

Reuters EcoWin Pro 5.5
Quick Start Guide





Quick Start Guide

Version 5.5

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This Quick Start is designed to give you an overview of the main features of Reuters EcoWin Pro, equipping you with basic knowledge of how the software works, and what it can do for you. Many of the areas covered in the overview can be followed up in greater depth using the online help documentation.

Enhancements for This Release

Reuters EcoWin Pro release 5.5 is enhanced to provide improved regression capabilities, forecasting capabilities within a document, and inclusion of a wide variety of pre-installed studies that can be used as templates for the creation of documents. Additional new features include the following:

- Command for restoring the floating toolbar.
- Propagate custom texts in Series List.
- Allow multiple lines in text labels.
- Set the color separately for the graph area.
- Candlestick charts improved.
The new candlestick settings consist of color combo boxes for up and down colors.
- Improved Graph layout dialog
For each graph type, only relevant settings are displayed.
- Optimize metafiles – Smaller files exported into Microsoft Office applications.
- Included a Median function in the formula language.
- New mean and variance functions included.
(Erroneous values included at the beginning of the calculation using mean, variance and cor we now have mean2, variance2, cor2, median2 functions).
- Flexibility to place titles and legends – make it floating
- Table enhancements:
 - Display of forecasted values in tables.
 - Be able to switch row and column in tables.
 - Save and restore column position and width in Table analysis grid.
 - Keyboard shortcut keys in Tables.

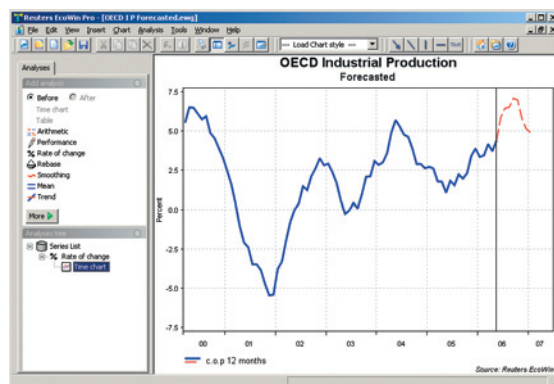
Excel Add-in Enhancements

Time Series Module

- New analyses included: Both Moving Average and Lag is now available.
- Improved means of entering date ranges: The From and To fields now accept number of observations.

Equities Module

- Enhanced speed and processing capabilities.
- Index data available in Equities Wizard.
- Improved support for dynamic data content.
- Additional analyses included: Min, Max and Mean.
- Multiple output supported through Regions.
- The Date Range Picker dialog has been improved significantly, and there is also support for a new date notation.
- Data Items assigned default formats.
- Search by Reuters Instrument Codes (RIC).



1 Introduction

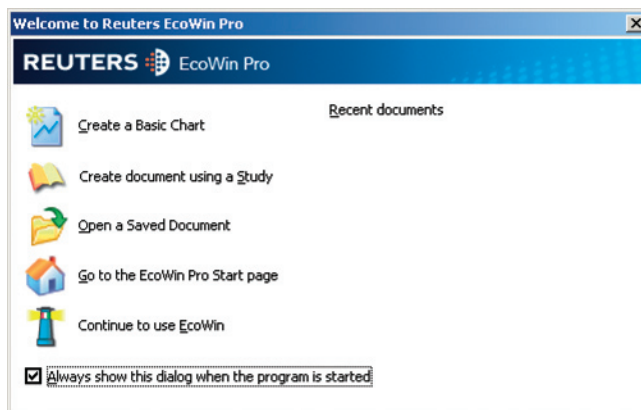
Reuters EcoWin Pro operates in a Windows environment. This means there is consistency in menus, commands and dialog boxes. You will find a standardized toolbar containing buttons consistent with Windows. With the Excel Add-in you can easily download and export data to Microsoft Excel and update your spreadsheets.

Help

Reuters EcoWin Pro contains comprehensive help documentation. Within the documentation, you will find descriptions, definitions, formulas and examples. Simply mark an item and press F1 on your keyboard.

Welcome to Reuters EcoWin Pro

When opening Reuters EcoWin Pro from the program menu, a dialog box will appear showing several options for using Reuters EcoWin Pro.



Create a Basic Chart

Create a chart directly by selecting time series.

Create Document Using a Study

Open a pre-installed study template for your document.

Open a Saved Document

Open a previously saved EcoWin Pro document.

Go to the EcoWin Pro Start Page

Access the EcoWin Pro Start page directly.

Continue to Use EcoWin

Access all options mentioned above from here.

Toolbar



New document with chart

New study

Formula editor

Series information

Hide/show Property bar

Add series

Duplicate series

Presentation settings

Insert arrow

Insert line

Insert vertical line

Insert horizontal line

Insert text

Reuters EcoWin Pro Start page

Chart Library

Help

Load chart style

Menus

File - Contains administrative features such as Saving, Printing, Settings, Series Editor and the Binder.

Edit - Includes copy commands, which you can use to move/copy documents or data into other applications. Reuters EcoWin Pro supports both OLE and DDE links. The Undo option can be found here.

View - Deactivate the Legend, the analysis shown in the Legend or multiple columns in the Legend. You can also find the Ruler command here.

Insert - Allows the user to insert Text labels, Arrows, Lines and multiple Panes.

Chart - Commands related to the formatting of your chart, such as Graph layout, Chart settings, Horizontal axis, Main vertical axis, Alternate vertical axis and Load styles.

Analysis - Contains Save as series, Calculation range, and the Insert menu which shows all the available analysis methods.

Tools - Provides utilities to administer (configure, repair, backup) your database.

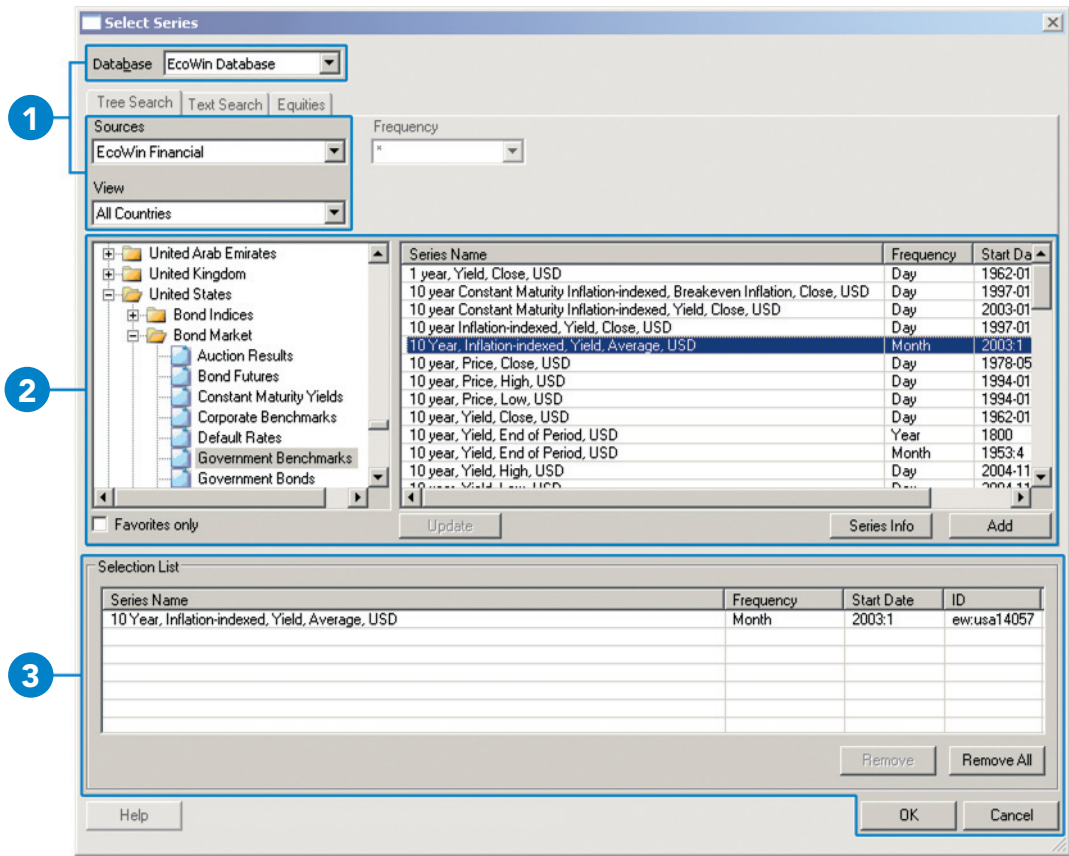
Window - Cascade, Tile and Arrange Icons are commands for organizing your documents on the screen. The Set size command is also available here.

Help - Content includes Help Topics, Recent News, Check for new version, a link to the Reuters EcoWin Pro Start page and Contact us.

2 Creating a New Chart



To create a new chart, select the **Create a basic chart** option from the start dialog box or the **New document with chart** button in the toolbar. The Select Series box will then appear.



1. Select database and source

First specify whether you want to look in the EcoWin database or your In-house database. Then select the database source: EcoWin Financial or EcoWin Economic. The add-on databases to which you subscribe will also appear here.

2. Add series to the Selection List

In the Tree View you will find the time series sorted by different views, such as countries and categories, for example. Time series are sorted by different levels in order to make searching easier. Select a time series by double-clicking on it or by marking it and then clicking the **Add** button.

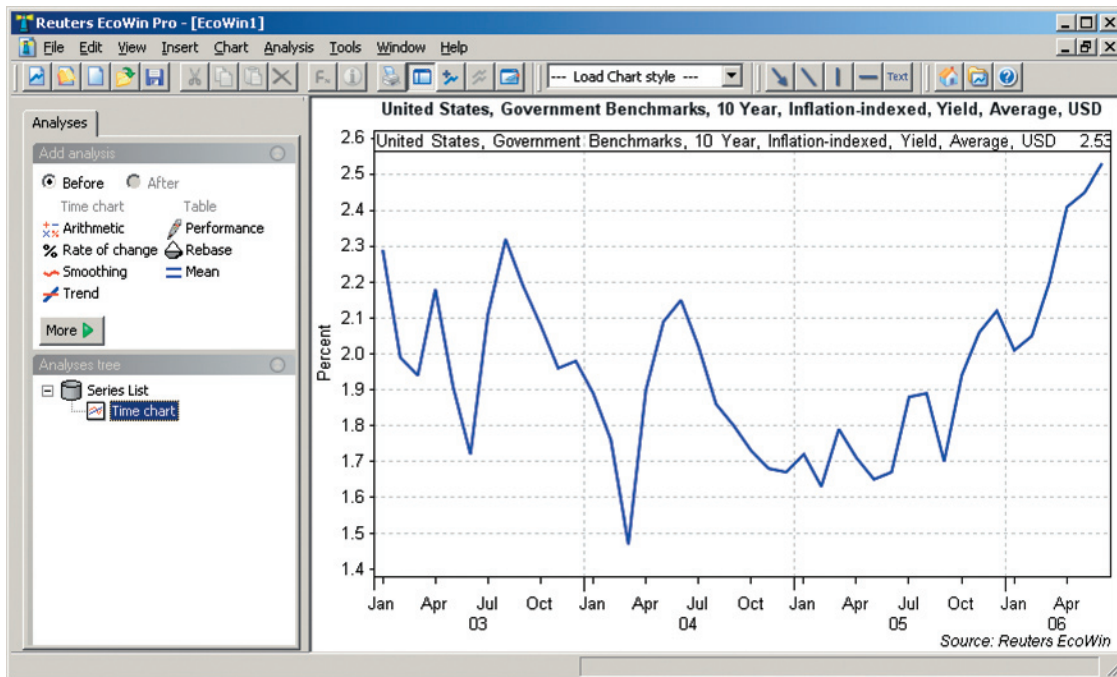
3. Create your chart

All series you have selected in the previous steps are shown in the Selection List. When you have added all series you want to present in your document, click the **OK** button to create your chart.

Saving Your Chart

Using the Save As option in the File menu, you can save documents consisting of charts, tables and reports in your own file library.

These documents can be retrieved at any time, by clicking on the **Open** button. The documents will be updated automatically when new values are entered into the databases.



The EcoWin series are presented, by default, as a line chart along with the Analyses tree to the left. In-house databases or any other data sources are based on the same principle, which means that time series from different databases can be combined freely.

3 Selecting Series

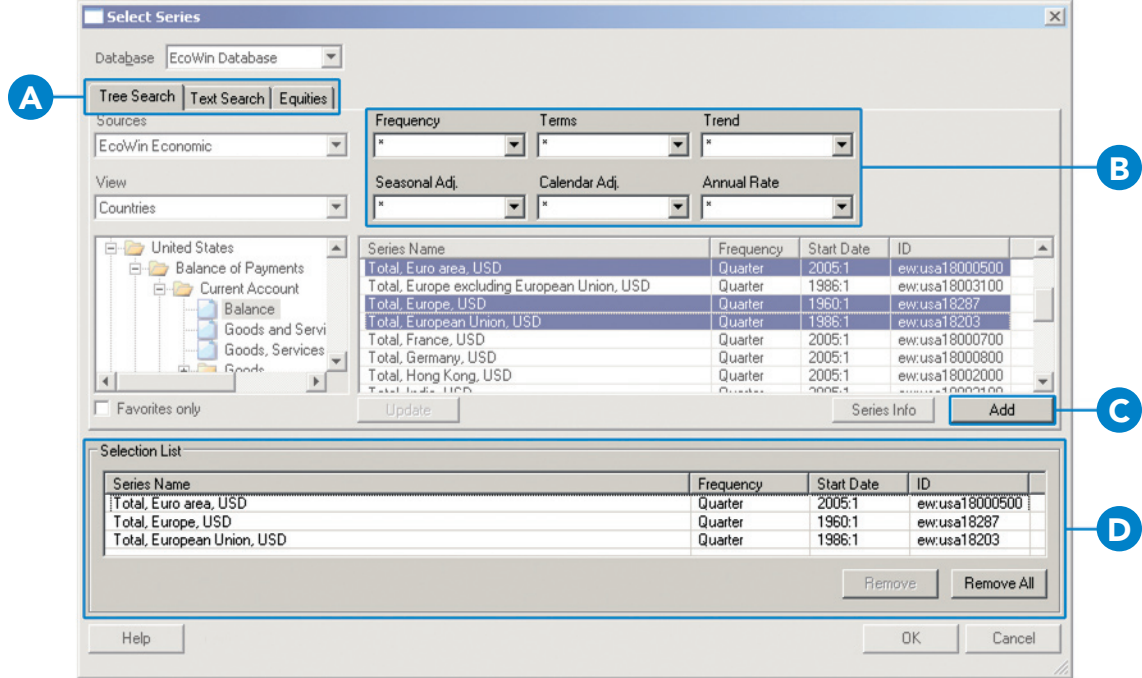
Using Select Series

Data is selected from the Select Series box. There are several ways to access this box in Reuters EcoWin Pro. If you have already started Reuters EcoWin Pro, a new chart can be created using the **New document with chart** button in the toolbar.

If you have not decided what output you would like, select the **New** button in the toolbar, then access the Select Series box using the **Add Series** button. This button can also be used if you want to add series to an existing document.

Series can be duplicated using the **Duplicate series** button in the toolbar.

The Tree View is the default search engine in Reuters EcoWin Pro. The filter function can be used to further refine your series selection. However, the properties of this function may vary from database to database. You can also personalize Select Series by using the Favorites function so that only the countries and categories you are interested in are displayed.



A. Search for series

Series can be found by using the Tree, Text, or Equities search. The Equities search tab is only available for those using the EcoWin Equities database.

B. Filter

Fine-tune your series selection with filters.

C. Add series

You can add series to the Selection List here.

D. Selection List

The Selection List allows you to browse and choose multiple series from different categories and databases, without having to close the Select Series box.

Text Search

Data can also be found using the Text Search. The Text Search searches the databases marked in the sources list when you click the **Search** button or **Enter** key. You can use the booleans **and**, **or** when searching. Without these booleans, the search will use **and** by default. Evaluation takes place from left to right only.

By pressing down the **Ctrl** or **Shift** keys, you can select multiple data sources from which to search.

The Text Search searches using the series' full descriptions and source as well as all the other meta data associated with the series, except the commentary and frequency. You can use the frequency filter to narrow your search further.

A maximum of 300 hits are returned. The search will not return any discontinued series.

Select Series

DatabaseEcoWin Database

Tree SearchText SearchEquities

Sources

EcoWinEcoWin EquitiesBank of EnglandBundesbankBureau of Economic AnalysisBureau of Labor Statistics

Frequency

Any

Search Text

new cars

Search

Select All

Deselect All

Series Info

Add

Search Result

Series Name [32 time series found]	Frequency	Start Date	ID
United States, Consumer Prices, New cars, Index	Month	1953:1	ew.usa118
United States, Consumer Prices, New cars, SA, Index	Month	1953:1	ew.usa118
France, Consumer Prices, New and used cars, Index	Month	1998:1	ew.fra1195
Austria, New Orders, Cars and autoparts, EUR	Month	1996:1	ew.aut0602
Ireland, Consumer Prices, By Commodity, Transport, New ...	Month	1989:11	ew.irl11610
Estonia, New Passenger Car Registration, New cars	Month	1997:1	ew.eek080
France, Business Surveys, Retail Sector, Cars, new, Const...	Month	1987:1	ew.fra0400i
France, Business Surveys, Retail Sector, Cars, new, Const...	Month	1987:1	ew.fra0400i
France, Business Surveys, Retail Sector, Cars, new, Curre...	Month	1987:1	ew.fra0400i
France, Business Surveys, Retail Sector, Cars, new, Curre...	Month	1987:1	ew.fra0400i
New Zealand, Imports, Other categories, passenger motor ...	Month	1988:1	ew.nzl1712
South Africa, New Vehicles, Domestic Sales, Passenger c...	Month	2003:1	ew.zar0850
South Africa, New Vehicles, Exports, Passenger cars	Month	2003:1	ew.zar0850

Selection List

Series Name	Frequency	Start Date	ID

Remove

Remove All

Help

OK

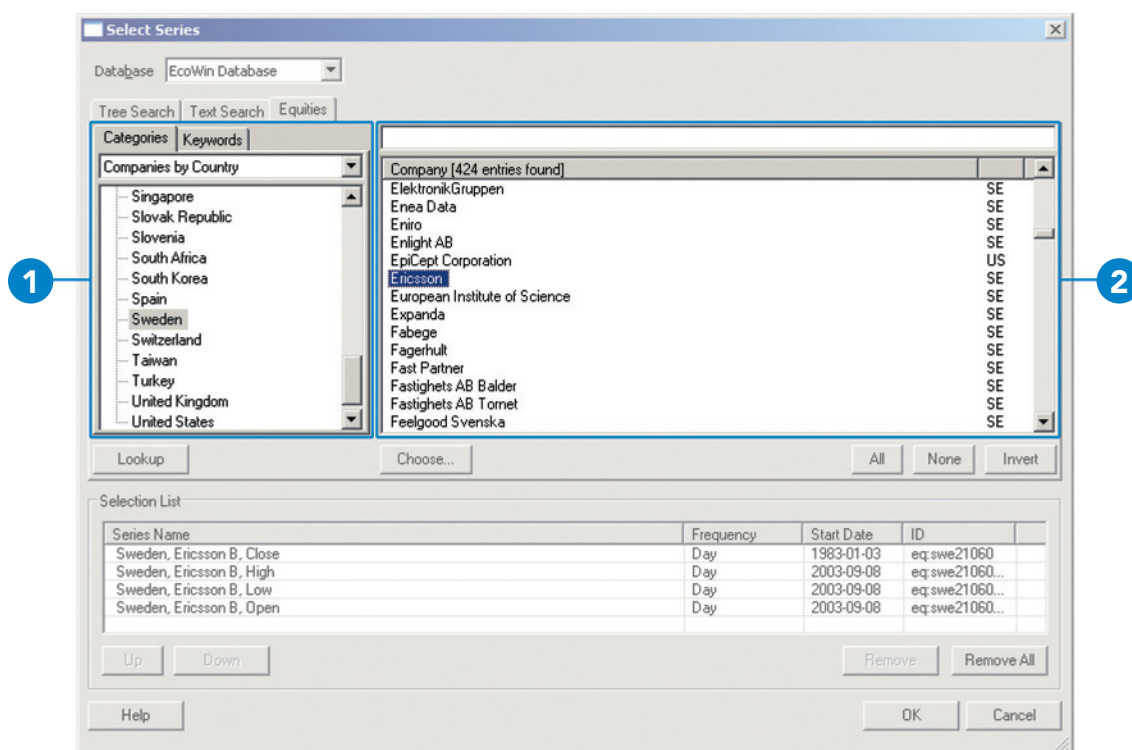
Cancel

Equities Selection

The Equities tab is available to those using the EcoWin Equities database and offers a more efficient way of searching for companies.

The EcoWin Equities database lets you tap directly into an accurate, comprehensive and up-to-date source of equity-related data.

This database gives you access to worldwide balance sheets, income statements and cash flow statements, as well as key ratios, global equity prices, quarterly fundamentals, world equity indices, and more.



1. Choose Category

Choose the category you want to search from the drop-down menu.

Mark the country in which you are interested and click the **Lookup** button. All companies listed for this country will now be shown in the Company window.

2. Select Time Series

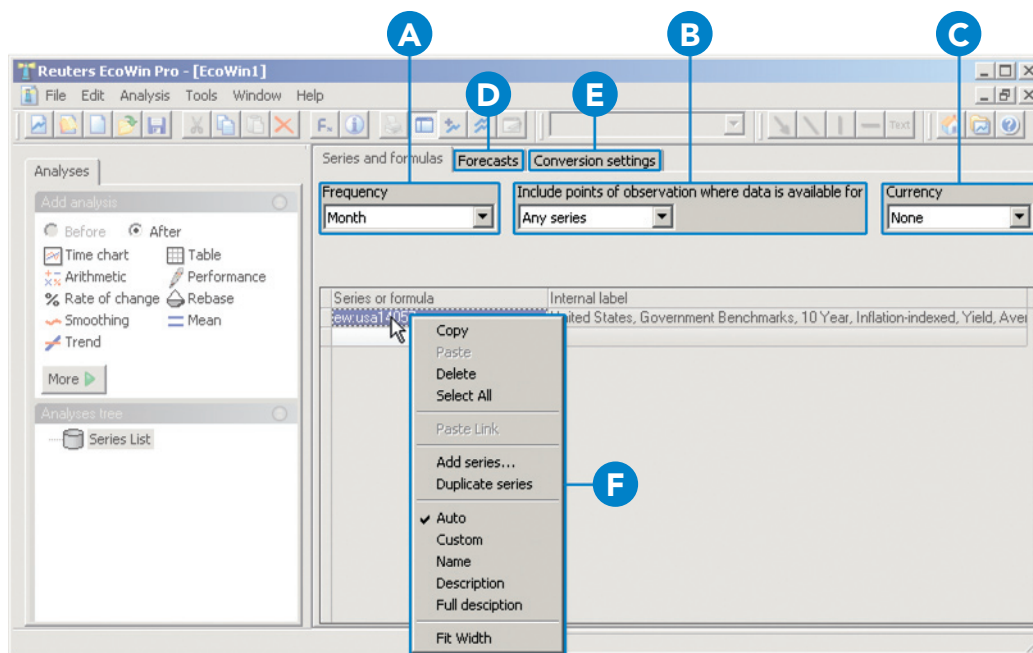
Mark the companies of interest and click the **Choose** button. A new window will now open.

Companies will appear in a tree structure in the Select Time Series window. If this structure is expanded, all variables for these companies will be shown.

Series List

The Series List is where all your selected series are located. In order to convert Frequency, set Calendar or make Currency conversions for your

selected series, go to the Series List and make your changes.



A. Changing Frequency

Convert frequency for all series in the Series List by selecting any of the preset frequency periods.

B. Calendar

The Calendar determines how Reuters EcoWin Pro will handle missing values.

Any series includes all observations where there is at least one observation in any series.

All series is used if one of the times series in the Series List has a missing value. If so, that specific date/observation will be removed for all the time series.

Calendar includes all observations regardless of missing values in any series.

C. Currency

Convert currency for all series in the Series List by selecting any of the preset currencies.

D. Forecasts

You can extend any time series in the document with your own future values for use in all calculations and presentations.

E. Conversion Settings

You can make more advanced decisions regarding frequency conversions and the handling of missing values using Conversion settings.

F. Right-click Menu

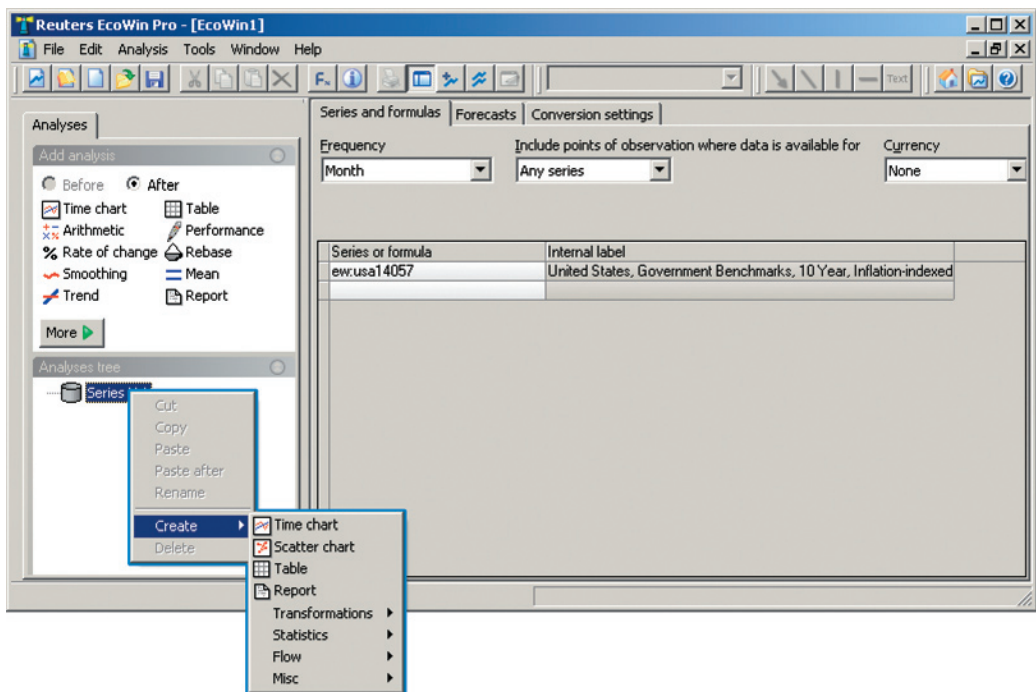
Right-clicking on the series ID or the internal label of a series will bring up a drop-down menu.

Any series can be copied, deleted, added, or duplicated from here. You can also make changes to the series label from this menu. Custom labels can be propagated to charts and tables.

4 Creating an Output

Reuters EcoWin Pro gives you several options for presentation of the data. We have already mentioned the possibility of creating a **Time chart**.

The other output alternatives are **Scatter chart**, **Table** and **Report**.



Time chart



A standard Time chart is displayed as a plotted line. A number of additional chart layouts are possible. A group of series can be represented as a bar group, a stacked bar group, an area group, an open-high-low-close group, a stripe group or a candlestick group.

Scatter chart



The Scatter chart shows the values for two time series plotted against each other.

Table



A Table shows the dates and the values for the time series, as well as for the output of the analyses.

Report



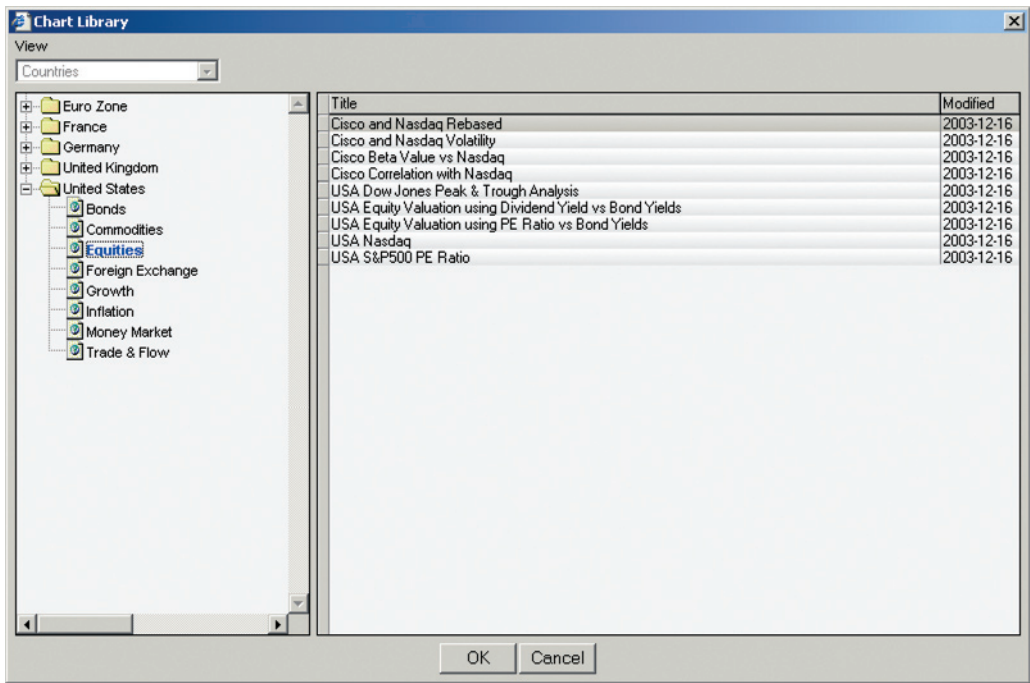
In a Report you will find information about the time series, for instance, source and description. If a regression analysis is added, a statistical report is generated automatically.

A library of pre-produced charts is available in Reuters EcoWin Pro. In this library, we have created interesting and ‘hot-topic’ charts, covering major countries as well as regions.



The charts can be found by clicking the **Chart Library** button, or via File, New, Document using Chart Library, where they are sorted according to countries and categories.

Charts from the Chart Library can be used in the same way as any other EcoWin documents you have created, meaning that they can be saved, manipulated and used in other applications. The charts are automatically updated and we are continuously adding new charts to the library, complete with comments, trends and other analyses.



6 Using Studies

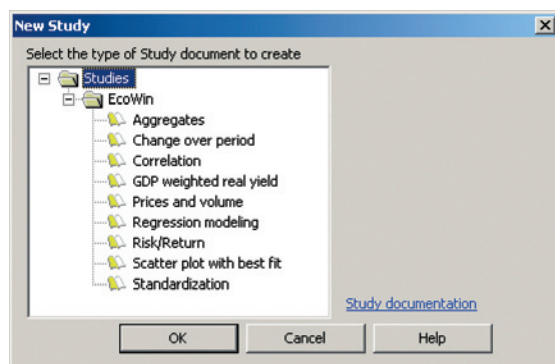
EcoWin studies are pre-formulated, editable algorithms that operate on the series, frequency, and other parameters that you provide. Depending on the particular study, the results may be charts, plots, reports, or diagrams.



Studies are available from the File menu or the **New Study** button in the toolbar.

Study types

Nine types of studies are supported, and can be selected from the New Study dialog, as illustrated below:



Aggregates

Allows you to create GDP (gross domestic product) weighted aggregates or indices. The variables that can be aggregated contain, for example, equity index and consumer price index.

Change over Period

Allows you to create a chart where up to five time series can be transformed into their corresponding change over period series. There is, in addition, an option for smoothing the change over period. The output displays the transformed variable(s) in a chart and in a table.

Correlation

Allows you to calculate a cross correlation function between two series. You can also find the lag for which the correlation between the two series is the strongest. A time chart with one series lagged a chosen number of time periods is automatically created. A bivariate regression is also performed for the chosen two series. This regression can also be used to generate forecasts.

GDP Weighted Real Yield

Allows you to build an aggregate real yield for Government Benchmark Bonds.

Prices and Volume

Allows you to pick a closing price for an equity, for which the study will find the corresponding high, low, and open prices, and the volume traded for that equity.

Regression Modelling

The Regression Modeling study allows you to estimate a number of linear regression models for a given dependent variable that you want to describe, explain and forecast.

Risk/Return

Allows you to quickly get an overview of the risk and return characteristics for a number of series. All input data series are transformed into a common form prior to the risk and expected return calculations.

Scatter Plot with Best Fit

Allows you to produce a scatter chart with a line of best fit and a standard deviation band around the line of best fit.

Standardization

Allows you to select one or more time series and, for each series, a separate time chart depicting the time series, the mean of the time series, and the standardized time series will be created.

7 Using Charts in Office Applications

It is possible to copy any chart in Reuters EcoWin Pro using Edit, Copy chart picture and object. These charts can be automatically or manually updated in Office applications.

Paste Link | EcoWin Document Object

In order to access this option, the original EcoWin document needs to be saved. Only a link to the original document is saved in the Office document. This link will be broken if the original document is moved, deleted or not accessible for some reason. Applying an analysis or renaming a chart in the EcoWin document will also break the link. When double-clicking an EcoWin document in an Office application, it will open in Reuters EcoWin Pro. Since the document is linked, you can use the Edit, Links menu to update links and select automatic or manual update.

Anyone who does not have Reuters EcoWin Pro installed will be able to open documents with linked EcoWin objects. However, they will not be able to update, edit or open the chart object.

Paste | Picture (Enhanced Metafile)

This option creates a static picture of the chart; one that will never be updated. You can only manipulate it using standard Office tools. Right-click the picture to use Format picture. If you are not able to use Enhanced metafile, the problem might be that this function has been disabled in the Reuters EcoWin Pro application (located in the File menu, under Settings, Options, Chart).

Paste | EcoWin Document Object (Embedded Object)

Pasting the complete EcoWin document into an Office application will create an embedded object. It will be updated when it is double clicked and you will have access to most of Reuters EcoWin Pro's menus while still inside the Office application. It is also possible to update the chart by right-clicking it and selecting EcoWin Document Object, Update.

Anyone who does not have Reuters EcoWin Pro installed will be able to open documents with embedded EcoWin objects. However, they will not be able to update, edit or open the chart object.

Paste EcoWin document object is the general default if you use Ctrl+V or just choose Paste in the Office application.

Lock Size of Linked Documents

By setting the size of the linked EcoWin document in the OLE-link it is possible to keep the size fixed. The Set Size function can be found in the Window menu. Please note that users of versions prior to Reuters EcoWin Pro 5.4 will not be able to open or update linked documents created in Reuters EcoWin Pro 5.4. To avoid this, make sure that all users have the latest version installed.

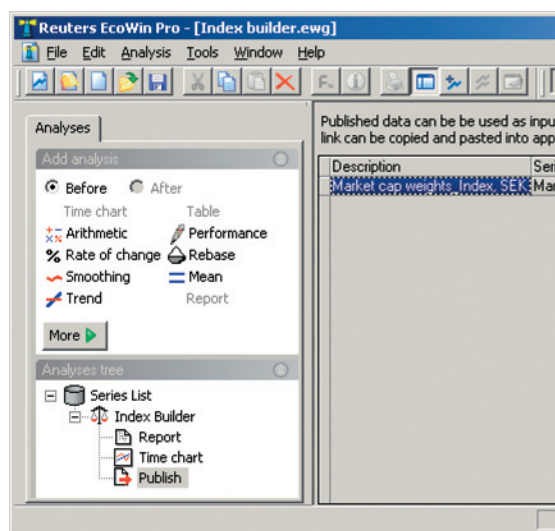
Publish – Linking Data into Excel or EcoWin Documents

The new Publish feature is primarily intended for two purposes:

- Linking time series data into Excel
- Linking time series data into other EcoWin documents

To make the data available for linking, it must be published.

1. Select the series you want to publish from either a table or a chart.
2. Right-click this series and select **Publish** from the context menu



The text in the first column can be edited if you do not want the suggested text. This text will be displayed when you browse for series to use as input in other EcoWin documents, as described to the right.

Creating a link to Excel

1. Publish the data you want to make available in Excel. Note that you can publish more than one series at a time by marking several columns in a Table and selecting **Publish**.
2. **Save** the document.
3. In a list of published data, select **Copy** or **Copy Special** from the context menu.
4. In Excel, select **Paste Special** and check **Paste Link**.

Using Published Data as Input in Another EcoWin Document

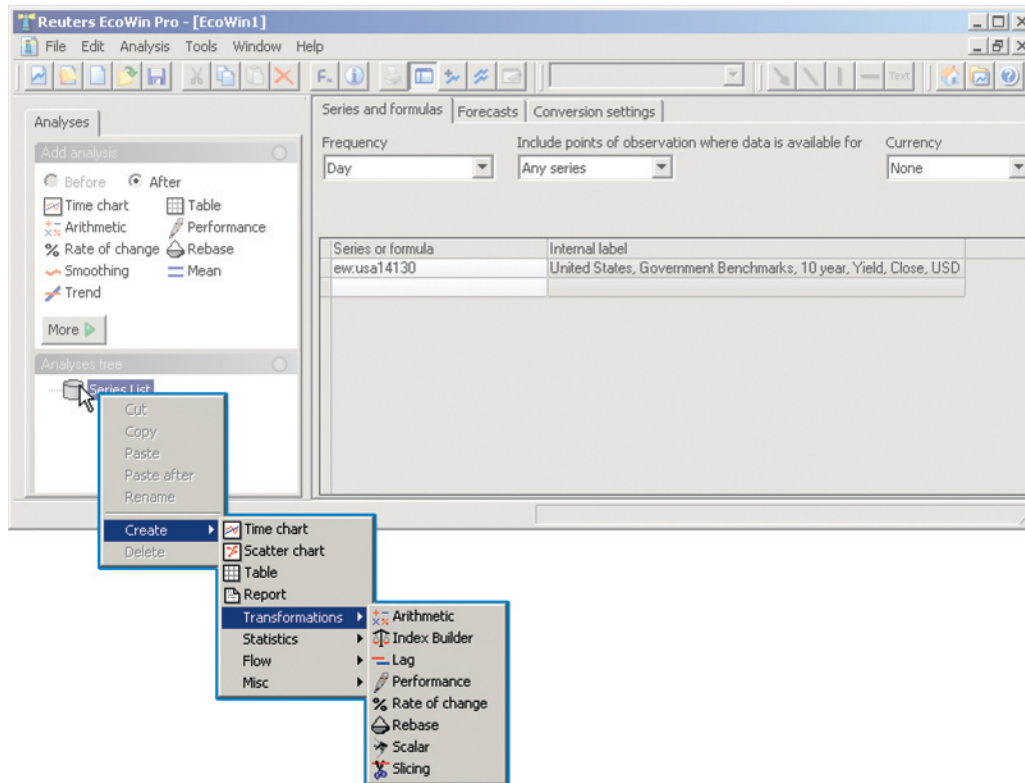
1. Publish the data you want to make available as input in other documents.
2. Edit the Description in the first column so that you can easily recognize this data.
3. Save the document in the EcoWin folder. This folder is by default located under **My Documents\EcoWin**.
4. In the document where you want to use the data as an input, select **Analysis, Add Series** and then select the database **Document Database**. You should now be able to find the document you saved in the previous step.
5. You will now be able to find the document you saved in step 3. When you select the document, you can see a list of data published in this document. Select the data you want to use as input and click **OK**.

Another way to create a reference to the published data is to select Copy from the list of published data in the first document and then select Paste Link in the Series List of the new document.

8 Adding analyses

Once you have selected the data you want to work with, an analysis can be applied. The analyses available are divided into three different groups; Transformations, Statistics and Flow. The groups can be seen by right-clicking on the Series List.

Analyses can be applied on top of each other by placing the cursor in the Analyses tree where you want to insert your analysis. You can also change the order of your analyses by using drag and drop in the Analyses tree.



Transformations

Arithmetic



Two time series can be added to, multiplied or divided by, or subtracted from each other. The resulting time series can in turn be manipulated using the four arithmetic operators or together with another time series.

Index Builder



The Index Builder analysis can calculate an index or an aggregate representing either the value of a self-financing portfolio of assets, or the value of a set of assets.

Lag



To lag or lead a time series means shifting the observations of a chosen time series backward or forward in time. When a time series is lagged, it is shifted forwards a chosen number of observations. Leading the time series means the series is shifted backwards a number of observations.

Performance



The performance of a time series can either be expressed as a percentage change, or as a change in the level from a certain date. For both these kinds of transformations it is possible to choose a variety of time intervals over which the performance calculations can be made.

Rate of Change



A change in a time series can be expressed either as a percentage change per period, or simply as a change in the level. For both these kinds of transformations it is possible to express the changes as an annual rate for both of these kinds of transformations.

Rebase



The value of a time series can be set to a constant, say 100, at a given point in time. The original time series is simply divided by the value at the given point in time and then multiplied by 100. It is also possible to rebase a time series relative to the value of a second time series at any given point.

Scalar



The Scalar analysis creates a number of new series from a set of input time series. Each new output series obtains its values from some scalar function of the input series. The scalar functions are observation values at specific dates or observation numbers, or the mean, median, performance or standard deviation of input series for a specified sample. This function gives you flexible cross-comparison possibilities for time series.

Slicing



With this analysis, you can divide a given sample of observations from any number of time series into smaller samples according to the criteria of calendar time and/or number of observations.

Statistics

Correlation



The correlation analysis can calculate correlation functions for any number of time series.

Covariation



The covariation analysis can calculate a number of moving statistics, i.e. the sample on which they are based is a time window with a fixed number of observations. This analysis is especially useful for detecting instabilities in correlations, standard deviations, and regression coefficients.

Mean



The mean, median, max or min can be calculated for any time series. It is also possible to have confidence intervals around these calculations.

Regression



The regression analysis estimates a linear regression model with ordinary least squares (OLS). The output from this analysis is estimated parameter values and their standard errors as well as overall regression statistics. These can be seen in a report.

Smoothing



Various ways of applying moving averages to any time series: Moving Averages and Centered Moving Average, as well as Exponential Weight. This function also allows you to apply moving standard deviation (over time).

Trend



Reuters EcoWin Pro can plot or remove certain deterministic trends from a time series. It is possible to draw a confidence interval around the estimated trend.

Flow

Early Warning



The user formulates a plan or projection for the present year concerning this year's sum of a flow variable. Given the chosen seasonal model, i.e. additive or multiplicative model, and the actual development during the present year up to now, this analysis estimates whether the actual development is following the plan. This estimate can be formulated in percentages or values.

Aggregation



Depending on the underlying time series' data frequency, a number of summation periodicities are available. The user specifies how often the aggregation will be restarted within each year.

Misc

Stop



The Stop selection halts the creation of a series at the point at which Stop was selected.

If you want more information about a specific analysis, mark that analysis in the Analyses tree and press F1.

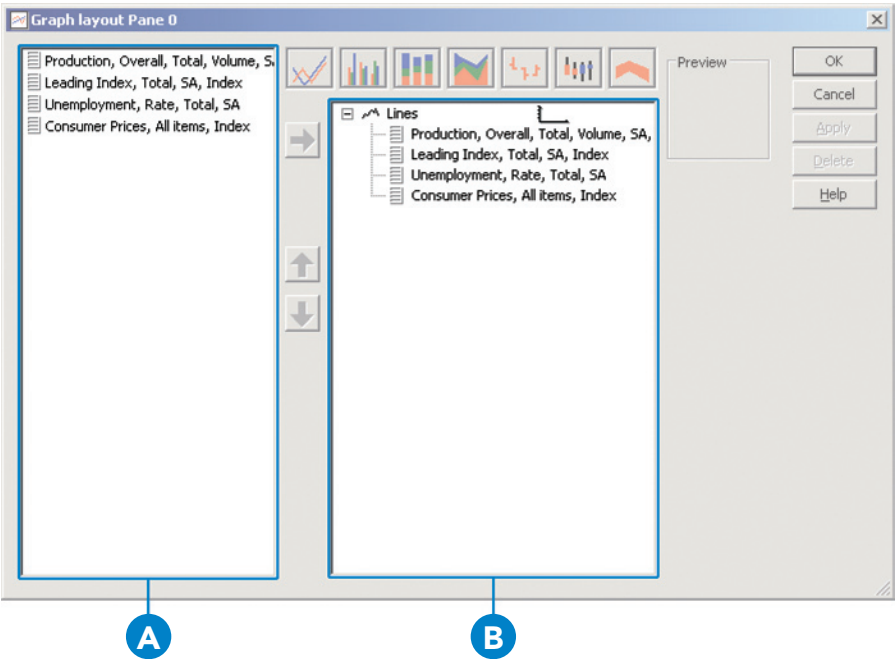
9 Changing the Chart Layout

EcoWin Pro makes it easy for the user to make changes to the chart layout.

When a time chart is created, the series are automatically presented as lines. The tool for changing the chart layout is the **Presentation settings** button.



If you want to remove a series from the chart, use the right-hand part of the Graph layout box. Just mark the series and select Delete. The series will then be deleted from the chart, but is still available in the Series list and can be added to the chart again, using the arrow.



A. Series
Shows all series available in the Series List.

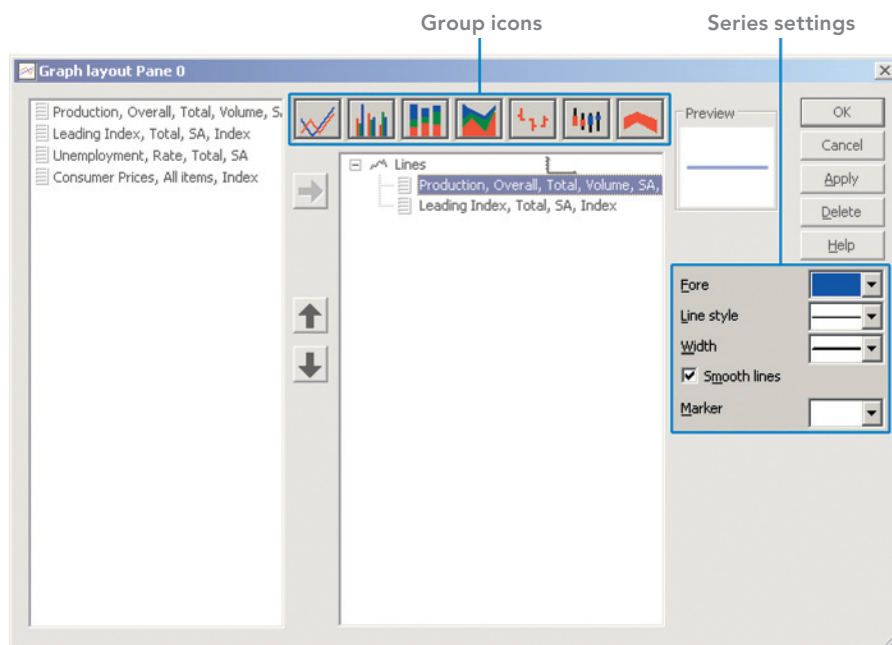
B. Groups
Shows all series that will be presented in the chart.

Groups and Series

If you want to change the chart style for all the series in your chart, mark Lines and select a new group style for your series.

If you want to present one of the series with a different chart style, a new group has to be created. To do this, mark the relevant series in the right-hand field and select one of the Group icons.

To modify the settings of a series the series has to be marked. Selections for color, line style and width can then be made, depending on type of chart style.



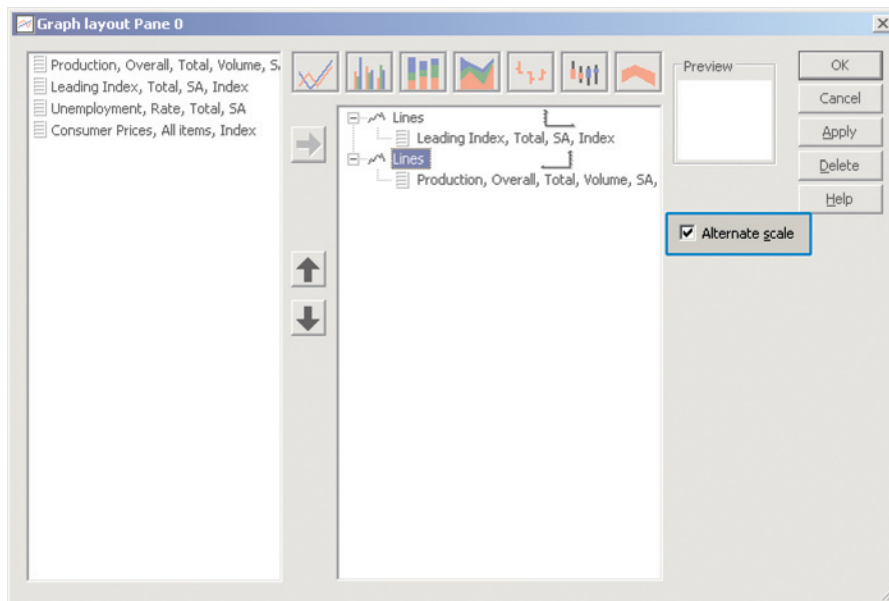
Load Chart Style

You can use previously saved EcoWin Pro charts as templates when creating new charts. This choice is available from the **Load chart style** drop-down menu in the toolbar.

A template is created by simply saving the chart. A number of features of this chart can then be applied to another chart. The most important properties are the grouping of the time series, the chart layout and what can be called 'user made changes', such as the grid, background, the fonts applied to the value axis and the main title.

Alternate Scale

If you want to display one of the time series on an alternate scale, you have to mark this series and create a new group. In order to activate the Alternate scale box, mark the group for the relevant series. The Alternate scale box can then be marked.



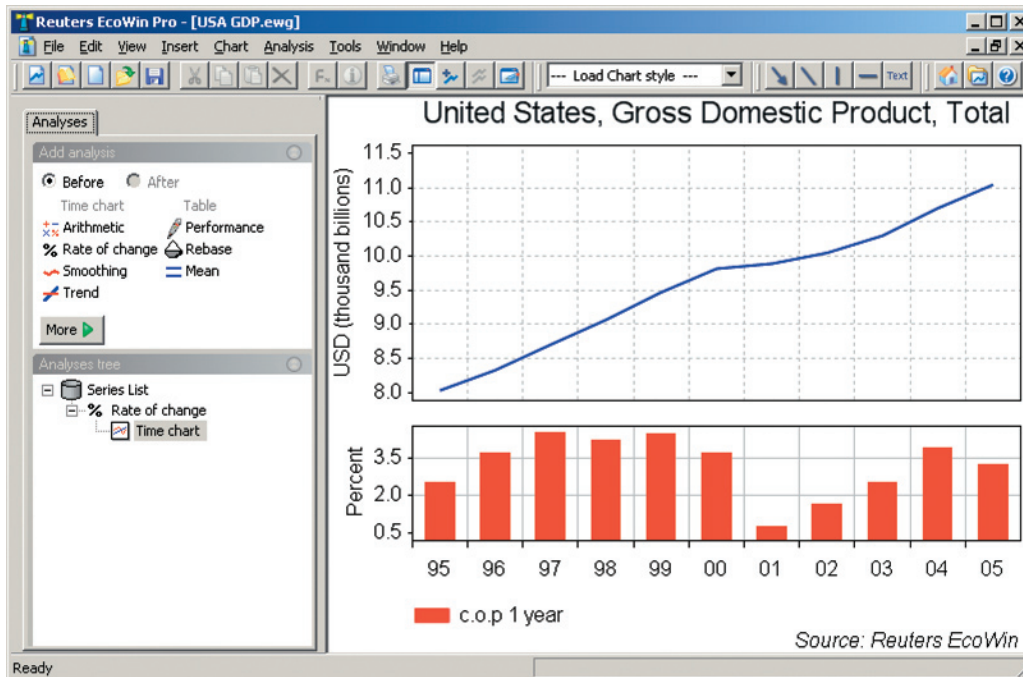
Alternate scale

10 Multiple Panes

It is possible to display several panes in one time chart. Panes are always inserted below the existing one and this can be done in several ways: By dragging and dropping a series outside the graph area or by using Insert Pane below in the Insert menu. All panes in a time chart share the same settings for title, background, range paint and x-axis. The graph layout is separate, however. Any pane can be resized relatively by clicking between two panes and dragging.

All series that are added to a document will automatically be added to the upper pane only.

The panes support dragging and dropping of series between them and this is often the fastest way to add series to a pane. Series can also be Copied/Pasted between different panes using the Copy command in the Edit menu.



11 Chart Properties

The default chart setting is to chart the data with full history. If you mark a time series in the chart, you will find a status field showing the exact date and value for that point of the series in the bottom right corner. You can use the right and left buttons on the keyboard to scroll along the time series and clearly see the dates and values of the series. If you have more than one series in a chart, the Ruler command can be used to display dates and values for multiple series at the same time.

Horizontal Axis Properties

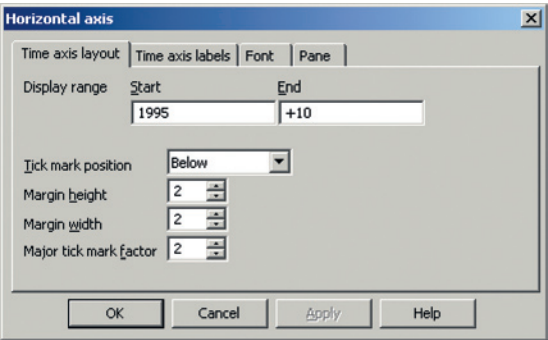
To edit or view the properties that are specific to the horizontal axis, you have to double-click on the X-axis. An X-axis properties box will appear.

Time Axis Layout

The Display range can be altered to fit your requirements. You can choose to either set a specific date or number of observations.

Several other choices regarding margins and tick mark position are also available under this tab.

Changes can also be made to the display range using the Display/Zoom bar available under the chart. Double-clicking the bar displays the full length of the series in the chart.



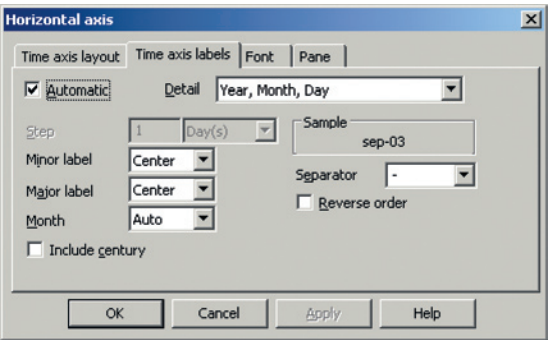
Time Axis Labels

Automatic

In Automatic mode the purpose is to show as much information as possible. When this mode is turned off, you can manually enter the distance between each minor tick mark.

Include Century

When this option is marked the years will be printed with four digits, e.g. 1998.

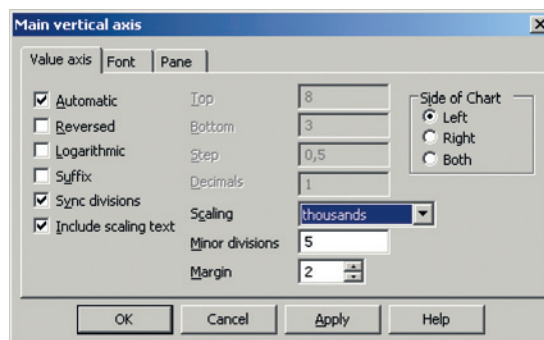


Vertical Axis Properties

To add new settings to the Y-axis, double-click on the vertical axis and enter your settings. The preset mode is always Automatic which means that EcoWin Pro will find the most suitable scale for the series included in your chart. The Y-axis can be reversed, duplicated on the right-hand side or recalculated to a logarithmic scale. If automatic is turned off, you have the option of entering your own values for Top, Bottom, Step, Decimals and Scaling.

Scaling

Scaling allows you to change the scale of the time series in a chart according to your own preferences. The text on the Y-axis will change according to your selection.



Title

Double-clicking on the title in a chart allows you to easily change the chart's titles and fonts.

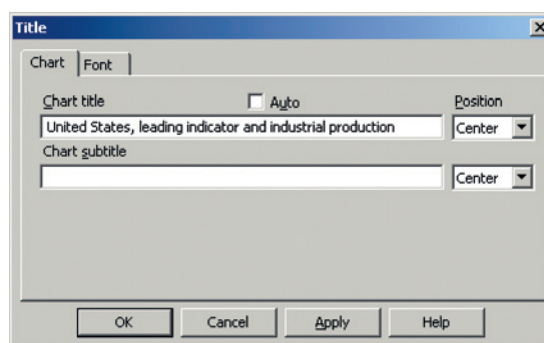
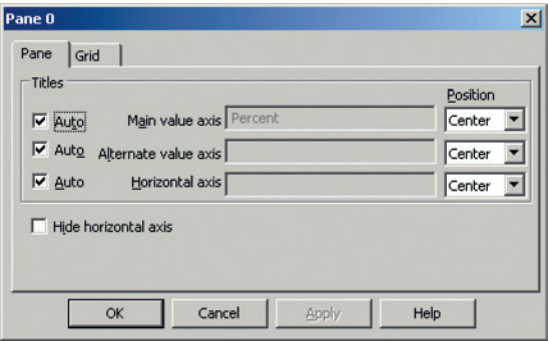


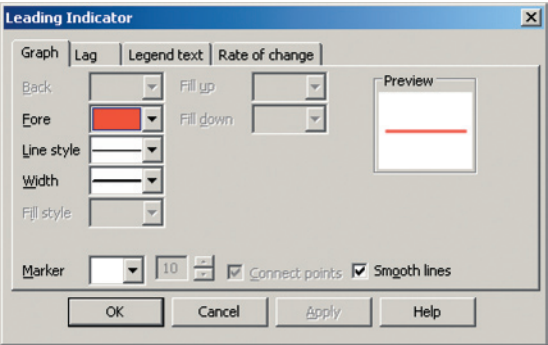
Chart Settings

Double-clicking directly in the chart allows changes to be made to the grid lines as well as the horizontal and vertical axes. Changes can be made to titles, background and range paint from the Chart settings command in the Chart menu. In addition, the color for the graph area can be set separately.



Time Series Properties

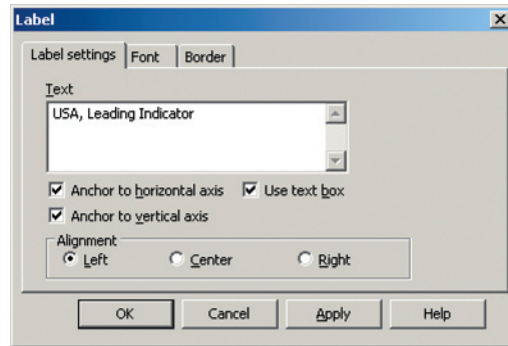
Double-clicking on one of the time series in a chart will bring up the properties of the specific series. Changes can be made to line style and width, for example, from this box. You can also see which analyses have been applied to the specific time series, and the analyses applied can easily be changed from here.



Lines, Arrows and Text

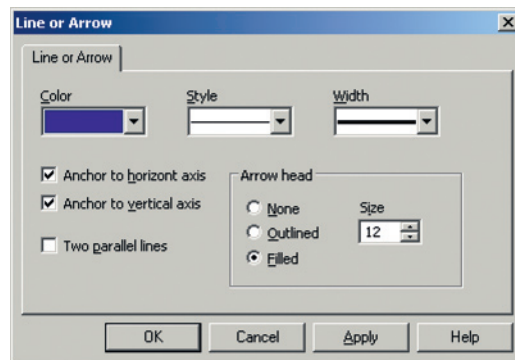
You can add labels, lines and arrows to the chart simply by clicking on these buttons in the toolbar, and pointing and clicking where you want it to appear in the chart. Double-click on the object to set the font, color and style. In addition, you can apply multiple lines to text labels.

To edit the properties of text inserted in the chart, double-click on the text; the Label Properties box will appear.



Objects can be moved from their initial locations. When using Print preview you will be able to see how the text fits into the chart. By marking the object once, a small square becomes visible and you can move the object by holding down the left mouse button and dragging the object to another part of the chart.

Lines, arrows, and text boxes are anchored horizontally and vertically by default. This means that lines, arrows and text will be relative to the x- and y-axis. If unmarked, these will be relative to the chart window. If you want to point out a specific value in the chart, anchoring is recommended.



12 Excel Add-in

Use the Excel Add-in to download time series data directly into Excel spreadsheets. The add-in consists of two parts: the Time Series module and the Equities module; while the former allows you to work with all sorts of data, the latter is designed specifically to handle equities-related data.

A. Toolbar Buttons

The toolbar buttons provide a quick way of accessing the Time Series and Equities wizards, as well as the online Help.

B. Download Time Series Data to Excel

Time series - This will open the Time Series window, through which you can select and download time series data.

Properties - Here, you can change the settings of one or several selected time series, and even replace the entire time series.

Load data - Opens up the Time Series wizard for all or a selection of series.

Convert old sheet - Convert spreadsheets from EcoWin Graphics format to EcoWin Pro format.

C. Download Equities Data to Excel

Equities - Download equities data. This will open the Equities wizard.

Edit Worksheet - Load content from the spreadsheet into the Equities Wizard for editing.

Convert Values - Convert from dynamic values to static ones, or vice versa.

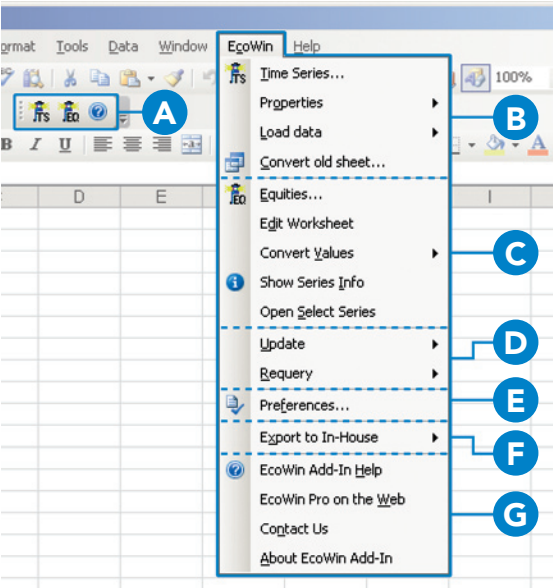
Show Series Info - Present information about a particular time series.

Open Select Series - Browse for time series using the Select Series interface.

D. Update

Update - Updates a sheet, a selection of series, or the entire workbook.

Requery - Re-runs the query originally used to create a particular EcoWin Equities output region. This may cause the entire region to shrink or grow.



E. Preferences

Allows you to change the preferences settings for the Excel Add-in.

F. Export to In-house

With this feature you can define a set of time series in Excel and export the data to your in-house database.

G. Help and Miscellaneous

EcoWin Add-in Help - Display the software documentation set.

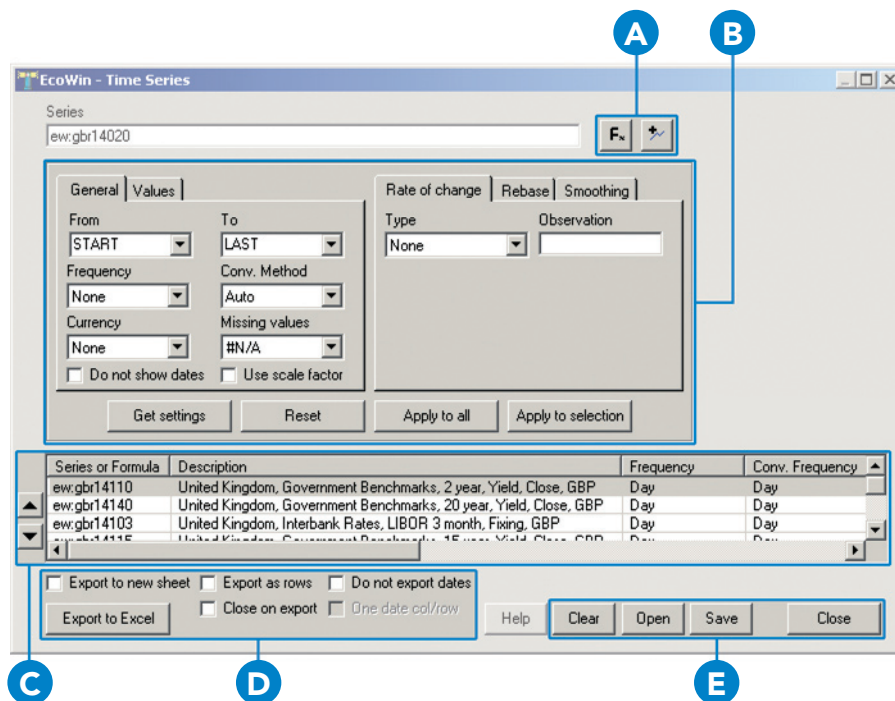
Reuters EcoWin Pro on the Web - Start an Internet browser, and direct it to the EcoWin web site.

Contact Us - Send your query directly to Reuters helpdesk by using the Contact Us form.

About EcoWin Add-in - Display additional information about the software.

Working with Time Series Data

Select 'Time Series...' from the EcoWin menu. This will open the Time Series window, as shown below.



A. Selecting Series

Before you can export any data to Excel you first have to select a number of time series. There are several ways to do this:

You can enter a series code directly into the Series text box, and press the Enter key.

You can also press the **Select Series** button, which brings up the Select Series dialog. Use this interface to browse your databases, and pick series using the Text Search or the Tree View. Multiple series can be selected.

Finally, you can press the **Formula Editor** button, and enter simple arithmetic expressions.

B. Series Settings and Analyses

The Series settings – such as display range, frequency and other parameters – can be modified. To the left-hand side there are general settings, and to the right you have a number of analyses. The settings you specify will then be used for every series you add to the Series List. To change the settings for one or several of the series in the Series List, use the **Apply to selection** or the **Apply to all** buttons.

You can change the settings of the series manually or copy the settings from any of the series already present in the Series List. To retrieve the settings

from a series in the Series List, select the series and then click **Get Settings**. To assign default values to all settings and analyses, click the **Reset** button (this action will not affect the series in the Series List).

Settings – General tab

From – Start of display range. Can be set to:

- **LAST**
Shows the latest observation available in the database.
- **START**
From the actual beginning of the series. This is the default setting.
- **Number of observations**
The number of observations prior to the latest one, e.g., -10 or -200.
- **Custom date**
A normal date. Short date format should be used (c.f., Regional Settings in Windows).
- **Calendar period**
Used when a specific calendar period should be displayed, e.g., -1M or -1Y.

To – End date of Display range. Can be set to:

- **LAST**
Shows the latest observation available in the database. This is the default setting.
- **TODAY**
Shows all observations up to today. Useful when you want to apply a common end date to all series.
- **Number of observations**
The number of observations prior to the last one.
- **Custom date**
A normal date. Short date format should be used (c.f., Regional Settings in Windows).
- **Calendar period**
Used when a specific calendar period should be displayed, e.g., -1M, -1Y, +1M, or +1Y.

Frequency – Select the frequency to which you want to convert the data.

Conversion method – Select the frequency conversion method, if any.

Currency – Select the currency in which you want to express the series.

Missing Values – Defines how non-existent observation values should be handled. Default is N/A, but can be changed to Previous Value or Empty.

Do Not Show Dates – If this is marked, the series will not show any date columns.

Use Scale Factor – If this is marked, the Scale factor will be used and all digits will be displayed in Excel.

Settings – Value tab

Lag Observations – The number of steps to shift the time series observations forward or backward.

Analyses

There are three different analyses available – Rate of Change, Rebase, and Smoothing. Rate of Change and Rebase also support a number of different variants. Note that you cannot apply more than one analysis per time series. For more information on analyses and the parameters they accept, please refer to the online User Manual.

C. Series List

Changing Order of Series – Use the **Up** and **Down** arrows to change the order of series in the Series List.

Series Selection – Changes can be applied to a selection of series in the Series List. To apply the current settings, click the **Apply to selection** button, or use the **Apply to all** button.

Series Properties – To change the properties of a single series in the Series List, you can double-click it. This will display the Properties dialog for the selected series. Properties can also be accessed by right-clicking the series and selecting the Properties menu item, or by pressing the Enter key.

Copy and Paste – Select one or more series in the list, then right-click. From the context menu, you can choose one of the standard Copy and Paste items. By using those commands you can move collections of time series identifiers between the Series List and other applications, such as EcoWin Pro or Notepad.

Delete – Pick some series in the Series List and press the Del key, or right-click and select the Delete menu item.

D. Export Options

Export to Excel – Exports the content of the Series List to Excel.

Export to New Sheet – Exports series into cell A1 in a new spreadsheet.

Export as Rows – If this is marked, series will be exported into rows instead of columns (the output will be transposed).

Close on Export – Closes the Time series window after export is completed.

Do Not Export Dates – If unmarked, one date column will be exported for each series. If marked, no date columns will be exported.

One Date Col/Row – If checked, only the date column for the first series will be exported. This option is only available if all series share the same Start date, Frequency and Last date. To ensure that the last date is the same, set To = TODAY for all your series.

E. Series List Commands

Clear – Clears the Series List, and resets the settings and analyses to their default values.

Open/Save – Load or save the contents of the Series List from or to disk.

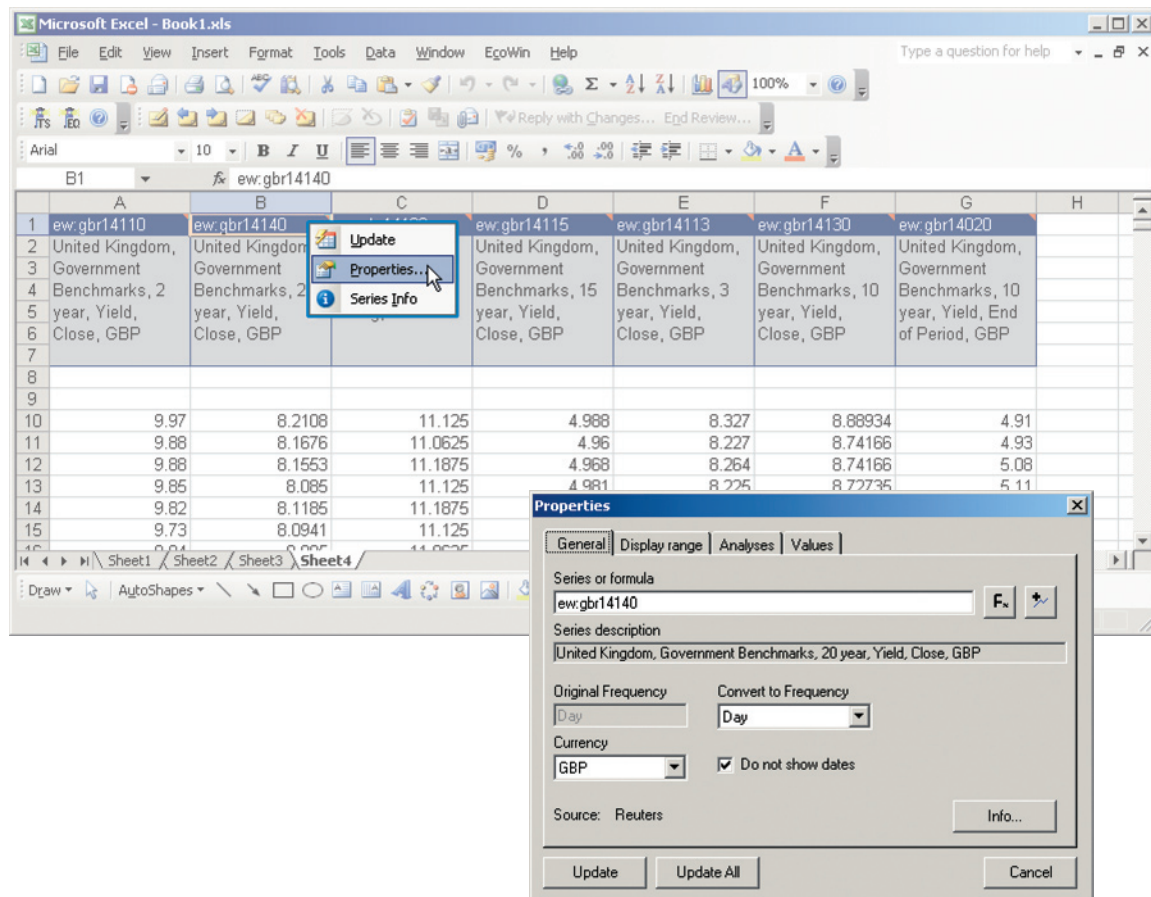
Close – Close the Time Series wizard window.

Series Properties

After you have exported your time series data to an Excel spreadsheet, you can use one of the Properties menu items to change the settings of one or several time series. Depending on your Macro Security settings in Excel, you may also be

able to right-click a cell containing a time series identifier in the Excel spreadsheet to access the same dialog.

From here, the settings of individual series can be changed, and series replaced.



Working with Equities Data

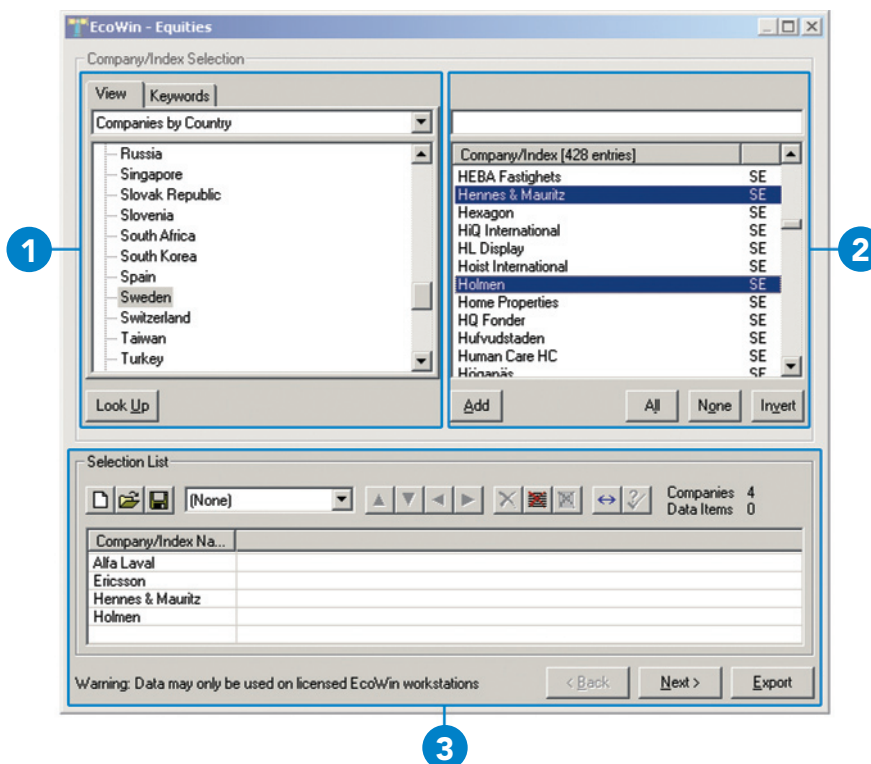
Using the Equities wizard you can easily download equities data into Excel – e.g., this can be historical data or estimates, for prices and for fundamentals.. It is a tool that lets you create and edit dynamic and static equities data.

The wizard provides you with an easy way of picking the companies (and/or indices) and data items you are interested in, and offers a wide variety of formatting options.

Company and Index Selection

Select 'Equities...' from the EcoWin menu.

1. Look up companies or indices either by using keywords (searching by name, ISIN or RIC) or by browsing through the tree structure.
2. Pick the companies you are interested in, and add them to the Selection List.
3. Click **Next** to proceed to data items selection.



Data Item Selection

1. You will have four different categories of data items to choose from: Attributes, Prices, Fundamentals and Estimates. (The Estimates tab will only be available to subscribers of estimate data).

Attributes – allows you to choose items such as the country of origin and different industry classifications.

Prices – close, high, low, volume, etc.

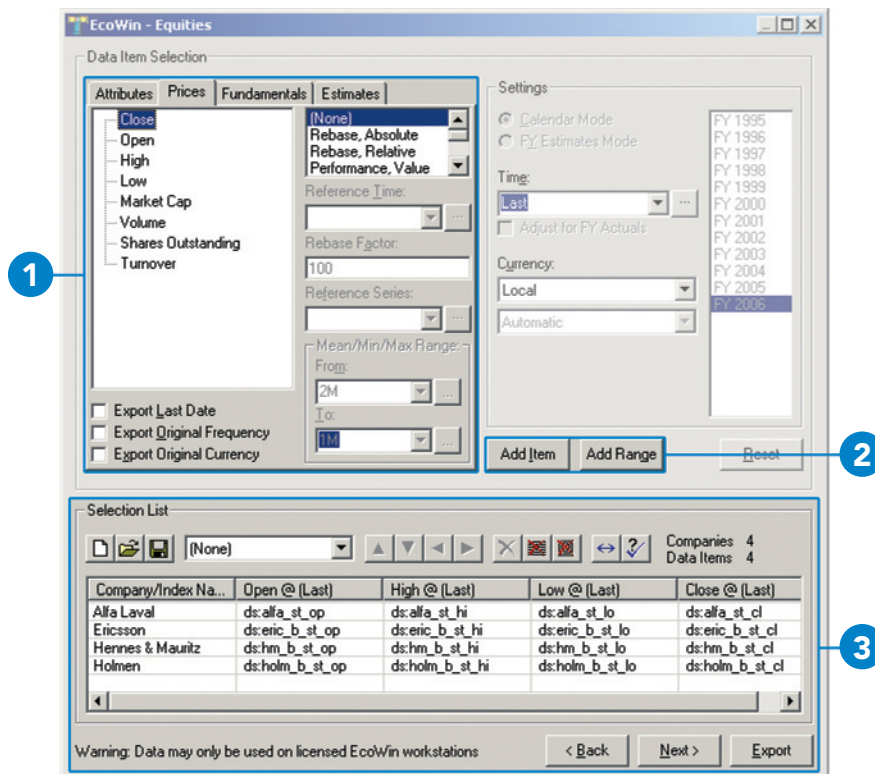
Fundamentals – choose variables from Balance Sheet, Income Statement, Cash Flow Statement and Key ratios.

Estimates – select the estimates of interest such as EBIT Median, Sales Median, etc.

2. Select the data item you are interested; you can then decide to apply one of the available analyses, such as Rebase or Performance. When clicking the **Add Item** button you will get the last value of the series, while **Add Range** allows you to choose a time range, that is, it will help you create several, consecutive observations at the same time.

3. The selected data items are now added to the companies in the Selection List, and you can select another data item.

Note that you cannot change the settings of the data items that have already been added to the Selection List.



Presentation Settings

Once the data items have been selected you have several options for how to present them. You can Target the data, meaning that the data can be downloaded to your current worksheet, or a new one, and you can also direct the output to start at any cell you choose. Customized Formatting allows you to choose between several different formatting schemes.

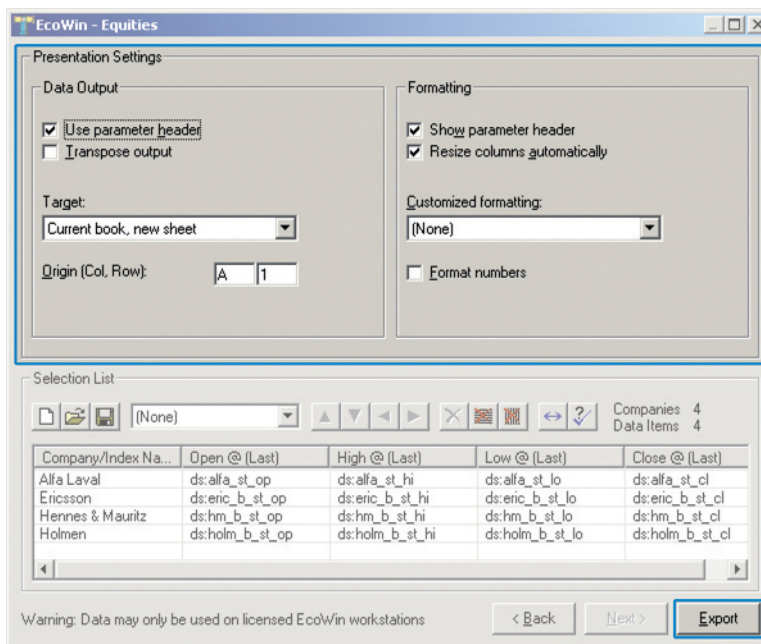
Export your data selection to the assigned book, sheet and cell, and in the format selected, by clicking the **Export** button.

After you have downloaded data into Excel it is possible to change, for example, the currency of a particular data item. Do this by going to the EcoWin menu, and select Edit Worksheet.

Regions

All equities data will be exported to Regions, and this enables you to export data several times to the same worksheet. Later, when you want to edit your data, you will be asked which region you want to modify, and this data will then be loaded into the Equities wizard.

You can also ask the system to Requery for data, which is useful if you want to update for example an Index Constituent List. Such a list is then allowed to grow or shrink depending on whether companies may have dropped out or been added to the index. Note that this is conceptually different from a normal Update operation, which will only update the data for companies already present in the spreadsheet.



The dialog box is titled "EcoWin - Equities". It contains two main sections: "Presentation Settings" and "Selection List".

Presentation Settings

- Data Output:**
 - ☒ Use parameter header
 - ☐ Transpose output
 - Target:** Current book, new sheet (dropdown)
 - Origin (Col, Row):** A 1 (text boxes)
- Formatting:**
 - ☒ Show parameter header
 - ☒ Resize columns automatically
 - Customized formatting:** (None) (dropdown)
 - ☐ Format numbers

Selection List

Buttons: [None] (dropdown), [Previous], [Next], [Cancel], [OK], [Help], [Requery], [Update], [Refresh], [Print], [Export]

Company/Index Na...	Open @ (Last)	High @ (Last)	Low @ (Last)	Close @ (Last)
Alfa Laval	ds:alfa_st_op	ds:alfa_st_hi	ds:alfa_st_lo	ds:alfa_st_cl
Ericsson	ds:eric_b_st_op	ds:eric_b_st_hi	ds:eric_b_st_lo	ds:eric_b_st_cl
Hennes & Mauritz	ds:hm_b_st_op	ds:hm_b_st_hi	ds:hm_b_st_lo	ds:hm_b_st_cl
Holmen	ds:holm_b_st_op	ds:holm_b_st_hi	ds:holm_b_st_lo	ds:holm_b_st_cl

Warning: Data may only be used on licensed EcoWin workstations

< Back New > **Export**

13 Creating In-house Time Series

Reuters EcoWin Pro can be integrated into your own data, for example, your company's in-house tracking of sales of various products, volume or other data sets relevant to your organization.

If you want to create your own time series, you can do this using the Series editor. The Series editor can be found in the File menu, Series editor, New, Series.

Note that if you use Excel, you can also use the Reuters EcoWin Excel Add-in to create and edit in-house time series data.

1. Give your series a name.
2. Select start time for the series.
3. Select frequency and optional currency.
4. Type a description for the series.
5. In order to easily find your in-house series, select country and category.
6. Save your series.

The screenshot shows the 'New series' dialog box with the following fields and callouts:

- 1** points to the **Name** field, which contains 'My series'. A note below the field states: '(a-z, A-Z, 0-9 and _ are allowed in series name)'. The **Database** dropdown is set to 'In-house'.
- 2** points to the **Start time** field, which contains '2000-01-03'.
- 3** points to the **Frequency** dropdown, which is set to 'Day'.
- 4** points to the **Description** field, which contains 'U.S. Interest rate'.
- 5** points to the **Country** and **Category** dropdowns. The **Country** is set to 'United States' and the **Category** is set to 'Bond Market'.
- 6** points to the **Save** button at the bottom of the dialog.

Other fields visible in the dialog include **Currency** (empty), **Source**, **Copyright**, **Comment**, **Order priority** (set to 0), **Scale** (set to 0), **Decimals** (set to 1), **Unit** (set to 'Percent'), and **Class** (set to 'Price').

Type data into the data column or use standard Windows commands, i.e. Copy and Paste.

If you want to make changes to your In-house series, choose File, Series editor, Open, Series.

To retrieve your In-house series, select In-house from the drop-down menu for Database. Search in the In-house database using the same criteria as for the EcoWin database.

The screenshot shows the Reuters EcoWin Pro software interface. The title bar reads "Reuters EcoWin Pro - [ih:My_series]". The menu bar includes "File", "Edit", "Analysis", "Tools", "Window", and "Help". The toolbar contains various icons for file operations and analysis. The main window is divided into two panes. The left pane is empty. The right pane contains the series editor for "ih:My_series".

Description: U.S. Interest rate

Frequency: Day **Type:** Normal **Class:** Price **Unit:** Percent

Currency: USD **Scale:** 0 **Last Modified:** **Last Revised:**

[Edit attributes...](#)

#	Day	ih:My_series
1	1/3/2000	3.2
2	1/4/2000	3.1
3	1/5/2000	3.1
	1/6/2000	

Ready

Graph 2/28/2002 55.1075703843

14 DDE Linking

DDE is a way to transfer data to other Windows applications. Reuters EcoWin Pro supports DDE links to data in the EcoWin databases to make it possible to use this data in applications such as Microsoft Excel. When the data is updated in the database, any data that uses DDE links is also updated automatically.

An easy way to create a DDE link is to copy the link information to the clipboard from a chart in Reuters EcoWin Pro. Please note that DDE linking can only be implemented before any analyses are added. Select a value by clicking on a graph, then copy (using the Copy command in the Edit menu, the toolbar, the context menu or by pressing Ctrl+C). In Microsoft Excel, select a cell and mark the Link option in the Edit menu, Paste Special dialog box. No analyses performed for the series will be included in the link, and some analyses even prevent links from being created, since there is no obvious way to determine what the original series or formula was.

Below are a few examples of DDE links for Excel:

EcoWin|Expr!'ew:swe19001'

The last value of the series ew:swe19001.

EcoWin|Expr!'ew:swe19001[-1]'

The second to last value of the series ew:swe19001.

EcoWin|Expr!'ew:swe19001/ew:gbr19001'

The last value of the formula ew:swe19001/
ew:gbr19001.

EcoWin|Expr!'ew:swe19001[-3,0]'

The last four values of the series ew:swe19001.

To enter a vector expression like this in Microsoft Excel, mark four cells, enter the expression and then press Ctrl+Shift+Enter.

EcoWin|Date!'ew:swe19001'

The date of the last observation of the series ew:swe19001.

Further Assistance

Reuters EcoWin Pro Help

Reuters EcoWin Pro contains comprehensive help documentation. Within this you will find descriptions, definitions, formulas and examples. Simply mark an item and press F1 on your keyboard or click on the **Help** button in the toolbar.

Reuters EcoWin Excel Add-in Help

The help for the Reuters EcoWin Excel Add-in is available in the EcoWin menu in Excel and contains a quick start guide, user manual, and reference manual.

Reuters Customer Zone

Technical and user documentation is available on Reuters Customer Zone. This site includes information for contacting Reuters support either online or by local telephone.
<http://customers.reuters.com>

Customer Support

For local telephone numbers please see:
<http://customers.reuters.com>

You can send your query directly to the Reuters helpdesk by using the Contact Us form available in the Help menu of the application.

For more information:

Send us a sales enquiry at
www.reuters.com/salesenquiry

Read more about our products at
www.reuters.com/productinfo

Find out how to contact your local office
www.reuters.com/contacts

Access customer services at
www.reuters.com/customers

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