START GUIDE

CDMNext

v.6.0

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1. PRODUCT OVERVIEW

CDMNext offers a transformed web-based platform from a generic data extraction tool allowing users to create quick analysis in a form of insights with rapid and easy access to CEIC databases. We have introduced substantial improvements from performance to usability to capabilities over the previous web and desktop versions (WebCDM + CDM).

With the goal to improve user experiences with simple steps and clicks to complete a workflow, our proprietary platform conveys a new concept in data discovery, advanced visualization, data transformation, extraction, integration, management, collaboration and engagement.

2. STARTING CDMNEXT

2.1 Login
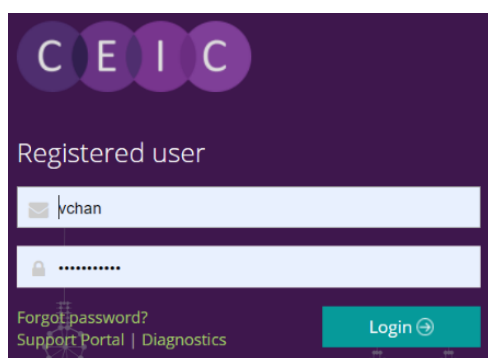
To access CDMNext, go to **https://insights.ceicdata.com** and log in with your registered email.

Forgot password?

Enter your registered email address to reset your password.

Support Portal

Login to CEIC Support Portal directly to access our comprehensive Knowledge Base covering solutions and FAQs on data related questions, platform issues and CDMNext functionalities.

Guest Mode

For IP authenticated users who prefer to navigate CDMNext without registration, a guest access is available for the same subscribed data with limited platform functionalities.

2.2   Prerequisites

CDMNext currently supports the following browsers and versions:

Browsers	Resolutions	Devices
Windows 7 and above 1) Microsoft EDGE 88+ 2) Google Chrome 31+ 3) Firefox 30+ 4) 360 **Mac OS X Mavericks** 1) Chrome (latest) 2) Firefox (latest) 3) Safari (9+) **iOS 8.0 and above** 1) Chrome (latest) 2) Firefox (latest) 3) Safari (9+) **Android 5.0 and above** 1) Chrome (latest) 2) Firefox (latest)	♣ Desktop (with resolution 1920 x 1080 and up) ♣ Laptop (with resolution 1366 x 768 and up) ♣ Tablet (1024x768 - landscape orientation) ♣ Tablet (768x1024 - portrait orientation) The minimum screen size - a tablet in landscape: 1024x768 resolution a table in portrait: 768x1024 resolution	♣ Desktops, Laptops ♣ iPad 3+

2.3   Landing Page

Upon logging on CDMNext, the landing page starts with intuitive search to help you discover CEIC data series and other insights / reports.

The data and insight discovery tool on the left panel allows users to easily navigate all the available content in our CEIC databases, Analysis, Comparables, Release Calendar and Watchlist by searching and/or browsing.

The right panel is reserved for managing / editing users' own insights. Users can retrieve their saved / shared insights in 'My Insights' folder.
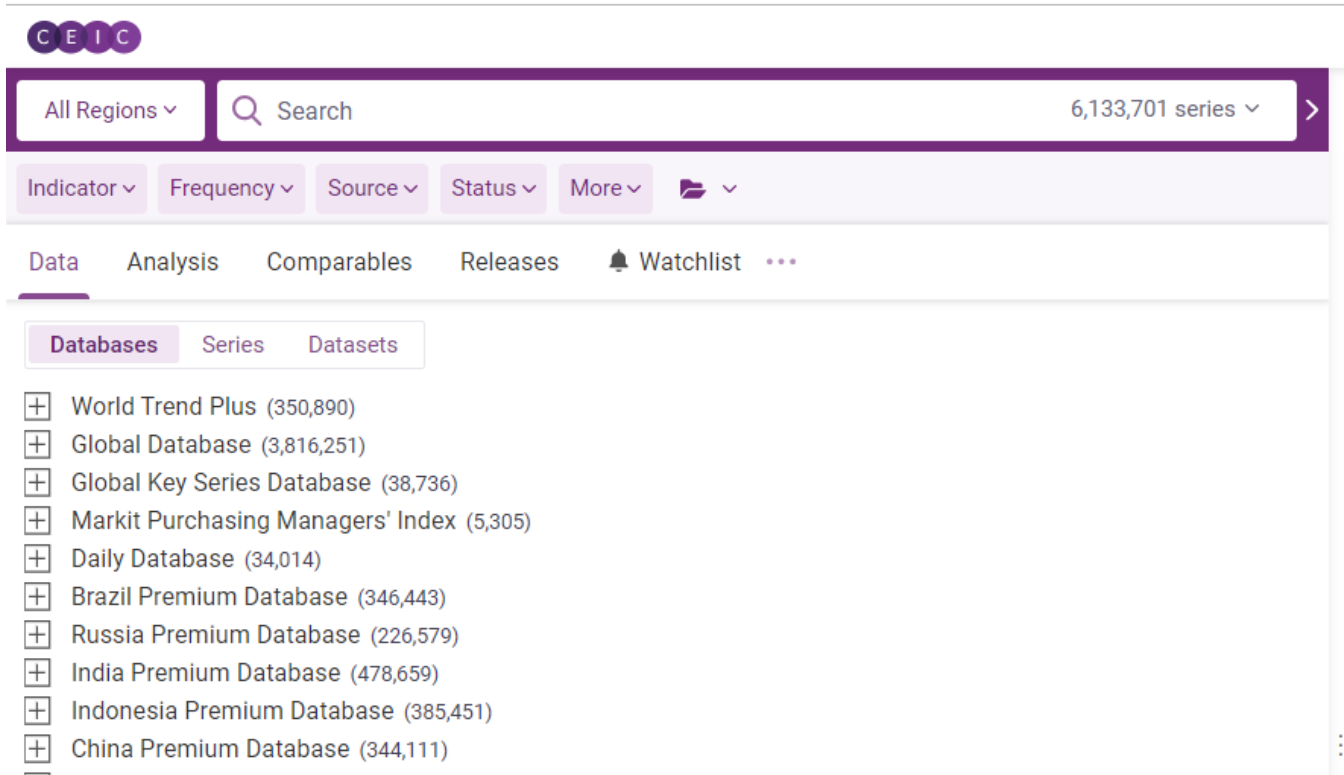
The tabs below the search bar provides the different viewing modes to navigate the search results.

1. **Data** – access to the full CEIC Databases, individual series and datasets
2. **Analysis** – access to all CEIC Insights, EMIS Insights, and other third-party reports (added intelligence on data and current events)
3. **Comparables** – standardized list of key series grouped by region
4. **Releases** – release schedule of series in a timeline
5. **Watchlist** – latest updates and notification management on selected series

To customize your own landing page, click on … to select the tabs to display in your preferred order.
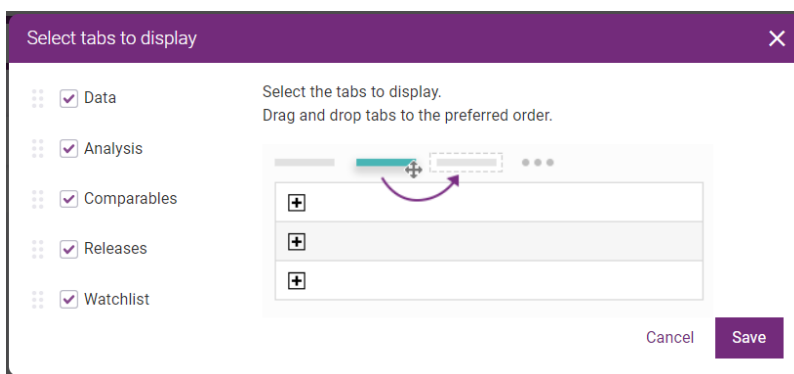
3.   CREATING INSIGHTS

To create an insight, simply add or drag & drop the selected series to the right panel. This action automatically adds the series to My Series.

Once series are added to the right panel, an insight is automatically created in your account. You may name your insight to save it properly to My Insights.

You may add additional sheets to your insight for visual creation, including line, area, column, bar, pie, table, map heatmap, or to insert a text box for commentary, image or URL.
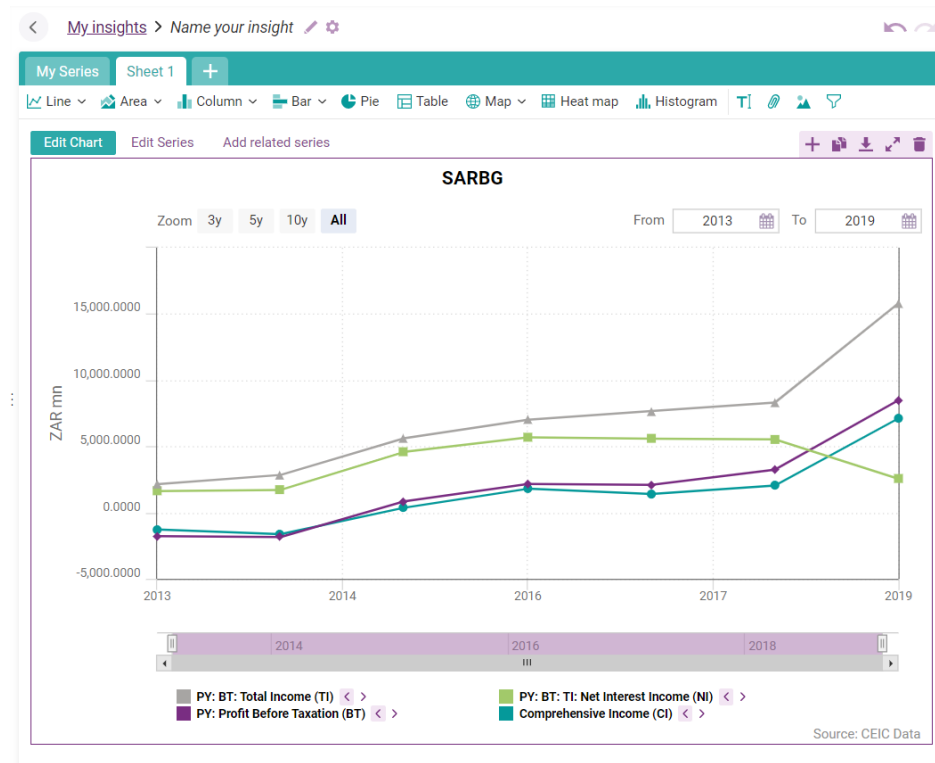
Next to the insight title on the right, you may click on the cogwheel to set special setting or share the insight with other colleagues within the organization.
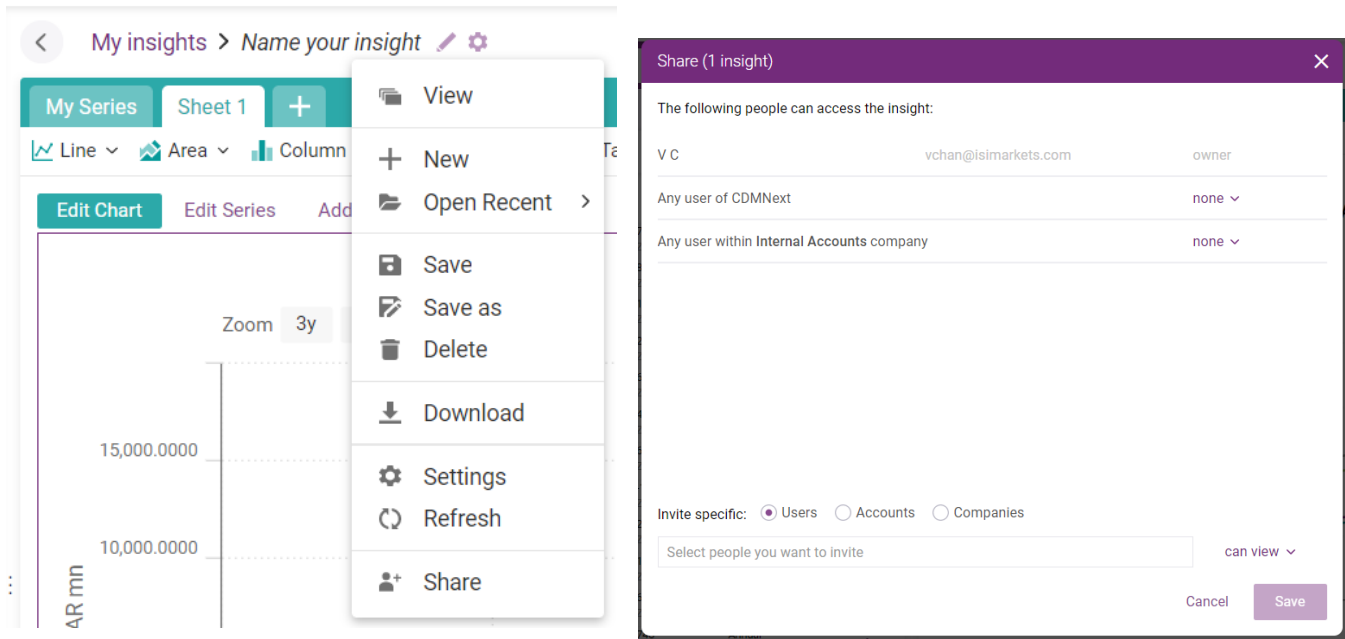

Next to the insight title on the left, you may click on My Insights on the left of the breadcrumbs to explore 'My Insights' that contains all of your insight collections (created/saved by yourself and shared by others).
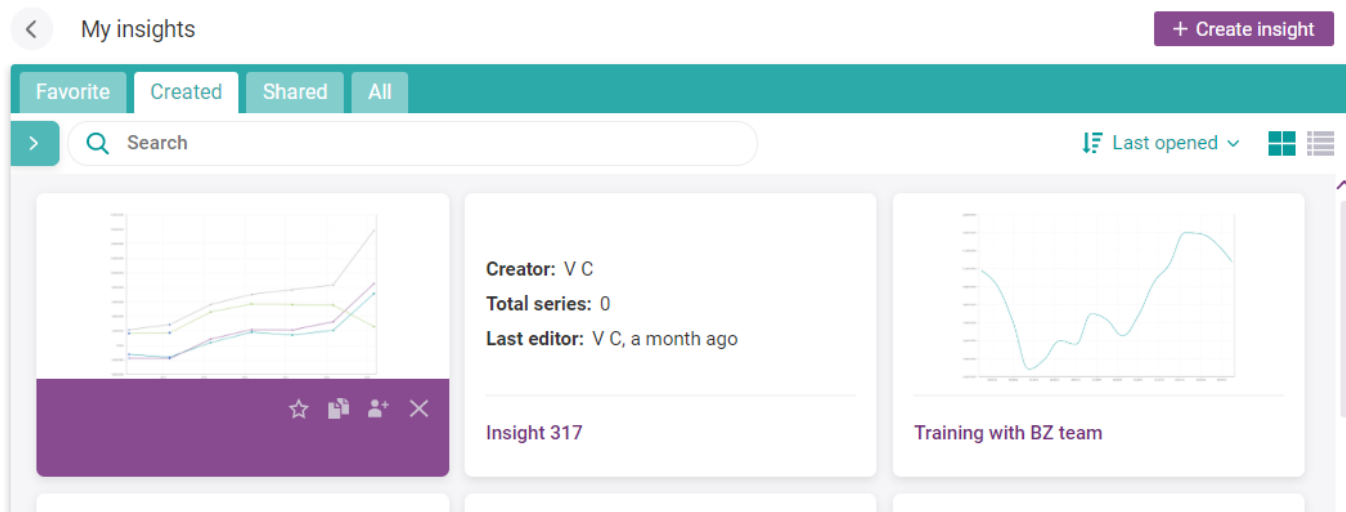
Under the Analysis tab, you may copy and customize one of the insights in your account. You may choose to preview or customize the insight when you mouse hoover the selection.

After clicking on 'customize,' a copy will be created to right panel under My Insights. You may rename this insight, or make further edits in the saved copy.
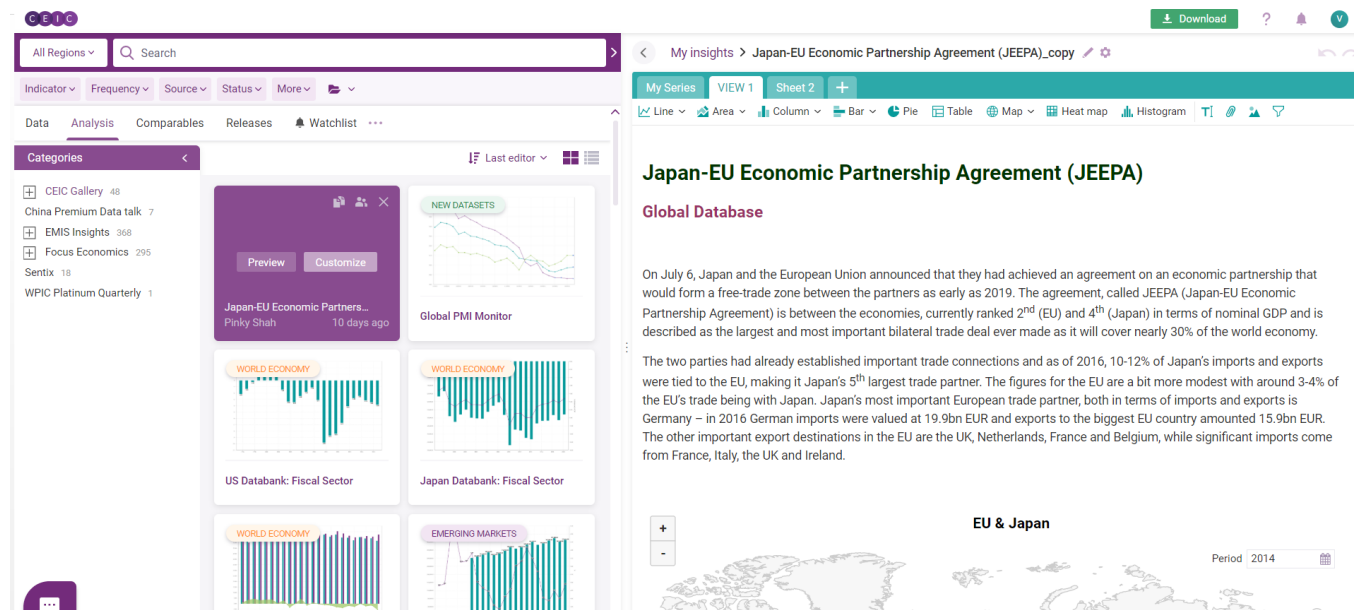
3.1   Data Discovery

On the landing page, the search is presented in the center of the screen. When the right panel is expanded for insight editing, the search will be minimized to the left panel.

You may adjust the size of the search screen to best fit your current activity.
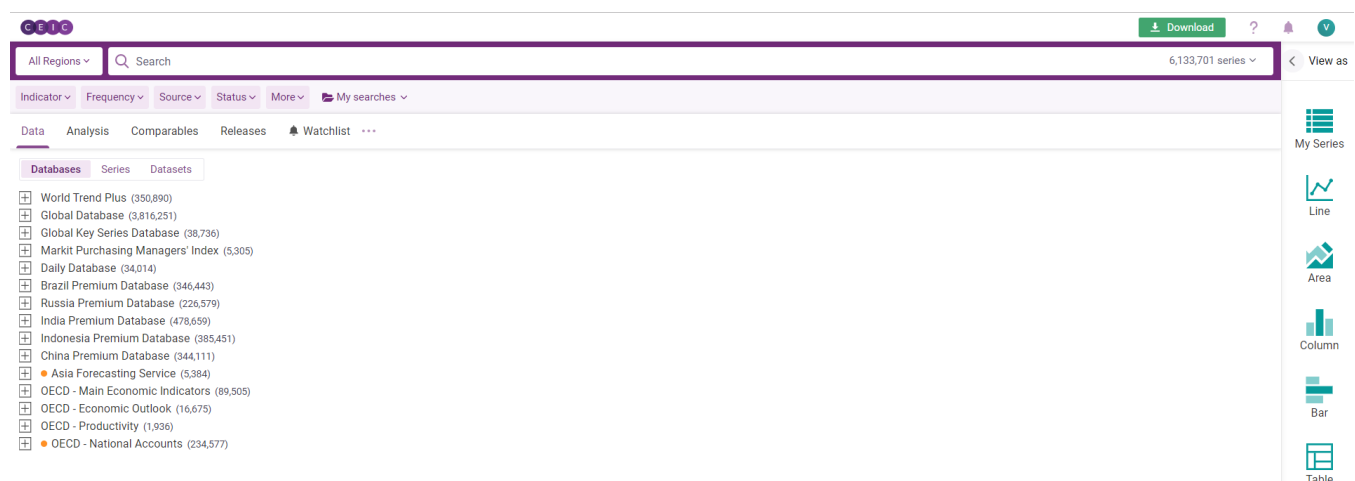
In the search bar, you may type in any keyword combination to run through CDMNext to locate the desired data series and insights.

API and R subscribers can retrieve the search results in those platforms, by selecting to perform the search as an R code or API call.
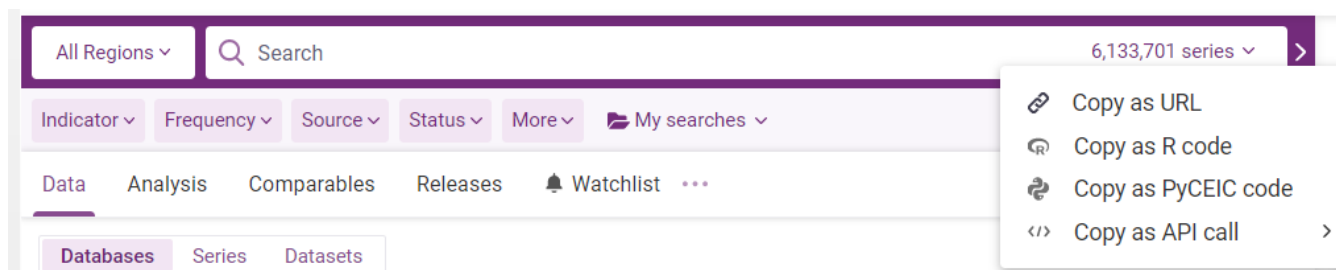
Next to the search bar, you may select the **region** filter to narrow down results by geographical location.
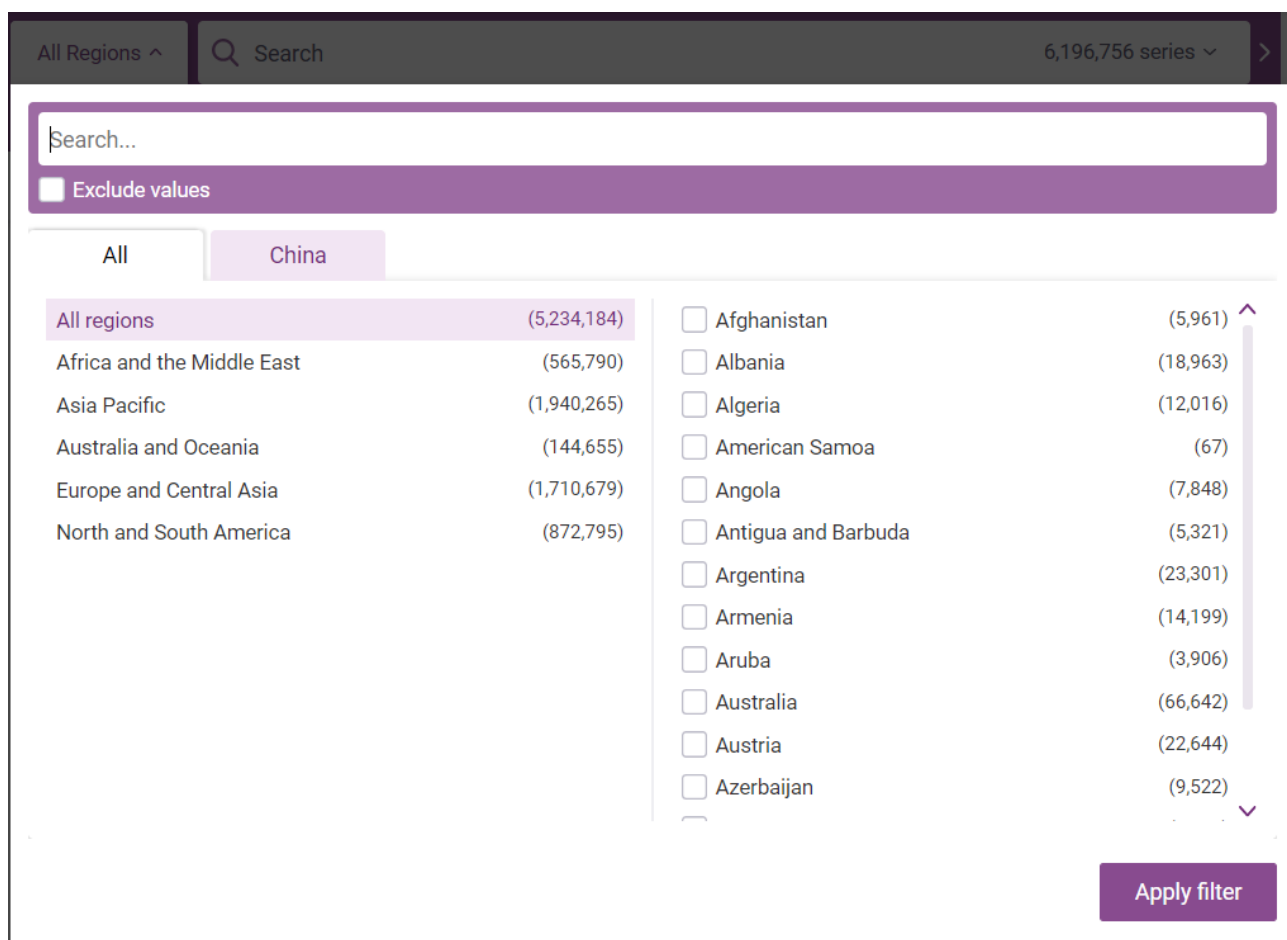
All the other multi-dimensional filters include the economic **indicators** in first and second levels (defined by CEIC database structure), **frequency, source, status**, and more.

Additional options in **more** include more filters to search **by units, observation period, series name only, subscription only, new series / key series only, forecast series, series with release schedule, and/or series with suggestion for rebased/discontinued series**.

Advanced allows users to include/exclude any keyword combination and series IDs. The search for series ID can filter out non-series ID inputs such as keywords / operators.

Help offers search tips.

The faceted search algorithm helps to refine and filter results by selecting one or more criteria in parent-child relationship. Within a rich database, this hierarchy structure enhances the flexibility to retrieve data in a systematic approach by excluding unmatched results.

For example, if you select 'active' under status, other filters will only include 'active' series with narrowed down results.

Under the series tab, the **sort by** field with dropdown options allows users to arrange the results in preferred order.

- Popularity – by series with highest usage
- Recently updated – by latest series with modified time point/status
- New series – by latest series added to the database
- % change, last value, status, region, frequency, first date, last date, unit, source

As you start typing, CDMNext search provides keyword autocomplete in **keyword predictions** which is managed by stemming, search suggestion, acronyms/synonyms.

In the search drop down, **CEIC suggestion** is also made available with relevant series attributes to facilitate facet predictions to speed up the search processing and enriching results.
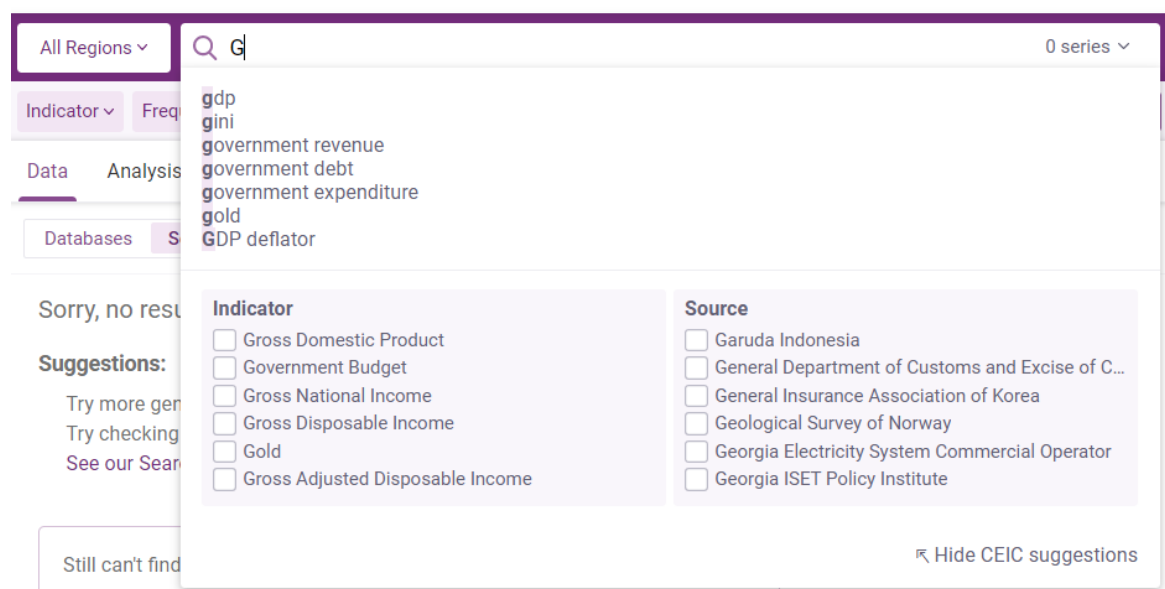

At the bottom of the search panel, you may select the number of results to display per page.

You may save up to 20 **favorite searches** with any keyword and filter combinations in '**my searches**' folder for frequent use.

Once a keyword and/or search filter is entered/applied, a 'save' button will appear below the search bar. Once saved, you may retrieve / edit the searches under 'my searches' folder.
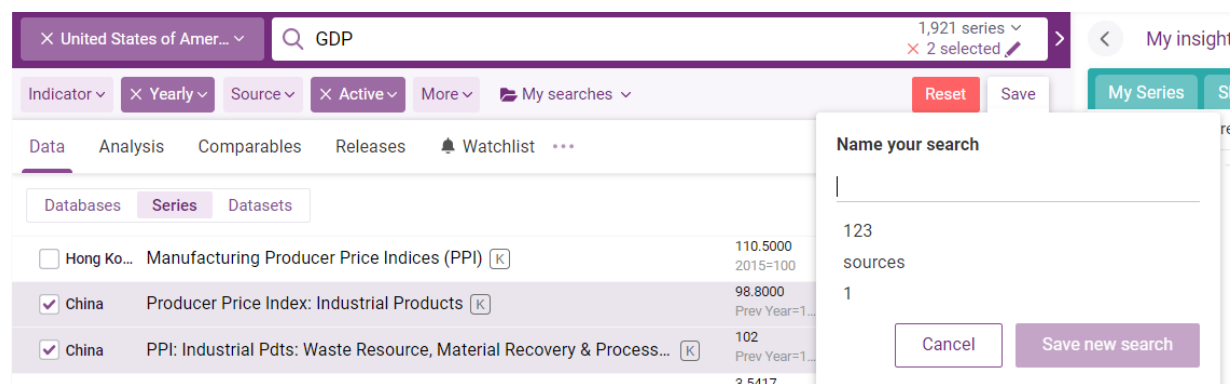
Besides search using the Data tab, you may search and browse with the Analysis, Comparable, Releases, and Watchlist tabs.

A single search screens out the results under all the 5 data tab.

To access the **series info**, you may click on the green information icon next to the series check box or click on the series name.

A **series info** consists of an overview of series attributes, pre-built chart, data series, statistics, related series / insights, math function editor, and help.

You can access the series remarks, corresponding footnote article and knowledge base in self-support. If you need further assistance, please submit your question to us. Our helpdesk team will review your questions as early as possible.

Under **by series** tab, users can right click on the selected series to show where the series belong to in the database tree or table level.

3.2   Data Selection

When you have identified the series to save in your insight, simply drag and drop the selected series from search to the series list or visual creation on the right panel. Alternatively, you may click on + to add series to the series list.

This action will be auto saved in your insight by default setting.

The arrows in between data discovery and selection allow you to adjust the space for each panel display. This allows you to collapse or expand for a shared / full screen display.
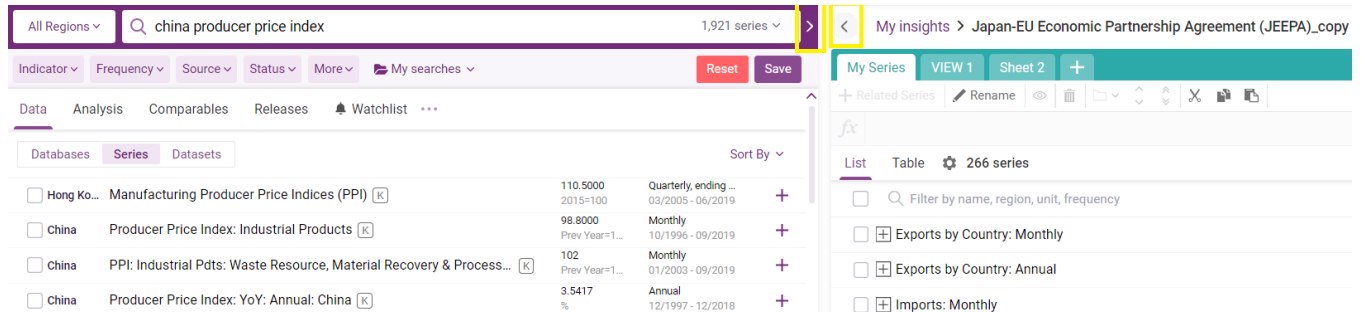
Within the data selection, you may view the data in a list or table format. Under the sort by options, you can arrange the series display order to your preference.

For better organization of the selected data, users may separate / group the data in the preferred sequence and category.

3.3   Data Transformation

To apply math functions to the selected series, you may type a function on the function bar or access function editor to see all available formulas.

In the formula bar, you can type in a single function or a combination of functions.

Function suggestion is also available while searching.

To access the full view of function editor, simply click on *fx* 'all functions.'

The same formula bar is presented to allow searching and browsing.

Alternatively, you can insert a function from the list of categories on the left.

To see the respective function description and illustrated example, click on 'help on this function.'

3.4   Visualization

Next to the Data tab, the **Sheet** tab is presented for visual creation. The available visual tools include chart (line, area, column, bar, pie), table, map, heat map, histogram, commentary, attachment insert and image upload.

You may create up to 10 views (tabs) within an individual insight.

To insert a visual with the selected series, you can simply drag and drop the selected series from search on the left panel to the right panel in the content area.
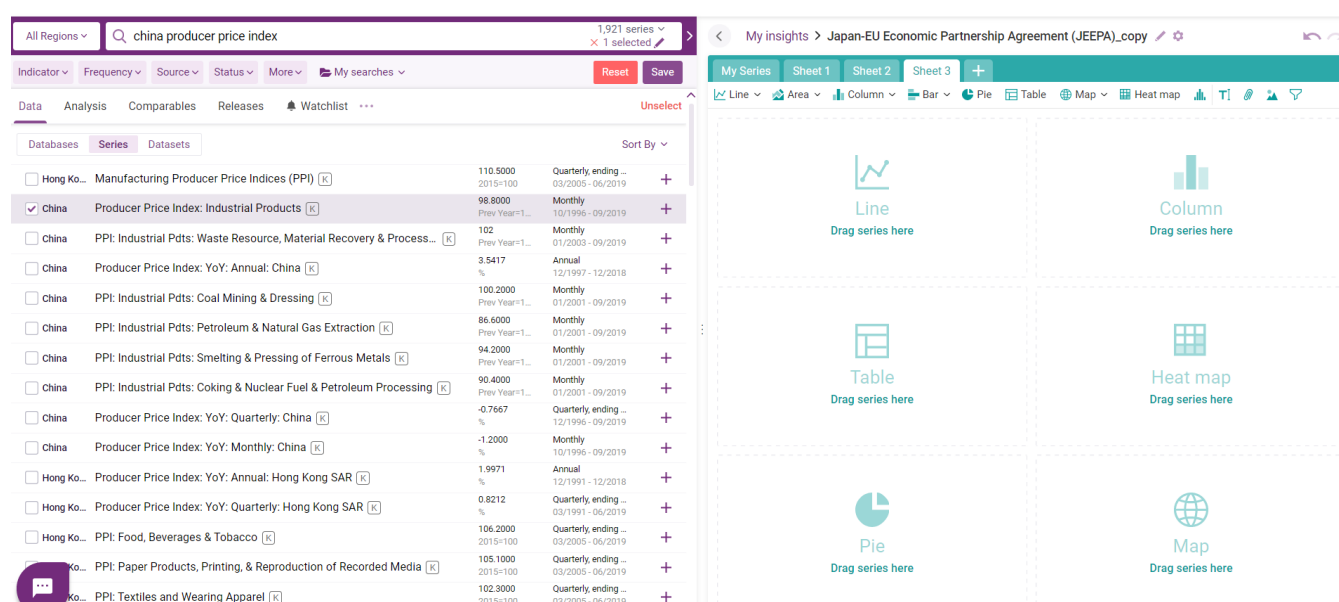

With more than one visual presented in the Sheet tab, you can drag and position each visual presented in the content area.

To modify the series settings of your selected visual, click on the **edit series** to open up the series settings on the left hand panel.

You can select the series to directly reflect in your visuals.

CDMNext offers an in-built auto axis detection to properly place series with 2 different units onto the left and right axis.
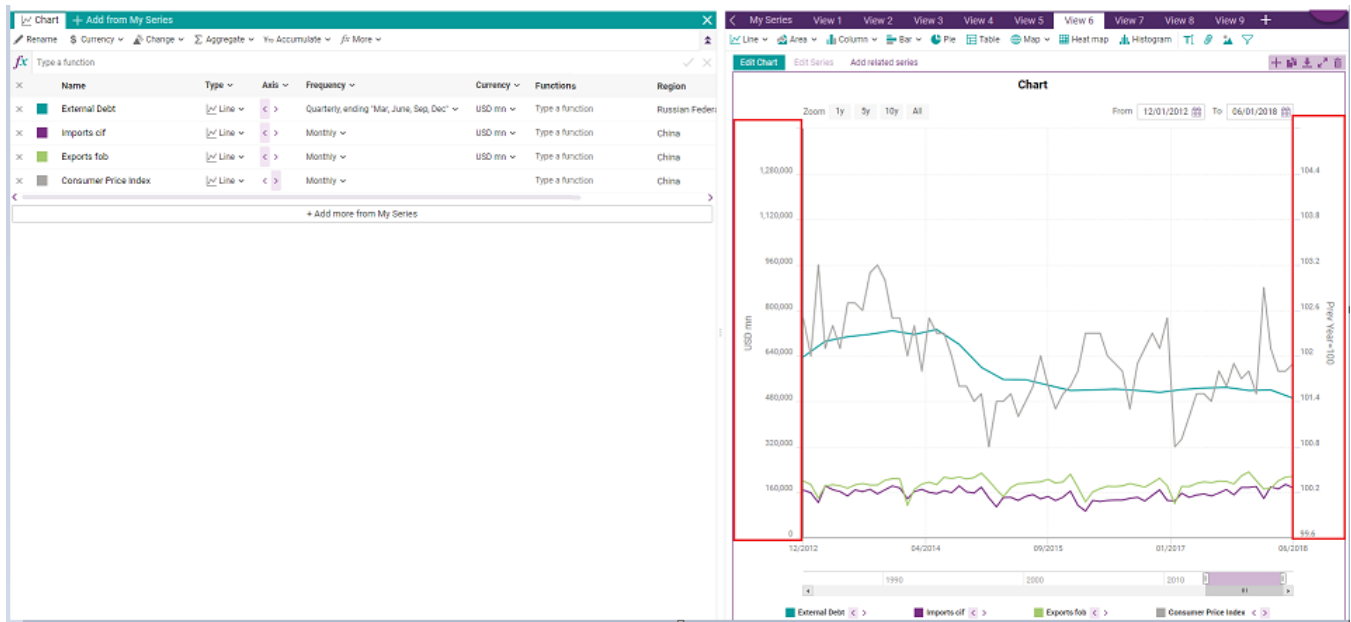
Besides **edit series,** you may also access **edit chart** to open a module to modify your visuals more precisely.
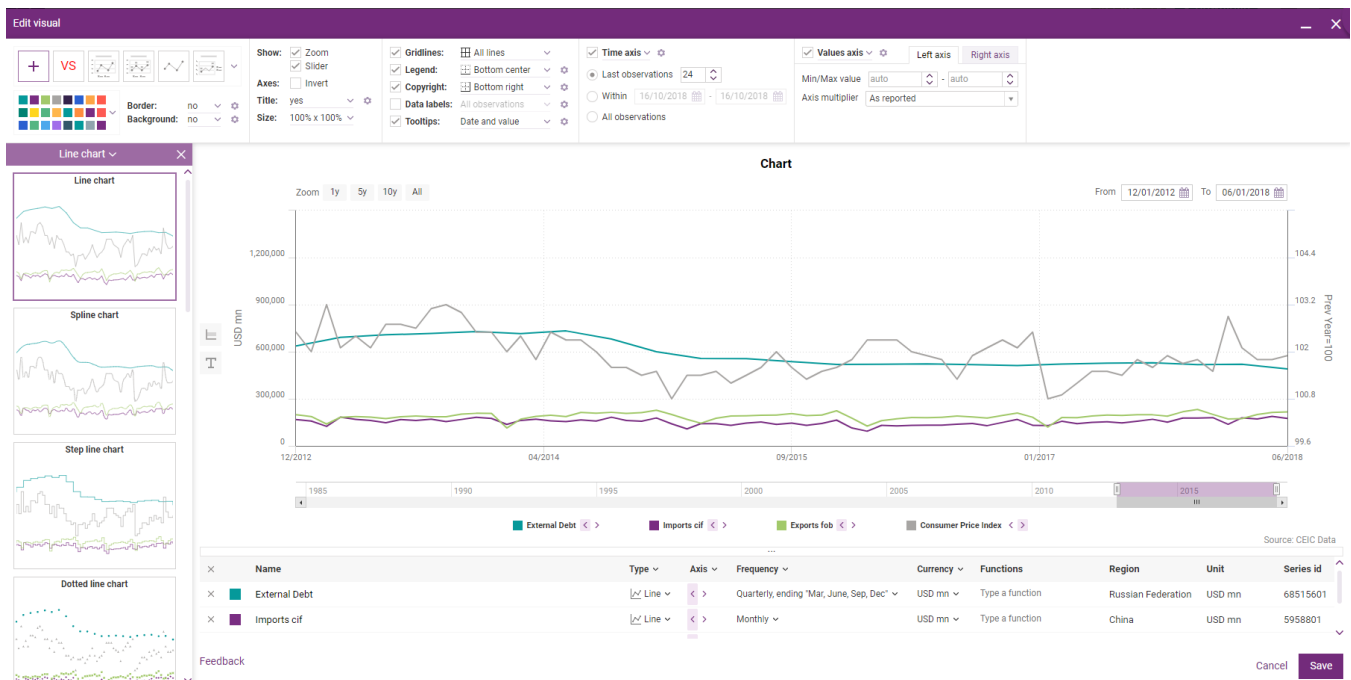

The visual configurations such as date range, attributes, values, legend, colors, tooltips, and data labels are available on the toolbar. The left panel offers a gallery of recommended visuals for your selected series.

How to create your own themes!

On the landing page, next to the download button – the theme is available to create and apply on insights.

The theme is a branding of fundamental settings to apply to CDMNext charts. It defines the default look of all the new charts created on CDMNext insights. On charts that have been created before, users can also apply the new theme manually.
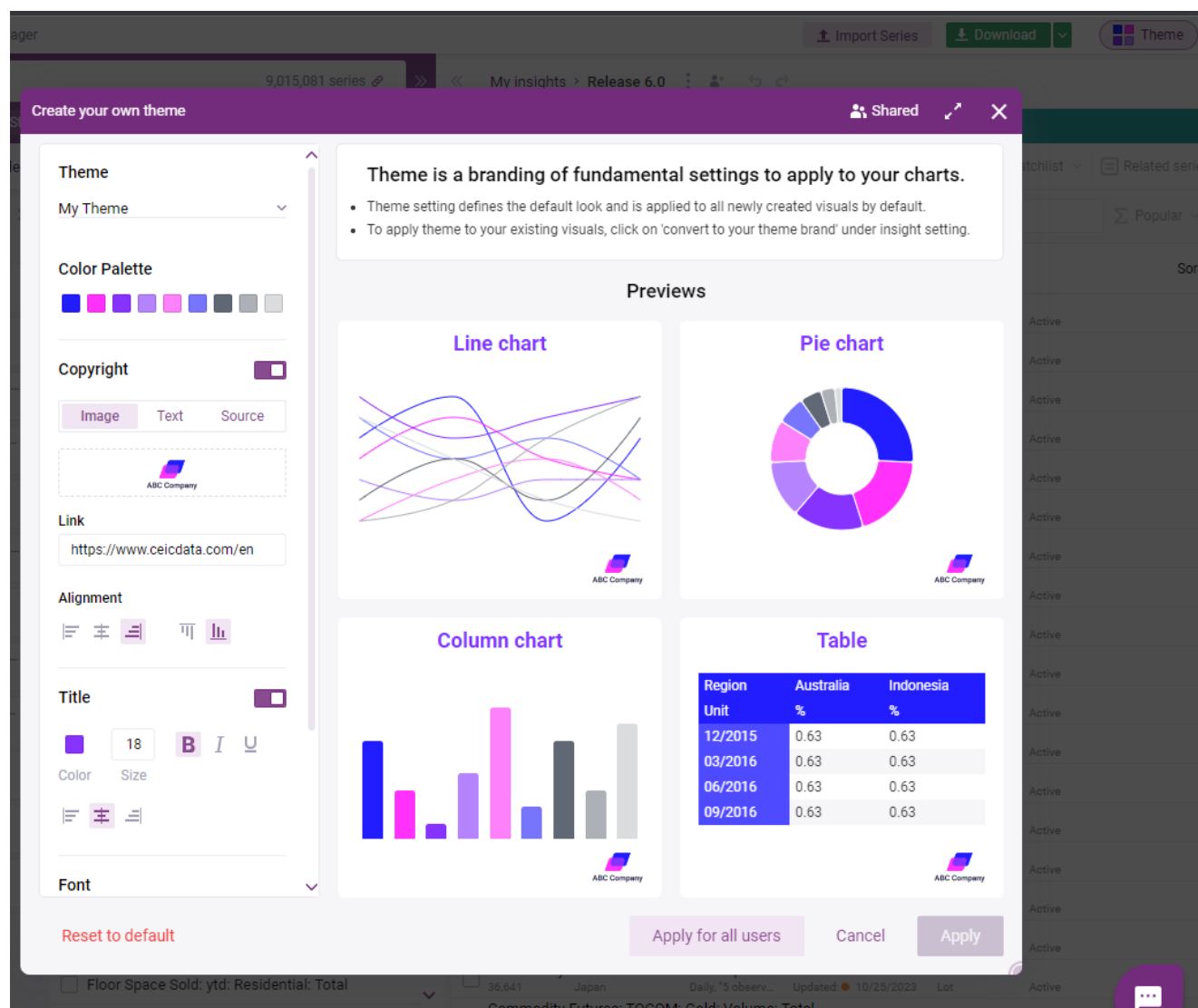
In terms of customization, users can choose from a wide range of color palette, copyright (image, text, source), link, alignment, title, font type/color, background, and border color.

Users can create multiple themes and save them under the theme folder, which allows to be shared with their colleagues across the organization.

Create your own theme Shared

Theme

My Theme ⌄

My themes

My Theme

CEIC Theme

Shared to me
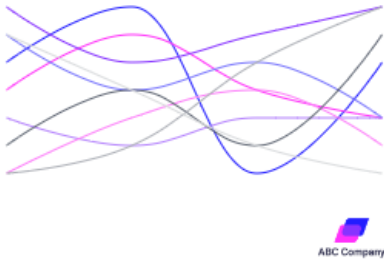
My Theme

My Theme

My Theme

My Theme

My Theme

My Theme

Theme is a branding of fundamental settings to apply to your charts.

- Theme setting defines the default look and is applied to all newly created visuals by default.
- To apply theme to your existing visuals, click on 'convert to your theme brand' under insight setting.

Previews

Line chart

ABC Company

Pie chart

ABC Company

Share theme ✕

The following people can see the theme

Users   Accounts   Companies

Type the user email or name

vchan@isimarkets.com		owner	
Any user within **Internal Accounts** company		none ⌄	
Georgi Ninov	gninov@isimarkets.com	can view ⌄	✕
Chris Pearce	cpearce@isimarkets.com	can view ⌄	✕

Cancel   Save

3.5   Series Suggestion Manager

Under both the MY SERIES and VIEW tabs, CDMNext offers a **related series** module for **suggested indicators** (available for all series), **forecast data** with linkage to actual series, **suggested replacements** for inactive series, **breakdowns**, and **dependencies** with linkage of base data and in-house calculated series.

The **indicators** are suggested based on the country currently displayed/selected in your data/visual. To select a country to see related indicator, click on the country dropdown.

By default, when no series is selected, related indicators suggest the following countries – China, United States, Japan, India, and United Kingdom.

The suggested indicators include the macro indicators from Global Economic Monitor, financial indicators from Daily Database, and global indicators from a mix of databases

-   **Macro indicators** (mostly from GEM, or GLODB with series in similar frequencies, units, meanings) – country specific

-   **Financial indicators** (Daily DB, GEM) – country specific

-   **Global financial indicators** (Daily DB, GEM) – common for all countries

The **forecast** tab presents the series relationship between actual vs. forecast series, a manual mapping defined by CEIC database team.

This manager provides the guided calculations to facilitate series jointing upon user's choice, in case the base and forecast series have different unit and/or frequency.

To manage your series, you may keep the individual series as they are, or replace them with a new one.

The forecast data is subject to suitability for Global Database & World Trend Plus Database.
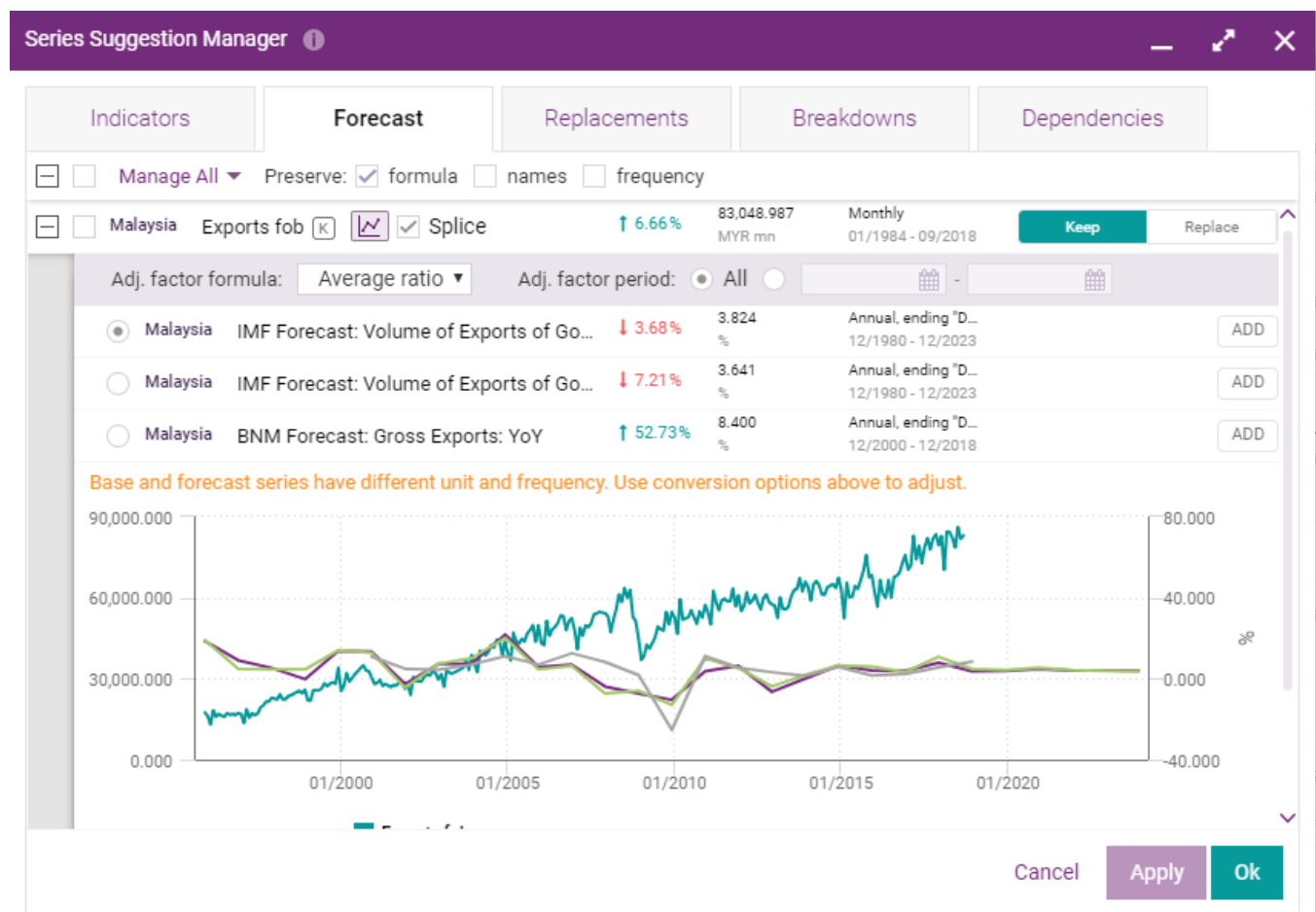
The **Replacements** tab presents the suggestion of new series to replace the inactive series.

To manage your series, you may keep the individual series as they are, or replace them with a new one.

The replacements are subject to availability for inactive series presented in all CEIC databases.
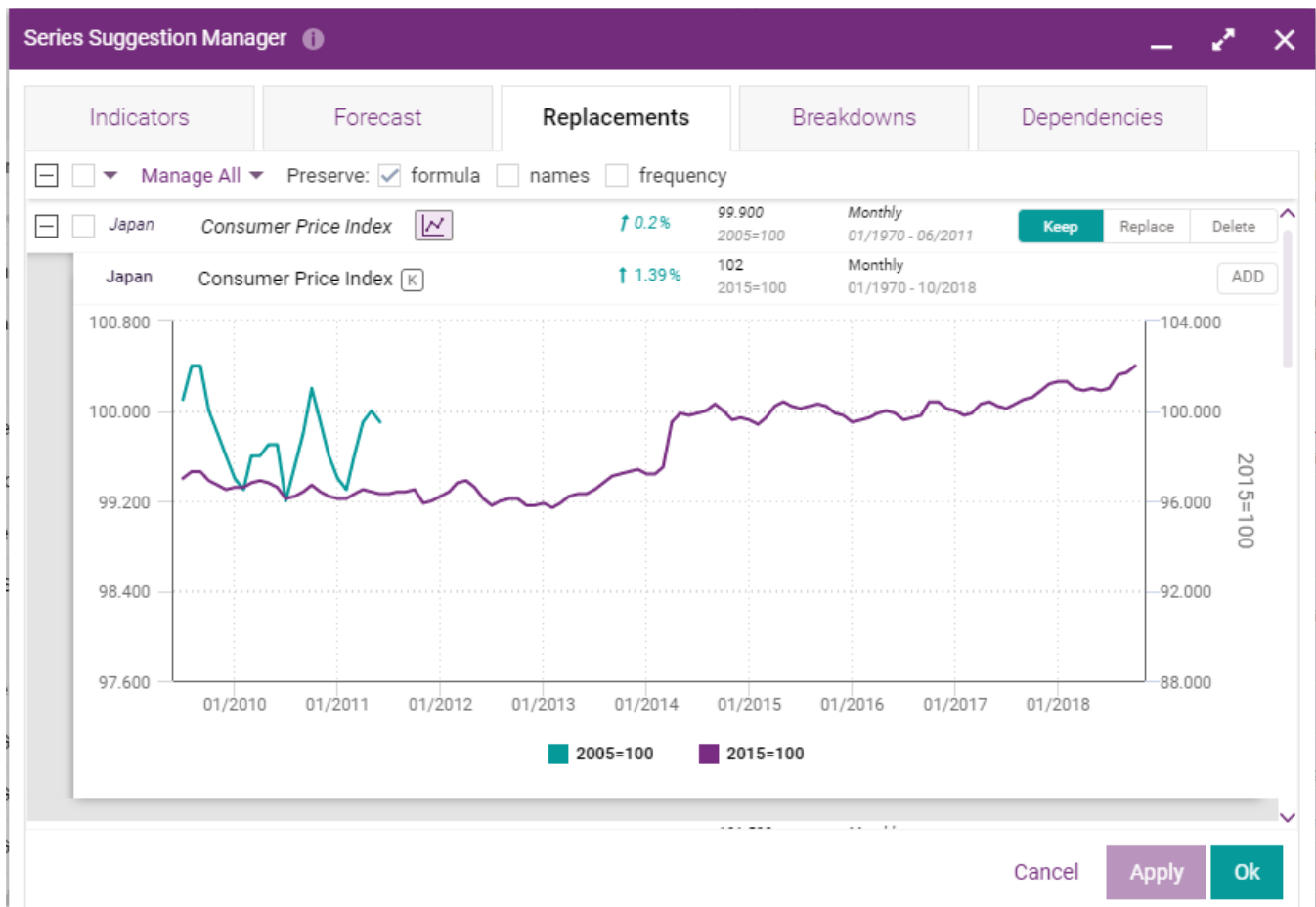
The **Breakdowns** tab present series relationship by quickly locating the related breakdown series under the assigned header in a more structured series naming.

The exposed series can be added and/or group to your existing / new insight.

The header and breakdown relationships are subject to availability for series presented in Singapore and South Africa under Global Database.
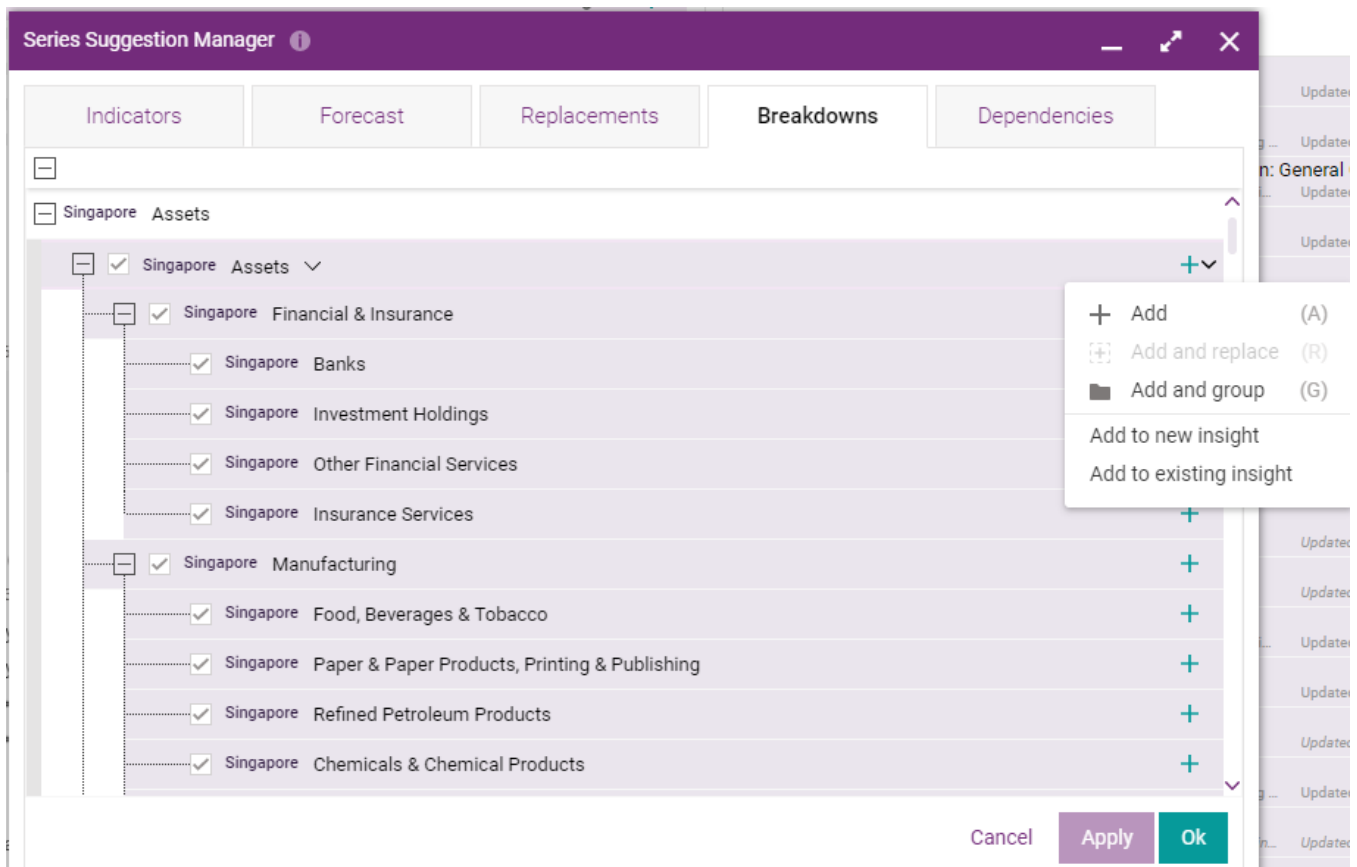
The **Dependencies** tab exposes the reference of base series and CEIC in-house calculated series.

The base and calculated series are presented on a pre-built chart for easy comparison..

The scope of base vs. derived series is focused in specific source from CEIC Generate, available in GEM and AEM dataset.
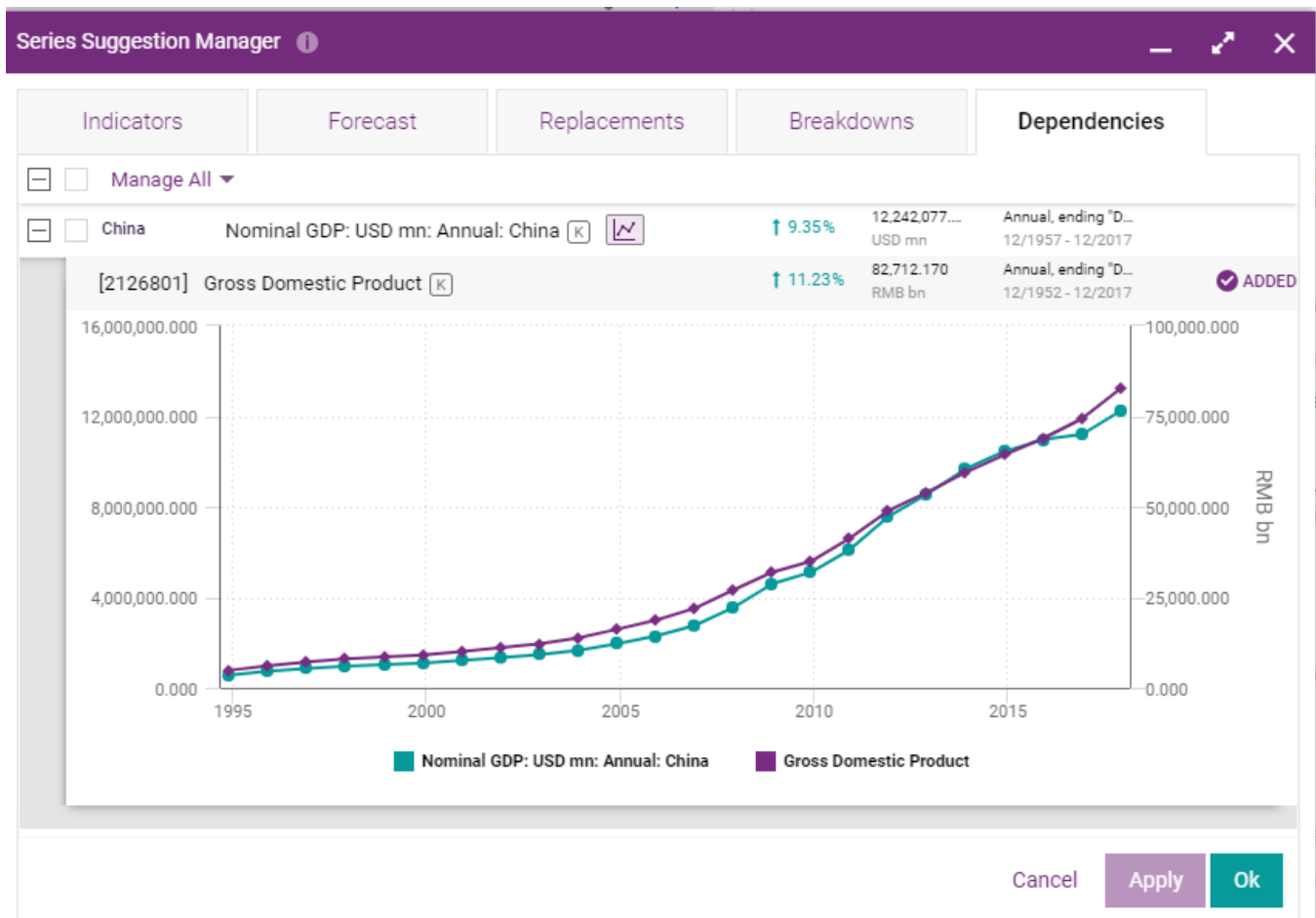
3.6   Download

The download options include series only and all views tabs of an insight.

The selection of download **formats**, **timeframe**, **data placement** and **output series details** are available in the download options.

- **'Copy to Clipboard'** allows the copy of data/visuals to your existing Excel file.
  API and CEIC R Package subscribers can also use this functionality to generate a code or http request to export the selected series in those applications.
- **'Download'** allows the download of your selection to a new file.

To download only your selected visual, you may right click on download or click on the icon presented for download and copy to clipboard.
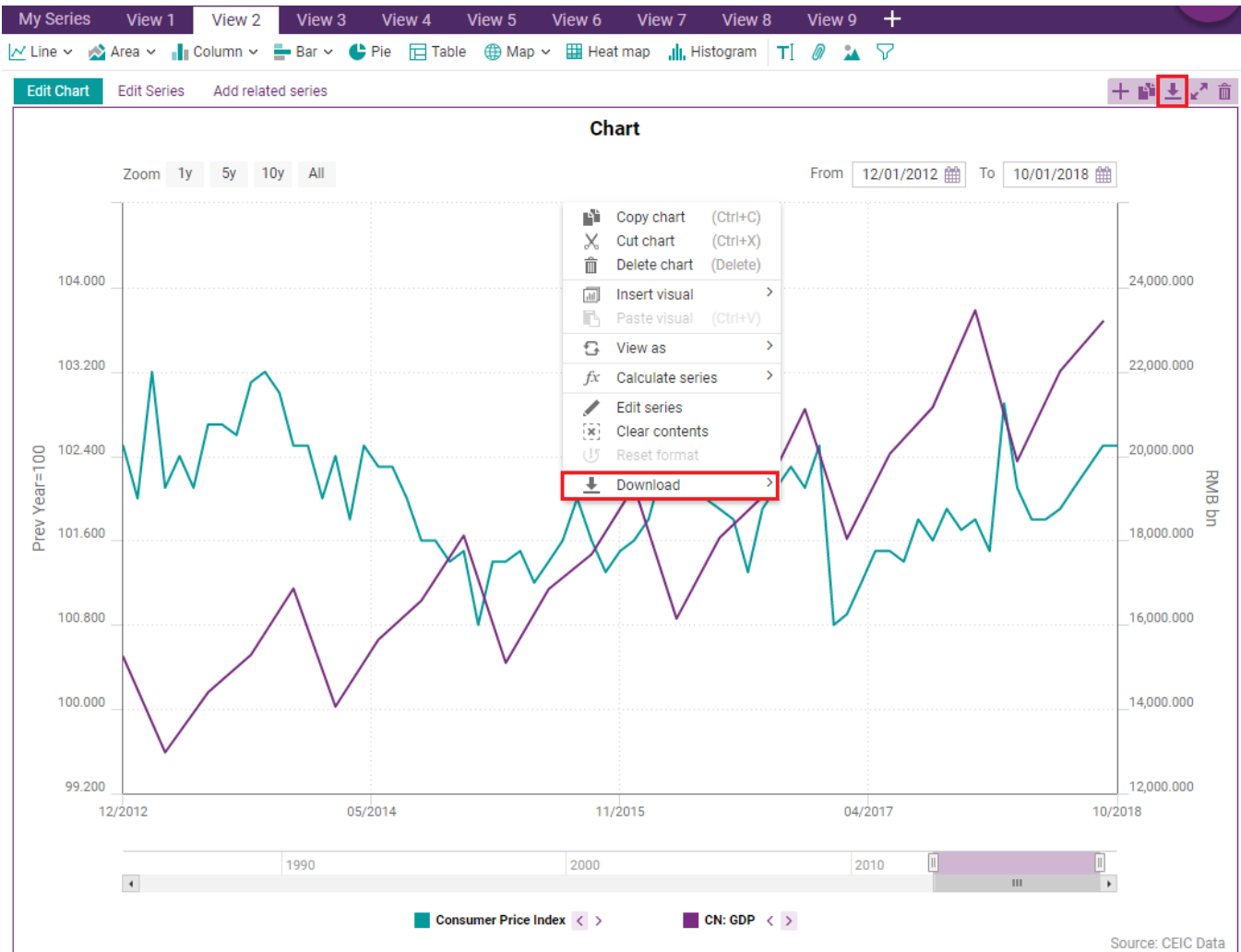
To refresh data in Microsoft Excel, please download our **CDMNext Excel Add-in** available under the upper right option in the drop down menu.

Alternatively, you can download the CDMNext Excel Add-in under the HELP tab.
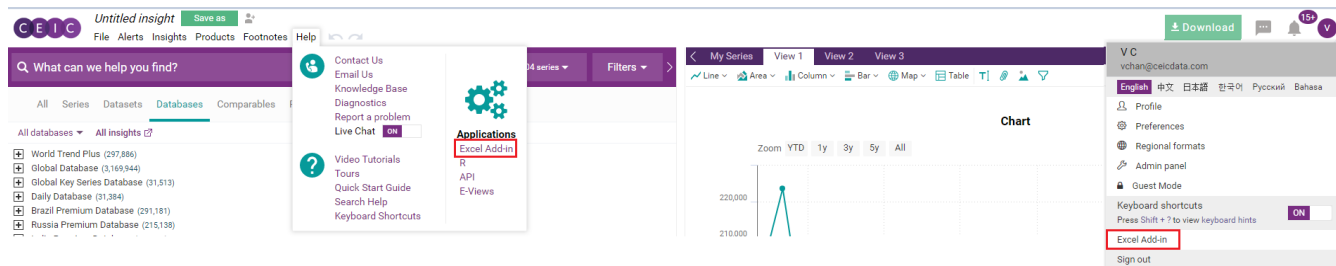
CDMNext Add-in is avaialble to download for CDMNext registered users.

Select your Microsoft Windows Version and Office Version to download our latest CDMNext Add-in version.

The workstation requirements, installation guide and quick start guide are available.

3.7   Alerts

The Watchlist allows you to add up to 1000 series for data update alerts.

You may select the series and right click to add to watchlist, or click on the bell icon.

The alerts can be delivered on CDMNext as pop up notifications and/or email notifications.

The email notifications can be delivered with a defined period as a summary.

To view or edit your Watchlist, you may visit the Watchlist tab on the landing page.

3.8   Share

After you have saved your insight, you may share it with other users within the same organization. Click on the cogwheel to share the insight with other colleagues within the same organization.
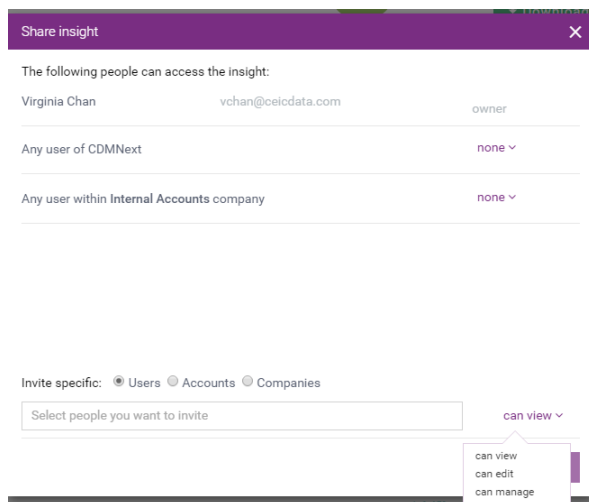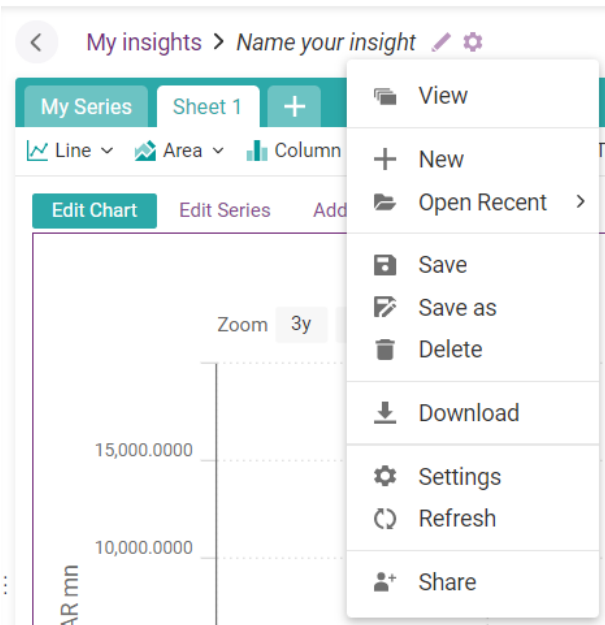
You may invite specific users to access your insight with option to view, edit or manage.

Can view – shared user(s) will be granted with permission to view the insight only

Can edit – shared user(s) will be granted with permission to modify the insight (such as adding series, creating a visual, uploading an attachment)

Can manage – shared user(s) will be granted with the same permission as the creator (such as sharing with others, deleting an insight)

4. IMPORT SERIES

4.1 User Data

To import your own custom data to CDMNext, users can click on the 'Import Series' option on the upper right on the landing page.

Follow the instructions in the pop-up message to download the CEIC defined template in Excel.

After uploading your file to CDMNext, you will receive a notification that your file has been successfully uploaded.

To retrieve or edit your data series, go to the 'Imported' sub-tab under Data tab.

In the BETA launch, users can only edit the series in Excel file and upload it again to CDMNext.

Note: if you have not uploaded any data to CDMNext, this 'Imported' tab will be hidden.

You may add your imported series to a new insight to create visuals and apply math functions on CDMNext.

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5. USER SETTING

5.1 General Setting

On the upper right-hand corner, users can click on the avatar to modify personal information, interface language (available in English, Simplified Chinese, Japanese, Korean, Russian, and Indonesian Bahasa), date / number format and other default settings.

The keyboard shortcuts and notifications are enabled by default.

6.   NOTIFICATIONS

For keep abreast on CEIC announcements, users can explore the notification slider – located on the upper right corner of the landing page.

The first tab with 'what's new' features the latest insights from our in-house experts, and our monthly insider with highlights.

The second tab with 'recommendations' promotes the recent insights that you have opened, and other latest insights from our team.

The third tab with 'notifications' summarizes the latest series updates / activities from your Watchlist.

7. ABOUT CEIC AND OUR DATABASES

For more information about CEIC, visit our website:

http://www.ceicdata.com

For more information about our databases, visit our website:

http://www.ceicdata.com/en/products