
Chapter 2

Adding Data Items

There are hundreds of available data items in Standard & Poor's Research Insight covering a wide array of fundamental financial and market information. From time to time, however, you may want to add a unique item to meet your particular needs.

This chapter covers

- creating your own data item
- viewing your item with the Look Up List
- assigning data values to your data item
- deleting your data item
- moving your data item to another database

Creating Your Own Data Item

To add a new data item to Research Insight, you must select a name for the item, define its characteristics and assign values. To create a new data item, begin from the Research Insight desktop.

1. From the **Databases** menu, select **Item**.
You will see the Item Definition dialog box.

The screenshot shows the 'Item Definition' dialog box with the following fields and values:

- Item: CUSTOM
- Tape ID: (empty)
- Name: Custom data item
- Data Type: Number
- Size: (empty)
- Elements: 1
- Adjusted: None
- Item Type: Company
- Periodicity: Annual
- Database: CS5USER

Buttons on the right side include: Accept, New Item, Close, Look Up, Definition, Note..., Delete, Move..., View/Modify..., and Help.

Select a Name and Mnemonic for Your Data Item

2. Enter an abbreviated name, or mnemonic, for your item in the **Item** field.
Try to use a mnemonic that is meaningful to you and anyone else who will use it. Once added, you can use this name and mnemonic to find the item in the Research Insight Look Up List.
3. Click the **Edit** button.
Research Insight checks to see if this item already exists in the dictionary of data items for the active Database Group. The dictionary contains all Research Insight defined items and any items you have previously added. If your data item does not already exist, you are asked if you want to add the item to the data dictionary.
4. Click **OK**.
Notice that the **Edit** button changes to the **Accept** button.
5. Enter the name of your item in the **Name** field.
At this point, you are ready to define the characteristics of your data item. Keep the Item Definition dialog box open and proceed to the next step to choose a data format for your item.

Choose a Data Format

Use the Data Type field in the Item Definition dialog box to establish the format in which your item is entered and displayed in Research Insight, and to determine how the item can be used in formulas and concepts. The following options are available:

Option	Definition
Number	Decimal items up to 20 characters long. The decimal point counts as a character. Research Insight displays most numbers to three decimal places.
Integer	Any whole number. For example, the item EMP (Employees) is an integer.
Character	Text, including keyboard symbols, presented in any order, up to 60 characters long. An example of the data item CONM (Company Name) is Microsoft Corp. Another common example of a character data item is the footnote. For example, for the item SALEF (Sales Footnote), AC = Reflects an Accounting Change and AZ = Excludes Discontinued Operations.
Period	Items referencing a point in time, either Annual, Quarterly, Monthly, Weekly, or Daily. For example, for the item CPD (Current Period Date - Annual) CPD = Y01.
Date	Dates represent calendar dates including month, day and year, or a month and year. Dates appear as MM/DD/YY. For example, for the item RDQ (Reported Date of Quarterly EPS), RDQ = 3/31/01.

Select an Adjustment Method for Per-Share Items

Use the Adjusted field to automatically adjust per-share items (such as prices, dividends and earnings per share) and share items (such as common shares outstanding) for stock splits, stock dividends and other capital changes. The following options are available:

COMPUSTAT (North America)

Option	Definition
None	No adjustment for capital changes.
as Common Share Items	Multiplies common share items by the appropriate adjustment factor. For example, CSHO (Common Shares Outstanding) multiplied by AJEX (Adjustment Factor (Company) - Cumulative by Ex-date).
as Per Share	Divides per share items by the appropriate adjustment factor. For example, PRCCM (Price-Close Monthly) divided by AJEXM (Adjustment Factor (Company) - Cumulative by Ex-date Monthly).

Option

as Rstd Com
Share Items

Definition

Multiplies restated common share items by the appropriate adjustment factor. For example, CSHPRR (Common Shares for Basic EPS - Restated) multiplied by AJEX (Adjustment Factor (Company)-Cumulative by Ex-date).

as Rstd Per
Share Items

Divides restated per share items by the appropriate adjustment factor. For example, EPSFIR (EPS Diluted Including Extra Items Restated)

Define the Number of Characters

Use the **Size** field for items of “character” data type, where the size defines the number of characters. For example, footnotes are two-character codes that represent additional information about an item. If you are adding your own footnote item, enter **2** in the **Size** field.

Define How Many Values an Item May Have

Use the **Elements** field to identify the number of values a company can have for the item per period. Most items only have one value for the period, e.g., annual Net Sales is a single element item because companies report only one annual sales figure each year.

Set multiple data values per period. For example, many companies use a number of different inventory methods simultaneously. The Inventory Valuation Method data item (INVVVAL) accepts up to four inventory methods per year for a single company. To define a multiple-element data item, replace the default value of **1** in the **Elements** field with the necessary number of elements.

Select a Category for the Item

Rich Insight Databases are broken down into categories that have financial and/or market data. The most notable category is the company. Other categories that have financial and/or market data include segments, stock issues, and currencies. Use the Item Type field to include your item in one of these categories. The following options are available:

Option	Definition
Companyowned	subsidiary that trades preferred stock and/or debt.
Businesssegment	Business segment of a company that reports its financial results. Research Insight can contain up to 10 business segments per company per year. Segment data, both business and geographic, is generally reported in the notes of the financial statements.
Geographic	Reports its financial results. Research Insight can contain up to 5 geographic segments per company per year, and each segment can have up to 5 geographic areas.
Issue	Change or by security brokers. Most companies have only one issue currently trading. However, some companies have multiple stock issues.
Currency	The COMPUSTAT (Global) database contains more than 110 currencies. All Global data is stored in native or as-reported currency units. Each currency can be translated into the other currencies in the database.

Option	Definition
Month End Rate	Use this rate option for a point in time item, such as a Balance Sheet item.
Month End Average Rate	Use this option for certain market items, such as monthly high and low prices.
12 Month Moving Avg Rate	Use this option for flow items, such as Income Statement or Statement of Cash Flow items.

Select Either the Financial or Market Category

Data items in the Global database are categorized as either Financial or Market items, because data can be reported in different currencies for one company. For example, revenues—a financial item—may be reported in one currency, and the stock price—a market item—may trade in another. Use them as follows:

Option	Definition
Financial	Financial data includes sales, income, assets, etc.
Market	Market data includes monthly high and low prices, etc.

Specify How Data Values are Scaled

The Currency Units of Representation can be scaled in either millions or billions of units. Selecting **Yes** in the **Scale** field means that the values Research Insight displays for your data item are scaled according to the currency in use. For example, Japanese Yrn are scaled to billions, so if the value displayed for a Japanese company is 100, this means 100 billion Yrn.

Selecting **No** in this field means that the values Research Insight displays for your data item are as reported. You would select **No** for a data item such as Employees (EMP).

Add a Note to Your Data Item

You may find it useful to include a description or definition about your data item for future reference. Or if you modify the item, you might want to keep a log of your modifications.

Begin from the Item Definition dialog box:

1. Click the **Note** button.
The Note dialog box displays.
2. Enter your note at the cursor.

To edit an existing note, access the Note dialog box and type over what you have previously written. Click **OK**. To save your changes, make sure that you select the **Accept** button in the Item Definition dialog box.

Viewing Your Data Item in the Look Up List

Research Insight lists your data item name and mnemonic alphabetically in the **All** category of the **Look Up** list with all of the other data items in the active Database Group. You can also select the **User** category to view only those items and concepts that you have added.

Assigning Values to Your Data Item

Once you have added a new data item and defined its characteristics, you will want to add data values for that item to companies, segments, issues or currencies. Research Insight provides you with three ways of doing this:

- Manually entering data values
- Calculating data values from existing data
- Importing data from an ASCII file

For a complete explanation of assigning values to a data item, refer to Chapter 3 - Editing and Assigning Data Values.

Deleting Your Data Item

Once you decide that you have no further need for a data item that you have created, you can delete it along with all of its associated data values. To delete only the associated data values, and not the data item definition, refer to Chapter 3 - Editing and Assigning Data Values. Use the following steps to delete an item and all of its associated values.

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **Item**.
2. Enter the mnemonic for your item in the **Item** field.
3. Click the **Edit** button.
4. Click the **Delete** button.
You will be asked if you want to delete the item and all of its associated data.
5. Click **OK**.
Your data item and the associated data values are deleted.

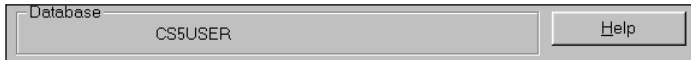
Note: Research Insight won't let you permanently delete a COMPUSTAT data item or any of its associated data values. You can replace the data values with your own, but you always have the option of restoring the values that Research Insight displays to the core database values.

Moving Your Data Item to Another Database

When you create a new data item, Research Insight stores the item in a write-to database, rather than in the COMPUSTAT North America or Global core databases. There are two write-to databases associated with the core databases in Research Insight.

	<u>Write-to Database</u>
COMPUSTAT (North America)	CS5USER
COMPUSTAT (Global)	GV5USER

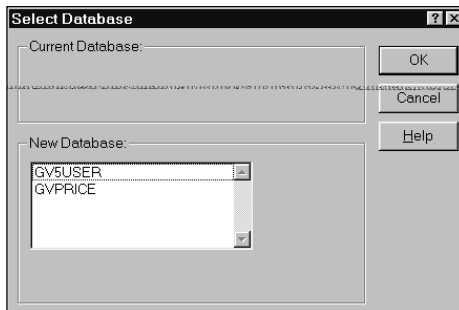
The Database area at the bottom of the Item Definition dialog box indicates where the data item you created will be stored.



Or, you may decide to store data items you created in your own database. For more information on creating your own databases, refer to Chapter 10 - Managing Your Databases. The example below shows you how to select the database where you want to store your data items.

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **Item**.
You will see the Item Definition dialog box.
2. Enter the mnemonic for your item in the Item field and click the **Edit** button.
Research Insight activates all of the fields in the Item Definition dialog box.
3. Click the **Move** button.
You will see the Database dialog box. All of the available write-to databases are listed here.



4. Select the new, write-to database where you want to save your data item.
5. Click **OK**.
Notice that the new database is identified at the bottom of the Item Definition dialog box.
6. Click the **Accept** button in the Item Definition dialog box to save your changes.
Keep in mind that you can only have one active write-to database at a time.