# Chapter 11
# Importing and Downloading

Importing is one of the timesaving features of Standard & Poor's Research Insight. You can use the Task Scheduler to import or download files during your off-hours and optimize the time you spend at the office.

You can also incorporate your own data, companies and concepts into Research Insight directly from any application that can create a delimited ASCII file.

This chapter shows you how to

- use the Task Scheduler
- import data into Research Insight
- import sets into Research Insight
- import concepts into Research Insight

# Using the Task Scheduler

**Note:** For network users. Only Network Administrators should use this feature. For further network usage recommendations, please refer to "Sharing Databases on a Network" in *Standard & Poor's Research Insight Beyond Basics* manual.

The Task Scheduler was designed to save you time when importing or downloading large files into Research Insight. You can import your own files or download files from the Internet. All you have to do is specify which files you want to import or download and the date and time you want the task performed. The Task Scheduler does the rest. The files you import or download will be added to the write-to databases. (For more information on write-to databases, see "Managing Your Databases" of the *Standard and Poor's Research Insight Beyond Basics* manual.)

## Scheduling an Import

Research Insight makes it easy for you to schedule an import for your own files.

Begin from the Research Insight desktop.

1. From the **Tools** menu, select **Task Scheduler**.
   You will see the Task Scheduler dialog box.

2. Click the **New Task** button.
   You will see the New Schedule Entry dialog box.

3. The **Import** radio button should be selected by default, so simply click **OK**.

You will see the Schedule Import dialog box.

4. Select **User Data, User Sets or Economic Data** from the Define Import area.

**Hint:** Click the **Browse** button and select the drive and directory where the file is stored. This information will be reported in the source field.

5. Click the **Text Options** button. You will see the Text Options dialog box.

6. Select the column delimiter type used in the import file and click **OK**. The column delimiters are as follows:

| | |
|---|---|
| **Tab** | Delimits columns with tabs. |
| **Comma** | Delimits columns with commas. |
| **Space** | Delimits columns with spaces. |
| **Semicolon** | Delimits columns with semicolons. |
| **Custom** | Delimits columns with a custom character. |
| **Use Quotes** | Encloses text with quotes. |
| **Use Labels** | Includes labels at the top of each column. |
| **Fixed Field** | Delimits columns with a specified number of spaces. Enter the number of spaces you want your columns separated by in the text box. |

**Hint:** If you select the **Use Labels** option, Research Insight will include labels at the top of each column in a table report, but not in a free-form report.

7. If you like, enter a description of your file in the **Description** field.
8. Schedule your import. Select either **Now**, **One Time**, **Upon New Data File** or **Periodically** from the Schedule area of the Schedule Import dialog box.

| | |
|---|---|
| **Now** | Research Insight will import your file as soon as you close the Task Scheduler. |
| **One Time** | Research Insight will import your file at a specific date and time. Once you select this option, you will be able to select the date and time you want your file imported. |
| **Upon New Data File** | At startup, Research Insight will look for a more current data file compared to the date of the file at setup time, or compared to the last data file imported. Once you select this option, you will be able to specify the time that you want Research Insight to begin searching for a new file. |
| **Periodically** | Research Insight will import your file either daily, weekly, or monthly at a specific time. Once you select this option, you will be able to schedule the time you of day you want your file imported and the date you want the import to begin. |

9. When you are satisfied with your selections, click **OK**.
   You will return to the Task Scheduler dialog box. The import you just scheduled will appear in alphabetical order in the list of Scheduled Tasks.

**Hint:** When you schedule multiple tasks, Research Insight will import files according to the order of the time scheduled, regardless of the length of time needed to import each file. For example, if you schedule one import at 11:00 p.m. and another at 11:15 p.m., and the first import takes 20 minutes, Research Insight will import the second task immediately after the first task is finished.

10. When you are finished scheduling imports, close the Task Scheduler dialog box.

**Important:** In order to import data, Research Insight must be running, so do not close Research Insight if you have an import scheduled.

## Changing the Import Schedule

From time to time, you may want to alter the import schedule previously established. Research Insight makes changing this schedule a simple process.

Begin from the Research Insight desktop.

1. From the **Tools** menu, select **Task Scheduler**.
   You will see the Task Scheduler dialog box.

2. Highlight the task you want to change and click the **Update Task** button.
   You'll see the Schedule Import dialog box.

3. Make your changes to the import schedule and click **OK**.
   You will return to the Task Scheduler dialog box. The import you just rescheduled will appear in alphabetical order in the list of Scheduled Tasks.
4. When you are finished scheduling imports, close the Task Scheduler dialog box.

**Important:** Research Insight must be running in order to import data.

## Scheduling an Internet Download

Research Insight makes it easy for you to schedule a download for fundamental and Value Added data from the Internet.

Begin from the Research Insight desktop.

1. From the **Tools** menu, select **Task Scheduler**.
   You will see the Task Scheduler dialog box.
2. Click the **New Task** button.
   You will see the New Schedule Entry dialog box.

3. Click the **Internet Download** radio button and click **OK**.
   You will see the Schedule Internet Download dialog box.

4. Select the file or files you want to download from the File Types area. These files are described below.

| | |
|---|---|
| **Daily Prices** | Contains market data such as daily prices, adjustment factors, common shares traded, and dividends per share. |
| **Fundamentals** | Contains fundamental company information such as sales, net income and operating earnings per share. Also contains fundamental financial data, per share data and ratios for the S&P indexes. |
| **Value Added Data** | The Value Added database consolidates the sector, economic sector, non-active sector and Value/Growth Indicator files. It also includes IPO Date, Industry Sector Code–Historical, Economic Sector Code—Historical, Index Fundamentals, Insider Trading and Institutional Ownership data items. |

| | |
|---|---|
| **FIRST CALL Consensus** | Contains two quarters and two fiscal years of FIRST CALL consensus earnings estimate data, expected report dates, consensus recommendations, future growth rates, earnings surprise data, operating actual earnings, and P/E ratios. |
| **FIRST CALL Revisions** | Contains earnings estimate consensus trends and estimate revision momentum. |
| **COMPUSTAT(Classic)** | Contains non-restated, quarterly COMPUSTAT data as it was originally collected by Standard & Poor's. |
| **EVAntage** | Contains Stern Stewart's proprietary EVA model data. |

5. Specify the number of days worth of data you want to download or select the **All days needed** option. This option is selected by default and automatically downloads the appropriate number of days' worth of data necessary to complete your fundamental data file.
6. If you're downloading one of the FIRST CALL estimates files, you can specify whether you want to download the entire file or only the changes that have been made to a file since your last download. To download the entire file, click the **Full** radio button. To download the changes, click the **Differences** radio button.

**Hint:** Unless you download FIRST CALL data on a daily basis, we recommend that you download the entire file or keep **All days needed** selected to ensure you are using the most current data available.

7. Schedule the time you want your file downloaded. Select either Now, One Time, or Periodically from the Schedule area of the dialog box.

| | |
|---|---|
| **Now** | Research Insight will download your file as soon as you close the Task Scheduler. |
| **One Time** | Research Insight will download your file at a specific date and time. |
| **Periodically** | Research Insight will download your file either daily, weekly, or monthly at a specific time. |

8. When you are satisfied with your selections, click **OK**.
   You will return to the Task Scheduler dialog box. The download you just scheduled will appear in alphabetical order in the list of Scheduled Tasks.

**Hint:** When you schedule multiple downloads, Research Insight will download files according to the order of the time scheduled, regardless of the length of time needed to download each file. For example, if you schedule one download at 12:00 a.m. and another at 12:15 a.m., and the first download takes 20 minutes, Research Insight will download the second task immediately after the first task is finished.

9. When you are finished scheduling downloads, close the Task Scheduler dialog box.

**Important:** In order to download data, Research Insight must be running, so do not close Research Insight if you have a download scheduled.

## Establishing Your Internet Settings

In order to download data, you need to have a connection to the Internet. The first time you open the Schedule Internet Download dialog box, Research Insight will ask for your User Name and Password. You may also need to enter proxy settings, depending on whether you access the Internet through a firewall at your organization (check with your organization's Network Administrator).

The Internet Download Settings dialog box is shown below.

## Changing the Internet Download Schedule

From time to time, you may want to alter the Internet download schedule previously established.

Begin from the Research Insight desktop.

1. From the **Tools** menu, select **Task Scheduler**.
   You will see the Task Scheduler dialog box.
2. Highlight the task you want to change and click the **Update Task** button.
   You will see the Schedule Internet Download dialog box.
3. Make your changes to the download schedule and click **OK**.
   You will return to the Task Scheduler dialog box. The download you just scheduled will appear in alphabetical order in the list of Scheduled Tasks.
4. When you are finished scheduling downloads, close the Task Scheduler dialog box.

**Important:** Research Insight must be running in order to download data.

## Suspending a Scheduled Task

When a task is suspended, all of the scheduling information is saved and can be activated again.

Begin from the Research Insight desktop.

1. From the **Tools** menu, select **Task Scheduler**.
   You will see the Task Scheduler dialog box.
2. Highlight the task you want to suspend and click the **Activate/Suspend** button.
   The Task Scheduler suspends the highlighted task from the list of scheduled tasks. To activate this task again, simply highlight the task and click the **Activate/Suspend** button.
3. When you are finished, close the Task Scheduler dialog box.

## Deleting a Scheduled Task

Once you decide that you have no further need for a scheduled task, you can delete it from the list of scheduled tasks.

Begin from the Research Insight desktop.

1. From the **Tools** menu, select **Task Scheduler**.
   You will see the Task Scheduler dialog box.
2. Highlight the task you want to delete and click the **Delete Task** button.
   Research Insight asks if you are sure you want to delete the selected tasks.
3. Click **Yes**.
   The Task Scheduler deletes the highlighted task from the list of scheduled tasks.
4. When you are finished, close the Task Scheduler dialog box.

## Viewing Import and Download Results

For your convenience, the Task Scheduler records all completed activities in a log file. This file shows you information such as the name of the file imported or downloaded, and the date and time the import or download started and finished.

Begin from the Research Insight desktop.

1. From the **Tools** menu, select **Task Scheduler**.
   You will see the Task Scheduler dialog box.
2. Click the **View Log** button.
   You will see the Schedule.log file.

3. When you are finished viewing the import or download results, select **Exit** from the **File** menu.
   You will return to the Task Scheduler dialog box.
4. When you are finished, close the Task Scheduler dialog box.

# Importing Your Own Data into Research Insight

You can use the importing feature to incorporate data items and values into Research Insight. This section shows you how to import data from a delimited ASCII file into Research Insight.

There are three steps involved in importing your own data: creating your spreadsheet file, saving and importing the data from your spreadsheet file into Research Insight.

## Creating Your Spreadsheet

To create your spreadsheet file, open a new document in Excel. Create the table header by entering labels in the first row of the spreadsheet. First, enter the retrieval key (e.g., ticker symbol) in cell A1. The different types of retrieval keys you can use are listed below. Next, in cells B1 and across, enter the data that corresponds to the data item mnemonic, the time period and the specific company ticker symbol in each cell. An example is given 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 are listed below.

**TIC** The company's ticker symbol.
**CUSIP** The company's CUSIP number, a 9-digit number.
**GVKEY** The company's primary key in the Global database.
**Currency Code** 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.

## Saving Your File

In order for Research Insight to read your import file, it needs to be saved as a .csv (comma separated values) file.

## Importing Your 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. (For more information on write-to databases, see "Managing Your Databases" in *Standard and Poor's Research Insight Beyond Basics* manual.) The file you are importing must be closed before you proceed.

Begin from the Research Insight desktop.

1. From the **File** menu, select **Import**.
   You will see the Import dialog box.

2. Select the drive and folder where the file you want to import is located.
3. Enter the name of the file you want to import in the **File Name** field or select it from the list box.
4. Ensure that the **Data** radio button is selected.
5. Click **Open** to import the file.
6. Click **OK** when Research Insight displays a message asking you to confirm that the file is comma separated.

   If you saved your spreadsheet as a comma separated file with the .csv extension (comma separated values), 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 new window will briefly display an import progress bar, the write-to database, the type of retrieval key used and the items being imported. Research Insight will tell you when the processing is complete.

**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.

# Importing Sets Into Research Insight

This section shows you how to import your own sets from an Excel spreadsheet into Research Insight. Sets imported into Research Insight must be in a delimited file.

There are two steps involved in importing sets: creating your spreadsheet file and importing the set from your spreadsheet file into Research Insight.

## Creating Your Spreadsheet

To create your spreadsheet file, open a new document in Excel. Create the table header in the first row. The header must contain a retrieval key, such as a ticker symbol. An example is shown below.

| | A | B |
|---|---|---|
| 1 | Key | |
| 2 | Field | |
| 3 | Field | |
| 4 | Field | |

Next, fill in the company identifiers in cell A2 and down.

| | A | B |
|---|---|---|
| 1 | TIC | |
| 2 | IBM | |
| 3 | HWP | |
| 4 | DEC | |

We recommend that you save your file as a comma separated values file (*.csv file). After saving your file, close your spreadsheet application. You are ready to import your set into Research Insight.

## Importing Your Set

Once you have completed your spreadsheet, you are ready to import your set. The set you import will be added to the write-to database.

Begin from the Research Insight desktop.

1. From the **File** menu, select **Import**.
   You will see the Import dialog box.
2. Select the drive and folder where the file you want to import is located.
3. Enter the name of the file you want to import in the **File Name** field or select it from the list box.
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 **Set** radio button is selected.

6. Click **Open** to import the file.
   Research Insight displays a message asking you to confirm that the file is a comma separated values file. If so, click **OK**. If not, click **NO** and select the delimiter used for the file.
   The Set Type dialog box appears.

7. Select the type of set you want to import. If your spreadsheet contains company ticker symbols, you can still choose to import the companies as a Business Segment set, geographic segment set or issue set. The retrieval keys in the spreadsheet don't have to match the set type you choose.
8. Click **OK**.
   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.

The imported set appears on your screen in a spreadsheet format.

| | TIC | Name | |
|---|---|---|---|
| 1 | A | AGILENT TECHNOLOGIES INC | |
| 2 | B | BARNES GROUP INC | |
| 3 | C | CITIGROUP INC | |
| 4 | D | DOMINION RESOURCES INC | |
| 5 | E | ENI S P A -SPON ADR | |
| 6 | | | |

9. From the **File** menu, select **Save** to save the file as a set.
   You will see the Save As dialog box.

10. Enter the set name in the File Name text box.
11. Click **Save**. Your file is now saved as a set.

# Importing Concepts Into Research Insight

This section shows you how to import concepts into Research Insight. The Import feature makes it easy to share your concepts with your colleagues. You can create concepts in Research Insight and export them so they can be imported back into another Research Insight system. The concepts you import will be added to the write-to database.

Begin from the Research Insight Desktop.

1. From the **File** menu, select **Import**.
   You will see the Import dialog box.
2. Select the drive and folder where the file you want to import is located.
3. Enter the name of the file you want to import in the **File Name** field or select it from the list box.
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 **Concepts** radio button is selected.
6. Select the Concept radio button in the lower right corner and click **Open**.
   The Import Concepts dialog box appears.

7. Select the concepts you want to import in the From list box and click **Add**.
8. Click **Accept**.
   Research Insight informs you when processing is complete.