy under a different workbook name and it will be editable.

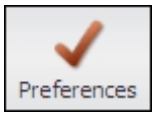
Note: If you delete rows or columns of data after exporting your data to Excel, these will reappear after you refresh.

Preferences and Settings

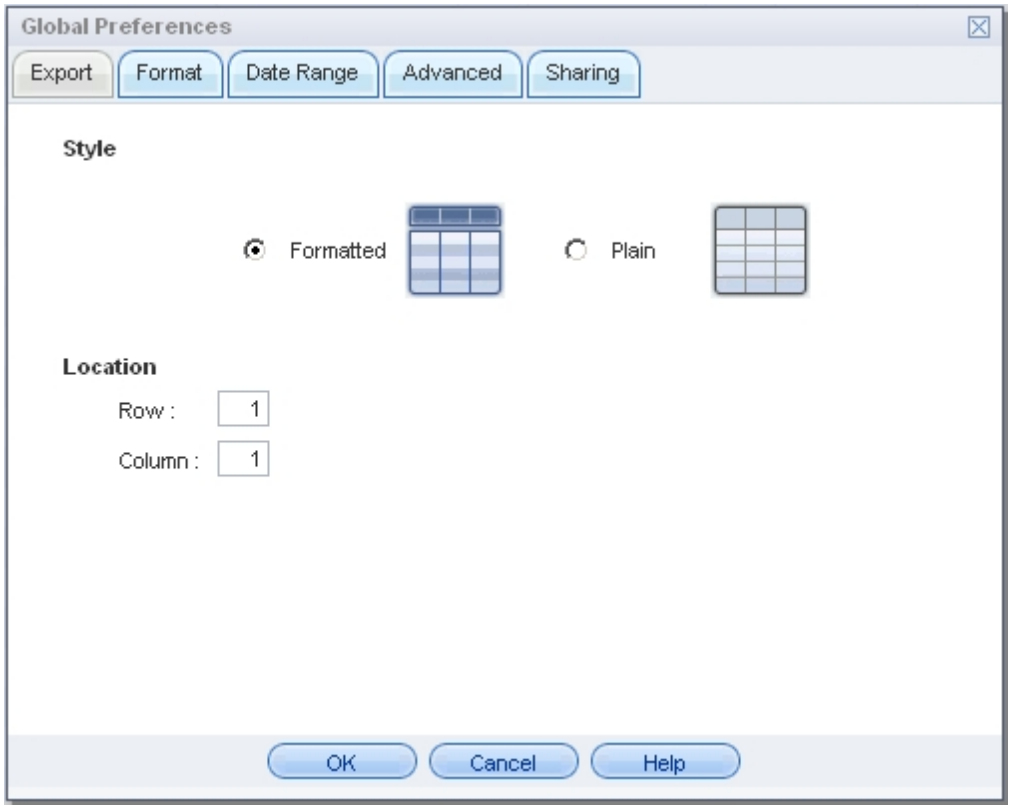
DataInsight-Web offers many options to customize the way your data will display and export. **Preference** options are available at a global level, where defaults can be specified for the entire application, as well as at the workbook level, where an individual workbook may have its own unique settings.

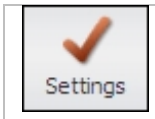
Preferences and Settings Overview

OR

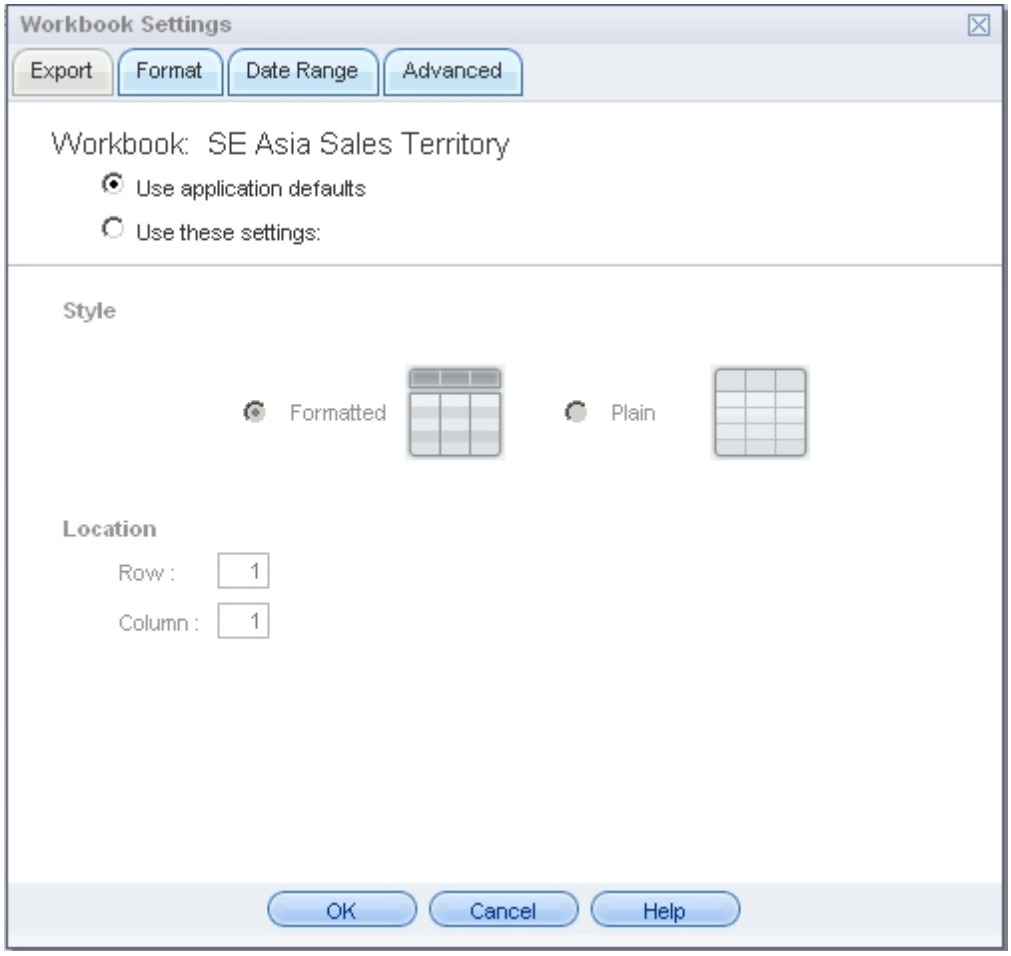


Use “Preferences” to set global defaults for all workbooks.





When you have a workbook selected, use “Settings” to specify settings for that one particular workbook, overriding any global default settings for all workbooks.



Most options can be set at either the global or workbook level.

Note that at the workbook level you can choose to use application defaults, or to use settings specific to a workbook.

Global Preferences and Workbook Settings Explained

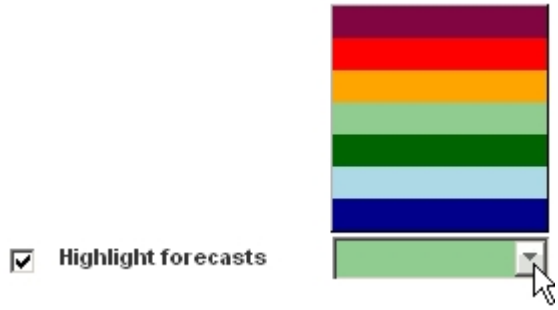
Tab	Option and Description
Export	*Style*  **Formatted** This style displays a table that has formatting applied to it to make it more attractive and easier to see the column and row headers. Results are grouped, with each "grouping item" having its own row header with the members of the group below it. (Example: If grouping by country, there will be a row with the name of the country and the following rows will contain the series for that country.) Data that has "Data Edge" information associated with it will be displayed according to the Highlight Forecast selection of the Format tab. **Plain** This style is an Excel spreadsheet without formatting, and is recommended when the sheet is being used programmatically or as the input to another process, where style information and grouping could be a problem. With plain style, each "grouping item" does not appear on a row by itself (like in Formatted). Instead, the grouping items are repeated in their own column, so each row has this information.
	Location  The cell location (row number and column number) is where you would like the data to start in the generated Excel document.
Format	*Orientation*  Indicate whether you want values in rows or columns by making a selection here.
	Decimal Places  Select the number of decimal places to be displayed. **Note:** When exporting data, full values will be exported to Excel. This setting determines the format Excel will apply to the data. Once in Excel, data can be reformatted to show additional decimal places.
	Display dates as  For dates that do not pertain to a single calendar day, such as "2000 Q1" or "2000", select whether these dates should be passed to Excel

as the start or end of the period in question.

Example:

For 2001 Q1 data, export this to Excel as 1 Jan 2001 (start of period) o r 31 Mar 2001 (end of period).

Highlight forecasts



For data where a "data edge" is reported, this preference lets you display forecast values in the highlight color of your choice for both DataInsight-Web tables and Excel spreadsheets after you export them.

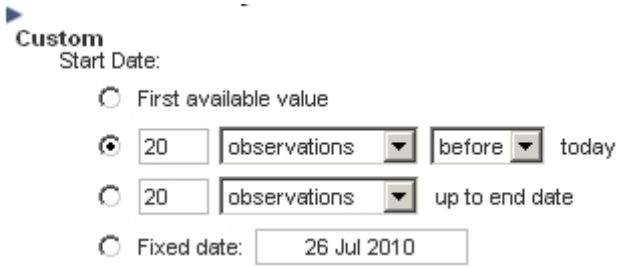
Date Range

Set amount of history and forecast

Select the date range in a number of years, quarters, months or observations in the past and in the future. Note: This selects the date range relative to TODAY—it does not determine the data edge of individual series.

Custom

Start Date



First available value:

Select to export time series data, beginning with the first observation of the data that exists in our database.

Number of values before or after today:

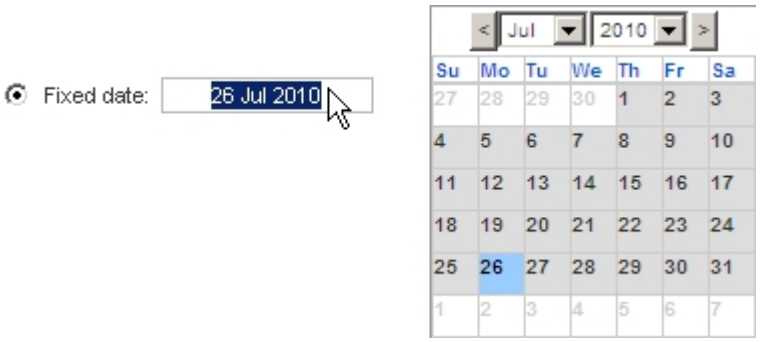
Enter the number of observations, years, quarters, or months to export, starting with today and going back into time for historical data, or ahead into the future for forecast data.

Number of values up to end date:

Enter the number of observations, years, quarters, or months to export, going back into time from the end date you specify in the following section.

Fixed Date:

Enter an end date or select it by clicking once on the date and using the calendar tool provided.



End Date

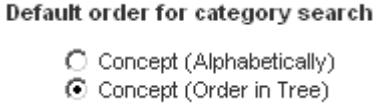
Last value:
Select to export time series data, ending with the last observation of the data that exists in our database.

Today:
Select to use today's date as the end date.

Number of values before or after today:
Enter the number of observations, years, quarters, or months to export, starting with today and going back into time for historical data or ahead into the future for forecast data.

Fixed Date:
Enter an end date or select it by clicking once on the date and using the calendar tool provided.

Advanced *Default order for Category Search*

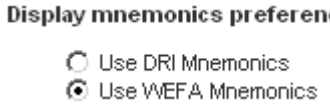


When ordering series by concept (by clicking on the column header to sort ascending or descending), the default behavior is to sort alphabetically. This control lets you change the sorting behavior so that sorting is not done alphabetically, but is done by the order of the concept in "Available Criteria" in category search.

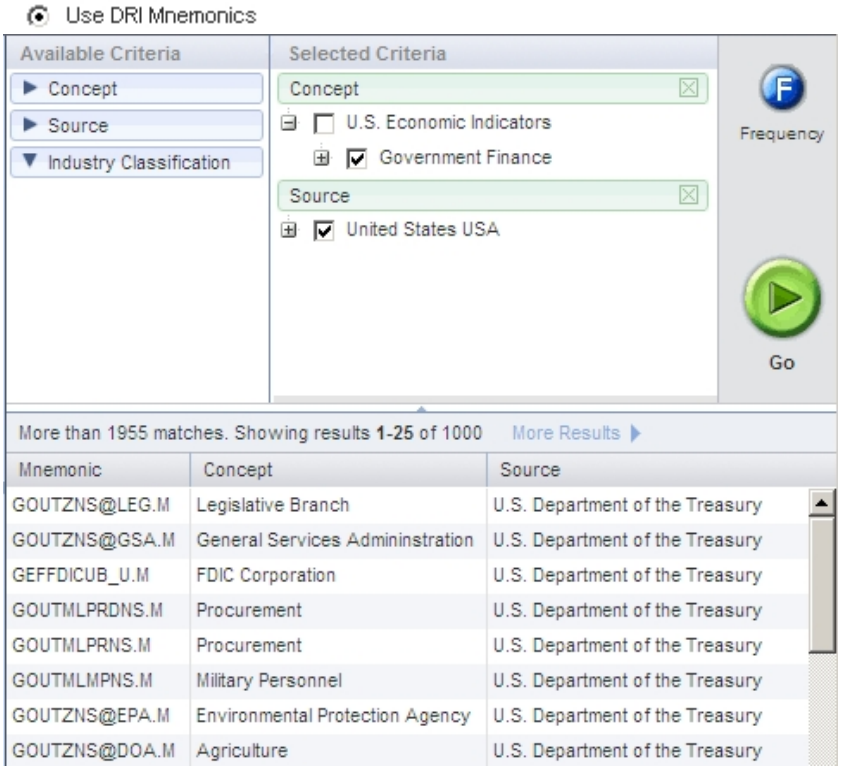
For example, if concepts appear in category search in "Available Criteria" in this order—Sales, Cost of Goods Sold, Gross Profit,

Expenses, Net Profit—this preference, when set for "Concept (Order in Tree)," will display results in this same order, not alphabetically.

Display mnemonics preferences



When there are series that have both a DRI and WEFA series name (i.e., the series have been merged), this selection allows you to set which name you want displayed.



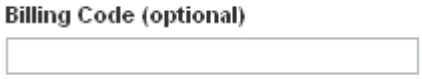
Note: Click on “Go” to refresh the mnemonics if you change the display preference of series already appearing in the results list. Only the merged series will display differently (as in the examples above).

Non-Refreshable Sheets

When exporting a workbook, DataInsight-Web creates Excel documents that can be updated directly within Excel using Excel’s

built-in "External Data" toolbar. Check this box to disable this feature. (See **Exporting Data to Excel** for more information.)

Billing code



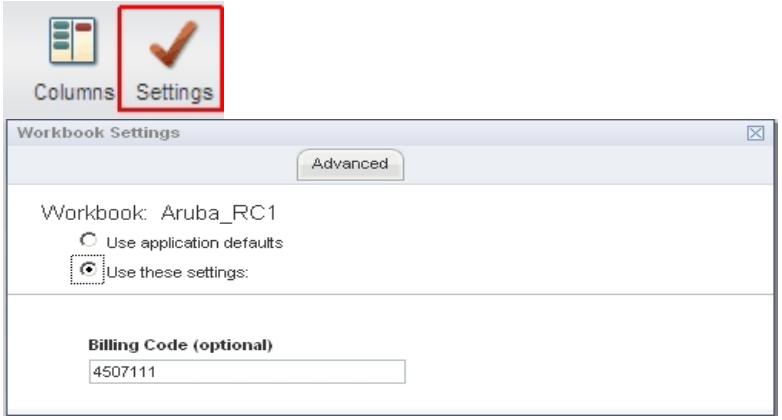
An optional billing code, which is recorded during your data usage and can be used to track data usage for billing purposes, for those users that accrue data usage related charges.

Note about Billing Codes and Sharing: The billing code comes from the source workbook when the source workbook has a *workbook-level billing code* specified, using the button at the bottom of the screen.

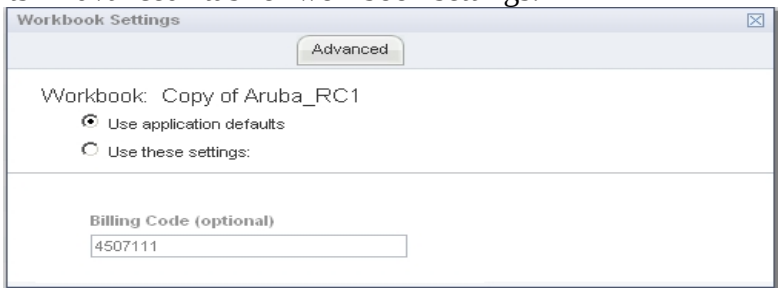
Examples:

Scenario 1

You set the billing code at the workbook level and the billing code appears on the "Advanced" tab for workbook settings.



Users that share this workbook with you will see your billing code on its "Advanced" tab for workbook settings:

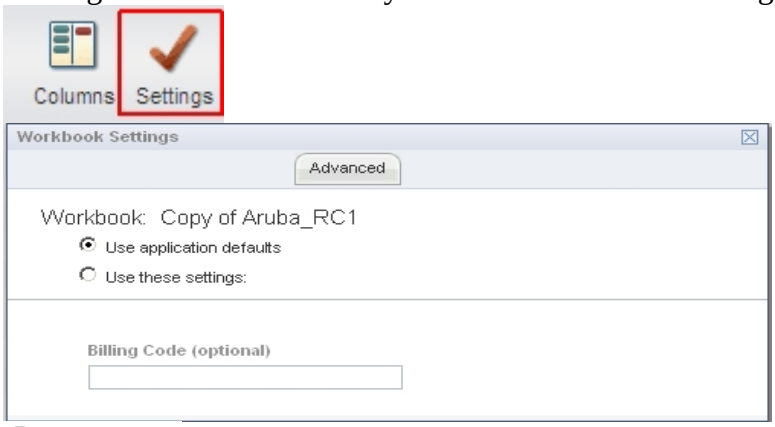


Scenario 2

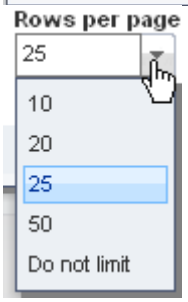
You assign a billing code to all your workbooks as a default, using global preferences, and the billing code appears on the "Advanced" tab.

When you share this workbook, other users will see nothing in the

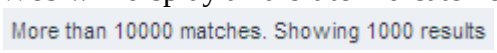
"Billing Code" field when they look at the workbook settings.



Rows per page

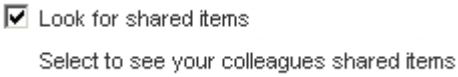


Select the number of rows, from 10 to unlimited, which will be returned by search.
Note that search results are limited to 1,000 series and DataInsight-Web will display an alert to indicate how many results it finds.



Sharing

Look for Shared Items

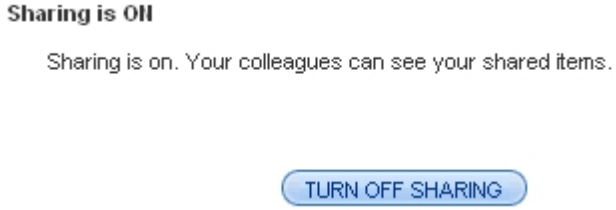


When you select the check box in this pane, shared items appear as branches under the names of your colleagues at the bottom of the navigation pane.

When you clear the check box in this pane, no shared items appear in the navigation pane.

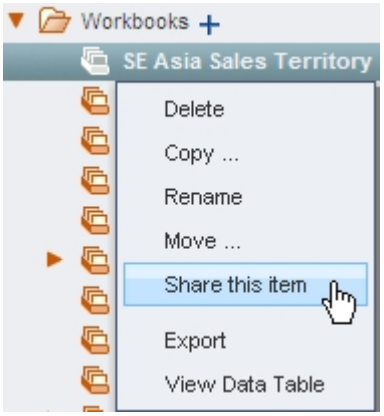
See "Billing Code" (above) for an important note about sharing.

Sharing is ON/OFF

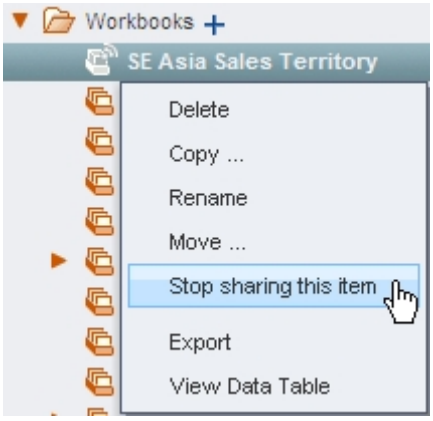


When you turn sharing on in this pane, your colleagues will see the items that you have marked for sharing.

To mark a workbook for sharing, right click on it in the navigation pane and select "Share this item" from the context menu that appears. Your shared items will appear in the lists of your colleagues.



To stop sharing, right click on the item again and select "Stop sharing this item."

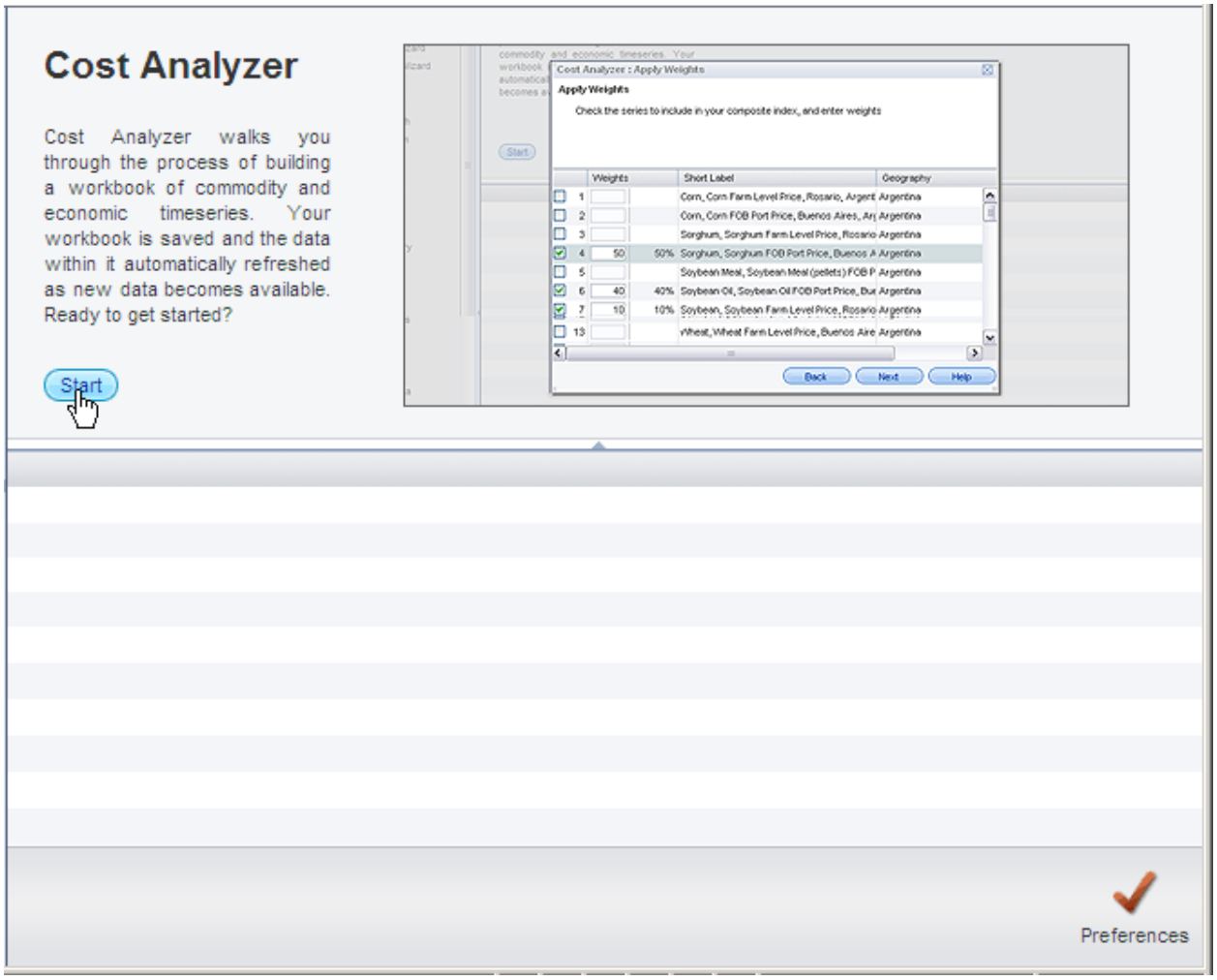


When you turn sharing off in this pane, your colleagues cannot see the items that you have marked for sharing.

Cost Analyzer

The **Cost Analyzer** tool allows you to tactically analyze a single buy or strategically evaluate an entire supply chain performance to know if your suppliers' prices are inflated or not.

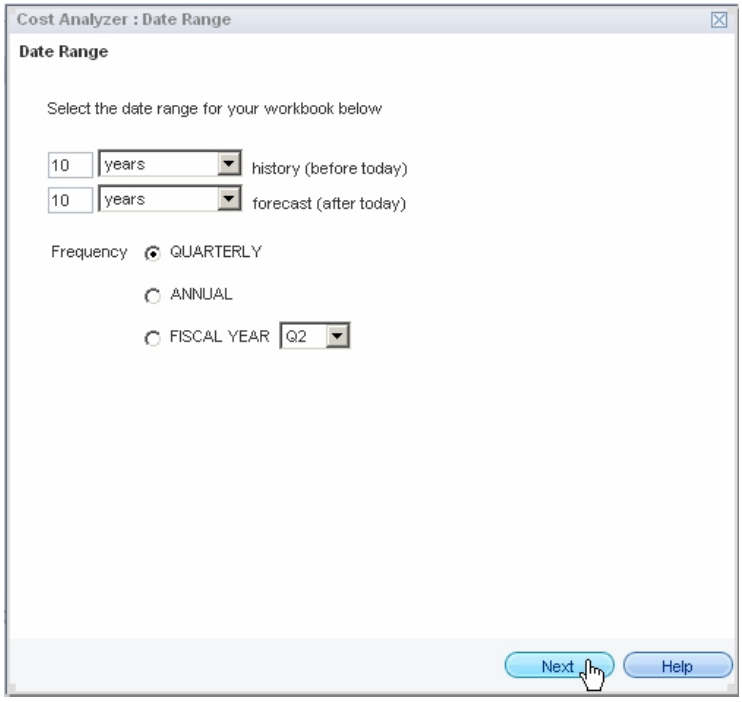
The **Cost Analyzer** wizard walks you through the process of building a workbook of commodity and economic time series. Your workbook is saved and the data within it automatically refreshed as new data becomes available.



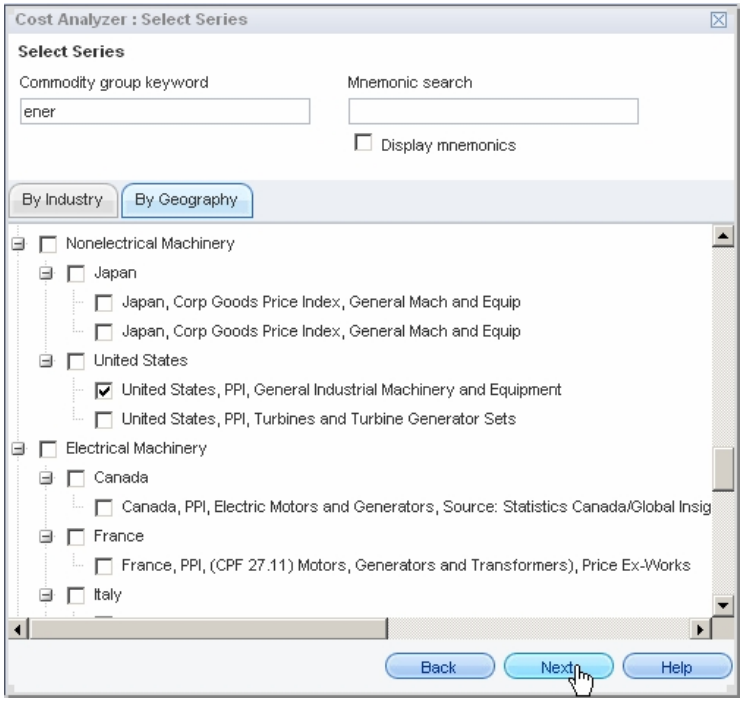
Using Cost Analyzer

Here is an overview of the steps that you will find in the Cost Analyzer wizard:

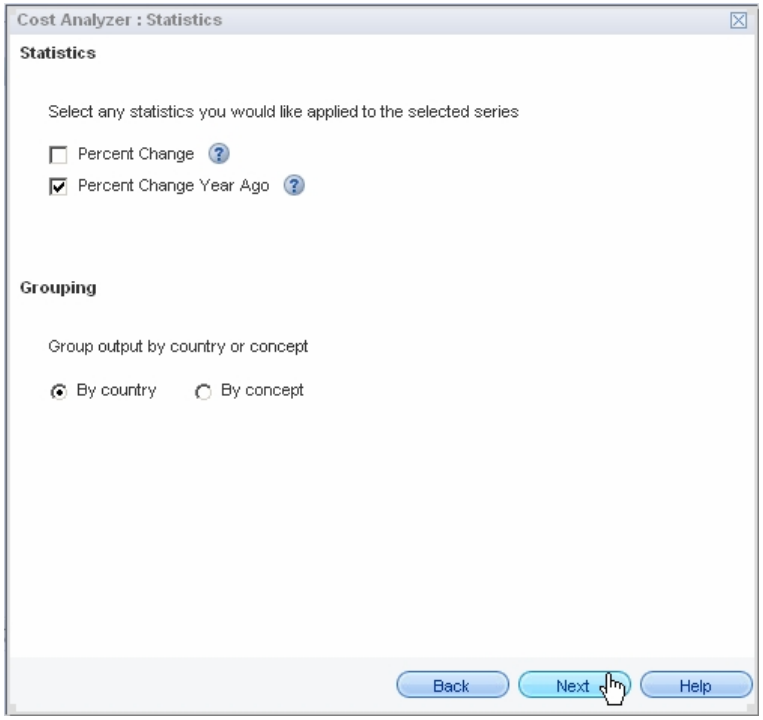
1. Give the date range and frequency of the time series data.



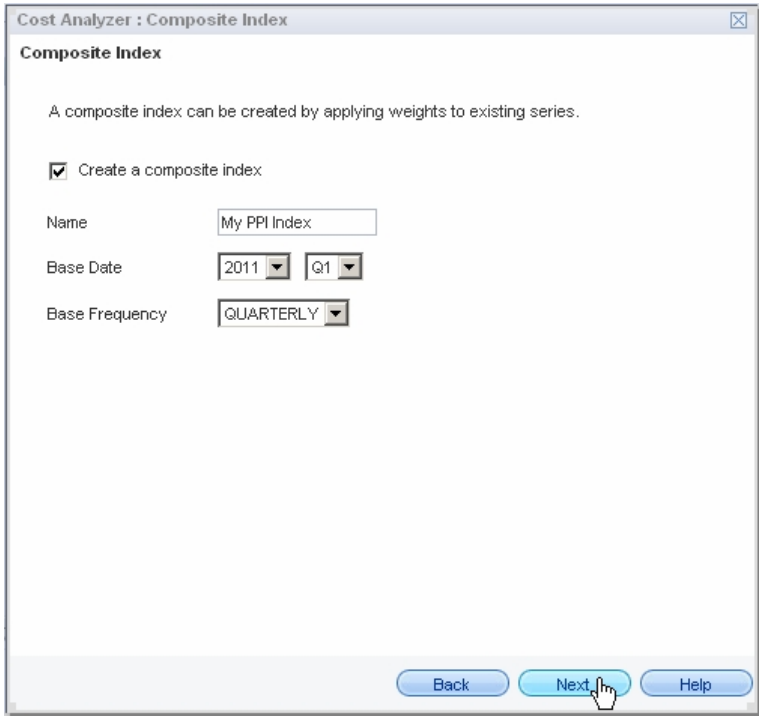
2. Select series by entering a commodity group keyword and/or a mnemonic, or by selecting the branches and nodes of the data tree directly.

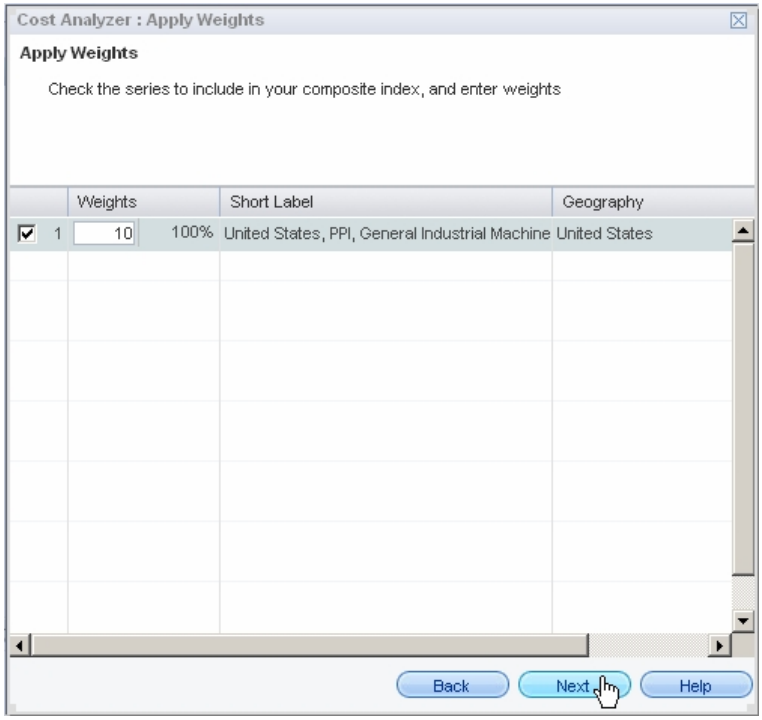


3. Select any percent change type statistics that you want to have applied to the selected series and how you want the output grouped.



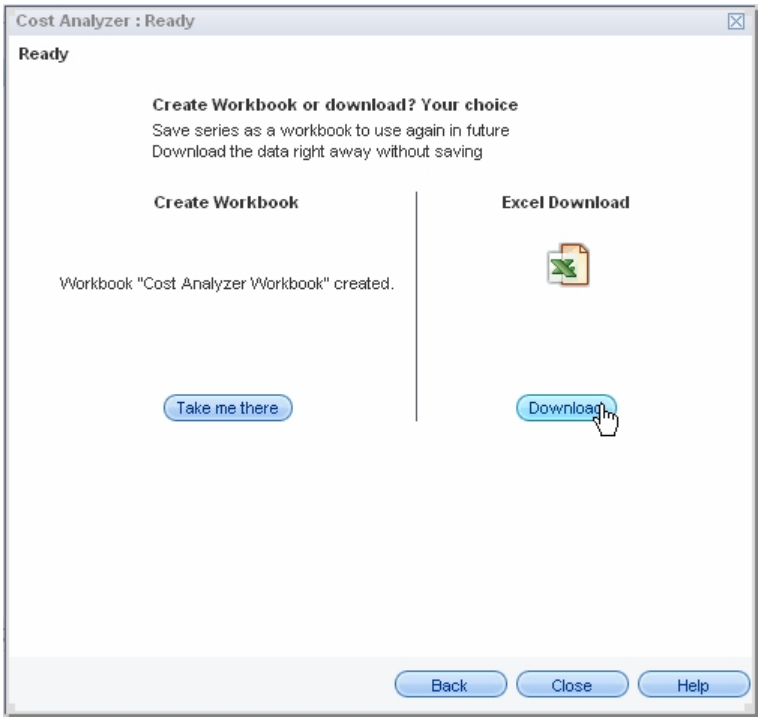
4. Select if you want a composite index, name it, make your selections and apply weights to it.



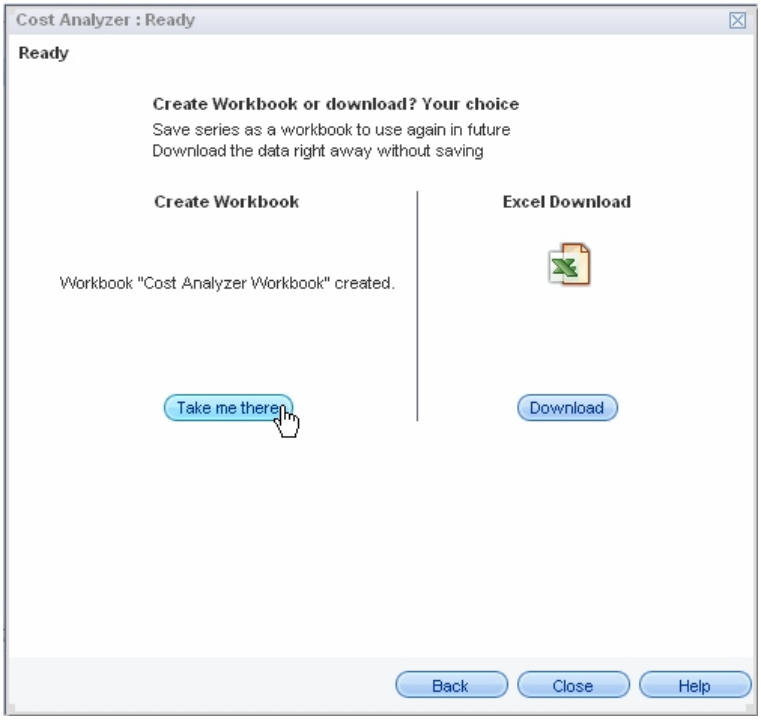


5. Save your workbook to create or download it directly into an Excel workbook.

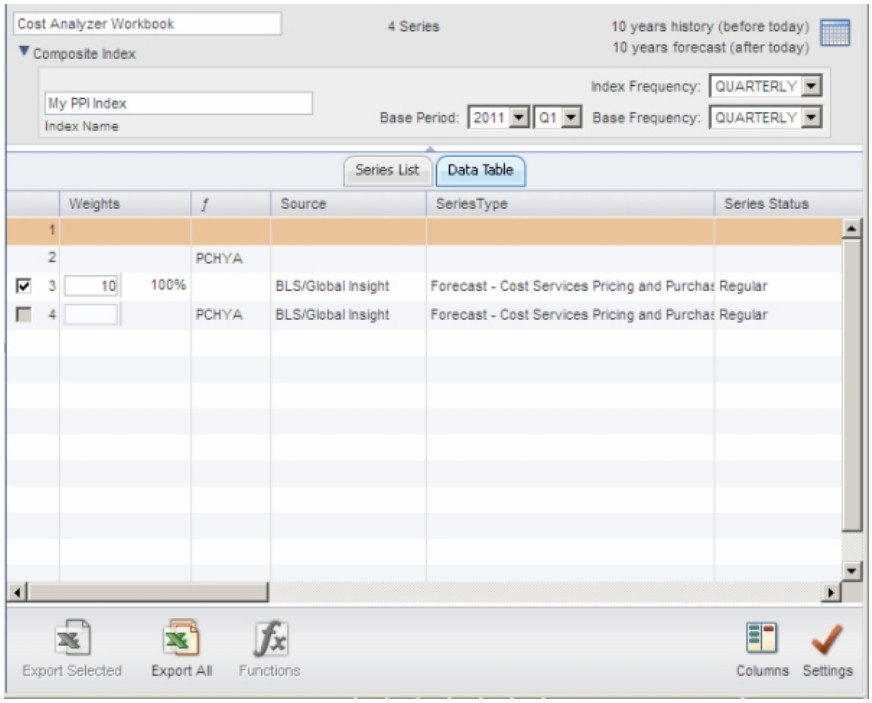
Saving Your Workbook



When you click "Save," you have the option of loading the table into DataInsight-Web by clicking "Take me there**,"** or not by clicking "Close."



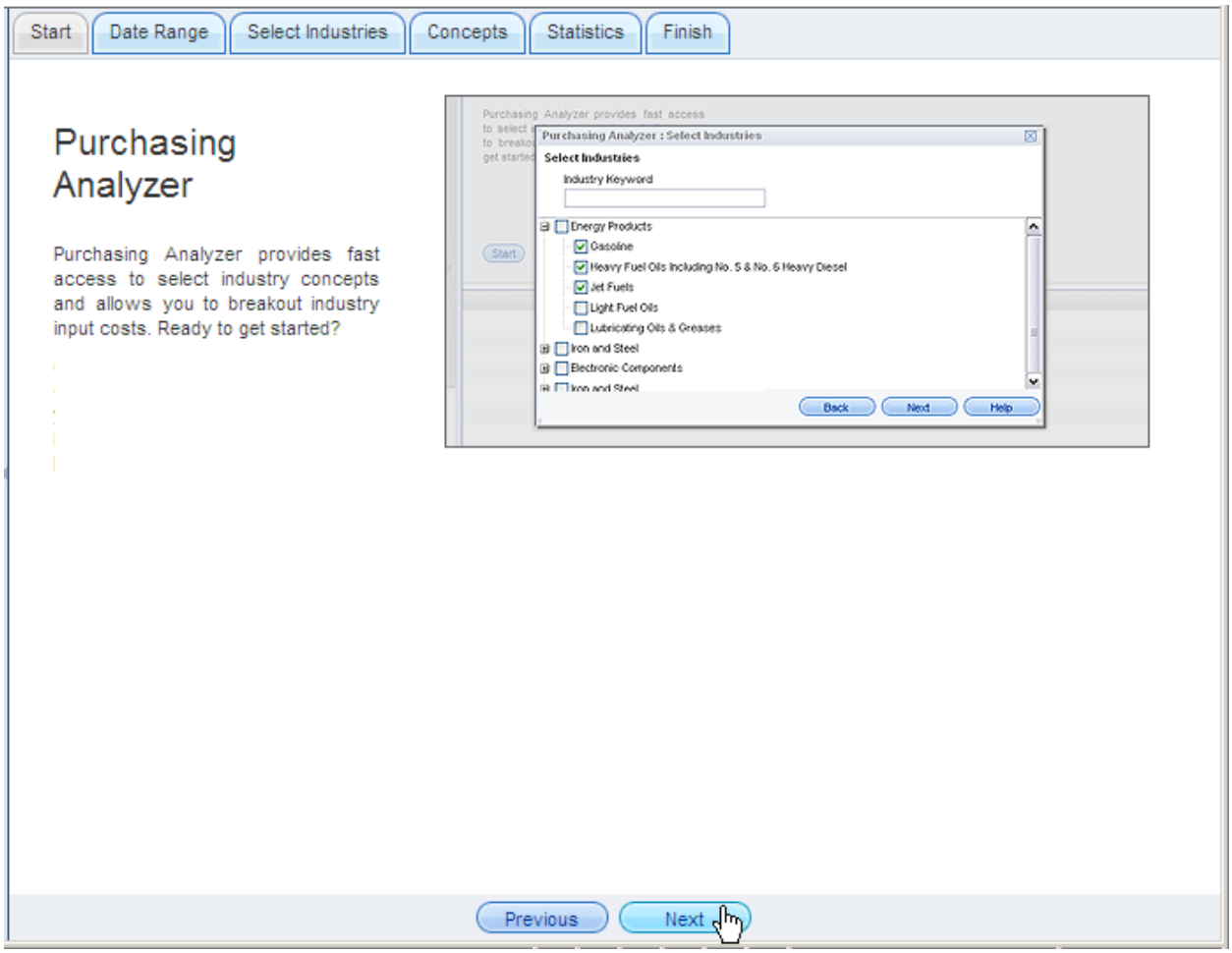
In DataInsight-Web, you can change the name of the workbook, name and modify your index if you selected one, and manipulate the table easily using the options provided.



See **Preferences and Settings**, **Exporting Data to Excel**, and **Applying Functions to Data** for more information about the Cost Analyzer screen elements.

Purchasing Analyzer

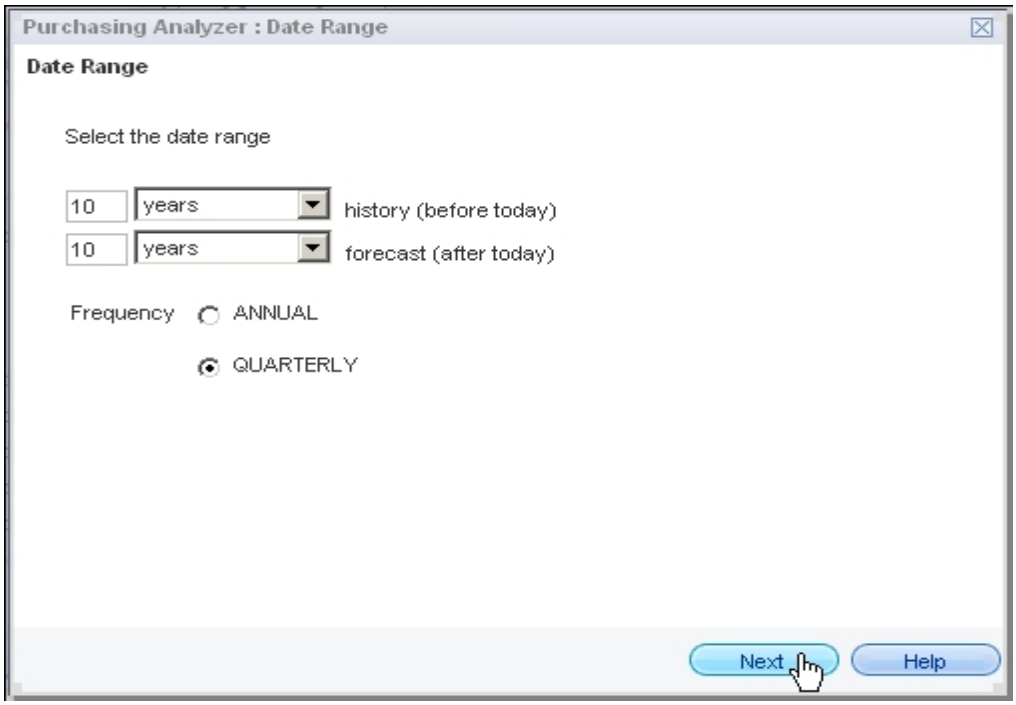
The **Purchasing Analyzer** provides fast access to select industry concepts and allows you to breakout industry input costs.



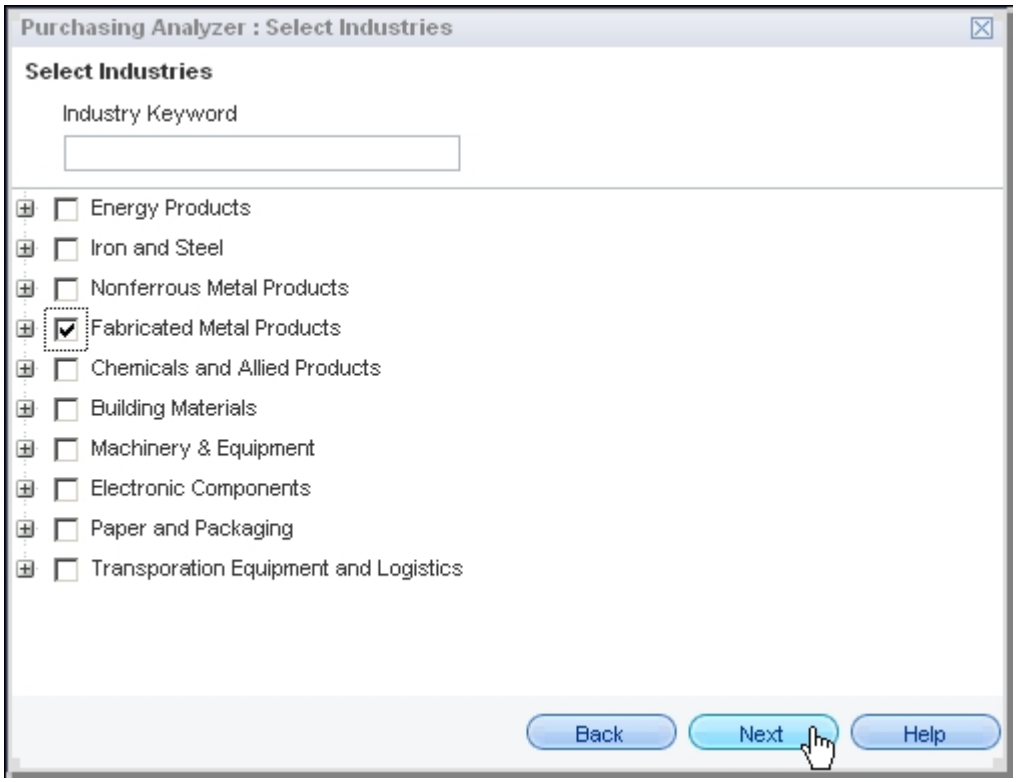
Using Purchasing Analyzer

Here is an overview of the steps that you will find in the **Purchasing Analyzer** wizard:

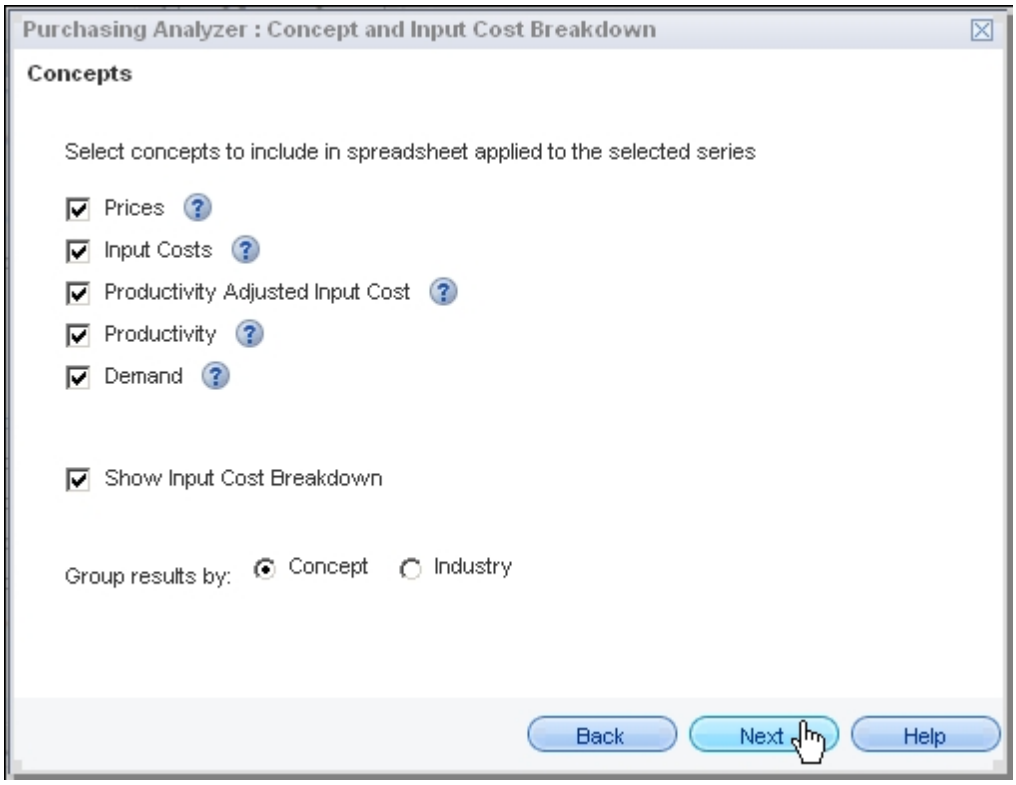
1. Give the date range and frequency of the time series data.



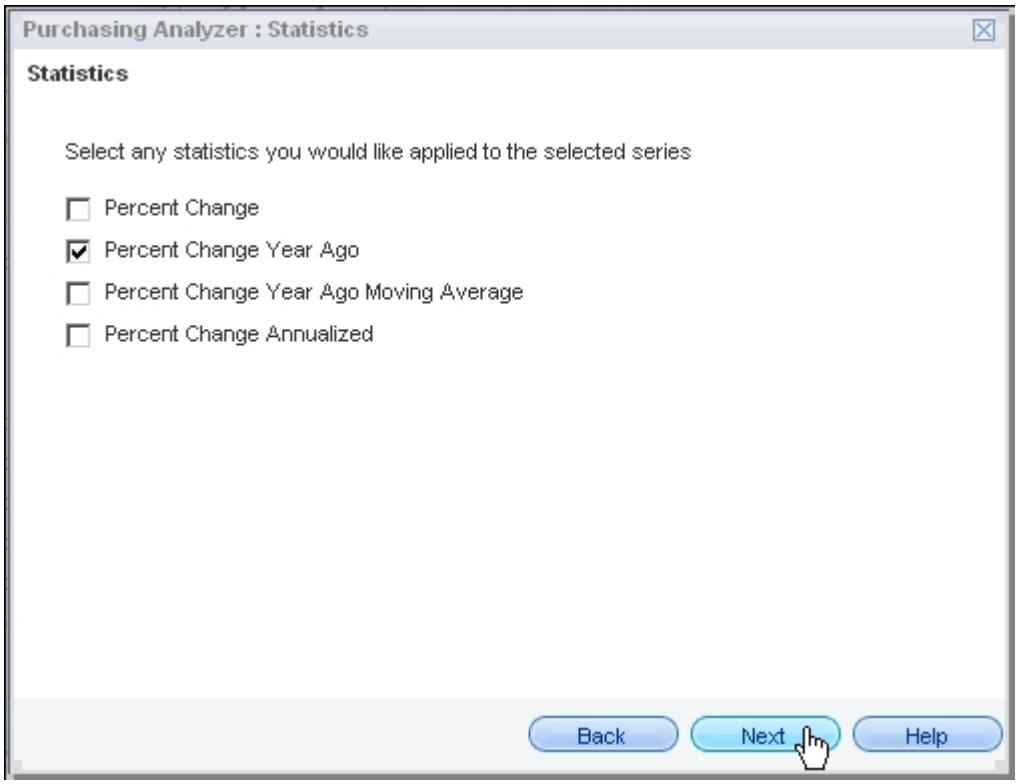
2. Find an industry by entering an industry keyword or by moving down the branches and nodes of the data tree directly and select it.



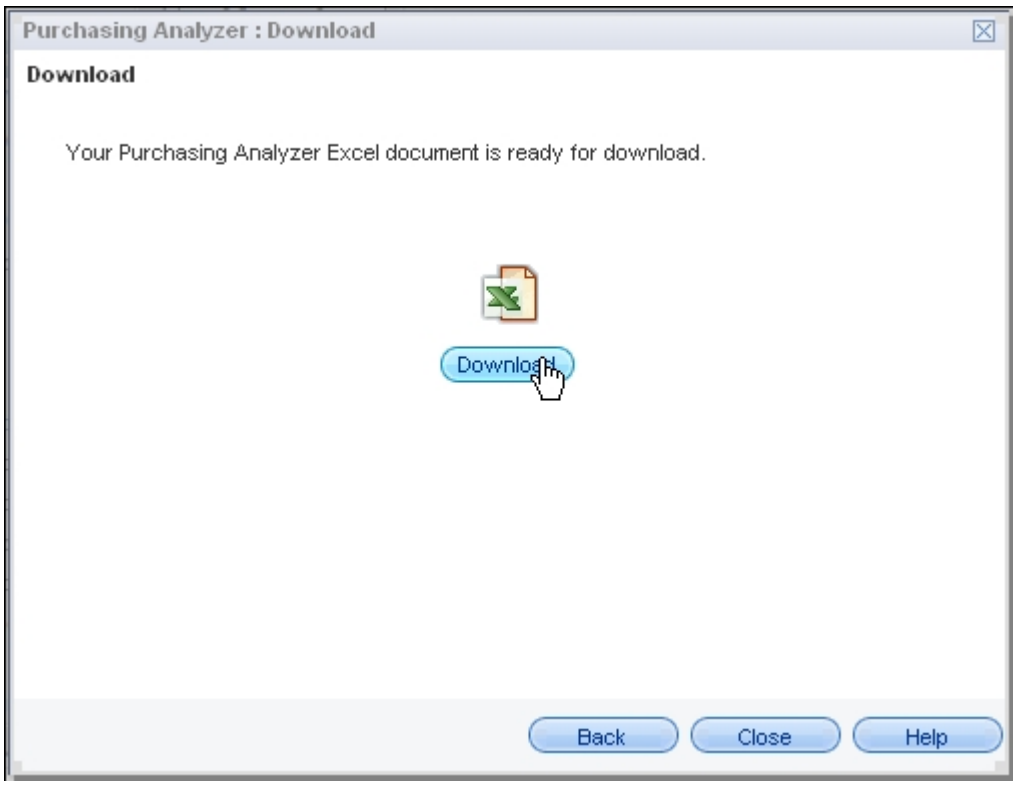
3. Select concepts to apply to your selected series.

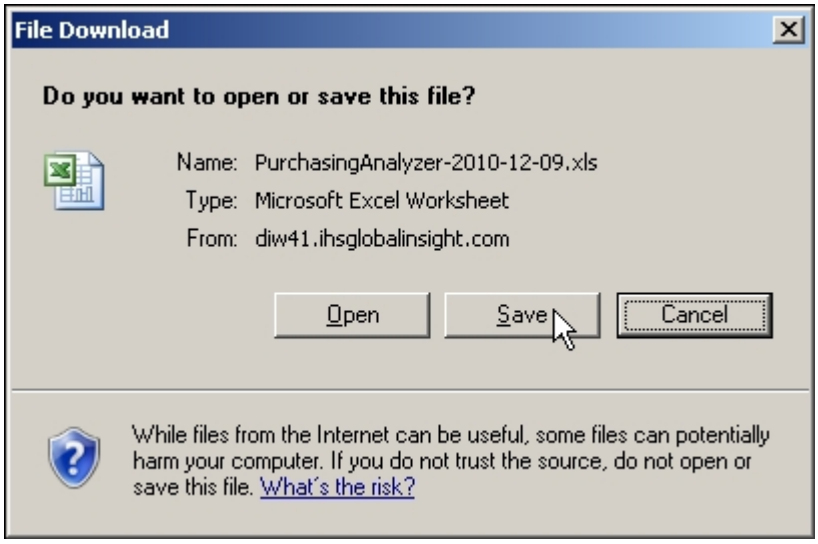


4. Select any statistics to apply to your selected series.



5. Select Download for workbook creation and select to open or save the Excel workbook using the dialog that appears.





6. Close the Download dialog to return to DataInsight-Web.

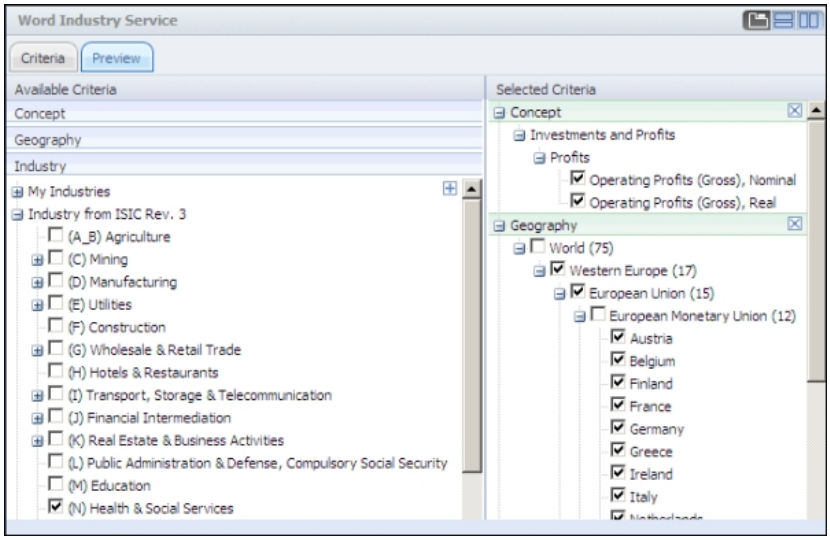
Using Smart Datagroups

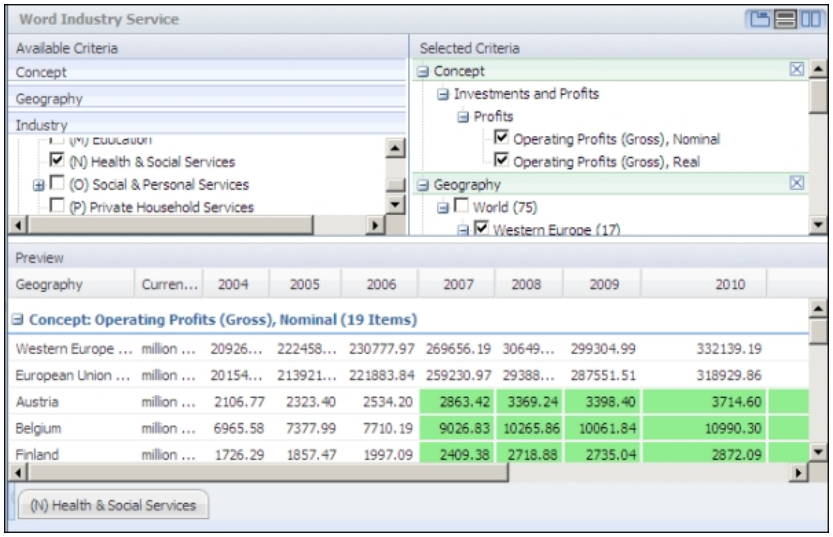
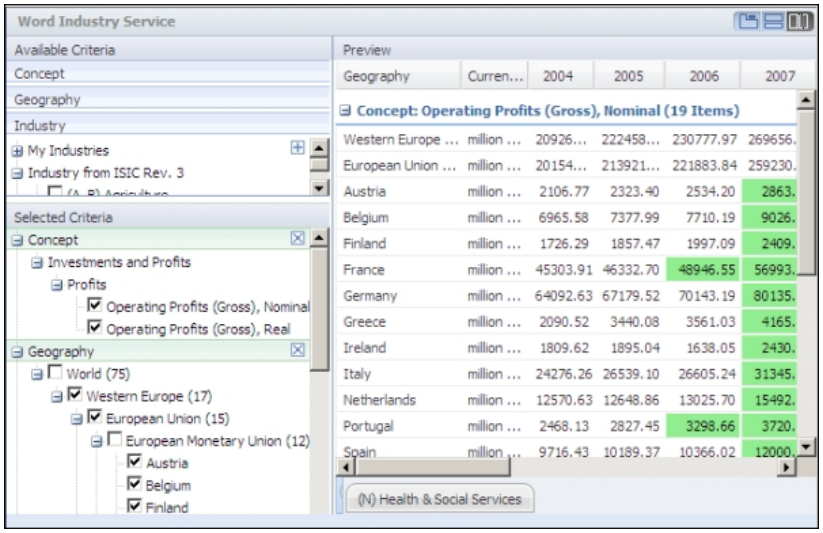
A Smart Datagroup is a categorized data set designed to support enhanced features for additional analytics such as currency conversion and rebasing, multi-dimensional data display sorted by user defined criteria and statistical ranking.

As a subscriber to a smart datagroup, you have more options available to you than our regular workgroup subscribers. A smart datagroup pulls data, derived from several sources, directly from the IHS Global Insight database.

Previewing Smart Datagroup Layouts

The smart datagroup layout icons help you customize the display of your preview.

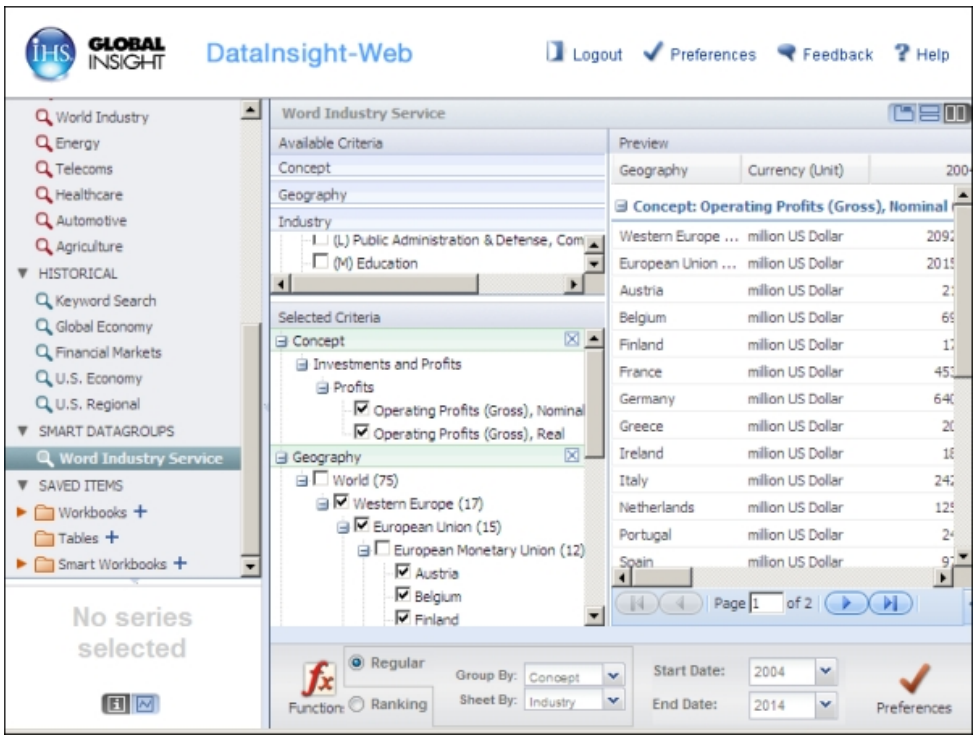
Icon	Mode	How it looks…
	**Tab**	

	Stacked	
	Side-by-side	

Smart Datagroup Options

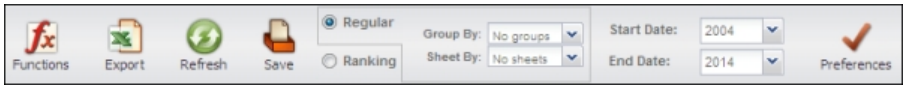
Smart datagroup features allow you to apply functions to your data, export your data and selected formatting to a new or existing Excel workbook, refresh your data with the latest information, and save your criteria for use over subsequent smart datagroup sessions.

A smart datagroup, like World Industry Service or WIS, pulls yearly data, derived from several sources, directly from the IHS Global Insight database.

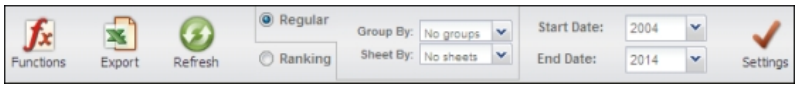


Smart Datagroup Icons and Options

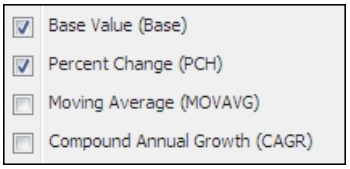
Options available when a smart *datagroup* is selected:



Options available when a smart *workbook* is selected:



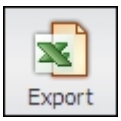
Icon/Option	What it does…
	Allows you to apply functions to your data.



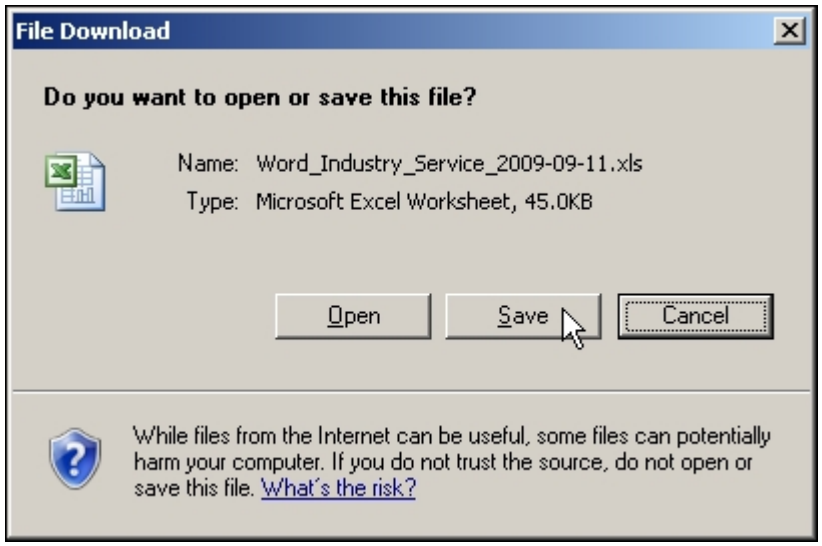
Measures	2004	2005
Value	209,261.36	222,458.03
Percent Change	13.20%	6.31%
Value	213,740.54	222,458.03
Percent Change	-0.49%	4.08%

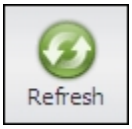
Function Definitions

Base Value:	The raw data.
Percent Change:	The change in data, from one period to another, expressed as a percentage of its value in the first of the two periods. PCH(x) Percent change of x lag 1 (x/x.1 - 1)*100
Moving Average:	A method for smoothing data by averaging a fixed number of consecutive years. MOVAVG(n, x) Moving average of x lag n
Compound Annual Growth Rate:	The smoothed year-over-year growth rate of a value over a specified period of years. CAGR(x) Compound annual growth rate of x lag 1 ((x/x.1)**p - 1)*100 p is the number of periods in each year



Allows you to open or save your data in an Excel workbook. The preview indicates how the worksheet will look.

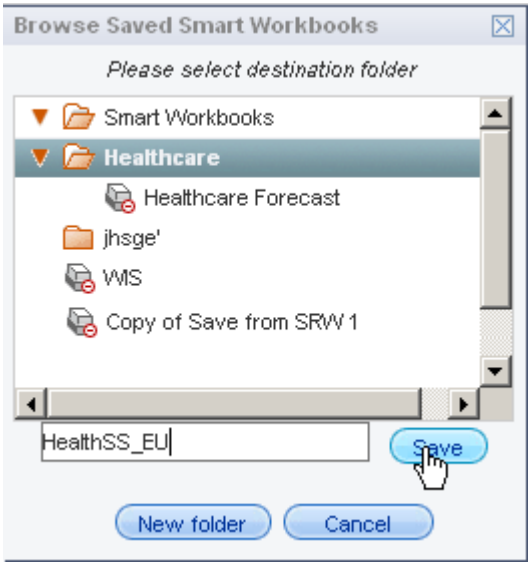




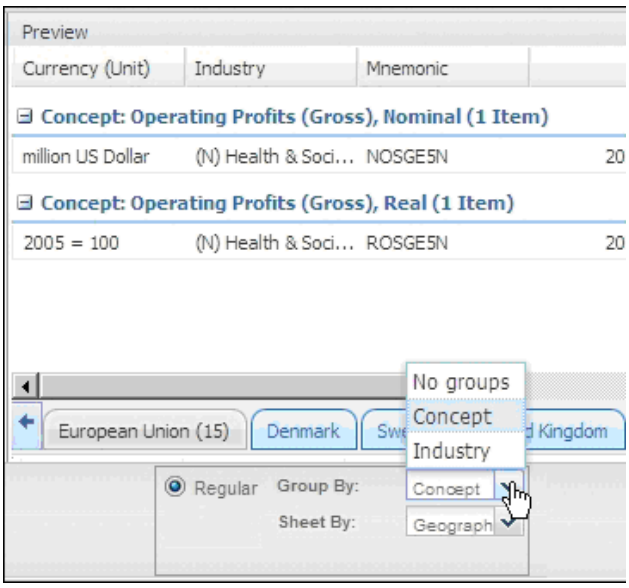
OR

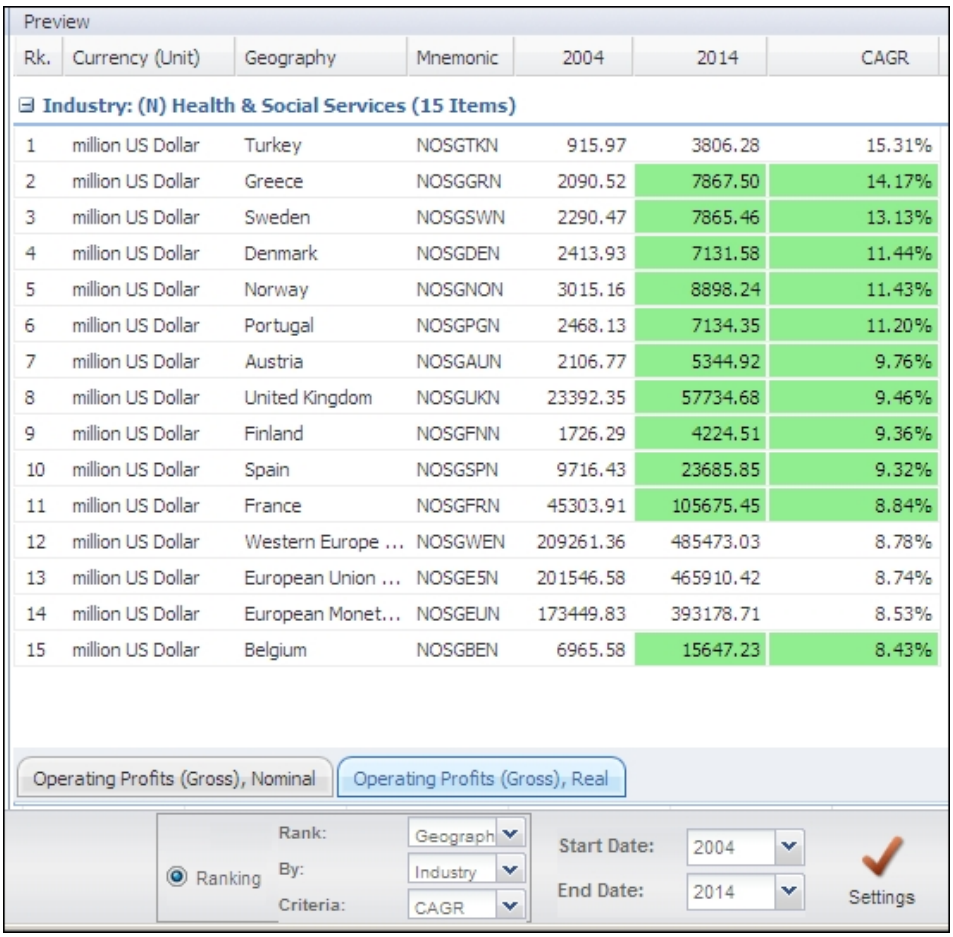
Use the "Refresh" icon to pull the latest data into your smart datagroup when the preview panel displays the need for it or you see an asterisk notation after "Preview."

Allows you to save your current selections in a new or existing smart workbook and to create a new folder for it when desired.



Note: A quick way to save your selections on the fly is to create a smart

	workbook and keep it selected before you make your selections.
	Select whether you want to group your output in your report by criteria. Note that you can select a tabular display of criteria using the "Sheet by" list.  Select to rank your output by data. Note that "Regular" is the default selection for reports but you can change the default to "Ranking" using the **Smart Workbook Settings** tab within "Preferences or Settings" (explained below).

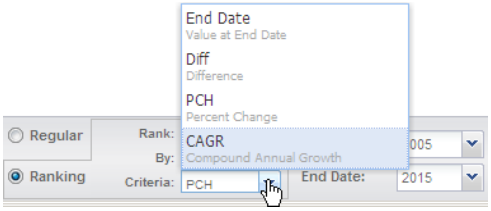

Preview

Rk.	Currency (Unit)	Geography	Mnemonic	2004	2014	CAGR
Industry: (N) Health & Social Services (15 Items)						
1	million US Dollar	Turkey	NOSGTKN	915.97	3806.28	15.31%
2	million US Dollar	Greece	NOSGGRN	2090.52	7867.50	14.17%
3	million US Dollar	Sweden	NOSGSWN	2290.47	7865.46	13.13%
4	million US Dollar	Denmark	NOSGDEN	2413.93	7131.58	11.44%
5	million US Dollar	Norway	NOSGNON	3015.16	8898.24	11.43%
6	million US Dollar	Portugal	NOSGPGN	2468.13	7134.35	11.20%
7	million US Dollar	Austria	NOSGAUN	2106.77	5344.92	9.76%
8	million US Dollar	United Kingdom	NOSGUKN	23392.35	57734.68	9.46%
9	million US Dollar	Finland	NOSGFNN	1726.29	4224.51	9.36%
10	million US Dollar	Spain	NOSGSPN	9716.43	23685.85	9.32%
11	million US Dollar	France	NOSGFRN	45303.91	105675.45	8.84%
12	million US Dollar	Western Europe ...	NOSGWEN	209261.36	485473.03	8.78%
13	million US Dollar	European Union ...	NOSGE5N	201546.58	465910.42	8.74%
14	million US Dollar	European Monet...	NOSGEUN	173449.83	393178.71	8.53%
15	million US Dollar	Belgium	NOSGBEN	6965.58	15647.23	8.43%

Operating Profits (Gross), Nominal | Operating Profits (Gross), Real

Ranking | Rank: Geograph | By: Industry | Criteria: CAGR | Start Date: 2004 | End Date: 2014 | Settings

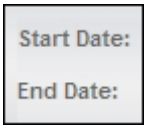
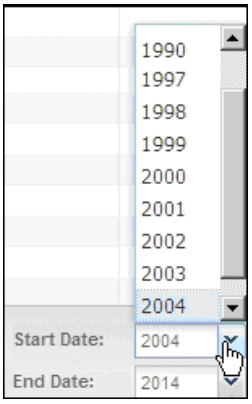
Apply functions to the data via the “Criteria” pop up list:



Select functions to be applied to that data (for all rows of output).

Select “End Date” to display the data values without a function applied.

Function Definitions	
End Date:	The last data point of your end year.
Diff	The difference between comparison values. Diff(x) Simple difference x - x.1
Percent Change:	The change in data, from one period to another, expressed as a percentage of its value in the first of the two periods.

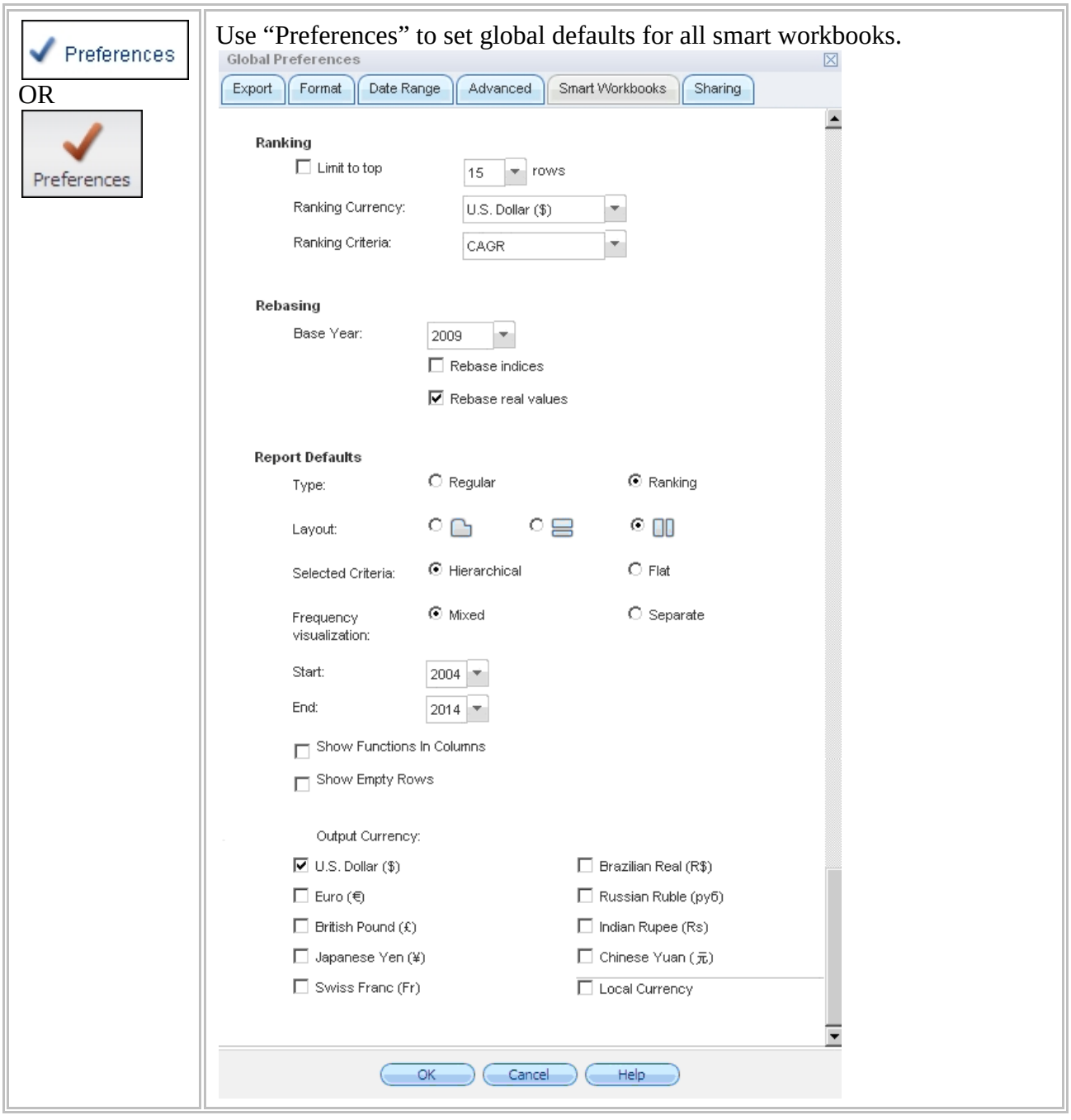
	PCH(x) Percent change of x lag 1 (x/x.1 - 1)*100
	Compound Annual Growth Rate: The smoothed year-over-year growth rate of a value over a specified period of years. CAGR(x) Compound annual growth rate of x lag 1 ((x/x.1)**p - 1)*100 p is the number of periods in each year
	Select the time span, by year, for your data. 

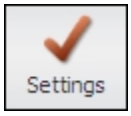
Smart Workbook Preferences and Settings

DataInsight-Web offers many options to customize the way your data will display and export. Preference options are available at a global level, where defaults can be specified for the entire application, as well as at the workbook level, where an individual workbook may have its own unique settings.

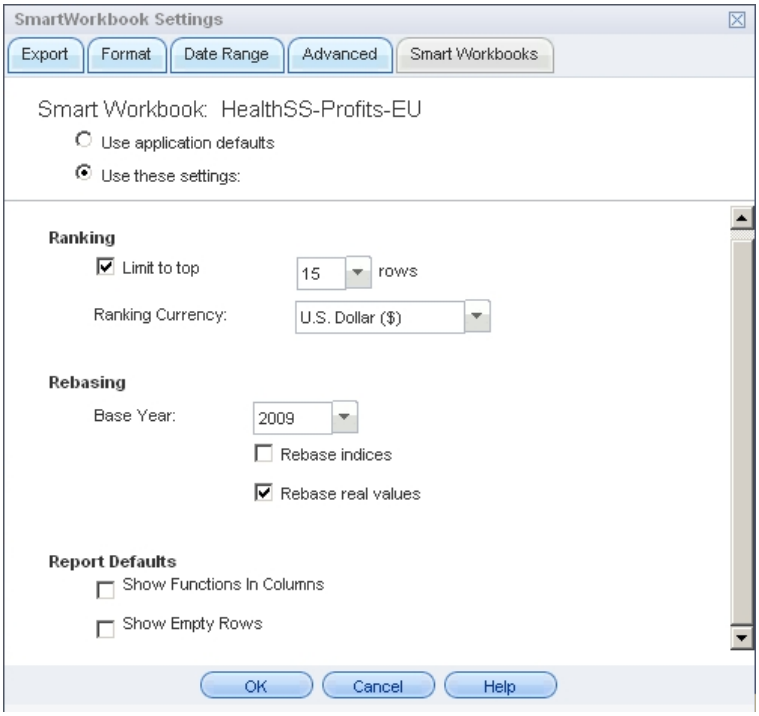
Subscribers to smart datagroups, like WIS, have special preference options applicable to smart workbooks that they create to work with smart datagroup data.

(See **Preferences and Settings** for information about the other tab options available to all DataInsight-Web users.)





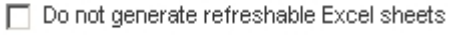
When you have a smart workbook selected, use "Settings" to specify settings for that one particular workbook, overriding any global default settings for all smart workbooks.



Most options can be set at either the global or workbook level.
Note that at the workbook level you can choose to use application defaults, or to use settings specific to a workbook.

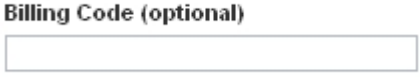
Global Preferences and Smart Workbook Settings Explained

Tab	Option and Description
Advanced	***Non-Refreshable Sheets***



When exporting smart workbooks to Excel, DataInsight-Web creates Excel documents that can be updated directly within Excel using Excel's built-in **External Data** capabilities. Check this box to disable this feature. (See **Generating a Smart Datagroup Report** for more information.)

Billing code



An optional billing code, which is recorded during your data usage and can be used to track data usage for billing purposes, for those users that accrue data usage related charges.

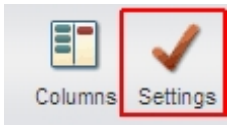
Note about Billing Codes and Sharing: The billing code comes from the source workbook when the source workbook has a *workbook-level billing*

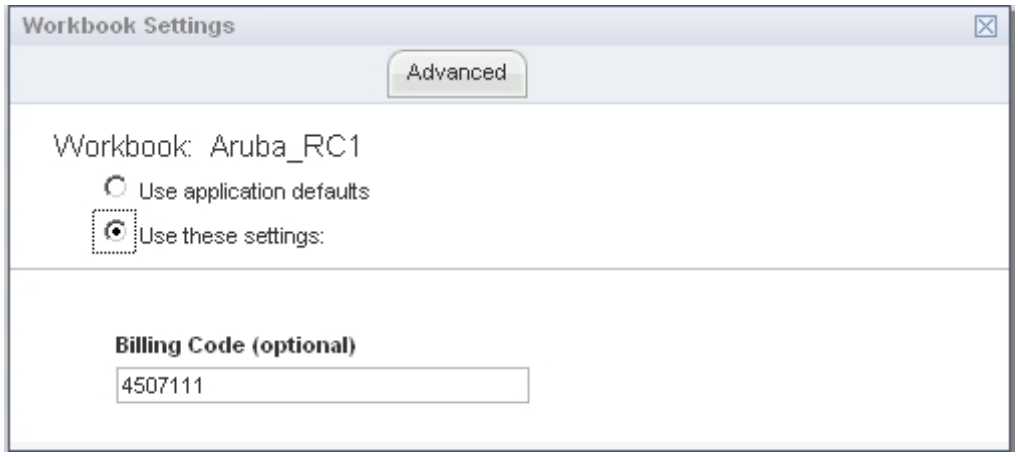
code specified, using the button at the bottom of the screen.

Examples:

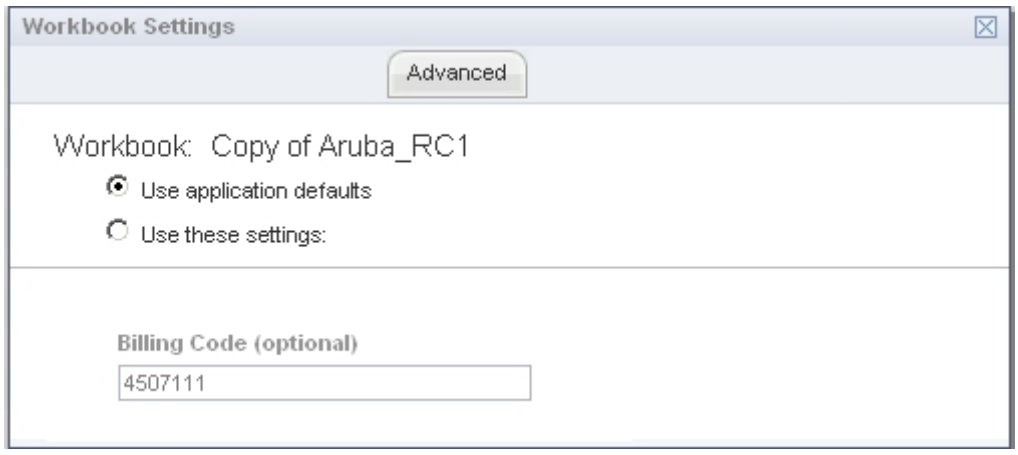
Scenario 1

You set the billing code at the workbook level and the billing code appears on the "Advanced" tab for workbook settings.



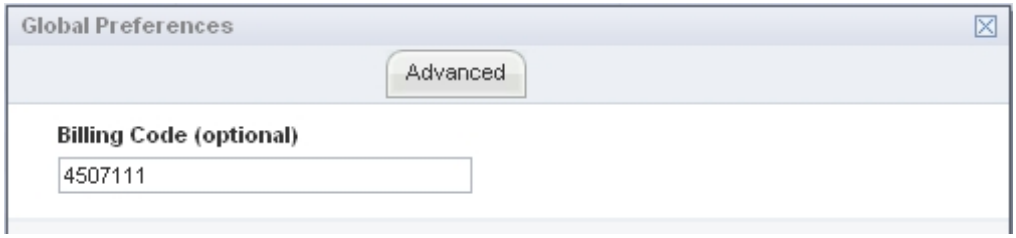


Users that share this workbook with you will see your billing code on its "Advanced" tab for workbook settings:

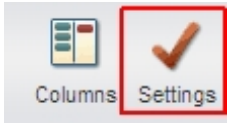


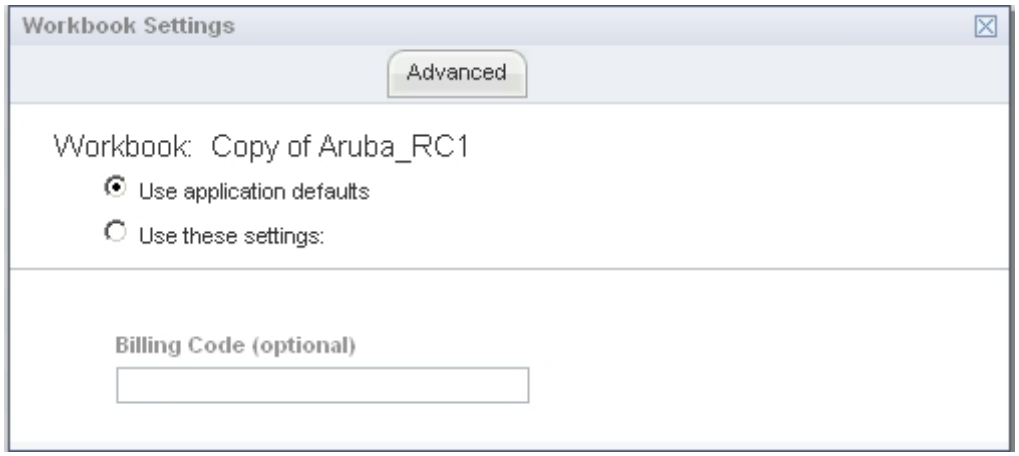
Scenario 2

You assign a billing code to all your workbooks as a default, using global preferences, and the billing code appears on the "Advanced" tab for your selected workbook.



When you share this workbook, other users will see nothing in the "Billing Code" field when they look at the workbook settings.





Smart Workbooks

Ranking

Select to limit ranking to the top five through twenty-five rows of your table or leave unchecked to rank all the values without limits.

Select ranking currency and criteria using drop-down lists.

:

Function Definitions for Ranking Criteria

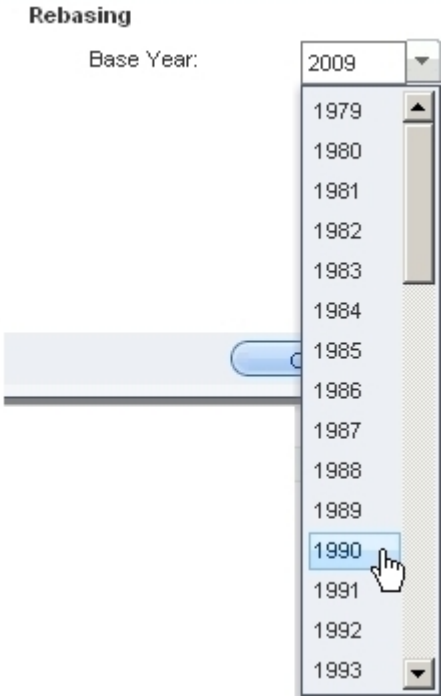
End Date	The last data point of your end year.
Diff	The simple difference between comparison values. Diff = end value - start value
Percent Change	The change in data, from one period to another, expressed as a percentage of its value in the first of the two periods. PCH(x) Percent change of x lag 1 (x/x.1 - 1)*100
Compound Annual Growth Rate:	The smoothed year-over-year growth rate of a value over a specified period of years. CAGR(x) Compound annual growth rate of x lag 1 ((x/x.1)**p - 1)*100 p is the number of periods in each year

Note: Ranking functions are not evaluated on the values lagged by 1 period. Ranking always displays only two periods: start and end. The functions which determine the ranking are calculated always on the base of these two periods.

Rebasing

The main objective of rebasing a series is to update the base year to a more current year.

Select the base year for rebasing from the scrolling list and then choose to rebase the indices, real values or both.



Generic Formula for Rebasing

Rebased_series = series * series[old base period] / series[new base period]

Note: For real monetary values it is a little bit different:

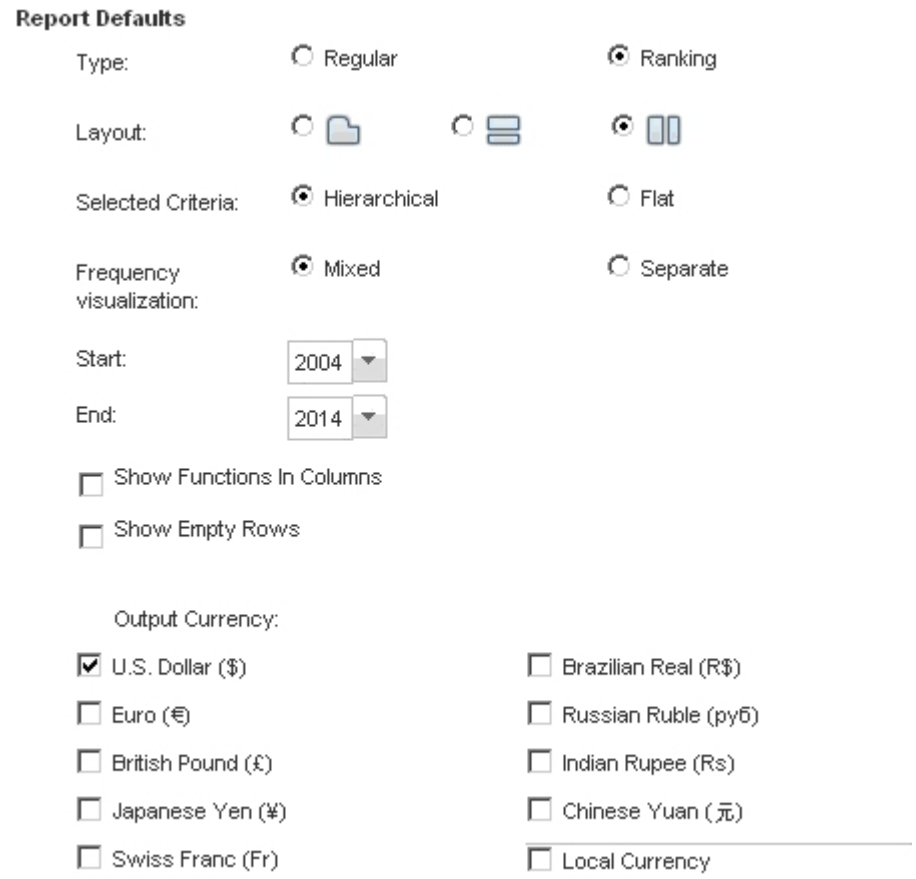
Rebasing for Real Monetary Values

Rebased_series = series * LinkedNominalSeries[new base period] / series[new base period]

Where “LinkedNominalSeries” is the value of the corresponding nominal monetary value.

Example: For the WIS smart datagroup, "Total Sales (Gross Output), Real" uses the value of "Total Sales (Gross Output), Nominal")

Report Defaults



Type

Select whether you want to group your output in your report by dimension or rank your output by data.

Layout

Select how you want your report preview format to look: either tab, stacked, or side-by-side. (See **Preview Display Layouts** for more information.)

Selected Criteria

Select whether you want your selected criteria to be hierarchical or flat. A “Flat” selection is often useful for sorting the resulting data.

Hierarchical:

Flat:

Frequency Visualization

Select whether you want your frequencies to display as mixed or separate.

Example of "Mixed" Frequency Visualization:

Telecommunication Recession - Residential

Criteria | Preview

Regions	2005	2005Q1	2005Q2	2005Q3	2005Q4	2006
Alabama	2243620124.00	552917702.00	557381456.00	563577359...	569743607.00	2326225425.00
Alabama	491905176.00	119600901.00	121699008.00	124179923...	126425344.00	521933322.00
Alabama	199954432.00	48616716.00	49459943.00	50502479.00	51375294.00	212247063.00
Alabama	154096777.00	37658400.00	38193461.00	38836945.00	39407971.00	161131555.00
Alabama	97937096.00	23794431.00	24233038.00	24723788.00	25185839.00	103730027.00
Alabama	39916871.00	9531354.00	9812566.00	10116711.00	10456240.00	44824677.00
Alabama	826170319.00	205218573.00	205769939.00	206941533...	208240274.00	842276583.00
Alabama	248405974.00	61358088.00	61750519.00	62400159.00	62897208.00	255008502.00
Alabama	293527439.00	73075300.00	73145442.00	73432598.00	73874099.00	299872138.00
Alabama	205786359.00	51326175.00	51345897.00	51476183.00	51638104.00	206102477.00
Alabama	78450547.00	19459010.00	19528081.00	19632593.00	19830863.00	81293466.00

Example of "Separate" Frequency Visualization:

Telecommunication Recession - Residential

Criteria | Preview

Regions	2005	2006
Alabama	14786315.00	14879377.00
Alabama	1017450971.00	1120083946.00
Alabama	417465170.00	449010041.00
Alabama	154669770.00	167519676.00
Alabama	130381794.00	138177198.00
Regions	2005Q1	2005Q2
Alabama	552917702.00	557381456.00
Alabama	119600901.00	121699008.00
Alabama	48616716.00	49459943.00
Alabama	37658400.00	38193461.00
Alabama	23794431.00	24233038.00
Alabama	9531354.00	9812566.00

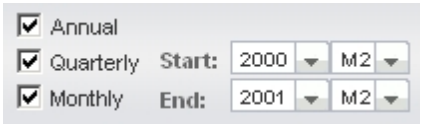
Notes on Frequency Selection

When there are multiple frequencies selected, DataInsight-Web works like this:

Examples

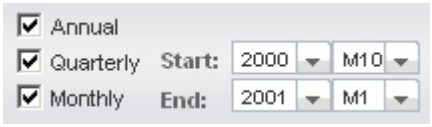
A, Q, M frequencies are selected:

Selected time: 2000M2 - 2001M2



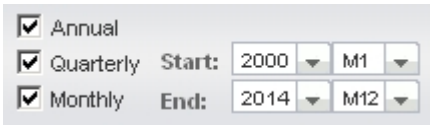
Periods selected: 2000M2, 2000M3, 2000Q2, 2000M4, 2000M5, 2000M6, 2000Q3, 2000M7, 2000M8, 2000M9, 2000Q4, 2000M10, 2000M11, 2000M12, 2001, 2001Q1, 2001M1, 2001M2

Selected time: 2000M10 - 2001M1



Periods selected: 2000Q4, 2000M10, 2000M11, 2000M12, 2001, 2000Q1, 2000M1

Selected time: 2000M1 - ...



Periods selected: 2000, 2000Q1, 2000M1, 2000M2, ...

Therefore, if the selected period is also a beginning of the less frequent period, that period will also get selected (e.g. 2000Q1 will also include 2000, 2000M4 will also include 2000Q2, when 2000M1 includes Q1 and 2000 as a whole). This only behaves like this if the less frequent period is available and you select it.

Start Date – End Date

Select the time span, by year, for your data.

Show Functions in Columns

Toggle to show and hide functions in columns.

Show Empty Rows

Toggle to show and hide empty rows.

Output Currency

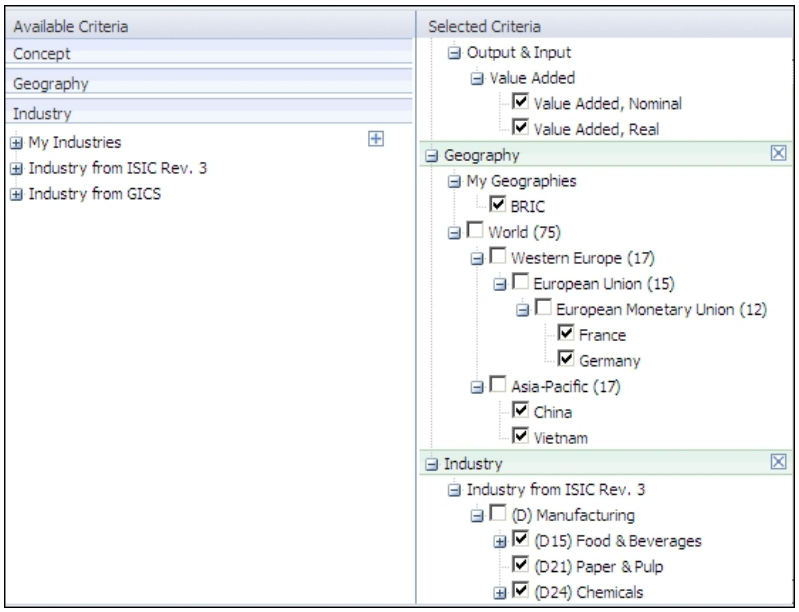
The currencies in which you would like your results expressed. Selecting “Local Currency” will display data for each country in its local currency (e.g. United Kingdom data will appear in pounds, China data will appear in yuan, etc.) You can select as many currency types as you want for your output.

Smart Datagroup Criteria Selection

When you need to reuse any of the criteria frequently, smart datagroups have a method of remembering them for easy selection, every time you run a report. Each criteria node offers a way for you to group, aggregate, or create formulas using selected components and to save these custom criteria for subsequent use.

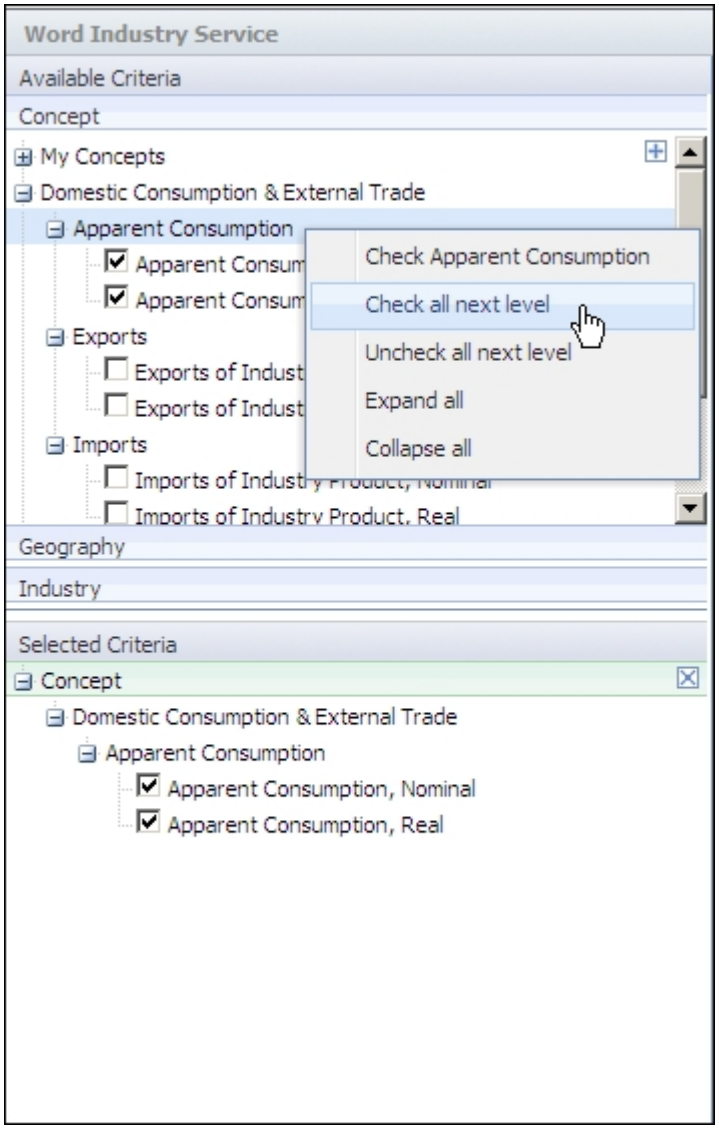
You make your selections in the “Available Criteria” panel and they appear in the “Selected Criteria” panel.

Working with Custom Criteria (below) gives information about the “My” criteria nodes of the selection trees.



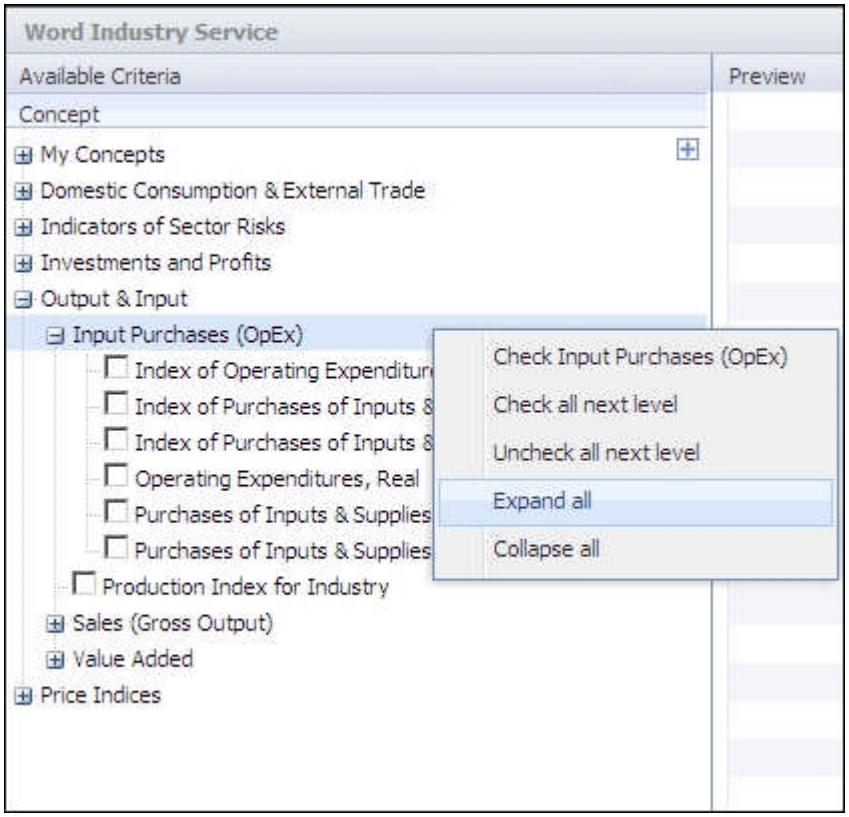
The Context Menu

The right-click context menu offers quick ways of working with the selection tree.



Checking and un-checking all next level options require you to highlight a parent node first and then click on the appropriate menu option. You can see how this works in the example above. As the system selects the sub-nodes for you, those selections appear in the “Selected Criteria” area automatically.

Expanding and collapsing the various branches of the tree are also highlight-and-select processes.



Working with Custom Criteria

When you need to reuse any of the criteria frequently, smart datagroups have a method of remembering them for easy selection, every time you run a report. Each criteria node offers a way for you to group, aggregate, or create formulas using selected components and to save these custom criteria for subsequent use.

Custom Criterion Icons

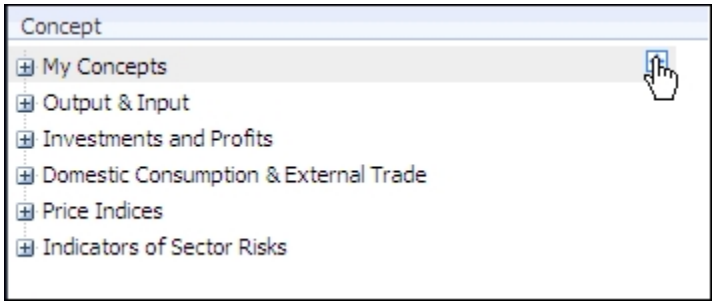
There are three action icons to use in the “My” criteria area.

Icon	What it does…
	Allows you to group, aggregate, and apply formulas to your custom criteria items.
	Allows you to modify your previously created custom criteria.
	Allows you to delete your custom criteria.

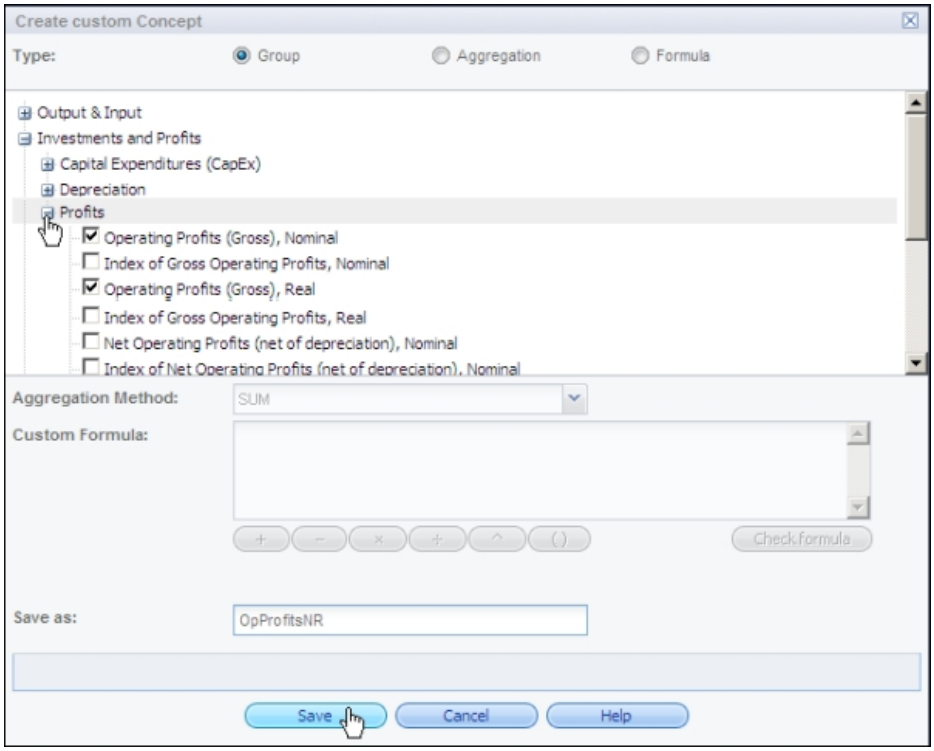
Adding a Custom Criterion to the Tree

To create a custom concept, geography, or industry:

1. Click on the boxed plus sign to the right of the top node in that dimension, "My Concepts" for example.

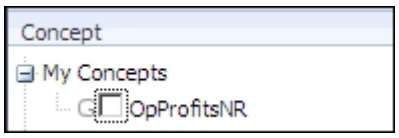


2. A "My Concepts" dialog appears for your selections. Select the type, find your selections in the tree, name your concept, and click "Save."



Guide to "Types"	
Group:	Two or more selections that make up a unit.
Aggregate:	A unit of two or more selections, taken into account as a whole, by using a mathematical operator on the components.
Formula:	A unit of two or more selections, made into an expression, by using a customized formula on the components.

3. Your custom criteria will be available under the "My" node for subsequent sessions of the smart datagroup.

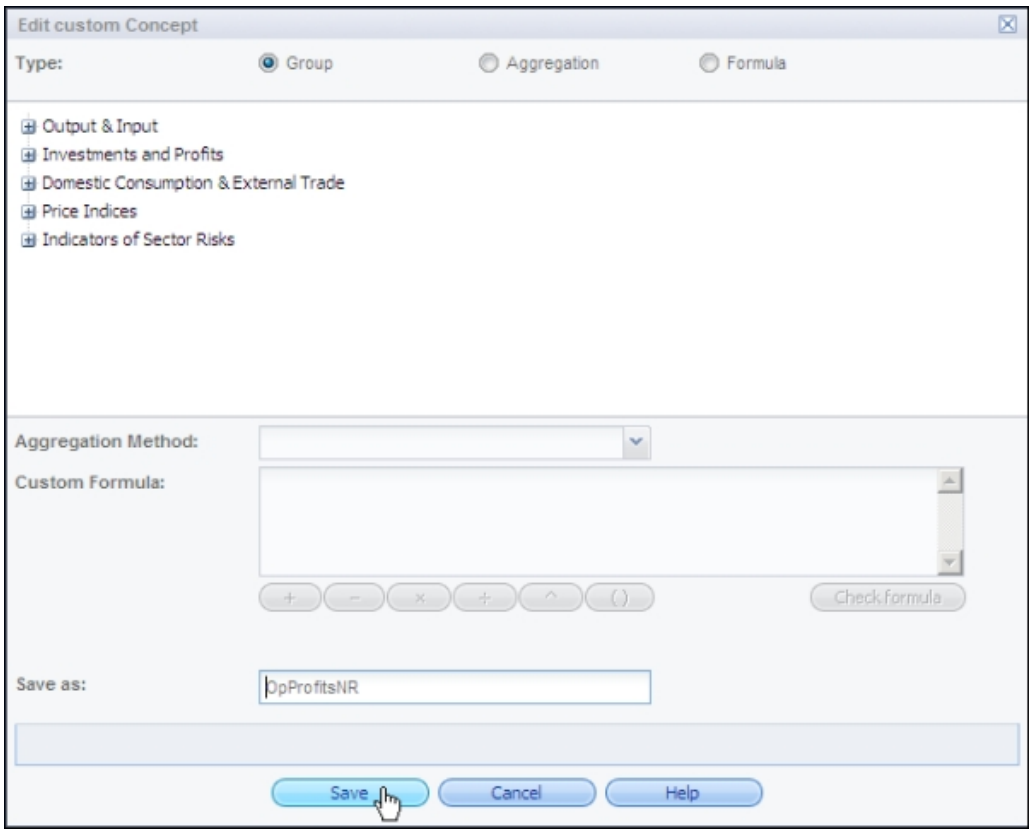


Modifying or Deleting a Custom Criteria Selection

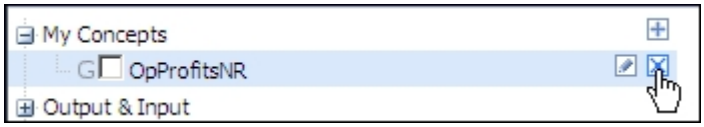
To modify a custom concept, geography, or industry:

1. Click on the "Edit" icon to the right of the custom criteria that you want to modify.

2. The "Edit Custom Concept" dialog appears for you to make your changes. Click "Save" to complete your modification.

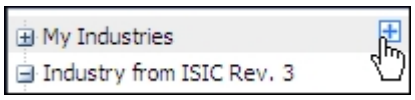


To delete a custom concept, just click on the "Delete" icon to the right of it.

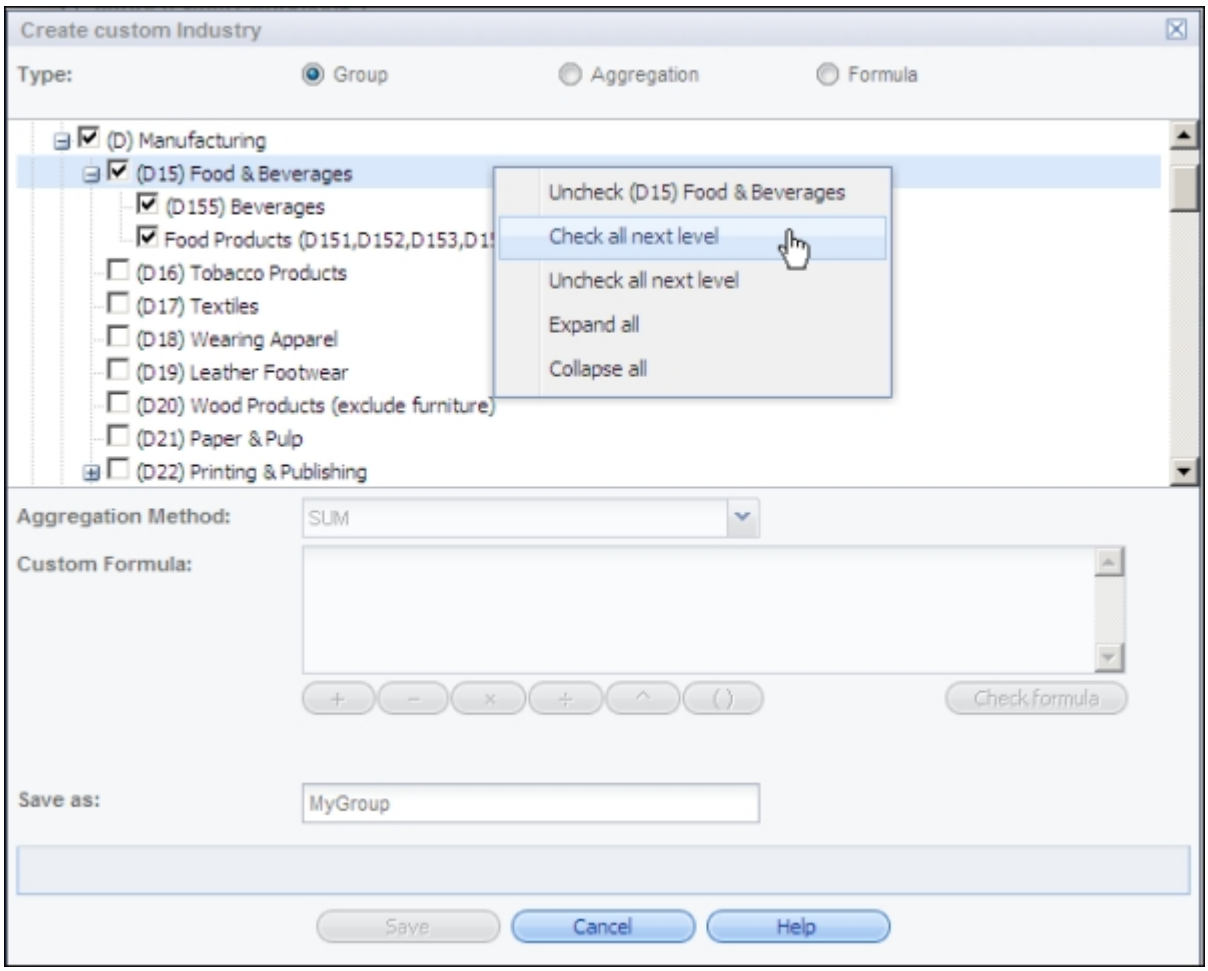


Defining Groups or Aggregates, and Applying Formulas

"My" criteria nodes allow you to customize your selections and save them for use whenever you access the smart datagroup again.



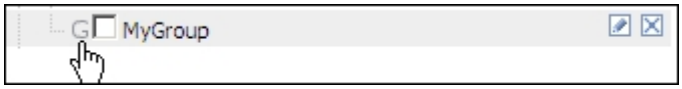
To start the process, click on the plus icon to the right of your "My" criteria node and a "Create custom…" dialog appears for your selections.



Creating Groups

Creating a group is the simplest way to put different tree components together. Just click on your selections (or use the right-click context menu to select them), name the group, and click "Save."

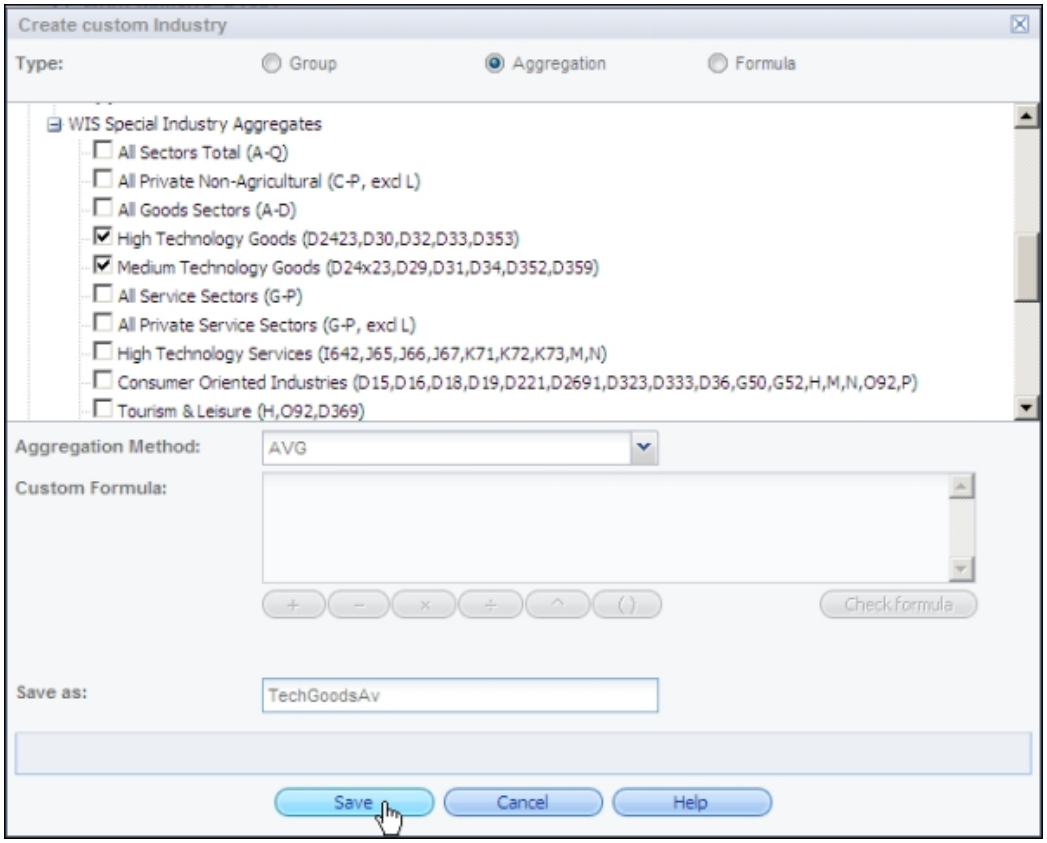
Once saved, your customized group will appear in your "My" criteria, marked with a "G" for easy identification.



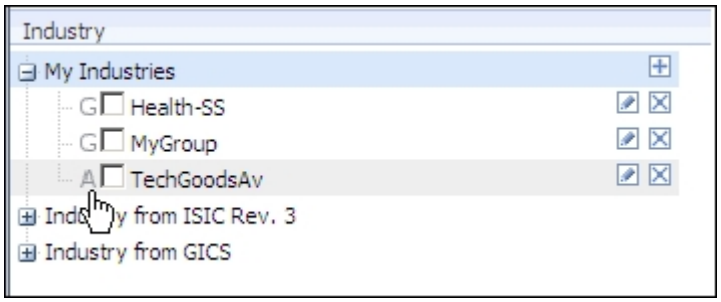
Creating Aggregations

To create an aggregation under concept, geography, or industry:

1. Select “Aggregation” as the type, find your selections in the tree, select your aggregation method, name your concept, and click “Save.”



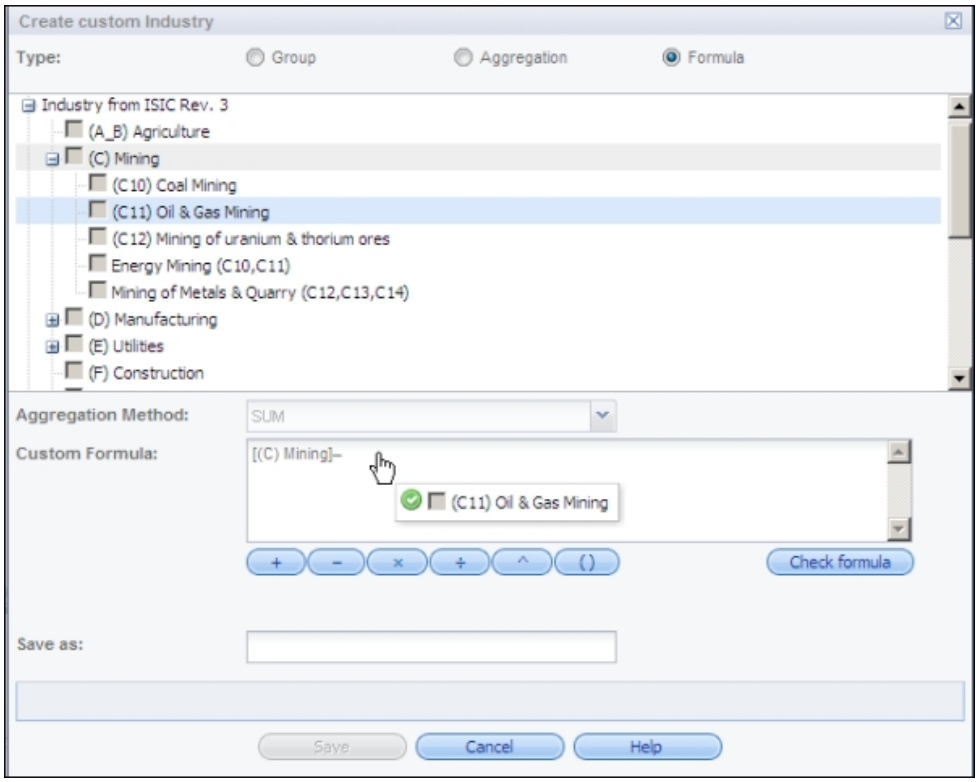
2. Your custom criteria aggregation will be available under the “My” node for subsequent sessions of the smart datagroup. It will be marked with an “A” for easy identification.



Creating Formulas

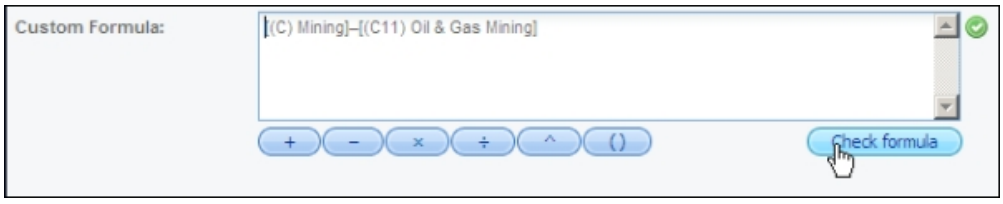
To create a custom concept, geography, or industry with a formula as part of it:

1. Select “Formula” as the type.

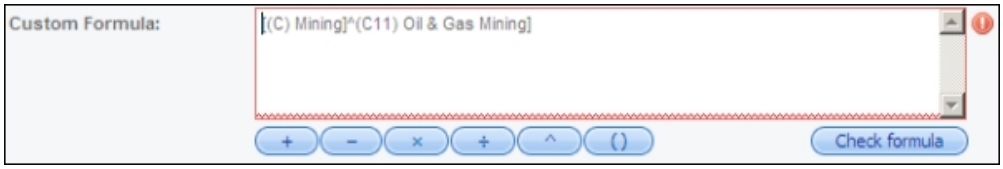


2. Drag and drop your components into the Custom Formula textbox. Place your cursor between each component and either click on the appropriate button or type in the operator.

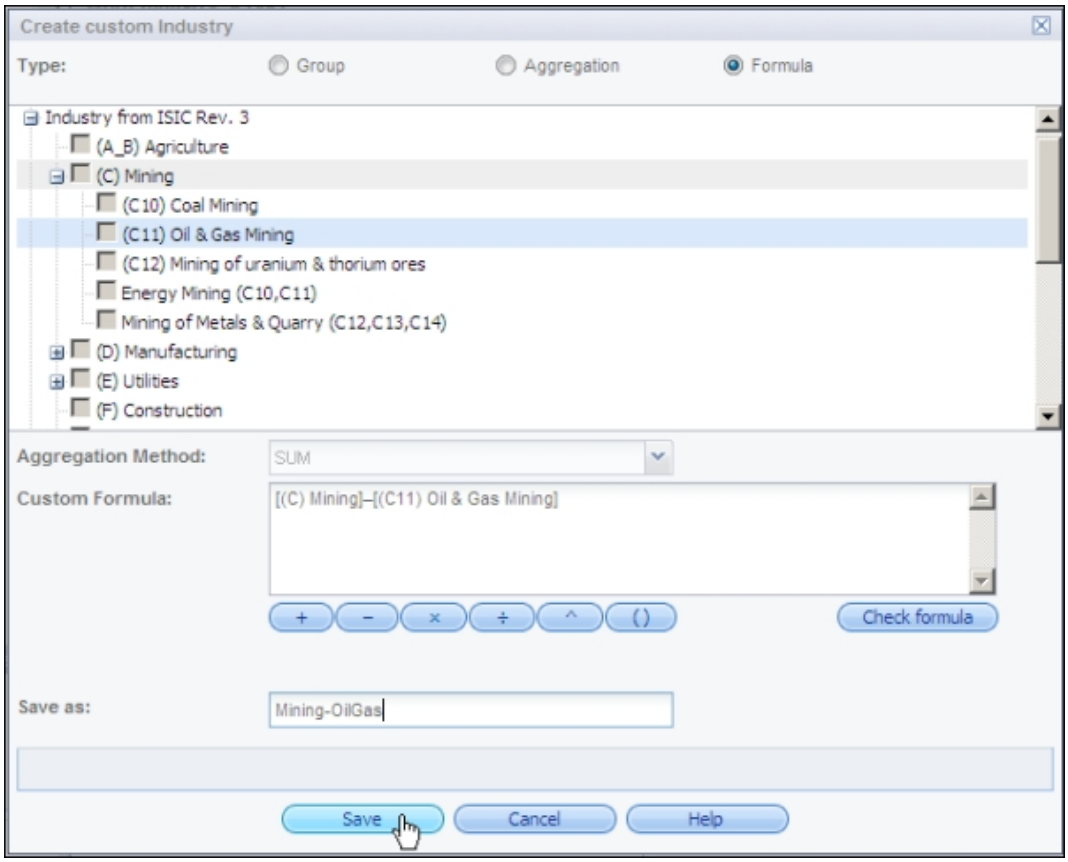
3. Click on the Check Formula button to verify the validity of the formula you created and if the system confirms that your formula is valid, a green check will appear to the right of the formula textbox.



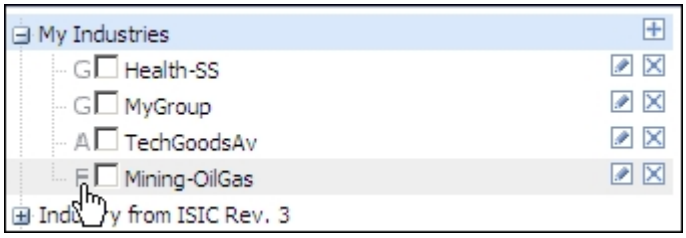
If you see a circled red exclamation mark, adjust the formula and check it again.



4. Name your custom criteria and click “Save.”



5. Your custom criteria with formula will be available under the "My" node for subsequent sessions of your smart datagroup. It will be marked with an "F" for easy identification.



User Defined Calculation Order

Calculation order is very important in your custom formula. When you define two or more calculations using custom components, the order in which they are carried out is the order in which you defined the calculations. In some cases, you may need to modify the calculation order to obtain correct results.

For example, if you wanted to use the result obtained from calculating two formulas to calculate the value of a third one, the first two formulas must be calculated together first to obtain the correct final results.

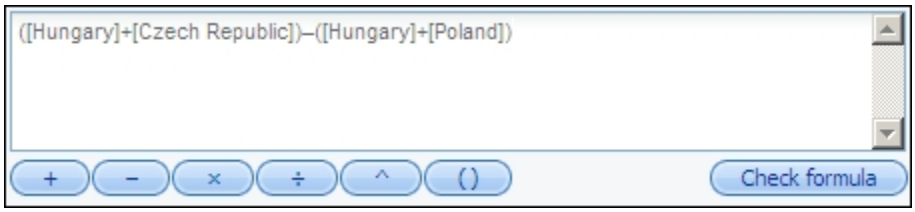
Formula Examples:

If you create your formula like this:

This will appear in your preview:

Industry	Geography	Currency (Unit)	2004	2005
Concept: Operating Profits (Gross), Nominal (2 Items)				
(452020) Compu...	MyFormula1	million US Dollar	42.15	71.15
(452010) Comm...	MyFormula1	million US Dollar	-30.88	-45.46
Concept: Operating Profits (Gross), Real (2 Items)				
(452020) Compu...	MyFormula1	2000 = 100	188.86	167.65
(452010) Comm...	MyFormula1	2000 = 100	-87.56	-116.45

If you create your formula like this:



This will appear in your preview:

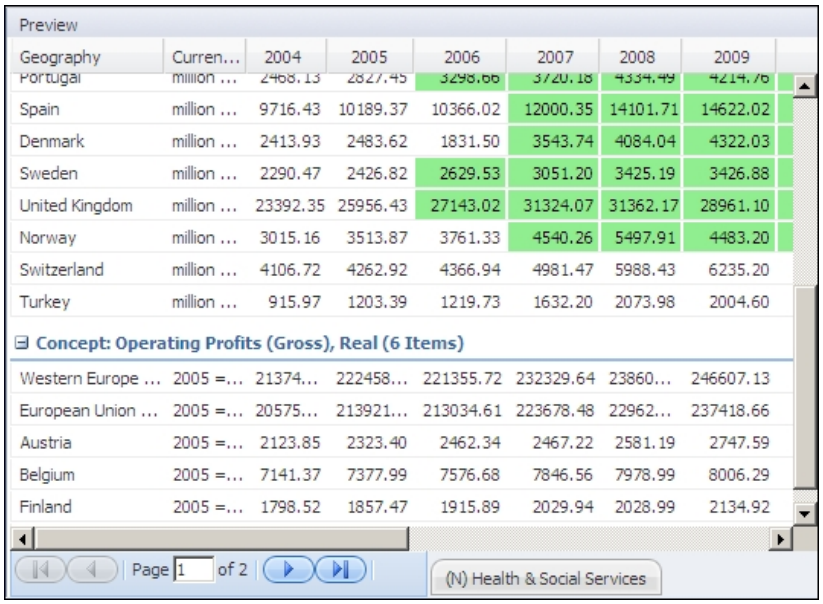
Industry	Geography	Currency (Unit)	2004	2005
Concept: Operating Profits (Gross), Nominal (2 Items)				
(452020) Compu...	MyFormula2	million US Dollar	-42.15	-71.15
(452010) Comm...	MyFormula2	million US Dollar	30.88	45.46
Concept: Operating Profits (Gross), Real (2 Items)				
(452020) Compu...	MyFormula2	2000 = 100	-188.86	-167.65
(452010) Comm...	MyFormula2	2000 = 100	87.56	116.45

Generating Smart Datagroup Reports

Once your select your smart datagroup criteria, use “Export” to open a smart workbook in Excel.

You can also **refresh** your data from within Excel unless you have set your **Preferences or Settings** to create non-refreshable workbooks (on the **Advanced** tab).

Table in DataInsight-Web:



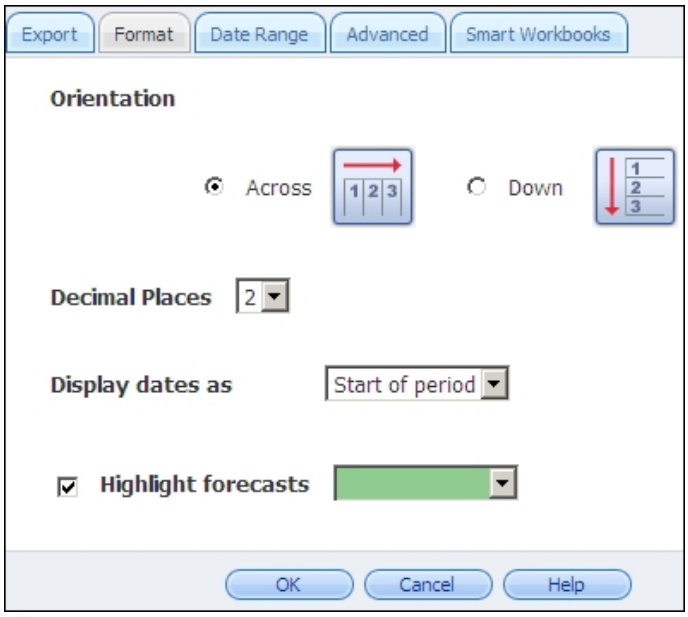
Geography	Curren...	2004	2005	2006	2007	2008	2009
Portugal	million ...	2468.13	2827.45	3298.66	3720.18	4334.49	4214.76
Spain	million ...	9716.43	10189.37	10366.02	12000.35	14101.71	14622.02
Denmark	million ...	2413.93	2483.62	1831.50	3543.74	4084.04	4322.03
Sweden	million ...	2290.47	2426.82	2629.53	3051.20	3425.19	3426.88
United Kingdom	million ...	23392.35	25956.43	27143.02	31324.07	31362.17	28961.10
Norway	million ...	3015.16	3513.87	3761.33	4540.26	5497.91	4483.20
Switzerland	million ...	4106.72	4262.92	4366.94	4981.47	5988.43	6235.20
Turkey	million ...	915.97	1203.39	1219.73	1632.20	2073.98	2004.60
Concept: Operating Profits (Gross), Real (6 Items)							
Western Europe ...	2005 =...	21374...	222458...	221355.72	232329.64	23860...	246607.13
European Union ...	2005 =...	20575...	213921...	213034.61	223678.48	22962...	237418.66
Austria	2005 =...	2123.85	2323.40	2462.34	2467.22	2581.19	2747.59
Belgium	2005 =...	7141.37	7377.99	7576.68	7846.56	7978.99	8006.29
Finland	2005 =...	1798.52	1857.47	1915.89	2029.94	2028.99	2134.92

Smart Workbook in Excel:

	A	B	C	D	E	F
1						
2						
3						
4						
5						
6	Created on Fri 11 Sep 2009, 12:27 PM EST (17:27 GMT)					
7						
8	**Geography**	**Currency (Unit)**	**2004**	**2005**	**2006**	**2007**
9						
10	**Operating Profits (Gross), Nominal**					
11	Western Europe (17)	million US Dollar	209,261.36	222,458.03	230,777.97	269,656.19
12	European Union (15)	million US Dollar	201,546.58	213,921.97	221,883.84	259,230.97
13	Austria	million US Dollar	2,106.77	2,323.40	2,534.20	2,863.42
14	Belgium	million US Dollar	6,965.58	7,377.99	7,710.19	9,026.83
15	Finland	million US Dollar	1,726.29	1,857.47	1,997.09	2,409.38
16	France	million US Dollar	45,303.91	46,332.70	48,946.55	56,993.07
17	Germany	million US Dollar	64,092.63	67,179.52	70,143.19	80,135.48
18	Greece	million US Dollar	2,090.52	3,440.08	3,561.03	4,165.83
19	Ireland	million US Dollar	1,809.62	1,895.04	1,638.05	2,430.91
20	Italy	million US Dollar	24,276.26	26,539.10	26,605.24	31,345.31
21	Netherlands	million US Dollar	12,570.63	12,648.86	13,025.70	15,492.50
22	Portugal	million US Dollar	2,468.13	2,827.45	3,298.66	3,720.18
23	Spain	million US Dollar	9,716.43	10,189.37	10,366.02	12,000.35
24	Denmark	million US Dollar	2,413.93	2,483.62	1,831.50	3,543.74
25	Sweden	million US Dollar	2,290.47	2,426.82	2,629.53	3,051.20
26	United Kingdom	million US Dollar	23,392.35	25,956.43	27,143.02	31,324.07
27	Norway	million US Dollar	3,015.16	3,513.87	3,761.33	4,540.26
28	Switzerland	million US Dollar	4,106.72	4,262.92	4,366.94	4,981.47
29	Turkey	million US Dollar	915.97	1,203.39	1,219.73	1,632.20

Formatting Options

You will find the formatting options by clicking “Preferences” or “Settings” and then going to the “Format” tab there. (See **Preferences and Settings** for information about the “Format” tab.)



Note that forecasted data can be highlighted for easy recognition.

Smart Workbook Options

These powerful options for smart workbooks are only be available for subscribers to Smart Datagroups. (See **Smart Workbook Preferences and Settings** for information about them.)

Refreshing a Smart Workbook in Excel

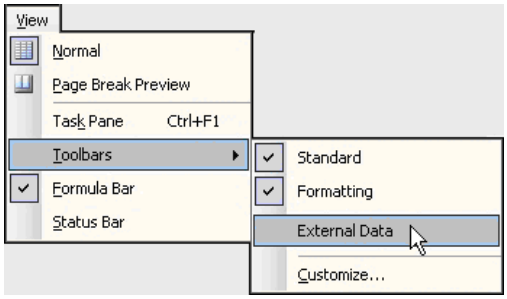
You can update your Smart Workbook in Excel 2003 using "External Data" toolbar and in Excel 2007 using the "Data" tab.

> If your Smart Workbook contains one sheet, your data will be refreshed within that workbook. If your Smart Workbook contains multiple sheets, the data will be refreshed in a new read-only workbook, which you can save under a different name to be able to modify it.

For more information, see the **Generating Smart Datagroup Reports** section of this guide.

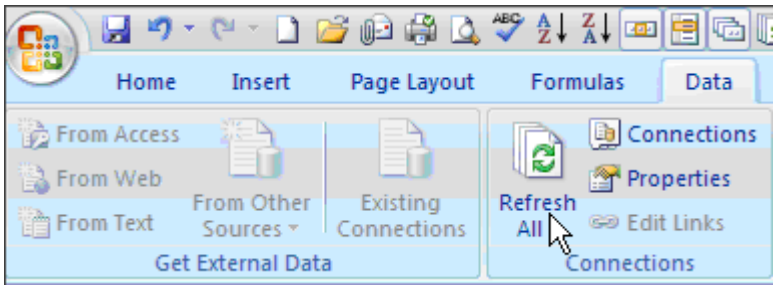
Accessing the External Data toolbar in Excel 2003

To display the **External Data** toolbar in Excel 2003, if it does not appear in the Excel toolbar area, use the **View > Toolbars > External Data** menu options.



Accessing the Refresh All Feature in Excel 2007

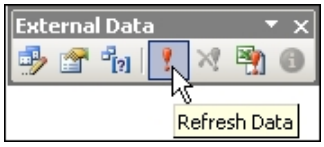
To refresh the smart workbook data in Excel 2007, use the "Refresh All" option on the **Data** tab.



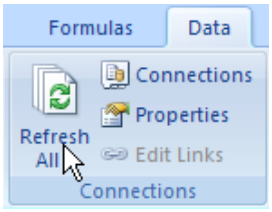
Refreshing the Data in Excel 2003 and 2007

To refresh the data in a smart workbook in Excel:

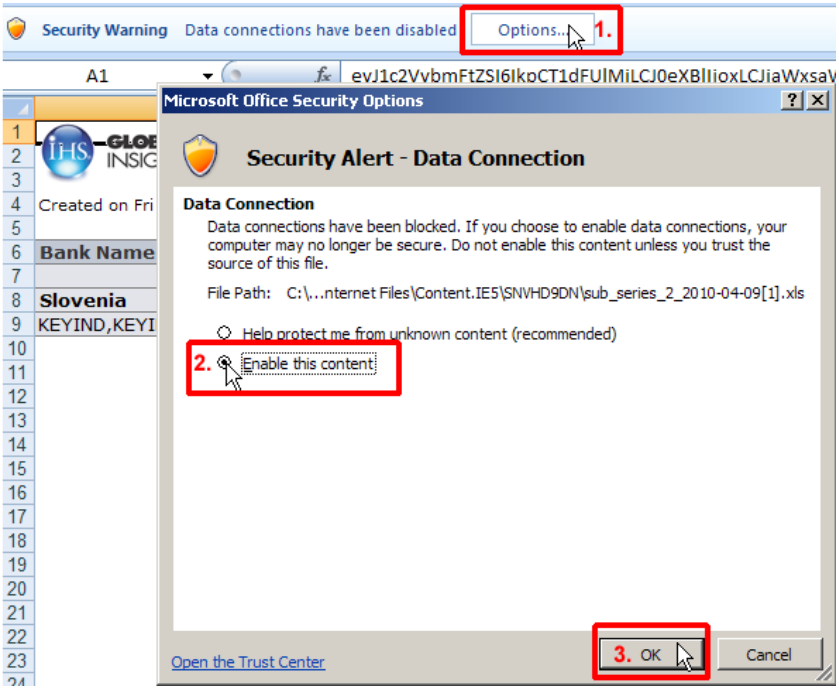
1. After making modifications or opening a previously saved smart workbook, click the "Refresh" button on the **External Data** toolbar in Excel 2003, or click on "Refresh All" on the **Data** tab in Excel 2007, to pull in the latest data.



OR



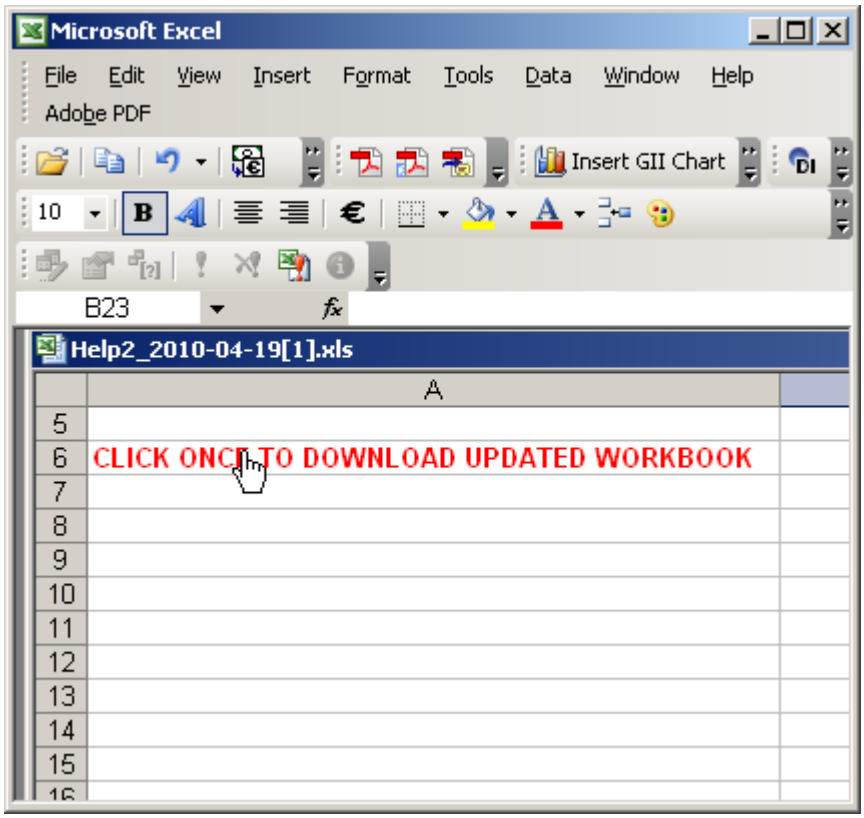
2. *(For Excel 2007 only)* When you export a Workbook to Excel 2007 you will see a Security Warning alert. Click "Options," click "Enable this content," and then click "OK."



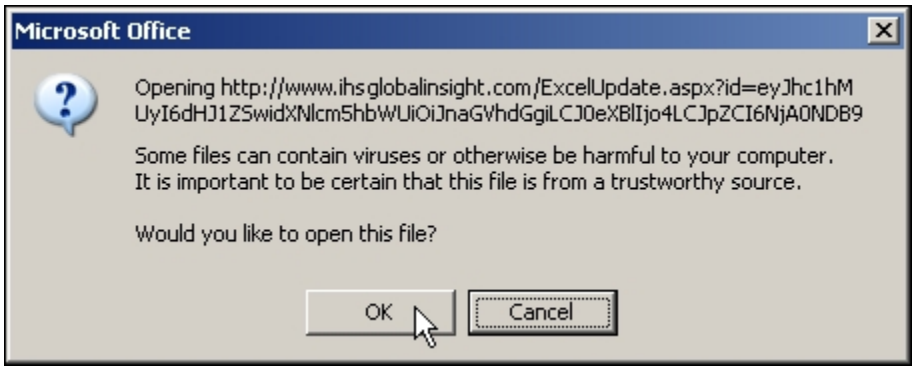
3. Login with your MyInsight credentials. You only have to do this once per Excel 2003 or 2007 session.

4. If you exported a smart workbook containing a single tab, current data will be pulled in and the refresh process will be complete.

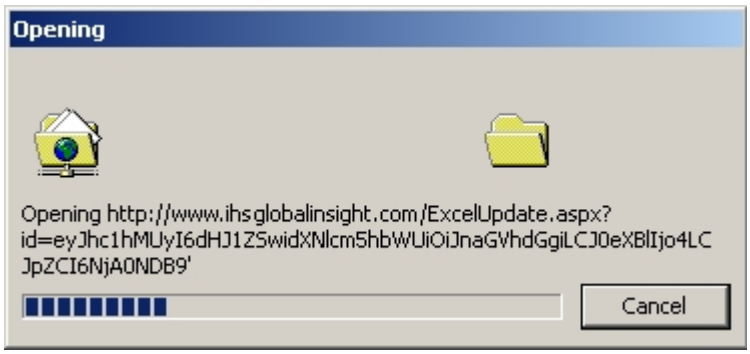
   If you exported a smart workbook containing multiple tabs, a download link will display. Click it ONCE as it indicates and go on to step 5.



5. Click “OK” to open the refreshed copy of your workbook.



A status screen will appear.



6. Current data will appear in an updated, read-only copy of your workbook (if it has multiple tabs).

Help2_2010-4-19 13_57_30.xls [Read-Only]

	A	B	C	D	E	F
1						
2						
3						
4						
5						
6	Created on Mon 19 Apr 2010, 1:57 PM EDT (18:57 GMT)					
7						
8	Rank	Currency (Unit)	Industry	2005	2015	Percent Change
9	1	2005 = 100	(N) Health and Social Services			
10	2	2005 = 100	(O) Social and Personal Services			
11	3	2005 = 100	(O92) Recreational, Cultural and Sporting			
12	4	2005 = 100	Sanitation, Trade Organizations, Other Services (O90,O91,O93)			
13	1	million US Dollar	(N) Health and Social Services	153,609.39	415,619.51	170.57%
14	2	million US Dollar	Sanitation, Trade Organizations, Other Services (O90,O91,O93)	85,694.19	152,137.36	77.54%
15	3	million US Dollar	(O) Social and Personal Services	136,910.48	241,290.83	76.24%
16	4	million US Dollar	(O92) Recreational, Cultural and Sporting	51,216.29	89,153.48	74.07%
17						
18						

7. Save the [Read-Only] copy under a different workbook name and it will be editable.

Note: If you delete rows or columns of data after exporting your data to Excel, these will reappear after you refresh.

Using the Smart Datagroup Report Wizards

The report wizard walks you through the process of creating a report for a Smart Datagroup and, since the selections offered within each wizard are specific to that datagroup, using this tool makes report generating both efficient and simple for you. Additionally, you can export your report to Excel or save your report as a smart workbook, where data is automatically refreshed as new data become available.

Smart Datagroup FAQs

Below you will find a list of many frequently asked questions and answers about Smart Datagroups and Smart Workbooks.

What is a Smart Datagroup?

A Smart Datagroup is a categorized data set designed to support enhanced features for additional analytics such as currency conversion and rebasing, multi-dimensional data display sorted by user defined criteria and statistical ranking.

How Do I Set Default Settings for my Smart Workbooks?

Click on the “Preferences” button to modify and save **Global Preferences**. The Smart Workbooks tab options are preferences that apply only to Smart Workbooks created using the Smart Datagroup navigation, the WIS Report Wizard and the WIS Ranking Wizard.

How Do I Create my own Custom Geography, Concept or Industry?

In the Smart Datagroup Geography, Concept or Industry criteria selection drawer, click on the '+' to the right of the top node (i.e., My Geographies, My Concepts or My Industries) to access the screen to define custom groups.

For example, to create your custom geography, click on the plus sign to the right of the My Geographies node. This will open the Create Custom Geographies screen, where you can define a Group of Countries and optional Aggregation Method or Custom Formula and name your custom geography. After saving your custom geography, it will appear in the My Geographies node in the Geography Criteria tree. For more information, see **Smart Datagroup Criteria Selection** .

Can I Apply Functions to the Data in my Smart Datagroup?

Once you have selected your criteria, click on the Functions button at the bottom right of the screen. You can apply Percent Change, Moving Average and/or Compound Annual Growth rates to the data in your report. Selected functions will be applied to all the data in your report.

How Can I Create a Report with One Concept in Percent Change (PCH) and all the Concepts in Base Value?

After selecting your Concepts, you can apply functions to specific Concepts in the Selected Criteria panel. Simply right-click on any Concept and check the function you would like applied to that Concept.

I've changed the Date Range for my Report, but the New Dates are not Reflected in the Preview Data Display Table?

After changing Smart Datagroup options on the bottom of the screen, you need to click the Refresh button to apply these changes. The word Preview in the display pane title bar has an asterisk next to it (i.e., Preview*), to represent when a refresh is needed.

Can I Display a Report in More than One Currency?

You can display your data in single or multiple currencies. Click on the Preferences button and go to the Smart Workbooks tab, to modify the Output Currency for your report. All of your Selected Criteria will be displayed in the currency(s) you have selected.

How Do I Rearrange the Order of the Rows in my Report?

After selecting your criteria, you can rearrange the order for any Concept, Geography or Industry by dragging and dropping them within the tree in the Selected Criteria panel. The order reflected in the tree will be the order of the rows in your report.

How Do I Rearrange the Order of the Columns in my Report?

Currently you cannot rearrange the order of the columns in your report.

How Can I Organize the Data in my Report by Geography, Concept or Industry?

When the Regular radio button in highlighted, you can use the Group by drop down list to organize the data in your report by Geography, Concept or Industry. Additionally, you can further group the data by sheets in the workbook by using the 'Sheet by' drop down list.

Alternatively, you can also rank the data, by clicking on the Ranking radio button. You can rank by Geography, Concept or Industry and select a ranking criterion of either End Date, Difference, Percent Change or Compound Annual Growth Rate.

Can I Change the Layout of the Criteria Panels and Data Preview Display?

In the upper right hand corner of the Smart Datagroup display panels there are three icons to modify the display in Tab Mode, Stacked Mode or Side-by-Side Mode. For examples of the layout for each of the options, see **Previewing Smart Datagroup Layouts**.

How Do I Refresh my Smart Workbook in Excel?

You can update your Smart Workbook in Excel 2003 using “External Data” toolbar and in Excel 2007 using the “Data” tab. If your Smart Workbook contains multiple tabs, the data is refreshed in a new workbook. For more information, see **Refreshing a Smart Workbook in Excel**.