
Chapter 3

Editing and Assigning Data Values

Customized data items are powerful tools for forecasting and for creating “what if” scenarios. With Standard & Poor’s Research Insight, you can assign data values for items you have added, and edit or change any existing Research Insight data value for historical, current and future time periods. You can restore the original data values of Research Insight items you have changed. You can also import data from an Excel spreadsheet into Research Insight.

This chapter covers

- assigning data values
- importing data from Excel into Research Insight
- editing data values and adding data values into the future
- restoring original data values

Assigning Data Values

There are two ways to enter data values: you can either enter the values manually, or have Research Insight calculate values based on existing items and concepts. Since the most common data item type is the company data item, the sections that follow are based on adding values for company data items. Follow the same basic procedures to add segment, issue and currency data items.

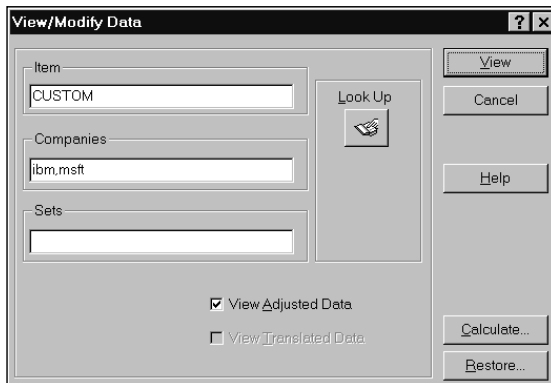
Manually Entering Data Values

If you are assigning or editing data values for a limited number of companies, you can simply enter the values into Research Insight.

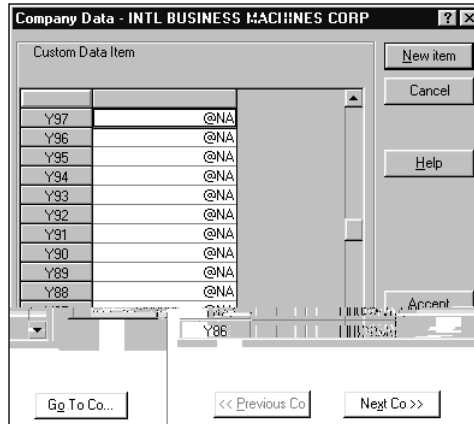
The following example shows you how to add data values for a data item in the COMPUSTAT (North America) database with the mnemonic CUSTOM. The values are added to two companies, IBM and Microsoft Corp.

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **View/Modify Data** to display the View/Modify Data dialog box.
2. Enter the item mnemonic in the **Item** field.
3. Enter the company tickers (**ibm,msft**) in the **Companies** field. When entering multiple companies, separate the tickers with commas. When entering sets, ensure that a **\$** precedes the set name. If you are not sure of a ticker or set name, click the **Look Up** button.
4. Click the **View** button.



The Company Data dialog box displays, with the companies presented in alphabetical order. Notice that Research Insight shows no data available (@NA) for each year. (Research Insight only displays @NA data codes for number data types.)



5. Select the cell next to the year that you want to add data, and enter the data value in the activated cell.
6. When you are finished entering data for the first company, click the **Accept** button, then click the **Next Co** button.
The Company Data dialog box displays for the second company.
7. Again, select the cell next to the year that you want to add data, and enter the data value in the activated cell.
8. When you are finished entering data for the second company, click the **Accept** button.
9. Select the **New Item** button to add values for another data item, or close the Company Data dialog box to return to the Research Insight desktop.

Calculating Data Values

Another method of adding data values to Research Insight is to create a formula which Research Insight calculates for the company or set and the time periods that you select. Research Insight stores the result of the formula as an item value. Keep in mind that this value is not updated if the values of the items in the formula change.

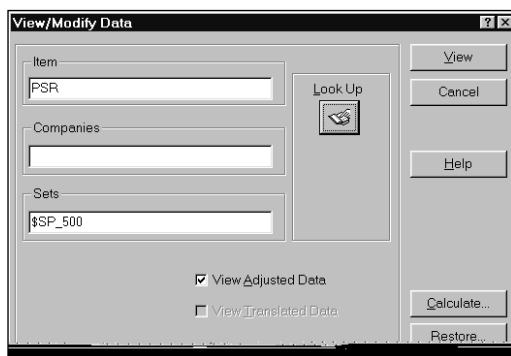
The following example is based on a newly created item named Price to Sales Ratio with the mnemonic PSR. Price to Sales Ratio takes a company's Market Value (time referenced to the last month of its fiscal year) and divides it by Annual Sales. In the example, this item is calculated for the population of companies in the S&P 500.

Begin from the Research Insight desktop:

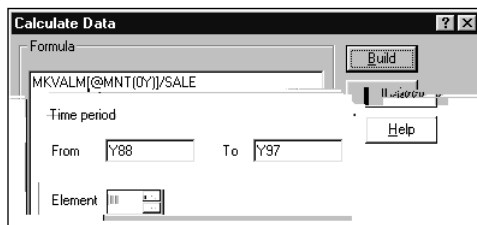
1. From the **Databases** menu, select **View/Modify Data** to display the View/Modify Data dialog box.
2. Enter the mnemonic for your item in the **Item** field.

Note: Notice the View Adjusted and View Translated fields. You must de-select the View Adjusted field if you are modifying an adjusted item such as price, shares, etc. For COMPUSTAT (Global) subscribers, you must de-select the View Translated field if you are modifying any item.

3. Enter a company ticker in the **Companies** field, or a set in the **Sets** field. When entering multiple tickers, separate the tickers with commas. When entering sets, ensure that a **\$** precedes the set name. If you are not sure of a ticker or set name, click the **Look Up** button.



4. Click the **Calculate** button to display the Calculate Data dialog box. (See the *during Calculate Data* data item characteristic on page 8 of Chapter 2.)

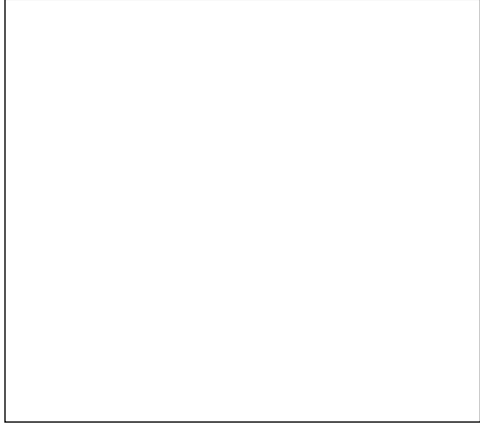


5. Enter the formula you want to calculate in the **Formula** field.
6. Select the time period or range of periods for which you want to calculate values. For example, if the item you have created has an annual periodicity, and you want to calculate values for 1988 through 1997, enter:

From: Y88

To: Y97

7. Click the **Build** button.
After calculating the formula, Research Insight returns you to the View/Modify Data dialog box.
8. To review the results of the calculation, click the **View** button.
Research Insight shows the data values for the time period or range of periods that you selected in the Calculate Data dialog box. Notice that an asterisk (*) appears next to any added or calculated data value.



Hint: Click the **Next Co** button to view the data for the next company you selected (for example the next company in the S&P 500 set). To go to a specific company in the set, click the **Go To Co** button, and the Companies dialog box displays. Scroll down the list and double-click on the company you want.

Importing Data into Research Insight

If you have a large quantity of your own data to incorporate into Research Insight, you may want to import it from Excel. For more information on importing, refer to Chapter 12 - Importing and Downloading of the *Getting Started* manual.

Before you import data into Research Insight, you must first create a spreadsheet file containing the data you want to import, as described in the following section.

Creating the Spreadsheet

To create a spreadsheet file, open a new document in Excel. Create the table header containing a valid retrieval key (e.g. ticker symbol), one or more mnemonics recognized by Research Insight and a valid time period reference for each mnemonic. An example is shown below:

	A	B	C	D
1	Key	Mnemonic	Mnemonic	Mnemonic
2	Field	Field	Field	Field
3	Field	Field	Field	Field
4	Field	Field	Field	Field

Retrieval Keys

Valid retrieval keys include:

TIC	The company's ticker symbol.
CUSIP	The company's CUSIP number, a 9-digit number.
GVKEY	The company's Company Key in the Global database.
Currency Key	A currency key used for the Global database.

If you want to import an Issue, Business Segment or Geographic Segment, enter the ticker symbol, a backslash, the appropriate segment letter and two-digit segment identifier. For example, to import data for the Domestic Geographic segment of the Mirage Hotel and Casino, you would use MIR\G01 as the ticker symbol.

Mnemonics

Valid mnemonics will match mnemonics from the data dictionary of the active database group. Absolute or relative time period referencing is required for items with a periodicity.

An example of a spreadsheet recognized by Research Insight is shown below:

	A	B	C
1	TIC	Sale[y96]	Sale[y97]
2	IBM	14562699	13046796
3	HWP	38420000	42895000
4	DEC	75947000	78508000

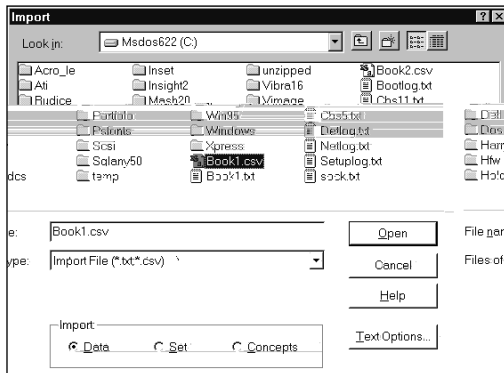
We recommend that you save the spreadsheet as a csv (comma delimited) file. After saving the file, close Excel. Now, you're ready to import the data into Research Insight.

Importing Data

After creating a delimited ASCII file, you are ready to import the data into Research Insight. The data you import will be loaded into the write-to database. The file you are importing must be closed before you proceed.

Begin from the Research Insight desktop:

1. From the **File** menu, select **Import** to display the Import dialog box.



2. Select the drive and folder where the file you want to import is located.
3. Select the file you want to import.
4. If you want to import a file delimited by anything other than commas or tabs, click the **Text Options** button, select your column delimiter and click **OK**.
5. Ensure that the **Data** radio button is selected.
6. Click **Open** to import the file.

If you saved your spreadsheet as a comma separated file with the .csv extension, Research Insight displays a message asking you to confirm that the file is indeed comma separated. If so, click **OK**. If not, click **NO** and select the delimiter used for the file.

A window will briefly display an import progress bar, the write-to database, the type of retrieval key used, and the items being imported.

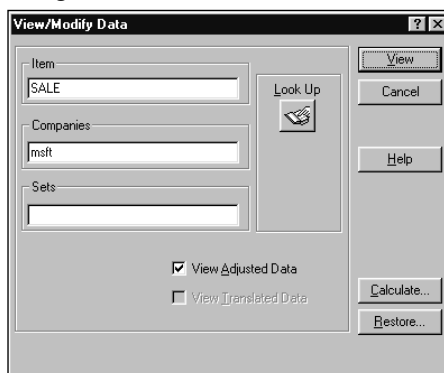
Hint: An import error file (import.err) is created if an import attempt is unsuccessful. This file explains what needs to be corrected to import successfully.

Editing Existing Data Values and Adding Data Values into the Future

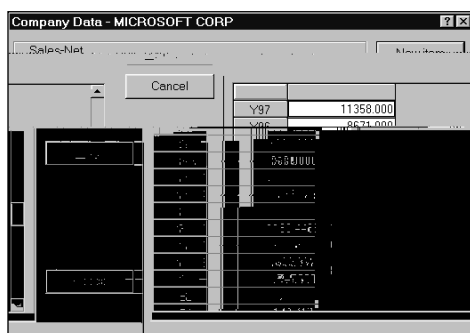
With Research Insight, you can change existing data values for any type of data item. You can also add data values for companies, business segments, geographic segments, issues and currencies for future time periods, making Research Insight a powerful forecasting tool.

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **View/Modify Data** to display the View/Modify Data dialog box.



2. Enter the mnemonic for the data item that you want to edit in the **Item** field.
For a list of all available data items and their mnemonics, click the **Look Up** button. The **Look Up** list includes data items you have previously added and all other Research Insight data items.
3. Enter the company ticker in the **Companies** field.
4. Click the **View** button.
The Company Data dialog box displays for the company you have selected.
5. Select the cell next to the year for the data you want to change and enter the data value in the activated cell. To add a value into the future, scroll up, select the appropriate year, and enter the value in the cell.

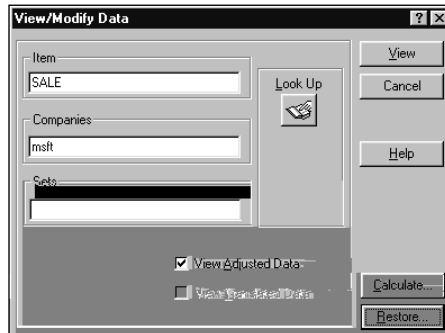


- When you initially add or change a value, Research Insight displays it in a yellow field. After you accept the value, Research Insight identifies it with an asterisk (*).
- When you are finished, click the **Accept** button.
 - To edit another data item, click the **New Item** button.

Restoring the Original Data Value

If you have edited or changed a value for a Research Insight data item, you can restore it to its original form or to the value contained on the core database.

- From the **Databases** menu, select **View/Modify Data** to display the View/Modify Data dialog box.



- Enter the item that you want to restore in the **Item** field.
- Enter a ticker in the **Companies** field or a set name in the **Sets** field.
- Click the **Restore** button to display the Restore Data dialog box.



- To restore the data for the company or set you entered in the View/Modify Data dialog box, keep the default setting of **Selected Company/Set**. To restore the data for every company in the database, select **All Companies**.
- Select the time period for which you want to restore data.
For example, if you want to restore data for an annual item for 1995 through 1997, enter the following: **From Y95** **To Y97**
- Click the **Restore** button.
After restoring the data values, Research Insight returns you to the View/Modify Data dialog box. From here you can proceed to restore another data item, or close the dialog box and return to the Research Insight desktop.

Note: Restoring user-defined data items returns all data fields to @NA (not available). You cannot restore user-defined data values to previous user-defined data values. To learn how