
Chapter 7

Adding and Editing Concepts

Concepts are mathematical or logical combinations of data items and/or other concepts. Unlike data items, they don't contain values; instead they are evaluated each time you use them. Concepts are generally used to save time and increase accuracy when manipulating data in routine, repetitious or complex expressions.

You can find a list of existing concepts in the Research Insight Look Up List, in the Items tab, under Select Item Category. While Standard & Poor's Research Insight already contains more than 375 concepts, there may be times when you want to create a custom concept for your financial analysis. Research Insight makes it easy to modify existing concepts or create new ones.

This chapter covers

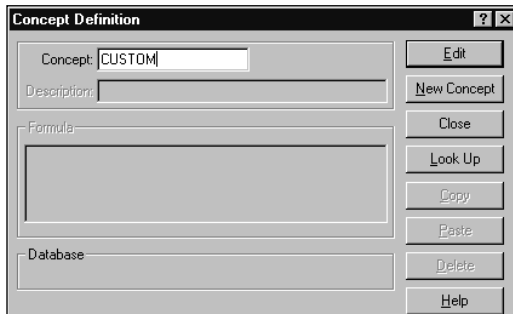
- creating your own concept
- editing an existing concept
- deleting a concept

Creating Your Own Concept

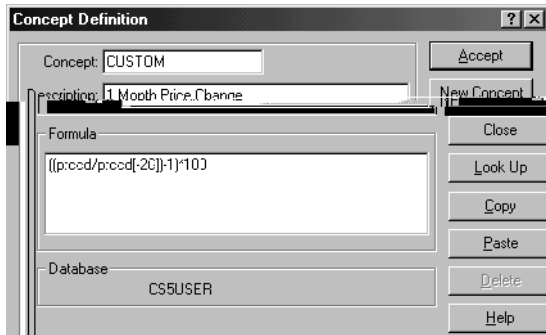
If you don't find an existing Research Insight concept that meets your needs, follow the steps below to create a custom concept.

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **Concept** to display the Concept Definition dialog box.



2. Enter the mnemonic (abbreviated name) of your concept in the **Concept** field.
3. Click **Edit**.
4. Research Insight searches for other concepts with the same mnemonic, then asks if you would like to add your concept to the dictionary. Click **OK**.
5. Enter the full name of your concept in the **Description** field. Your concept name can be up to 28 characters long and can contain any combination of letters, punctuation and keyboard symbols.
6. In the Formula box, create your concept using items, mathematical operators, functions, other concepts, etc. Concepts can contain up to 512 characters.



7. When you are satisfied with your concept, click the **Accept** button to add it to the data dictionary.
8. Now you can retrieve your concept from the Look Up List, in the Items tab, under the

Select Item Category list box.

Note: To ensure the safety of the information in your write-to databases, we recommend you back up all of the files in your Research Insight\UserData directory on a regular basis.

Editing an Existing Concept

To edit your own concept or an existing concept, begin from the Research Insight desktop:

1. From the **Databases** menu, select **Concept** to display the Concept Definition dialog box.
2. Enter the concept mnemonic you want to edit in the **Concept** field or locate the concept in the **Look Up** list.
3. Click the **Edit** button.
All of the concept information appears.
4. Make your changes to the concept and click **Accept**.
5. Research Insight asks you if you wish to overwrite the existing concept. Click **OK**.
Your new concept is added to the data dictionary.

Note: If you modify a Research Insight concept, and you want to change it back to its original form, you can access the original concept in on-line help and paste it into the Concept Definition dialog box.

Deleting a Concept

You can delete concepts you have created or modified, as well as Research Insight concepts.

Begin with the Concept Definition dialog box:

1. Enter the concept mnemonic you want to delete in the **Concept** field or locate the concept in the **Look Up** list.
2. Click **Edit**.
All of the concept information appears.
3. Click the **Delete** button.
4. To confirm that you want to delete the concept click **OK**.
Your concept is deleted from the data dictionary.