START GUIDE

CDMNext – Excel Addin

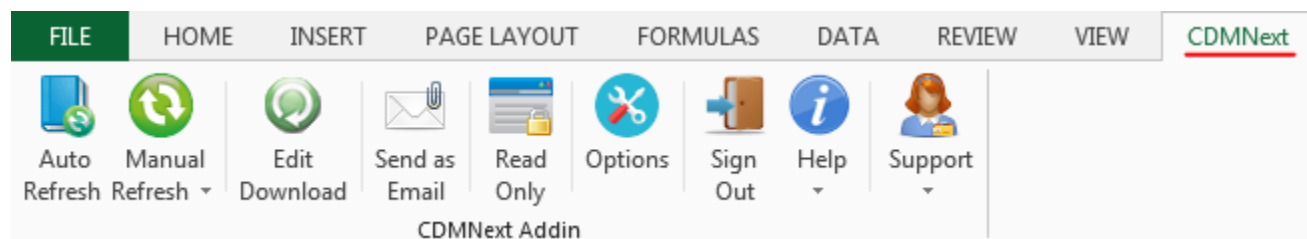# TABLE OF CONTENTS

1.   PRODUCT OVERVIEW

The CDMNext Addin allows users to refresh data with links coming from CDMNext and/or CDM applications.

Below is the location of the Addin available for Microsoft Excel.


2.   STARTING CDMNEXT ADDIN

2.1   Login

To login to CDMNext Addin, users should have a work file with previous downloaded data. Below screenshot shows a sample of a downloaded data file.
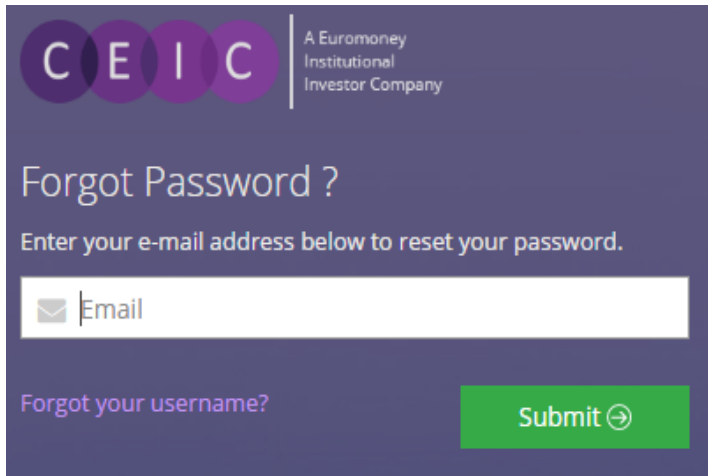
	A	B	C
1	Select this link and cl	Exports: Live Pig	Exports: Live Poultry
2	Country	China	China
3	Frequency	Monthly	Monthly
4	Unit	USD mn	USD mn
5	Source	General Administration of Customs	General Administration of Customs
6	Status	Active	Active
7	Series Code	6287401 (CJGAA)	6287501 (CJGAB)
8	Function Information		
9	First Obs. Date	1/1993	1/1993
10	Last Obs. Date	5/2013	5/2013
11	Last Update time	6/8/2013	6/21/2013
12	5/2013	36.644	1.713
13	4/2013	36.651	2.435
14	3/2013	33.716	2.763
15	2/2013	33.791	2.581
16	1/2013	10.412	0.944
17	12/2012	67.069	4.706
18	11/2012	35.730	2.566
19	10/2012	39.953	2.634

How to login

1. Inside an Excel file, click on the Refresh or Edit Download Excel options, the CDMNext Addin will launch the login form.

2. Enter your user ID and password to login and click "OK" (green tick) or press enter to proceed.

3. Check the "Remember my username and password" if you want CDMNext Addin to memorize your login details for next time.

4. When the user has logged in, "Check Updates" and "Sign Out" options are available.
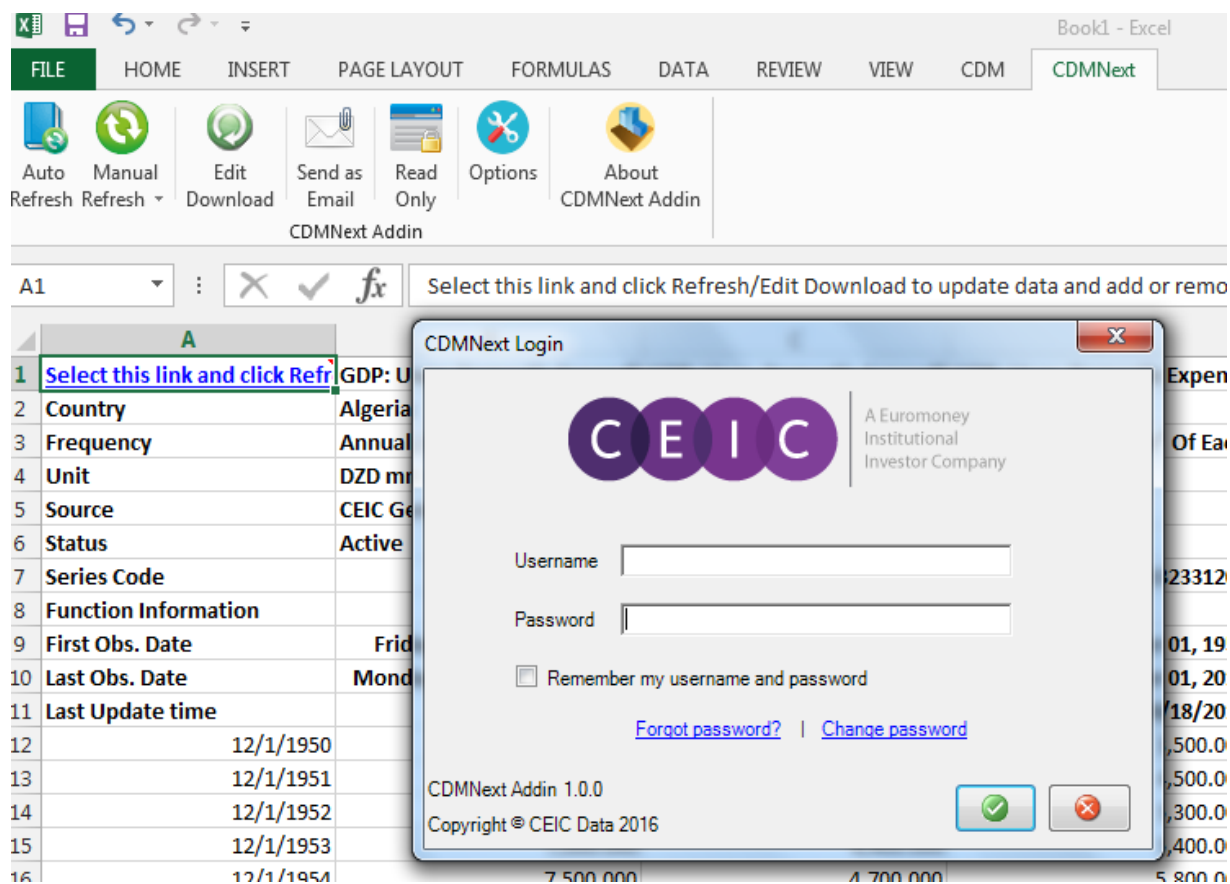
Should there be any login problems, CDMNext Addin will prompt you with an error message, where you can return to the login box to correct your details and try connecting again.
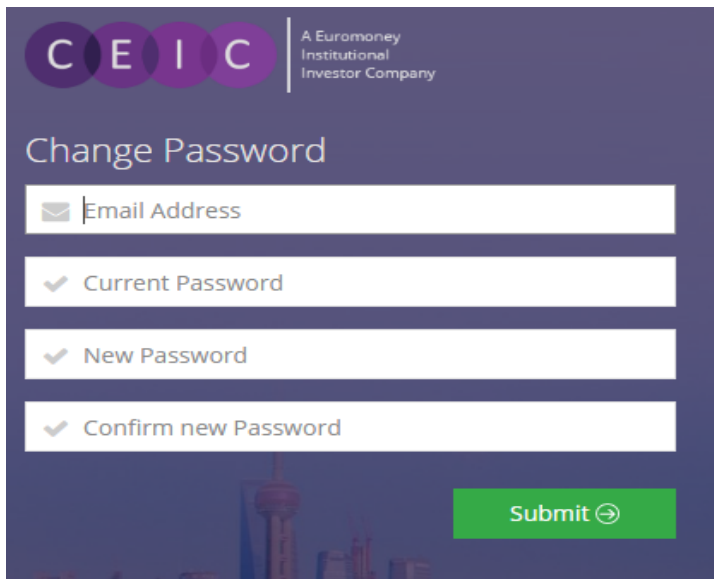
Forgot Password?

If you have forgotten your password, you can reset it by clicking on the link "Forgot Password?"

You will be directed to the Password Reset with 'Enter your registered email address to reset your password.'

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

Change Password

This link allows to you change your password by entering your current email and password.

Note: it is strongly recommended 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.

2.2 Prerequisites

CDMNext Addin currently supports the following Microsoft OS and Excel versions.

CDMNEXT ADD-IN 1.0.0 Supported Environments								
	MS Off 2003	MS Off 2007	MS Off 2010	MS Off 2010 (64 Bit)	MS Off 2013	MS Off 2013 (64 Bit)	MS Off 2016	MS Off 2016 (64 Bit)
Win XP Pro SP2	✓	✓	✓	✗	✗	✗	✗	✗
Vista Business	✓	✓	✓	✗	✗	✗	✗	✗
Win Server 2003 R2	✓	✓	✓	✗	✗	✗	✗	✗
Win Server 2003 R2 (x64)	✓	✓	✓	✗	✗	✗	✗	✗
Windows 7	✓	✓	✓	✗	✓	✗	✓	✗
Windows 7 (64 Bit)	✓	✓	✓	✓	✓	✓	✓	✓
Win Server 2008	✓	✓	✓	✗	✓	✗	✓	✗
Win Server 2008 R2 (64 Bit)	✓	✓	✓	✓	✓	✓	✓	✓
Windows 8	✗	✓	✓	✗	✓	✗	✓	✗
Windows 8 (64 Bit)	✗	✓	✓	✓	✓	✓	✓	✓
Windows 8.1	✗	✓	✓	✗	✓	✗	✓	✗
Windows 8.1 (64 Bit)	✗	✓	✓	✓	✓	✓	✓	✓
Windows 10	✗	✓	✓	✗	✓	✗	✓	✗
Windows 10 (64 Bit)	✗	✓	✓	✓	✓	✓	✓	✓

3. CDMNEXT ADDIN FEATURES

3.1 Refresh Series

CDMNext Addin provides an easy way for users to refresh the series data upon download. The Excel toolbar presents a few refresh buttons.

It refreshes the data based on the download settings that were used when users first downloaded it. To change the download settings, use the Edit Download Button.

The refresh may take time depending on the amount of data selected in the workbook.

Users must be logged into CDMNext Addin to refresh the links. Otherwise the workbook will open without data getting refreshed and CDMNext Addin will be prompted to launch.

Manual Refresh

This provides the option to refresh a selected set link, or all links containing in an Excel sheet or workbook.
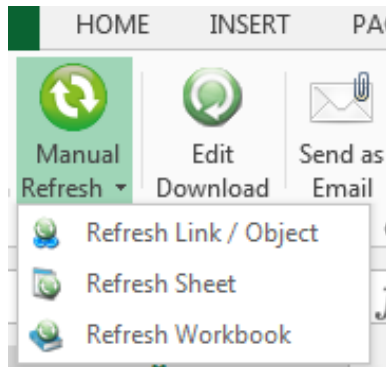
Refresh Link / Object

Select the refresh link of the data set. You can use this function to refresh data of one or more downloads in an active worksheet.

Refresh Sheet

Select this function to refresh data of all data sets in an active worksheet. You do not need to select any refresh links.

Refresh Workbook

Open the workbook to refresh data. Use this function to refresh all data sets in the active workbook. You do not need to select any refresh links.

Auto Refresh

The Auto Refresh is a toggle button. It provides the option for CDMNext Addin to automatically update the series in the file every time the workbook is opened, alternatively, users can use the Manual Refresh buttons to update the data.
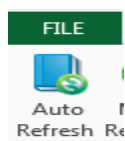
When the button is grayed out, the auto refresh is off.
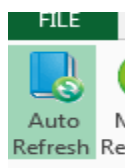
When the button is highlighted, auto refresh is on.

3.2   Edit Download

Use the Edit Download button to change the download settings – insert, delete, and/or reorder series, insert functions and space separators in Excel. The Edit Download window consists of the Properties and the Manage Series Section. Use the arrow button to collapse and expand the Properties section for more room to Manage Series.

Select a link and click "Edit Download" on the toolbar. Users can select only one link to edit at a time.

Under Edit Download, there are 2 sections:

Properties – to define all set download format

Manage Series – the series corresponding to the download will be displayed with the following options.

3.3   Send as Email

 Click on the Send as Email button to automatically attach the Excel file to an MS Outlook email in one click and share it with colleagues.

**3.4   Read Only**

Read Only is a toggle button.

 When turned on, it protects the links from being modified with Edit Download and prevents other users inserting new Links. Other users can still refresh the links, sheets and workbooks. Only the person who set the file as Read Only can change the permission.

When a different user attempts to perform Edit Download option, a warning message will be displayed.
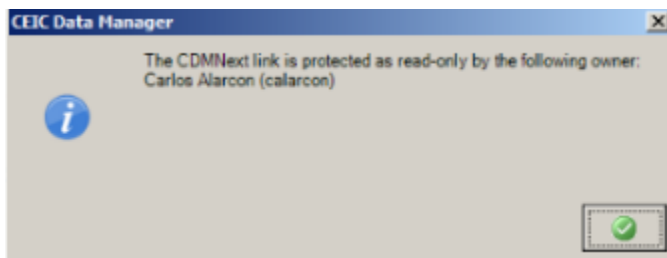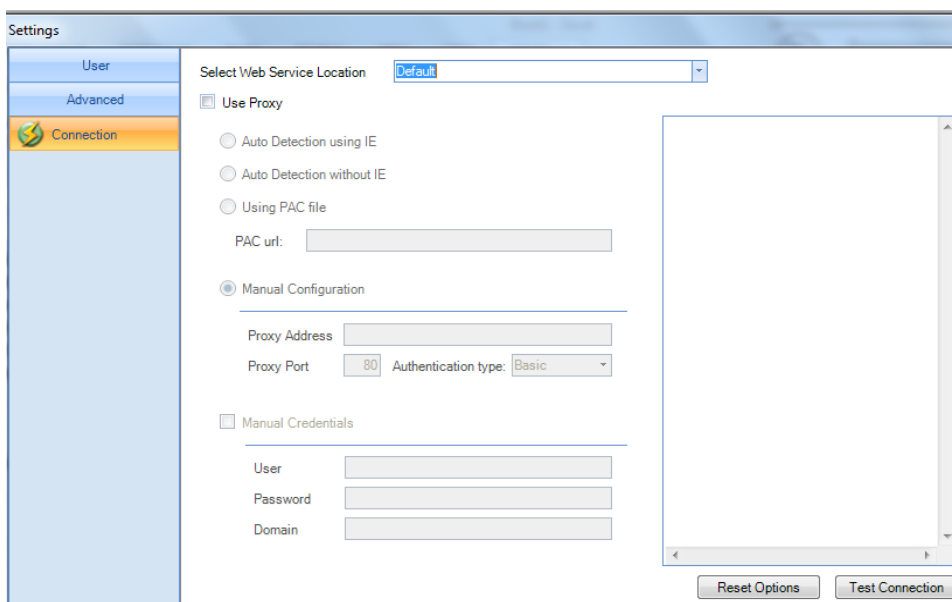
3.5   Options
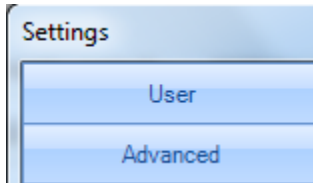
This button allows to change user and connection configurations

Options / Advanced/ Connection

If you are a first time user, it is recommended that you check the connection setting before logging into CDMNext Addin and make any required change. Once the settings are defined, CDMNext will use the selected setting every time when it logs in.

If Connection settings are changed after logged in, those changes will be applied during the next login.

Setting Options

Enter URL of Web Services – the default setting (normally no changes is required)

Use Proxy Setting – to use Direct Connection (normally unchecked)

Check this option to connect through proxy server and then select one of the four ways to look up proxy settings as described below. If none is checked, CDMNext Addin will try to detect which way to function.

Options / User/ Login Options

User and Password

- filled with the values you have entered when logged into CDMNext Addin

Remember my username and password – check this only if you want the system to remember your login credentials.

Ask me username and password every time I login – when checked, CDMNext Addin will show the login prompt every time upon login. This is the default setting. Users may change to "Log me in automatically."
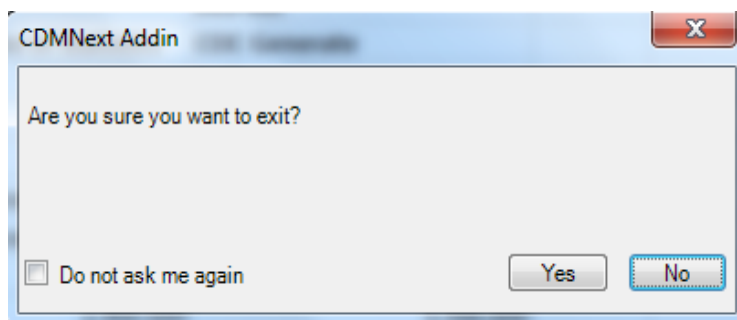
Log me in automatically – when checked, CDMNext Addin will not show the login prompt the next time you login.

3.6   Sign Out

Once the user is logged successfully, this option will be available to terminate the session.

For security concern to avoid unauthorized access of your CDMNext Addin login, remember to click on the Sign Out button after your session.

When you have clicked on Sign Out, a prompt will confirm whether you want to exit CDMNext Addin. Enter Yes or No.

If you do not want to see this prompt again, check the tick box "Do not ask me again."

3.7 Help

The Help Button provides you options to check for any CDMNext Addin updates and details about your installed version

Check Updates: Allow to check for CDMNext Addin Updates.

Patch Updates can now be automated so CDMNext Addin updates seamlessly. Alternatively, manual update is still available if preferred.

Automatic Updates (Default Setting) - If updates are available, CDMNext Addin will automatically install patch updates.

1. Login to CDMNext Addin.
2. Patch Updates will be downloaded automatically, notification will show if a new version is available.
3. After downloading, click **YES** to immediately install the updates, or click **NO** to install later.
2. Yes, Close MS Excel Microsoft application to proceed with update
3. The patch update is applied
4. The Excel is restarted automatically after applying the update

Manual Updates - To change settings to manual go to Options Login Options > Update Settings > Update application manually.

1. Login to CDMNext Addin.
2. Go to Help > Check for Updates
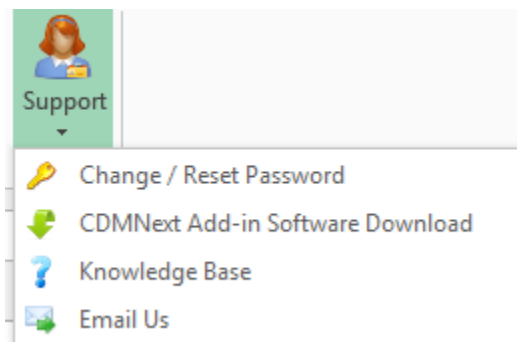3. A pop-up screen will show that CDMNext Addin is checking for updates

 A prompt will be displayed with available updates for installation. Otherwise "CDMNext is up to date" will be displayed.
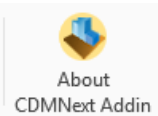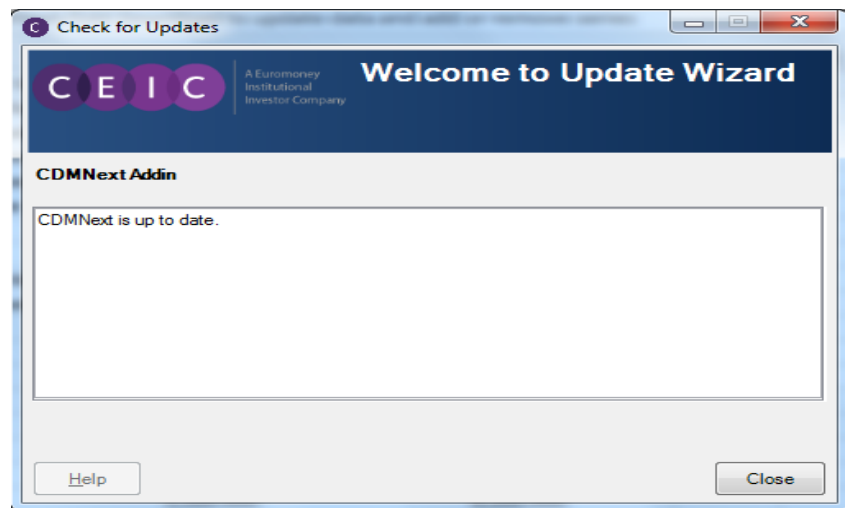
About CDMNext Addin

Check About CDMNext Addin for the installed product version.

3.8   Support

The Support menu is accessible from the CDMNext Addin Toolbar. It provides the support following support options

Change/ Reset Password

Click on the Change Password hyperlink and enter your details. Note that you must know your current user Email Address and Password in order to change/reset your password.

CDMNext Addin Software Download

Click on the link and you will be directed to our online support page, click on the Download Tab (where you are prompted to enter your user name and password). Select your Microsoft Windows and Office Versions then click on the Download to proceed.
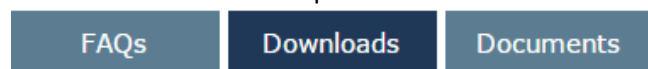
Knowledge Base

Users can find their answers about the platform, functionality and data information in the library of articles.

Email us

You can email us with feedback and questions along with log files through this button available under Support.

An email will open 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 as soon as they can.
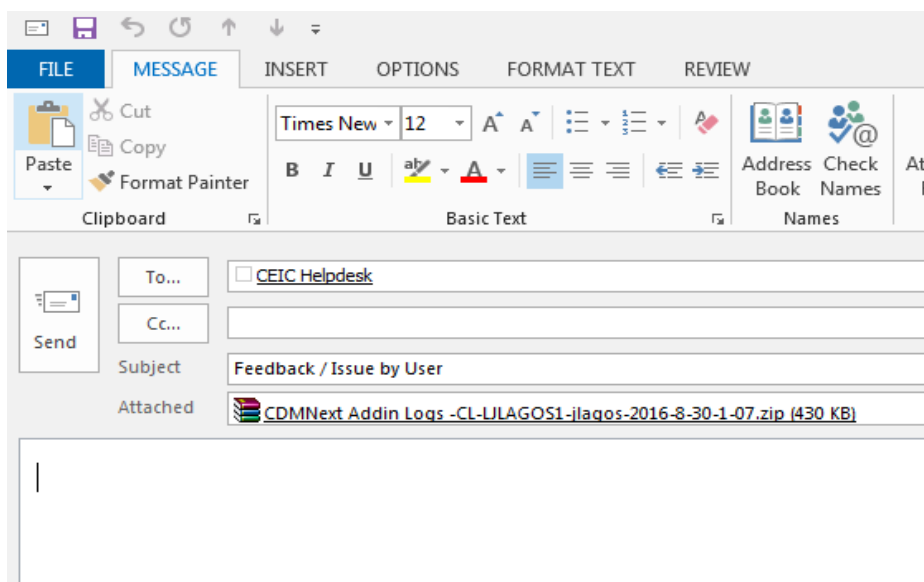
## 5.	ABOUT CDMNEXT ADDIN

This information window is accessible from the *Help* menu on the *CDMNext Addin* menu bar. Here you can view the CDMNext Addin version number and other application information.
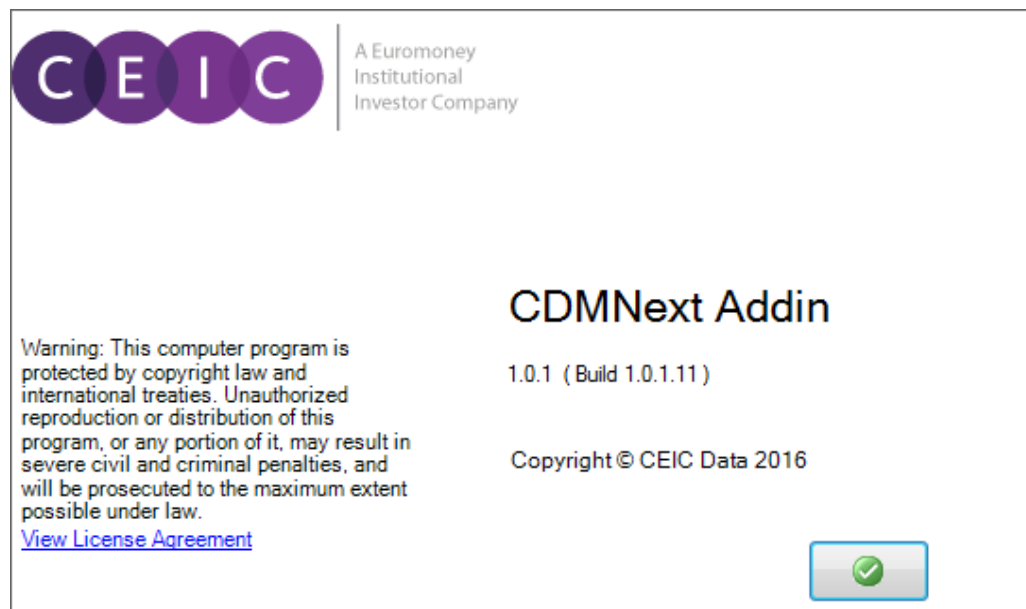
## 5.	ABOUT CEIC AND OUR DATABASES

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