

# START GUIDE

# CDMNEXT

## TABLE OF CONTENTS

<b>1. PRODUCT OVERVIEW .....</b>	<b>3</b>
<b>2. STARTING CDMNEXT .....</b>	<b>3</b>
2.1 Login.....	3
2.2 Prerequisites .....	4
2.3 Landing Page .....	5
<b>3. CREATING INSIGHTS .....</b>	<b>6</b>
3.1 Data Discovery .....	8
3.2 Data Selection.....	12
3.3 Data Transformation.....	13
3.4 Visualization .....	14
3.5 Download.....	15
3.6 Alerts.....	17
3.7 Share .....	18
<b>4. USER SETTING .....</b>	<b>19</b>
4.1 General Setting .....	19
4.2 Insight Setting.....	20
<b>5. HELP .....</b>	<b>20</b>
<b>6. ABOUT CEIC AND OUR DATABASES .....</b>	<b>21</b>

## 1. PRODUCT OVERVIEW

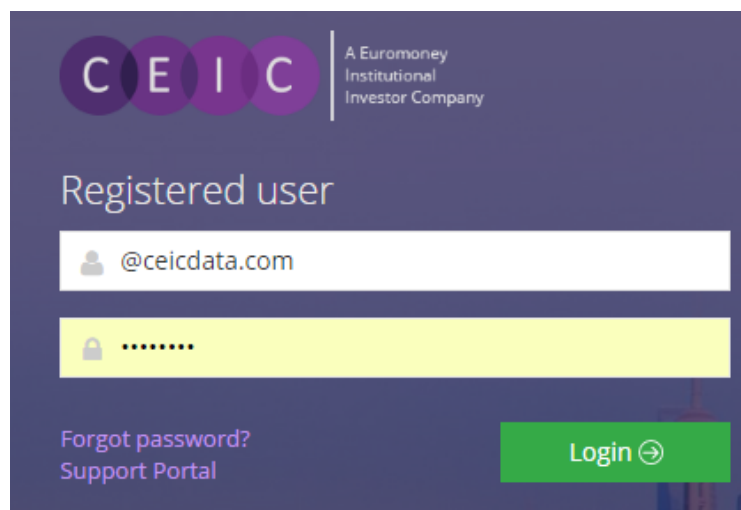
CDMNext offers a transformed web-based platform from a generic data extraction tool allowing users to create quick analysis in a form of insights with rapid and easy access to CEIC databases. We have introduced substantial improvements from performance to usability to capabilities over the previous web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



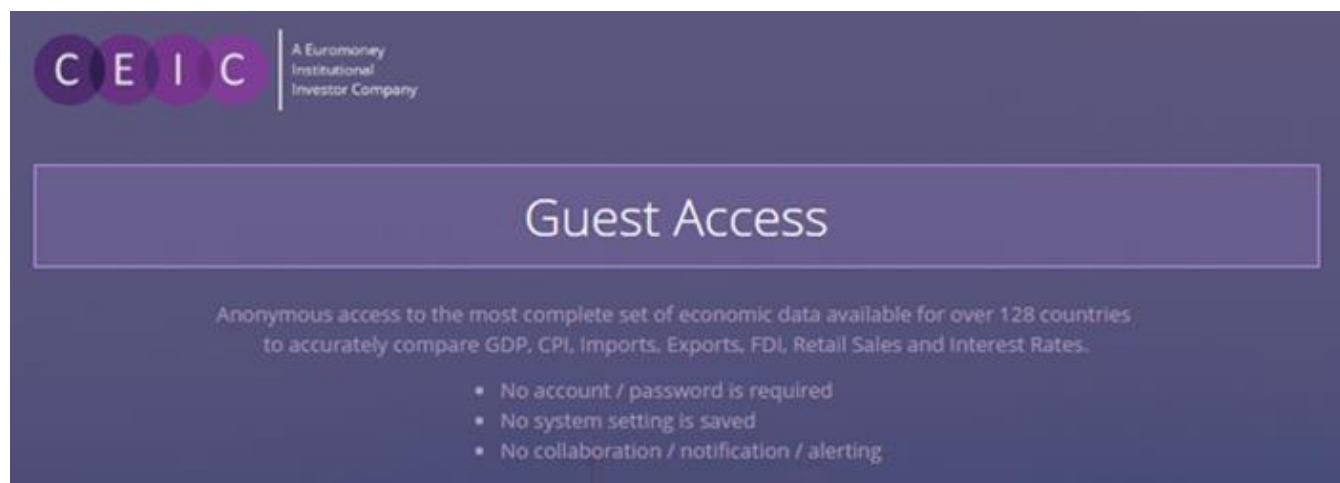
#### Forgot password?

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 CDM functionalities.

## Guest Mode



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

## 2.2 Prerequisites

CDMNext currently supports the following browsers and versions.

Browsers	Resolutions	Devices
<b>Windows 8, 7</b> <ol style="list-style-type: none"> <li>1) Internet Explorer 10+</li> <li>2) Google Chrome 31+</li> <li>3) Firefox 30+</li> <li>4) Safari (latest)</li> <li>5) Opera (latest)</li> <li>6) 360</li> </ol>	<ul style="list-style-type: none"> <li>Desktop (with resolution 1920 x 1080 and up)</li> <li>Laptop (with resolution 1366 x 768)</li> <li>Tablet (1024x768 - landscape orientation)</li> <li>Tablet (768x1024 - portrait orientation)</li> </ul>	<ul style="list-style-type: none"> <li>Desktop computers</li> <li>iPad 3+</li> </ul>
<b>Mac OS X Mavericks</b> <ol style="list-style-type: none"> <li>1) Chrome (latest)</li> <li>2) Firefox (latest)</li> <li>3) Safari (latest)</li> </ol>		
<b>iOS 8.0</b> <ol style="list-style-type: none"> <li>1) Chrome (latest)</li> <li>2) Firefox (latest)</li> <li>3) Safari (latest)</li> <li>4) Opera (latest)</li> </ol>		
<b>Android 5.0</b> <ol style="list-style-type: none"> <li>1) Chrome (latest)</li> <li>2) Firefox (latest)</li> <li>3) Opera (latest)</li> </ol>		

**Window 8, 7**

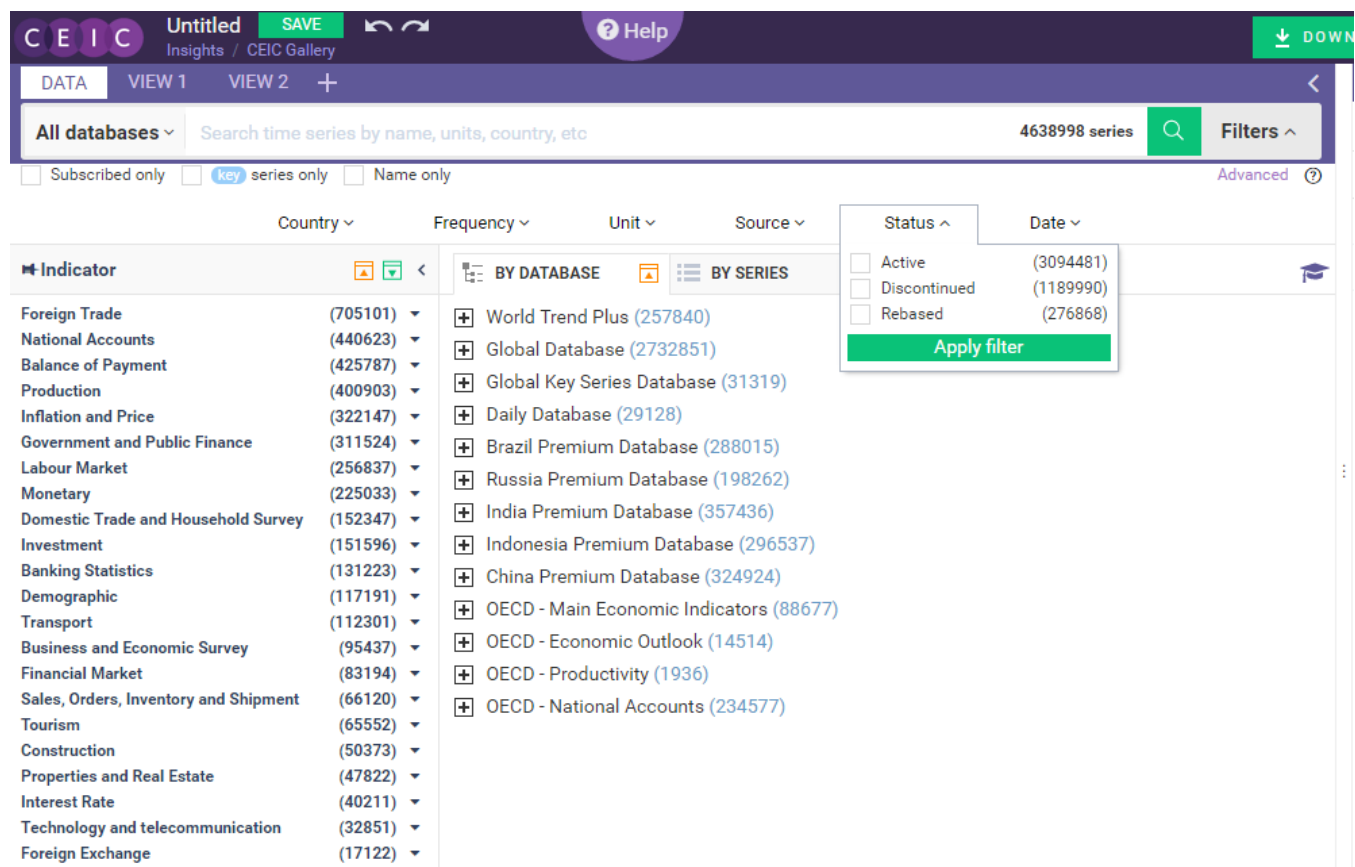
- 1) Baidu
- 2) Sogou
- 3) QQ
- 4) Maxthon
- 5) Liebao

 iPad 1, 2

## 2.3 Landing Page

Starting CDMNext, the landing / start page by system default is **New Insight** in **Search** mode.

On the data tab, users can type in any keyword to search for time series within all available CEIC databases.



CEIC Insights / CEIC Gallery

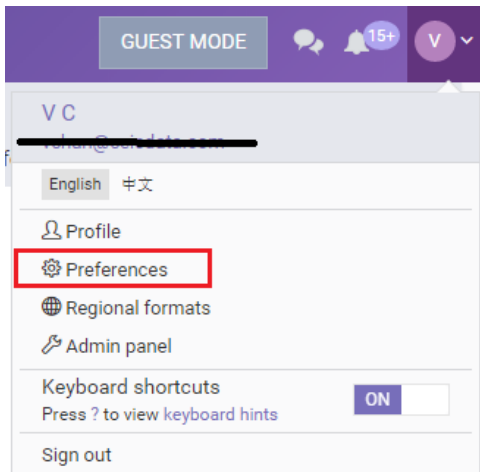
Untitled SAVE ? Help DOWN

DATA VIEW 1 VIEW 2 +

All databases Search time series by name, units, country, etc 4638998 series Filters ^

☐ Subscribed only ☒ key series only ☐ Name only Advanced ?

Indicator	Country	Frequency	Unit	Source	Status	Date
Foreign Trade	(705101)			World Trend Plus (257840)	<input type="checkbox"/> Active	(3094481)
National Accounts	(440623)			Global Database (2732851)	<input type="checkbox"/> Discontinued	(1189990)
Balance of Payment	(425787)			Global Key Series Database (31319)	<input type="checkbox"/> Rebased	(276868)
Production	(400903)			Daily Database (29128)	Apply filter	
Inflation and Price	(322147)			Brazil Premium Database (288015)		
Government and Public Finance	(311524)			Russia Premium Database (198262)		
Labour Market	(256837)			India Premium Database (357436)		
Monetary	(225033)			Indonesia Premium Database (296537)		
Domestic Trade and Household Survey	(152347)			China Premium Database (324924)		
Investment	(151596)			OECD - Main Economic Indicators (88677)		
Banking Statistics	(131223)			OECD - Economic Outlook (14514)		
Demographic	(117191)			OECD - Productivity (1936)		
Transport	(112301)			OECD - National Accounts (234577)		
Business and Economic Survey	(95437)					
Financial Market	(83194)					
Sales, Orders, Inventory and Shipment	(66120)					
Tourism	(65552)					
Construction	(50373)					
Properties and Real Estate	(47822)					
Interest Rate	(40211)					
Technology and telecommunication	(32851)					
Foreign Exchange	(17122)					

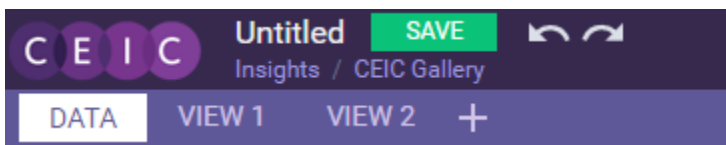


We offer 3 landing pages per user preference.

1. **New Insight** -> new workbook in search or browse
2. **Insights** -> library of insights and CEIC gallery
3. **Databases** -> showcase of CEIC databases

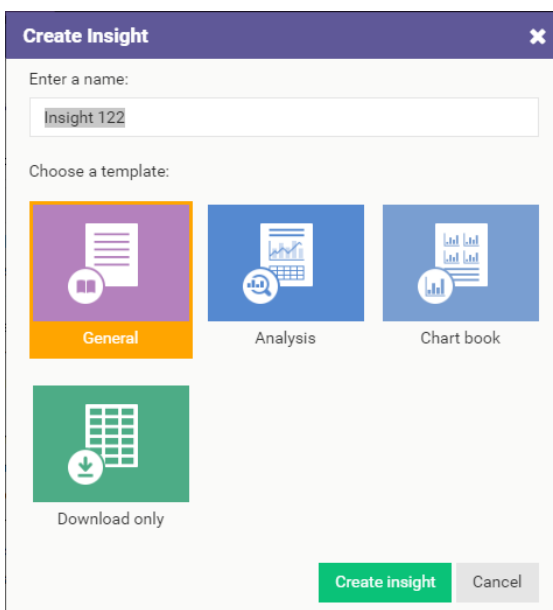
To select one of the 3 landing pages available, click on 'Preferences' under the drop down menu located in the upper right hand corner.

### 3. CREATING INSIGHTS



To create a new insight / workbook on the default landing page (**Database** – Search), simply click on **SAVE** after data has been selected.

Alternatively, if you are on the landing page of **Insights**, you may click on **New Insight** and choose a template. Here you are creating an empty insight first and then begin data discovery and selection.



On the page of **Insights**, you may search for all available insights that are previously created / saved by yourself and shared by others. A list of your insights can be retrieved on the home page.

The system supports searching for insights by the following criteria:

- a) Name
- b) Creator
- c) Description
- d) Category
- e) Tags

The screenshot shows the CEIC Insights dashboard. At the top, there's a navigation bar with tabs: Favorites (4), My Insights (54), CEIC Gallery (10), Shared with me (126), Recent (125), and All available (183). A search bar is on the left, and filters for tags, categories, and last modified are on the right. The main area displays a grid of insight cards. Each card has a title, a brief description, and a line chart. The cards shown are: ECB Monetary Policy, China FAI, China VAI, China Real Estate Investment, Brexit, Abenomics, Fed Interest Rate Hike, and China PMI. A 'Details' panel is open for the 'Brexit' insight, showing the creator (Kamen Parushev), total number of series (128), and last modified date (Kamen Parushev, 8 ...).

To create your dashboard, you may mark your favorite insights and add tags for grouping.

This screenshot shows a dialog box titled 'Remove from favorite'. It features a star icon and two buttons: 'PREVIEW' and 'OPEN'. Below the buttons, there's a text snippet: 'The decline in oil prices from mid-2014 (to the present USD45-USD65/barrel band during 2015) coincides with the similar decline in commodity prices more generally.' At the bottom, it says 'Last modified: Juan Carlos Araya 13 days' and 'Cheap Oil as a Symptom of Weak De...'.

This screenshot shows a dialog box titled 'Add tags to insight'. It has a search bar for tags and a list of existing tags: 'Income x', 'Expenditure x', and 'Growth x'. At the bottom, there are 'Save' and 'Cancel' buttons.

### 3.1 Data Discovery

In data discovery, CDMNext supports both live and manual search. By default, the system runs in live search. To change your search customization in default, go to 'Preference' under the drop down menu located in the upper right hand corner.

On the **DATA** tab, you may search (**by series**) by typing any keyword combination in the search bar with selection of any or all databases. Alternatively, you may browse (**by database**) to locate the time series.

On this new search UI, you can customize search with your preferred filters of selection. The drop down arrow in each filter expands the full list of selection. The multi-dimensional filters include the economic **indicators** in first and second levels, **region/country**, **frequency**, **unit**, **source**, **status** and **observation date**.

To pin your favorite filter to the left in your search (in this example, indicators of economic classification is selected by default), you can simply drag and drop the selected filter.

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.

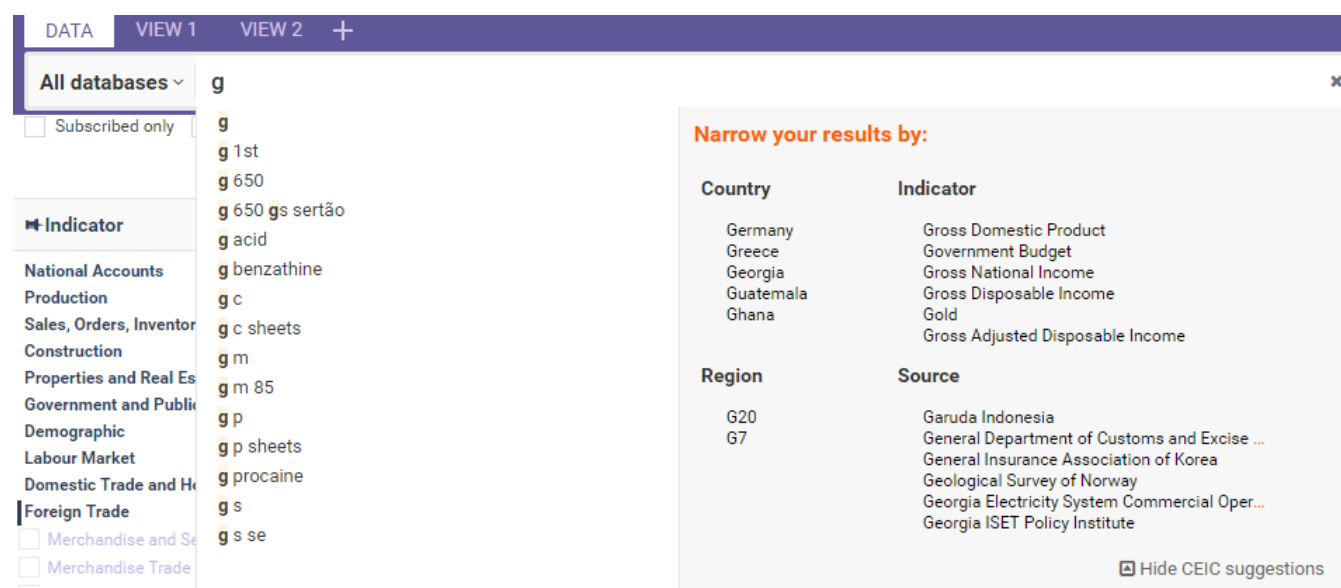
The screenshot displays the CDMNext Data Discovery interface. At the top, there are tabs for 'DATA', 'VIEW 1', and 'VIEW 2'. Below the tabs is a search bar with the text 'All databases' and a search icon. To the right of the search bar, it says '50,229 series' and 'Filters ^'. Below the search bar, there are checkboxes for 'Subscribed only', 'key series only', and 'Name only'. Below these checkboxes, there are several filter categories: 'Country', 'Frequency', 'Unit', 'Source', 'Status', and 'Date'. Each category has a dropdown arrow. The 'Indicator' filter is expanded, showing a list of indicators with their counts. The 'Date' filter is also expanded, showing options for 'First observation before' and 'Last observation after' with a date of '09/16/2016'. The 'Indicator' list includes categories like 'National Accounts', 'Demographic', 'Government and Public Finance', 'Inflation and Price', 'Foreign Trade', 'Business and Economic Survey', 'Labour Market', 'Foreign Exchange', 'Interest Rate', 'Balance of Payment', 'Domestic Trade and Household Survey', 'Production', 'Commodity Price', and 'Financial Market'. Each category has a count and a dropdown arrow. The 'Foreign Trade' category is expanded, showing sub-categories like 'Merchandise and Services Trade', 'Merchandise Trade', 'Processing Trade', and 'Services Trade'. The 'Business and Economic Survey' category is also expanded, showing sub-categories like 'Brazil Premium Database', 'Russia Premium Database', 'India Premium Database', 'Indonesia Premium Database', 'China Premium Database', 'OECD - Main Economic Indicators', and 'OECD - Economic Outlook'.

Indicator	Count
National Accounts	(8,364)
Demographic	(7,195)
Government and Public Finance	(6,324)
Inflation and Price	(4,021)
Foreign Trade	Check all
Merchandise and Services Trade	(1,678)
Merchandise Trade	(1,011)
Processing Trade	(0)
Services Trade	(0)
Business and Economic Survey	(2,330)
Labour Market	(1,808)
Foreign Exchange	(1,737)
Interest Rate	(1,690)
Balance of Payment	(1,680)
Domestic Trade and Household Survey	(663)
Production	(619)
Commodity Price	(464)
Financial Market	(444)



To further refine the search, you may include only **subscribed data**, **key series** and **new series**.

Under the search bar below, you may click on  to see the keyword search tips. As you start typing, the system provides keyword autocomplete in **keyword predictions** which is managed by stemming, search suggestion, acronyms/synonyms. On the right hand side of the search drop down, **CEIC suggestion** is available to facilitate facet predictions in speeding up search processing and enriching results.

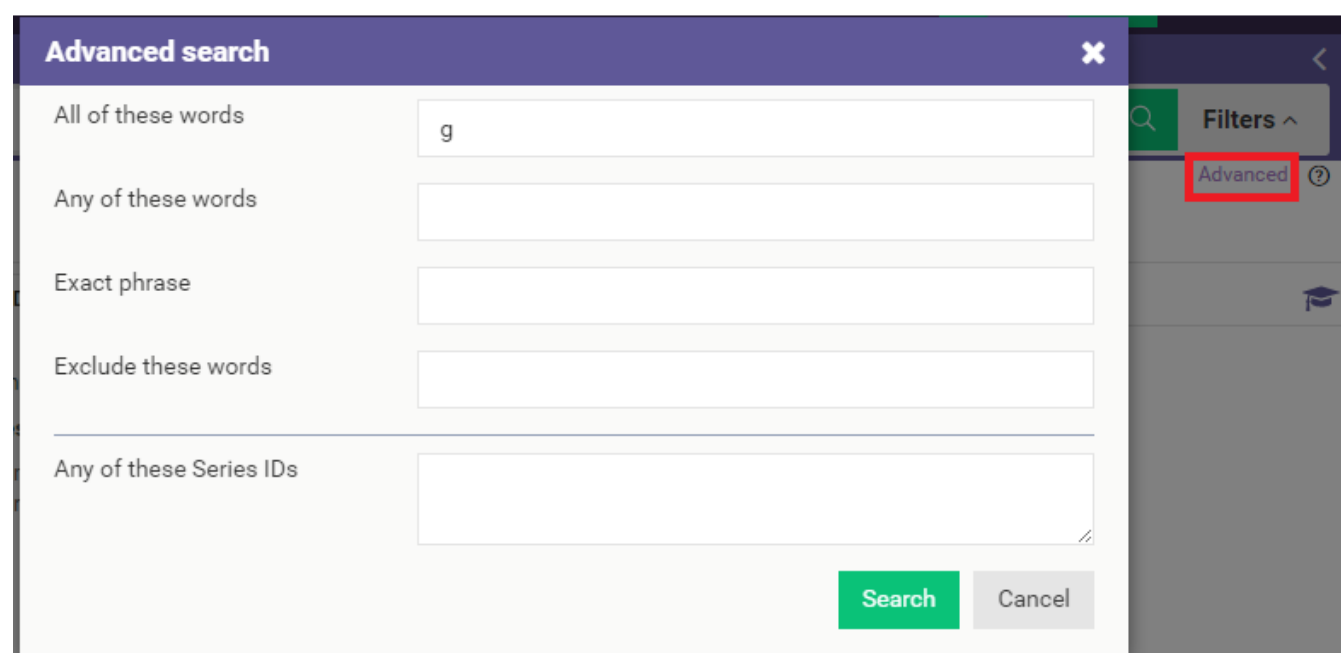


The screenshot shows the CEIC search interface. On the left, there's a sidebar with 'All databases' and a list of indicators under 'Indicator'. The main search bar has 'g' entered. Below the search bar, there's a 'Narrow your results by:' section with two tables: 'Country' and 'Indicator', and 'Region' and 'Source'. The 'Country' table lists Germany, Greece, Georgia, Guatemala, and Ghana. The 'Indicator' table lists Gross Domestic Product, Government Budget, Gross National Income, Gross Disposable Income, Gold, and Gross Adjusted Disposable Income. The 'Region' table lists G20 and G7. The 'Source' table lists Garuda Indonesia, General Department of Customs and Excise, General Insurance Association of Korea, Geological Survey of Norway, Georgia Electricity System Commercial Oper..., and Georgia ISET Policy Institute. There's also a 'Hide CEIC suggestions' button.

Country	Indicator
Germany	Gross Domestic Product
Greece	Government Budget
Georgia	Gross National Income
Guatemala	Gross Disposable Income
Ghana	Gold
	Gross Adjusted Disposable Income

Region	Source
G20	Garuda Indonesia
G7	General Department of Customs and Excise ...
	General Insurance Association of Korea
	Geological Survey of Norway
	Georgia Electricity System Commercial Oper...
	Georgia ISET Policy Institute

Additional options in **advanced search** and **series ID search** are available below.



The screenshot shows the 'Advanced search' dialog box. It has five input fields: 'All of these words' (containing 'g'), 'Any of these words', 'Exact phrase', 'Exclude these words', and 'Any of these Series IDs'. At the bottom, there are 'Search' and 'Cancel' buttons. On the right, there's a 'Filters' dropdown menu with 'Advanced' selected.

Advanced search

All of these words: g

Any of these words:

Exact phrase:

Exclude these words:

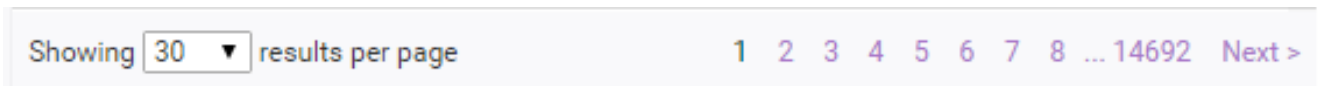
Any of these Series IDs:

Search Cancel

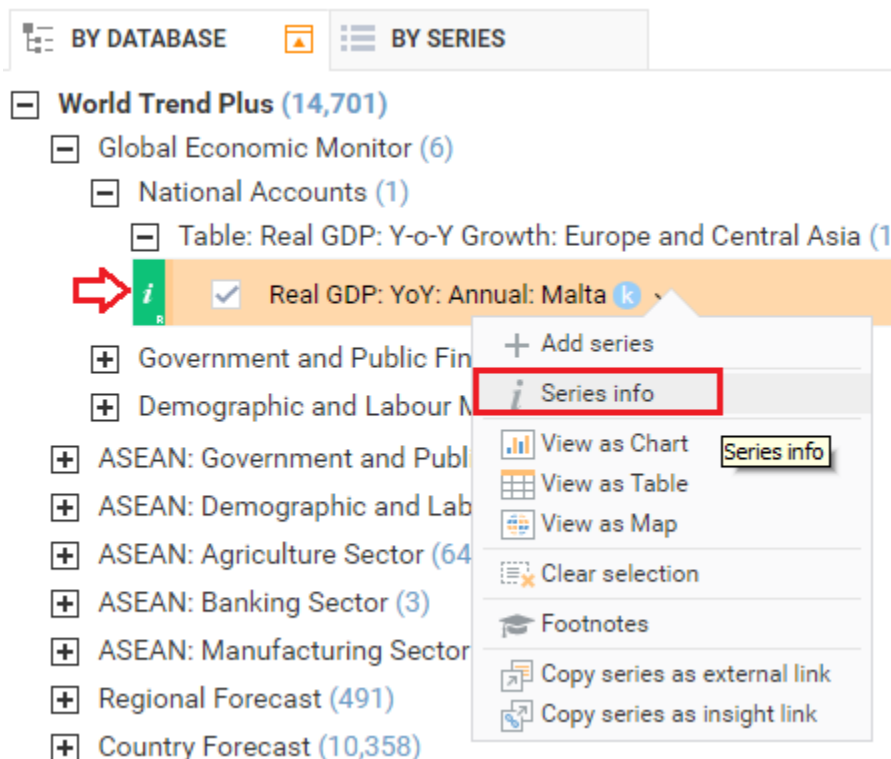
Filters ^  
Advanced ?

While advanced search honors the same behavior as CDM in keyword combination, series ID search can filter out non-series ID inputs such as keywords and/or operators.

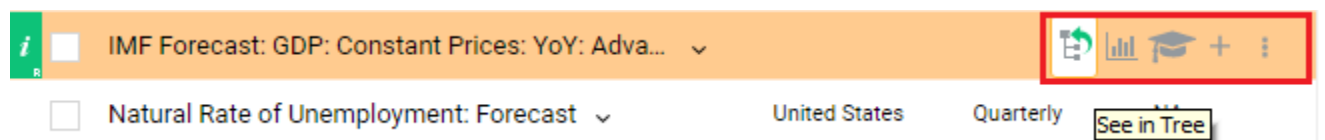
At the bottom of the search panel, you may select the number of results to display per page.



By right clicking on a selected series, you have the options to view **series info**, view series in a quick **chart**, **table** or **map**, respective **footnotes**, or **copy** series as link.



To access the **series info**, besides the right click options, you may also click on the green information icon when mouse hoover the series bar. To direct to the database tree / table of which the series belong, you can click on the '**see in tree**' icon.



A **series info** consists of an **overview**, **observations**, **related series / insights** and **help**.



Under help, you can access the corresponding **footnote** article and **knowledge base** in self-support. If you need further assistance, please submit your question to us. Our customer service team will review your question momentarily.

The screenshot shows the 'Help' tab in the CEIC data platform. It contains a section for 'Our remarks:' with a text input field. Below this are two sections: 'Footnotes Article' and 'Support Knowledge Base', each with a 'GO TO ARTICLE' button. At the bottom, there is a section titled 'Still cannot find an answer' with a text input field and 'CANCEL' and 'SUBMIT' buttons.

## 3.2 Data Selection

During data discovery, you may simply drag and drop any selected series from the DATA tab to selection on the right. This action will be auto saved in your insight by default setting.



The arrows in between data discovery and selection allow you to hide or expand for a shared / full screen display.

Within selection, you may view the selected data in a list or a table format. Under the actions tab, you can add / delete / preview selected series.

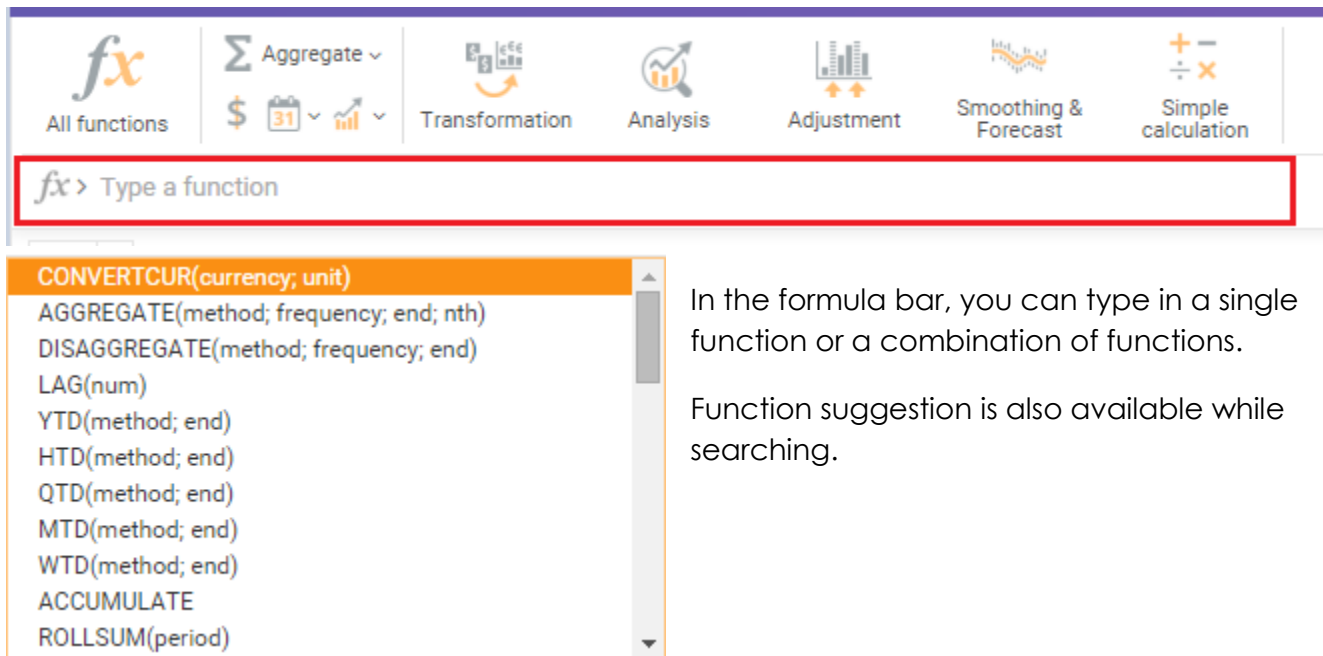
	Series id	Country	Unit	Frequency	Function description	First date	Last date	Status
Total Exports: YoY: sa: United States	211485702	United States	%	Monthly	AGGREGATE(Sum; Yearly; December	01/01/1990	01/11/2015	Active
Total Exports: YoY: sa: United States	211485702	United States	%	Yearly	AGGREGATE(Sum; Yearly; December	01/12/1990	01/12/2014	Active

Simply drag and drop the header to your preferred order in both list and table formats.

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

### 3.3 Data Transformation

To apply math functions, you may right click on selected series for quick calculations or access the function editor.

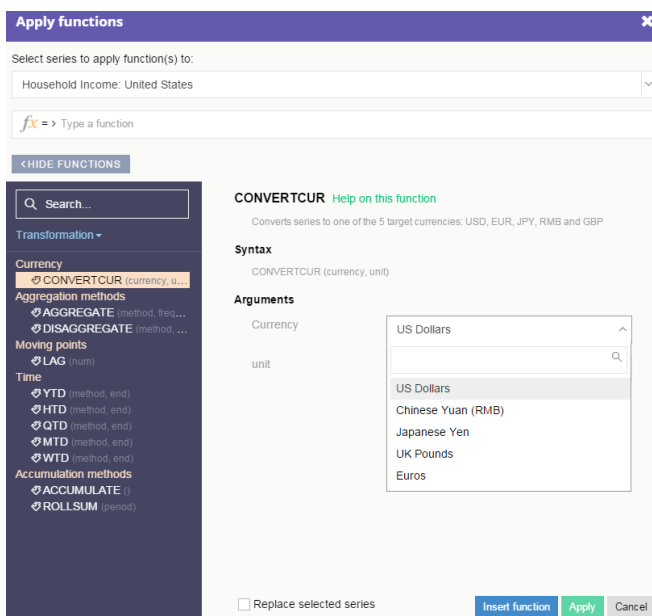


fx > Type a function

- CONVERTCUR(currency; unit)
- AGGREGATE(method; frequency; end; nth)
- DISAGGREGATE(method; frequency; end)
- LAG(num)
- YTD(method; end)
- HTD(method; end)
- QTD(method; end)
- MTD(method; end)
- WTD(method; end)
- ACCUMULATE
- ROLLSUM(period)

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

Function suggestion is also available while searching.



Apply functions

Select series to apply function(s) to:  
Household Income: United States

fx > Type a function

< HIDE FUNCTIONS

Q Search...

Transformation

Currency

- CONVERTCUR (currency, unit)

Aggregation methods

- AGGREGATE (method, frequency, end, nth)
- DISAGGREGATE (method, frequency, end)

Moving points

- LAG (num)

Time

- YTD (method, end)
- HTD (method, end)
- QTD (method, end)
- MTD (method, end)
- WTD (method, end)

Accumulation methods

- ACCUMULATE
- ROLLSUM (period)

CONVERTCUR [Help on this function](#)

Converts series to one of the 5 target currencies: USD, EUR, JPY, RMB and GBP

Syntax

CONVERTCUR (currency, unit)

Arguments

Currency

unit

US Dollars

US Dollars

Chinese Yuan (RMB)

Japanese Yen

UK Pounds

Euros

☐ Replace selected series

Insert function Apply Cancel

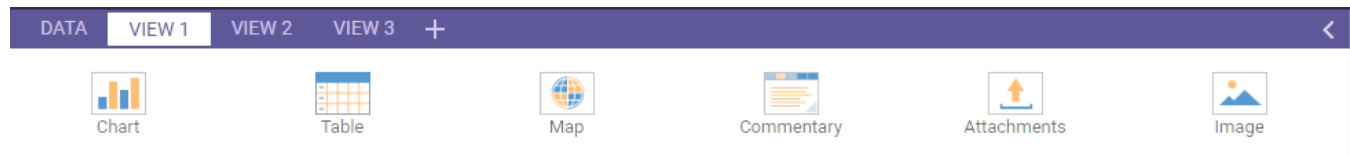
To access the full view of function editor, simply click on 'fx' all functions.'

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.

In addition, a brief description to each individual function usage is available.

### 3.4 Visualization

Next to data discovery, the next tabs on the menu bar are **VIEWS**. The available visual tools include chart, table, map, commentary, attachment and image.



## Visualize your insight

Drag and drop visuals here

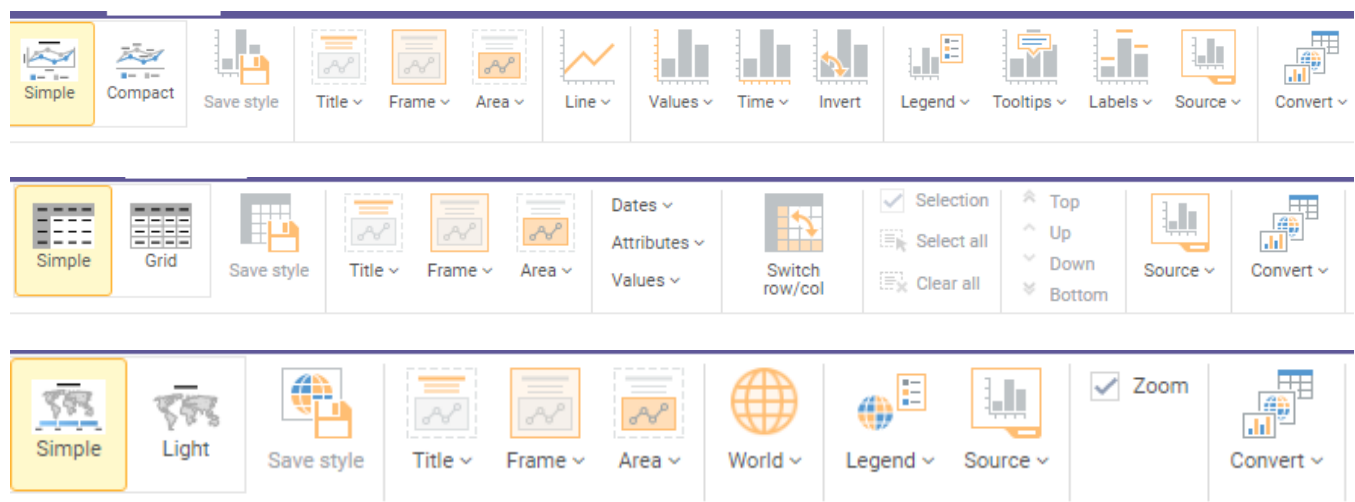
To create a quick visual with the selected series, simply drag and drop a visual in the content area.

Users can drag and position each visual to fit into the content area.

In visual configuration, CEIC provides up to 4 in-built defined styles for users to choose from. Alternatively, users can save their own preferred style.

Other visual configurations such as date range, attributes, values, legend, and data labels are available.

By clicking on the visual, the customization is available for further modification on the top.



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

### 3.5 Download

In the latest release, the download options include data, chart, data + chart and the whole insight (workbook). The available formats include Excel, CSV, PDF, PNG, JPG.

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

## Download

Data

Chart

Data + Chart

Whole insight

Format

XLS

CSV

PDF

PNG

JPG

☐ Create a chart from the data

Timeframe

All

Range

Sample

As shown

Hide advanced settings

Data placement

Orientation

Columns

Rows

Adjust columns

No

Wrap text

Date order

Ascending

Descending

Date format

Automatic

09/2016

Decimal places

2

1234.57

☒ Always ask me about the download settings

Output series details

Filter out dates with no observations

☒ Show date column

Add functions

All attributes

Select all

☒ Series Name

☒ Country

☒ Frequency

☒ Unit

☒ Source

☒ Status

2005

2010

Foreign Exchange Rate: PBC: RMB to USD;

DOWNLOAD

New insight

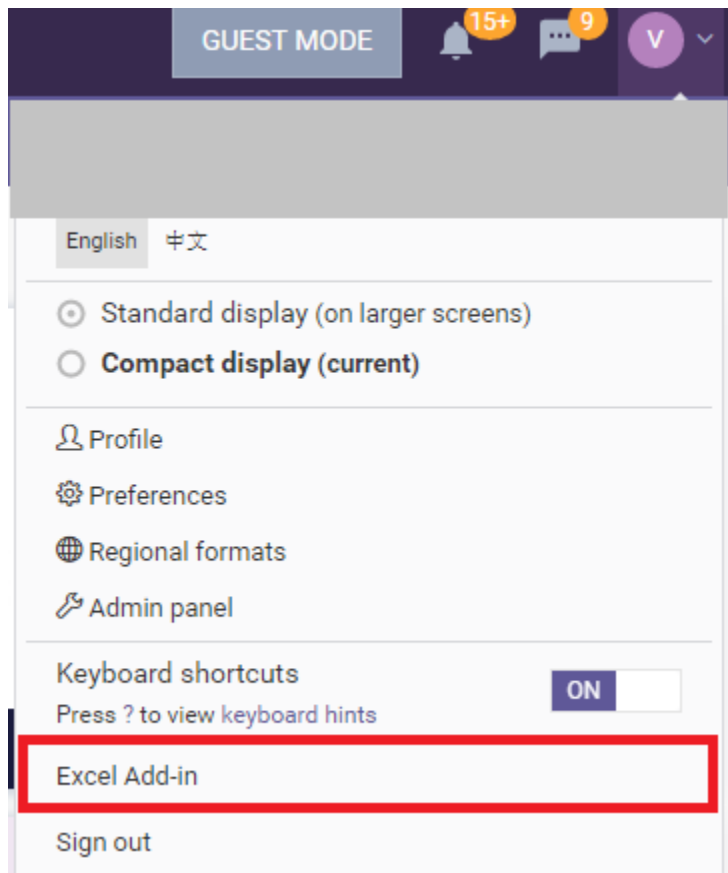
Set alert

15+

9

V

To refresh data in Excel, please download our CDMNext Excel Add-in available under the upper right option in the drop down menu. The installer is also available in our website under download.



## Download CDMNext Add-in for Microsoft Excel®

CDMNext users can download and refresh CEIC data directly in Excel files using our CDMNext Add-in.

CDMNext Add-in is supported on operating systems Windows Vista and higher. The office version needs to be either 2007 or higher.

### Download CDMNext Add-in for Microsoft Excel® Version 1.0.1

Select Microsoft Windows Version Please select one ▼

Select Microsoft Office Version Please select one ▼

#### Documentation

Please download the following documents for your reference:



Workstation Requirements  
(331 KB)



Installation Guide  
(1.54 MB)



Quick Start Guide  
(951 KB)



### 3.6 Alerts

To set data and insight alerts, the option **ALERTS** is available on the top menu. It provides the ground rule of user comments and notifications to facilitate collaboration which can be viewed and managed below.

The screenshot shows the 'Set alert' dialog box. At the top, there is a 'DISABLE ALL' button. Below it, the 'Smart Email notifications' section is expanded, showing a dropdown menu with options: 'none', 'each hour', 'once a day', and 'once a week'. The 'none' option is currently selected. Below the dropdown, there is a table of alert types with their frequencies and notification status.

ALERT ME IF:	NOTIFICATION
A series of the insight refreshed	<input checked="" type="checkbox"/> ON
A person changes the settings	<input type="checkbox"/> OFF
A person opens the insight	<input type="checkbox"/> OFF
A person marks the insight as favorite	<input type="checkbox"/> OFF

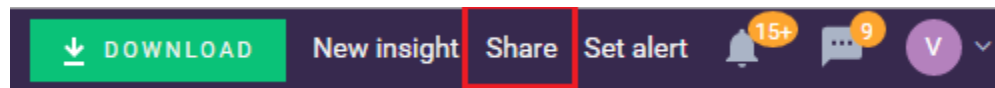
The alerts can be modified on the system level or via email notification.

**Smart Email Notifications:** Select a period to receive an email with aggregated notifications in a summary of alerts.

**Data Update:** By adding your favorite data series to an insight, you can turn on the notification for 'a series of the insight refreshed' for data monitoring. As soon as the data inside your insight has revised / updated its time point or series attributes in CDM, you will be notified instantly.

### 3.7 Share

After you have saved your insight, you may share it with other users within the same organization. Click on the **SHARE** button on the upper right menu.



You may invite specific users to access your insight with option to view, edit or manage.

A screenshot of the 'Share insight' dialog box. The title bar is purple with a close button. The main content area is white and lists the following people who can access the insight: 'CEIC DATA' (vchan@ceicdata.com, owner), 'Any user of CVision' (can view), and 'Any user within Internal Accounts Company' (can view). Below this list, there is a section for 'Invite specific' with radio buttons for 'Users' (selected), 'Accounts', and 'Companies'. A text input field labeled 'Select people you want to invite' is present, along with a 'can view' dropdown. At the bottom right, there are 'Save' and 'Cancel' buttons.

**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)

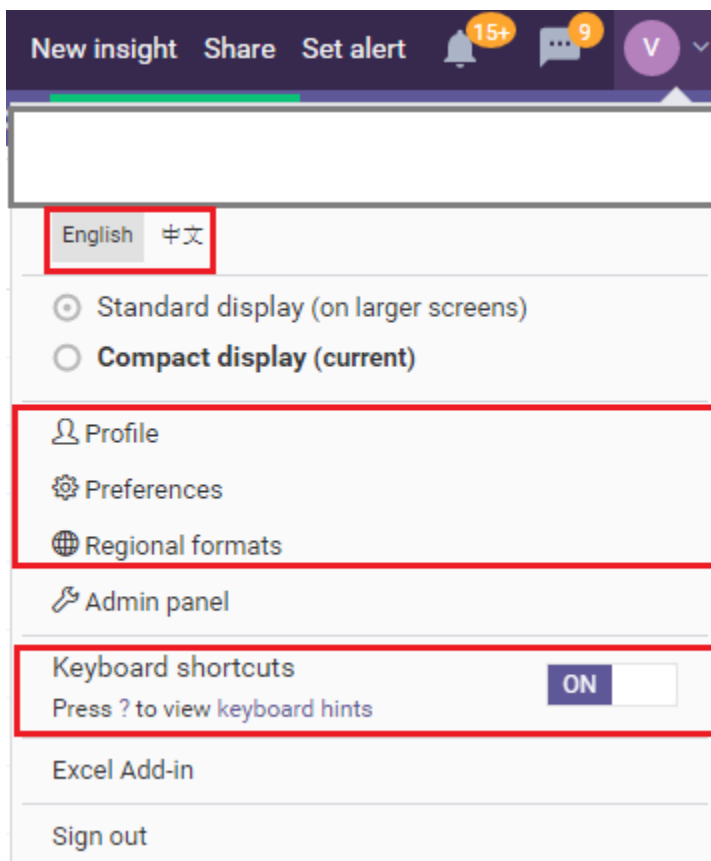
**Can manage** – shared user(s) will be granted with the same permission as the creator (such as sharing with others, deleting an insight)

## 4. USER SETTING

### 4.1 General Setting

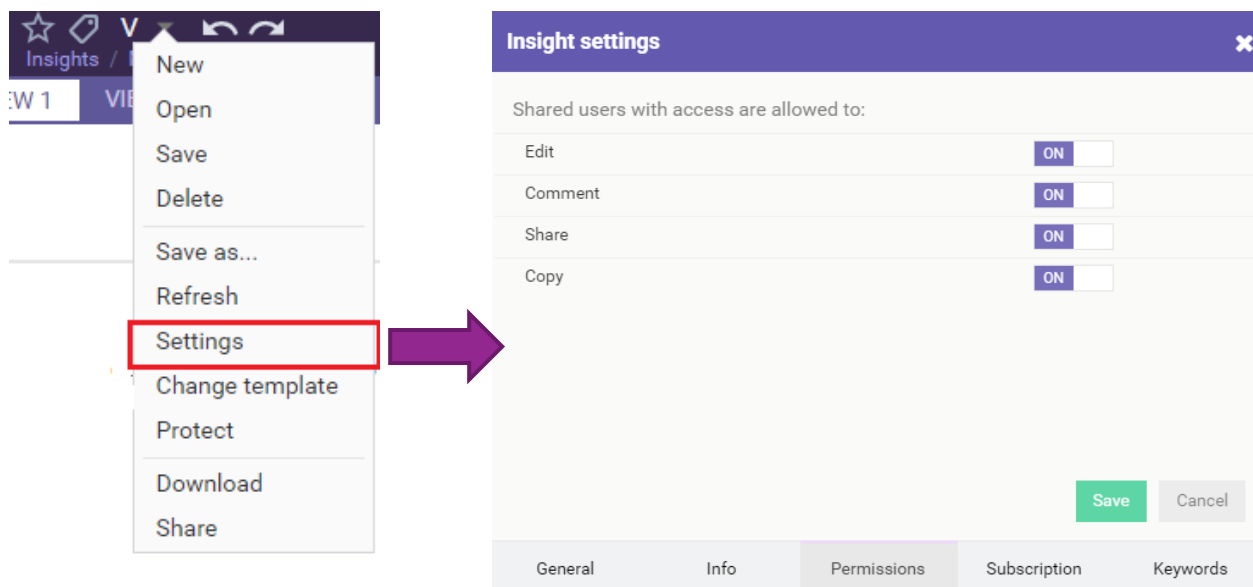
On the upper right hand corner, users can modify personal information, interface language (available in English and Simplified Chinese), date & time and default settings.

Keyboard shortcuts are available when enabled.



## 4.2 Insight Setting

Located on the upper left hand corner of the insight, you can further modify specific permission setting on an insight level.



## 5. HELP

For assistance on CDMNext, the help bubble on your screen can take you to Learn, **Tours and Support**.



**Learn** – visual learning through product tutorial and user guide

**Tours** – interactive tours with steps by steps to navigate the platform

**Support** – Knowledge Base covering solutions and FAQs on data related questions, platform issues and CDM features.

## 6. 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>

### SUPPORT AND LOCATIONS

Our customer support staff are based in 30 offices around the globe, and provide the training and support you need to make the most of the Brazil Premium Database. Leveraging on our extensive network of data experts, we resolve most inquiries within 24 hours. Regular e-mail alerts keep you informed of new series added to the database.

#### US HEADQUARTERS

CEIC Data  
225 Park Avenue South  
New York, New York 10003  
+1 212 610 2928  
[usinfo@ceicdata.com](mailto:usinfo@ceicdata.com)

#### EUROPEAN HEADQUARTERS

CEIC Data  
Nestor House Playhouse Yard  
London EC4V 5EX  
+44 207 779 8027  
[euinfo@ceicdata.com](mailto:euinfo@ceicdata.com)

#### ASIA HEADQUARTERS

CEIC Data  
18/F, 248 Queen's Road East  
Wanchai, Hong Kong  
+852 2581 1981  
[nainfo@ceicdata.com](mailto:nainfo@ceicdata.com)

#### LATIN AMERICAN HEADQUARTERS

CEIC Data  
Rua Tabapua, 422-CJ, 43/44  
CEP: 04533-001 Sao Paulo, Brazil  
+55 11 3074 2654  
[lataminfo@ceicdata.com](mailto:lataminfo@ceicdata.com)