START GUIDE
CDMNEXT
# TABLE OF CONTENTS

1. **PRODUCT OVERVIEW** ................................................................. 3

2. **STARTING CDMNEXT** ................................................................. 3
   2.1 Login ......................................................................................... 3
   2.2 Prerequisites ........................................................................... 4
   2.3 Landing Page ........................................................................... 5

3. **CREATING INSIGHTS** ................................................................. 6
   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

4. **USER SETTING** ........................................................................... 19
   4.1 General Setting ......................................................................... 19
   4.2 Insight Setting .......................................................................... 20

5. **HELP** ......................................................................................... 20

6. **ABOUT CEIC AND OUR DATABASES** ........................................... 21
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.

<table>
<thead>
<tr>
<th>Browsers</th>
<th>Resolutions</th>
<th>Devices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 8, 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Internet Explorer 10+</td>
<td>Desktop (with resolution 1920 x 1080 and up)</td>
<td>Desktop computers</td>
</tr>
<tr>
<td>2) Google Chrome 31+</td>
<td>Laptop (with resolution 1366 x 768)</td>
<td>iPad 3+</td>
</tr>
<tr>
<td>3) Firefox 30+</td>
<td>Tablet (1024x768 - landscape orientation)</td>
<td></td>
</tr>
<tr>
<td>4) Safari (latest)</td>
<td>Tablet (768x1024 - portrait orientation)</td>
<td></td>
</tr>
<tr>
<td>5) Opera (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6) 360</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mac OS X Mavericks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Chrome (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2) Firefox (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3) Safari (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>iOS 8.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Chrome (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2) Firefox (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3) Safari (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4) Opera (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Android 5.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) Chrome (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2) Firefox (latest)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3) Opera (latest)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 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.
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

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

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

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.

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 '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.

![Visualization options](image)

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.

![Visualization configuration](image)

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.
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 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.

- **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:


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.