CEIC DATA MANAGER (CDM) USER GUIDE

CDM Provides you with the power to access, analyze, present and share insights from the most complete, accurate and timely set of economic data from CEIC.

www.ceicdata.com
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1 Introduction

CEIC Data Manager (CDM) provides you with the power to access, analyze, present and share insights from the most complete, accurate and timely set of economic data from CEIC. From within a standalone application, in few clicks you can view data, download, chart, or send information. Spot trends using charting, analyze relationships using math functions, and receive alerts of new releases and data revisions, to stay on top.

2 Starting CDM

- CDM can be accessed from your Desktop or from your Programs directory.
- In MS Excel, Word and PowerPoint you will see a “CDM” tab (if you have installed the CDM add-ins).

Desktop

• Open CDM and enter your Username and Password.
• Check "Remember my username and password" will allow CDM to save your log in information for next log in.

Microsoft Office Toolbars:

• If there is a problem with the log in, CDM will prompt you with an error message. You can return to the log in pop-up again to correct the information and connect again.
3 CDM Tabs

3.1 Inside CDM

After logging in successfully, you will see the window shown below.

The Left-hand Navigation Bar shows 6 different Tabs, which enables you to switch between CDM features that include: Start; My Series; My Library; Search; Release Schedule and Footnotes.

3.2 Start

- Navigate the CEIC databases and series through this Start Tab. Simply click on a database to display the series tree in the right pane. The series are listed in a tree layout consisting of 4 levels on the right:

  Level 1 – Topics
  Level 2 - Sections
  Level 3 - Tables
  Level 4 - Series

- Expand or collapse Topics, Sections or Table levels, by clicking the (+) or (-) box.
- Click on the series to select and view a Quick View pane.
- Click the “Refresh” button on the Toolbar to keep the series observations up-to-date.
- The Series Selection Toolbar provides options to view your series list such as: only showing the series you have selected and only showing Key Series in the Global Database, which are selected by our CEIC analysts, to provide an overview of economic performance.
3.3 My Series

- My Series is where you can manage your customized Workspaces and Watchlist.
- Workspaces allow you to save series that you frequently use. The maximum number of workspaces is 250, with a maximum of 1,000 series in each workspace.
- Watchlist allows you to monitor up to 1,000 series for updates and alerts.
- Select series from the Start or Search Tabs and use the CDM Toolbar buttons to add series to your Workspaces or Watchlist if you need to monitor and use them regularly.

3.4 My Library

- My Library is a central repository for Excel files and CDM Charts, where they can be organized, opened, saved, renamed and searched in one place.
- By default there is a Public Folder for sharing Excel Files and CDM Charts amongst CDM users within the same company, while the Private Folder is designated for personal files. Mapping of these directories is compulsory during initial CDM setup where the Settings Wizard will prompt you to assign default folders.
- The right pane displays the Excel and Chart Files respective of the folder you have selected in the left pane. Simply double click on the files that you wish to open MS Excel, or CDM Charting Interface.
3.5 Search

- Search provides a simple layout with a faceted search algorithm. It allows you to refine and filter your results by selecting one or multiple criteria randomly in each category. There are 3 ways to search for series in CDM:

1. **Keyword Search**
   - Use the Search Buttons to search for Subscribed, Active, and/or Key Series before entering your keyword or series code, click on the Search or press enter. (Search Tips helps you get familiar with the search syntax.)
   - Results will be shown in the right pane. You can then use the 6 search filters on the left pane to further refine your results. Once selected, results will dynamically refresh so that you can quickly find what you are looking for.

2. **Quick Search**
   - Quick search is always located at the top of your CDM screen. Simply enter a keyword or series code in the box, click on the Search Button (magnifying glass) or press enter. You will be directed to the Keyword Search Window to refine your search if required.

3. **Advanced Search**
   - Click on the Advanced Search Button, shown next to the Key Series button, to select parameters to refine your search. After you have chosen additional parameters, click the Search button. Results will be returned back in the Keyword Search Window to refine your search if required.
3.6 Release Schedule

- Release Schedule informs you of when indicators are released or will be released.
- See a list of the Latest Releases (published in the past 24 hours) from any country as well as Coming Releases (scheduled for release in the next 7 days) on the right pane.
- On the left-hand side of the screen you can perform a Search based on select criteria.

3.7 Footnotes

- Footnotes are detailed information about the series and the databases - background about the series, source, and more.
- They can be accessed using the last tab on the left-hand navigation bar or by right-clicking on the series from the Start Tab, My Series and Search Results and selecting Footnotes.
- Footnotes are displayed in a floating window and an unlimited number can be opened.
4 CDM Toolbars

You can perform actions to your series by using the CDM toolbars, or alternatively, right-clicking on series to show a list of actions on-the-fly.

4.1 Download to Excel

- A key feature of CDM is being able to download series data to Excel.
- Select the series you wish to download from CDM’s Start Tab, My Series or Search results.
- Click on the button “Download to Excel” or right click and select “Download”.
- An "Excel Download" popup will appear. Specify your download options then click on OK (green tick) to download to excel.
- Remember to save the Excel file if you intend to reuse the information again.
- Note that you are only allowed to download up to 1,000 series at a time.
Refresh Series

- In Excel, you will see the CDM Toolbar (they will only be enabled if you are logged into CDM).
- If the Auto Refresh Button is toggled on, CDM will automatically refresh your workbook when you open the file. Alternatively, use manual refresh were you update the data yourself.
- Note that you must be on the CDM Link Cell to refresh data.
- When data in Excel has been updated, revised, discontinued, or rebased, you will receive an alert message in Excel informing you of the changes.

Green Alerts - Show newly released and revised data points compared with your last refresh.

Blue Alerts - Show newly released and revised data points within the last 30 days.

Text in Italics - Show Discontinued series.

Edit Download

- Edit Download allows you to change your download settings, insert, delete, and/or reorder series and insert space separators in Excel. You can also maximize and minimize properties section to view the Manage Series section more clearly.

Send as Email and Read Only

- Share your files instantly by clicking Send as Email Button. Protect your files being modified by other users by toggling the Read Only Button to on.
4.2 Export

- CDM’s Export function allows you to save series in CSV format to facilitate their use in your internal systems and third-party software.
- Select the series you wish to export from CDM’s Start Tab, My Series or Search results, and click Export. Then choose your export settings.
- To identify the exported series, you can choose to export the Series Name, the Series Code or both pieces of meta-data.

- Click OK (green tick), and then choose a file name and save location in the Export File As dialog box, and click Save.
4.3 Chart

- CDM Charting can be as simple or as sophisticated as you require. You can use Quick Charts to see trends and perform simple customizations, or if you require something more, you can go to the Chart Manager to choose from a large range of customizations for your presentations and quickly share them with your colleagues. CDM Charts can be created from the following options.

1. Chart Button
   - Click on the Chart Button from the CDM Toolbar to open the Charting interface named "New Chart". There are up to 3 panes available. Under Series Manager, choose a pane and select a blank box to start inserting series.
   - Enter a series code (alphabetical or numeric) directly and press enter to plot, alternatively, click the Insert Series Button above to open the "Insert Series to Chart" window, where you can find series using keyword/series code search of browse from the layout tree and plot one or more series to your chart.
2. Create charts for selected series
   - Select the series you wish to chart from CDM’s Start Tab, My Series or Search results.
   - Click on the Chart Button on the CDM Toolbar to plot your series.
   - Note that you are can plot a maximum of 20 series in a chart at a time.

Chart Manager
   - The Chart Manager will be displayed with your series plotted, using default settings. By default, the chart will be plotted using 24 observations, you can change the settings using Timeframe menu on the left side of the graph.
   - For further customization, the you can make use of the tools available in the Pane Toolbar to manipulate the graph and save or share your chart using the Chart Toolbar.
   - Remember to save your charts, located on the Chart Toolbar and rename your chart, which will be saved in My Library.
4.4 Table

If you want to quickly review or compare a few series without having to download the data to Excel, then you can make use of the Table feature. This is available in the CDM Toolbar via the button “Table”.

- Select the series you wish to tabulate from CDM’s Start Tab, My Series or Search results.
- Then click on the Table button in the CDM Toolbar and specify your Table Settings.
- In addition to viewing the raw data, you also have the ability to Insert Function and view the transformed series in Table format. For example, you can calculate the YoY change of a base series and review the results, side-by-side. Note that tables cannot be saved and they will be removed when you exit CDM.
4.5 Add to My Series

- Create your own workspaces and a watchlist with the combination of series you desire and add more series to an existing workspace when required.
- Select the series you wish to add from CDM’s Start Tab or Search results.
- Note that you are only allowed to add up to 1000 series a workspace.
- Click on the Add to My Series button on the Toolbar, or right-click on the right pane to open the pop-up menu then select Add to My Series.
- The "Add to My Series" popup window will open. Select the workspace you want to add to by clicking on the corresponding row or if you want to create a new Workspace enter a name in the row. "Save to" and a new workspace will be created. Click the OK (green tick) to proceed or No (red-cross) to cancel this action.

- If the workspace already has the series you selected, you will get a message prompt. Click OK to add those series into the same workspace or click Cancel to Exit.

- Your workspace is now saved in My Series.
- Apart from Download to Excel and Create Chart, you can also perform other actions on your saved workspaces, such as apply functions to transform the series, which is further explained in the Functions Section.
4.6 Add to Watchlist

- CDM’s My Watchlist allows you to monitor up to 1,000 series for updates and alerts you when updates occur.
- Select the series you wish to chart from CDM’s Start Tab, My Series or Search results and click “Add to Watchlist”.
- You can view your watchlist by clicking on “My Watchlist” in My Series.

- Series that have been updated since you logged in will be shown in red in the right pane.
- You can rearrange the series order in your watchlist by using the Move Up and Move Down arrows and group series by column header.

- When the series in your watchlist are updated, a pop-up alert will advise you. Update Time is Hong Kong time (GMT/UTC +8 hours).
4.7 Research Links

- Research Links is a feature exclusive to the Premium Databases, namely for China, India, Indonesia, Russia and Brazil. It gives you access to proprietary research commentaries produced by a team of regional experts specialized in these economies.

**Research Links can be accessed in 2 ways:**

1. Click on the Research Links icon (magnifying glass) in the CDM layout tree to view documents of the Section related to the database you are viewing.
2. Alternatively, click on the Research Links button from the CDM Toolbar to view documents from all Premium Databases.

- The Research Pane shows a list of documents that you can click on to view in a new CDM window. The list is filterable by database and also by language (English or Chinese or All).

- Research documents are in pdf format and can be Saved or Printed directly from CDM.
4.8 Feedback

- You can send us feedback and questions through the “Feedback” button available on the main CDM toolbar.

- Feedback will be sent via your default e-mail application, e.g. Outlook. Your message will be sent to our customer service whose local representative will contact you regarding your query.

5 CDM Link for MS PowerPoint and Word

CDM allows you to copy and paste charts and tables into Microsoft PowerPoint and Word and then update them directly from the programs using CDM add-ins.

Copying CDM Charts and Tables

- In Chart click on the “Download to MS Office” Button in the Chart Toolbar to show the options available.
For Tables right-click and select **Copy as a Linked Object**.

Using the PowerPoint and Word CDM Add-Ins

- Once you have downloaded your CDM graph(s) or pasted your table(s) into PowerPoint or Word, you can format and save them using standard Microsoft functionality.
- Time-points in the graph(s) or table(s) can be refreshed using the CDM add-ins **Refresh** and **Refresh All** commands. **Refresh** is located in the CDM toolbar, or can be found by right-clicking on the graph or table (as illustrated below). **Refresh All** is located only in the CDM toolbar.
- Note that the period plotted in your Table or Graph will be determined by the Timeframe settings in CDM.

**Note:** You must be logged in to CDM to refresh data using the add-ins.
6 Functions

CDM provides a number of math functions that can be applied to series in the CEIC databases. You can then use the transformed series to create charts or download to Excel for further analysis.

- Select your series then click on the Insert Function button which can be found on the My Series, Chart, Table Tabs and also Edit Download in Excel.
- Choose a function from the list on the left, refine with parameters in the middle and click on the plus (blue cross) to see your function added on the right pane. You can select more than one function. Delete functions by highlighting and click on the deleted (red cross).
- Tick the "Replace original series" to download just your transformed series at the bottom. If you leave this unchecked, both the original and transformed series will be downloaded.

- When done, click the OK button (green tick) to transform the series. The transformed series will be added after the original series in the series list with \((f^*)\) where * denotes the function number in that workspace.
7 Settings for Language

- **Interface**
  This option defines the language of the interface, i.e., the labels, buttons, messages, and so on. It has no impact on the display language of the databases and series. The default setting is "English - United States". If you make changes to this option, you need to restart CDM after saving the changes for it to take effect.

The following languages are available for the CDM interface:
**English (default); Chinese (Simplified); Japanese; Polish; and Russian**

- **Database Language**
  Some databases have non-English versions which are usually defined in the native language of the region(s) it covers. For example, China Premium Database has a version in Simplified Chinese and Russia Premium Database in Russian. Besides, WorldTrend Database has a version in Japanese.
  If you checked this option, the data of the corresponding databases will be shown in the database language specified in the menu, regardless of what the "interface language" is. For example, you can have interface in English and China Premium Database in Simplified Chinese.

- **Footnotes in Local Language**
  Some databases have non-English versions of footnotes. If you checked this option, the footnotes of that database will be displayed in native language.
8 Enhancements on the Latest Version of CDM

The features in this section apply to users who are on the latest version, CDM2.5.10 and onwards. This version includes enhancements to security, support and charts, refining features on CDM2.5.

8.1 Password Management

- In CDM 2.5.10, we have proactively taken steps to tighten security measures for our users by adding password management features.

a) Forgot Password?

If you have forgotten your password, you can reset it by clicking on this link. You will be directed to the Password Reset page shown below. You are required to enter your username and an email address associated to that username stored in our system. After verification, an email will then be generated with a link to reset your password.

![Password Reset](image)

Note: if you cannot provide an email address associated with your username, the system will advise you to contact our Customer Service Team.

Note: It is advised that Passwords be a mix of letters and numbers of at least 6 characters long.

b) Change Password

Click on this link, where you will be directed to the Change Password page to enter your old and new credentials.

![Change Password](image)

Note: It is strongly advised that you change your password every 180 days to increase security of your account. Users will receive an alert 7 days before password expiry, thereafter, users are required to change their password first before login.
8.2 Support

For convenience, in CDM2.5.10 all the support buttons have been consolidated under the new Support menu in the CDM Toolbar. This replaces the Feedback button, which has been renamed Email Us.

a) Change/ Reset Password

Users will be redirected to the FAQs of the Support section at www.ceicdata.com/support where you can find links to change/reset password.

b) CDM Software Download

Users will be redirected to the FAQs of Support section at http://www.ceicdata.com/support where you can find the Downloads tab to download CDM software.

c) Send Logs

This option is relocated from the Help menu

d) Email Us

This replaces the previous Feedback button.

Shortcut keys are available for the above menu and buttons.

Support – Alt + U
Change / Reset Password – Alt +U, C
CDM Software Download – Alt +U, D
Send Logs – Alt +U, L
Email Us – Alt +U, E

8.3 New Notifications Window

In CDM2.5.10, users will see a new notifications window after login, alerting you of important messages, such as new CDM version releases, password expiry, etc.
8.4 CDM Charting Enhancements

Refinements to charting have been made to enhance customization features and ease of use, which are detailed below:

- **Bring to Front / Send to Back**
  Particularly useful for chart types such as Area, when one series may overlap another, you can use the Bring to Front/Send to Back feature. After adding multiple series to the charting interface, highlight the series and right click the context menu, choose to bring the series to the front or to the back.

- **Add Series to Chart**
  When users click on the Add Series button, series will be inserted in a new row and placed on the top. It will not replace the existing series in the chart pane.

Add Series Button opens the “Add Series to Chart” window, where you can find series using keyword/series code search or browse from the tree layout and add one or more series to your chart.
- **Pane Toolbar**
  When multiple chart panes are selected, the pane toolbar will be grayed out automatically because the pane toolbar only applies to a single selected pane at one time.

- **X-axis Label for Quarterly Series**
  The default X-axis label for quarterly series has been modified from Jan, Apr, Jul, Dec to Mar, Jun, Sep, Dec which is more intuitive.
9 User Guide

The help document is accessible from the “User Guide” Button under Help Menu on the CDM Toolbar. A PDF User Guide is downloadable from:

http://www.ceicdata.com/client/downloads

10 About CEIC and Our Databases

For more information about CEIC, visit our website:

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