

DATASTREAM CHARTING

RELEASE 2.4

GUIDE TO NEW FEATURES

[Multi-chart editing](#)

[Collections](#)

[Library Views](#)

[Chart styling and formatting options](#)

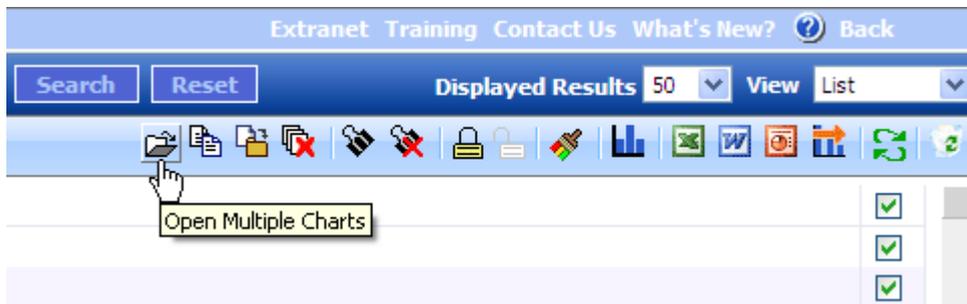
[Add-in](#)

[Other](#)

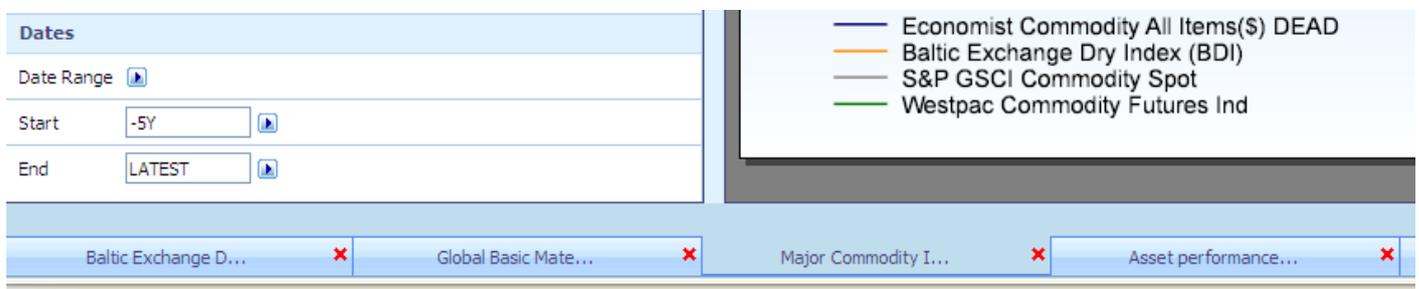
MULTI-CHART EDITING

Charts can now be displayed on multiple tabs, allowing you to open multiple charts with a single click for editing, rather than making repeated trips to the Library

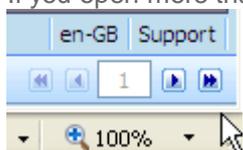
Use the check boxes and the button on the toolbar in the Library or in the Open Chart window to open multiple charts simultaneously:



The open charts will be displayed on separate tabs at the bottom of the Chart page.



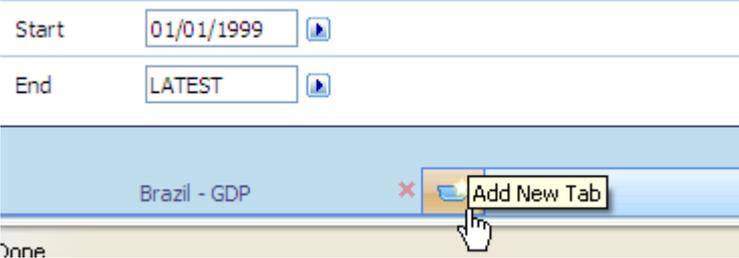
If you open more than 5 charts, you can page through them 5 at a time.



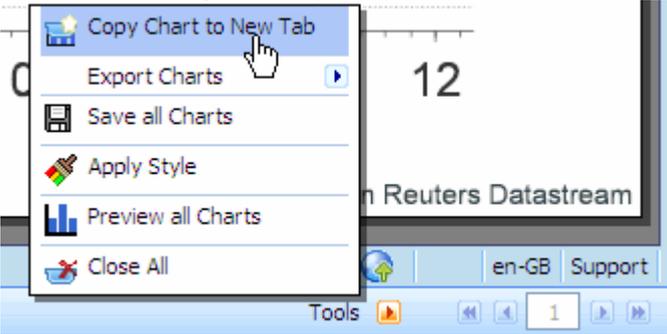
THOMSON REUTERS

This redesign makes many new workflows possible, for example:

- Start a new chart without having to close your current work



- Build on your ideas by copying your current chart to a new tab to try different adjustments. Use the Tools menu at the bottom right to copy the chart.



- Compare different scenarios by tabbing from chart to chart.
- Open previously saved charts for reference while working on new analysis, for example copy expressions or formatting from one open chart to another.
- Prepare a set of charts for export.

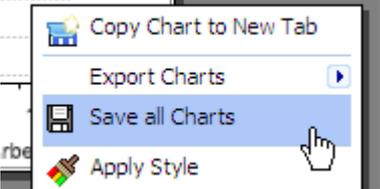
Productivity tools

The Tools menu also offers a number of productivity tools to trigger an action for all tabs, e.g. apply a style to all charts, export the open charts to Office or close all the tabs.

Any charts with unsaved changes are marked with an asterisk:



You can save all changes to previously saved charts in one click from the Tools menu.



However, if you have created any new charts you will have to save these individually using the usual Save icon and specify the destination folder so that they can be added to the Library.

COLLECTIONS

Collections enable you to structure your Library so that a single chart can be referenced from multiple locations, without the overhead of maintaining multiple copies of the chart in separate folders.

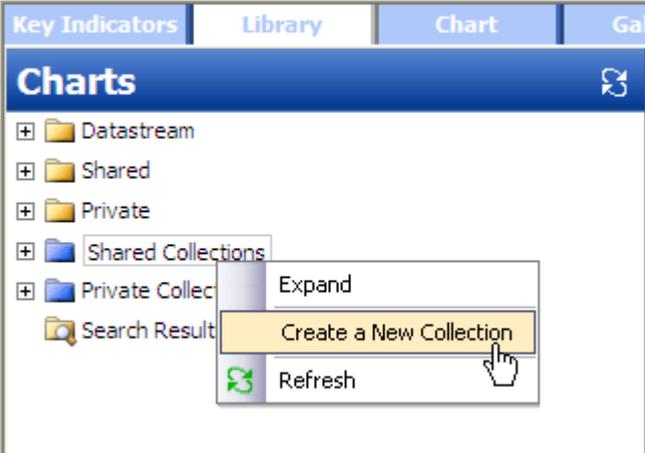
Collections are essentially a way of adding multiple tags to a chart so that it can be classified in different ways according to need. You can save your Master Chart in a folder in the Library as usual, then define as many Collections as you need and add the chart to each Collection. Any changes you make to the Master Chart will automatically appear in the Collections as well.

If you share a Library with colleagues, Collections can be a useful tool for making your charts available to other users of your ID without the need for them to access your original folders.

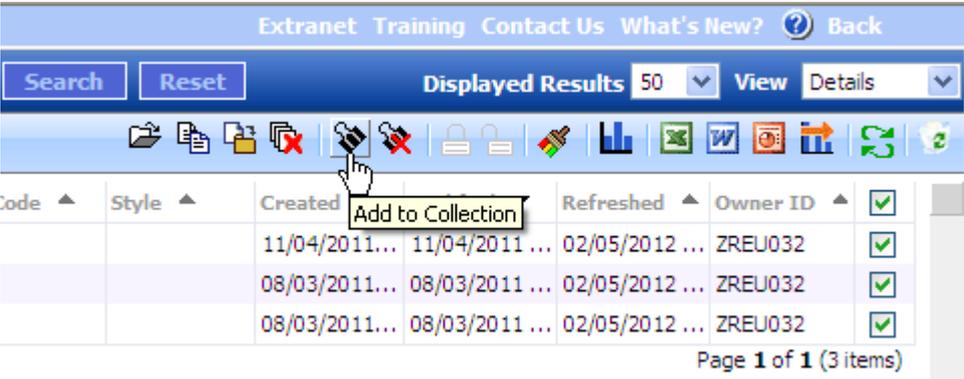
You can set up Shared Collections which will be accessible to all users of your Shared Chart Library, or if you have a child ID you can create Private Collections which only you can access.

Setting up Collections

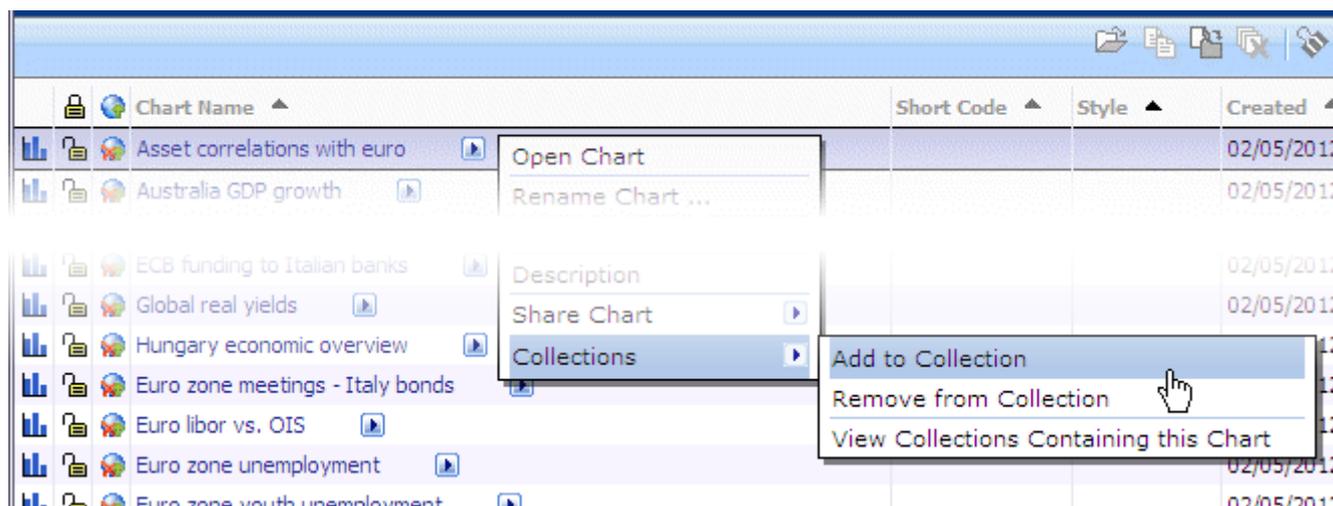
To create a new collection, right click on the Collections folder in the Library.



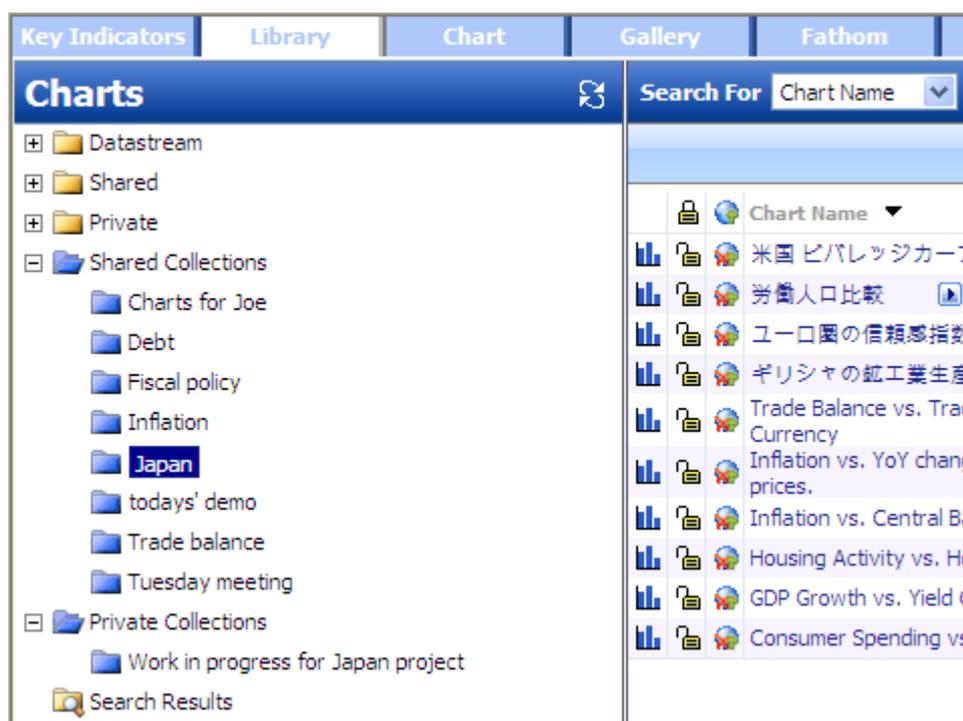
Then add charts to your Collections using the checkboxes and the clip icon on the toolbar.



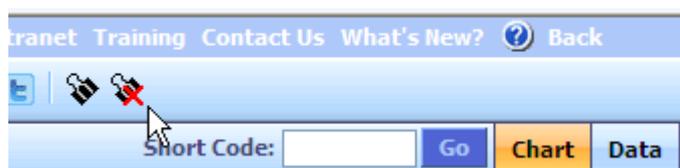
You can also use the flyout menu to add a single chart:



Collections can be used to classify charts in different ways, for example by sector, by market or by theme. Or use them to create a group of charts for a specific purpose such as a publication or a one-off project.



Remove charts from Collections using the same flyout menu or the Remove from Collection icon on the toolbar in the Library. You can also do this from the Chart page:

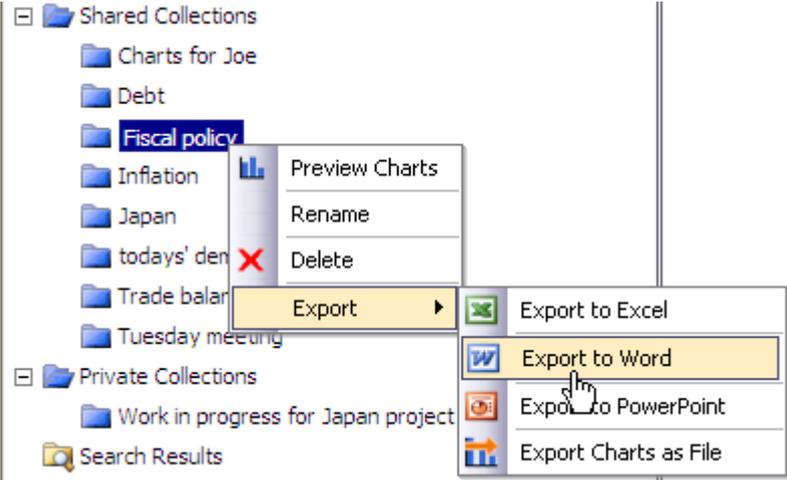


Note that if you delete the Master Chart from its original folder, it will automatically be removed from your Collections as well.

Managing charts in Collections

From a Collection you can:

- Preview the chart.
- Export the chart to Office applications or as an image file.
- Share the chart URL.
- Add or remove the chart to/from collections.
- See which collections contain this chart.

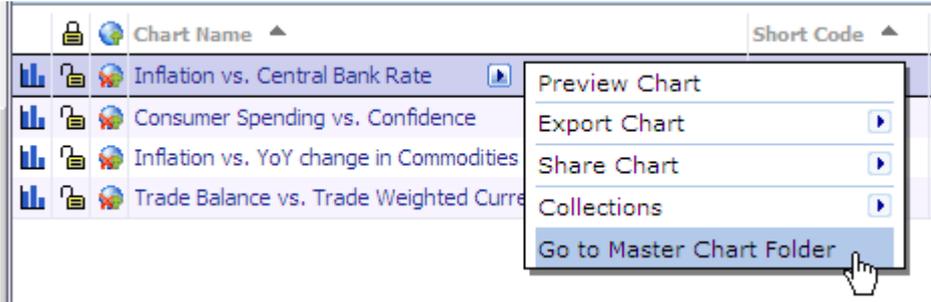


Editing a chart from a Collection

Shared collections

You cannot edit or amend a chart from a Shared Collection in any way. This limitation is to prevent inadvertent changes being made to the Master Chart. If you want to make changes to the Master Chart you must open the Master Chart in its original folder.

To get to the Master Chart you can use the flyout menu or click the hyperlinked path:



Owner ID	Master Chart	
.. ZREU032	Shared\BRI...	<input type="checkbox"/>
.. ZREU032	Share\BRI...	<input type="checkbox"/>
.. ZREU032	Shared\BRICs\Brazil\	<input type="checkbox"/>

Private collections

You are the owner of any charts in your Private Collections so you can open and edit these directly from the Collection.

[Top](#)

LIBRARY VIEWS

The Library display has been enhanced to offer more flexibility in terms of how charts are presented.

Choice of three different views



- Details View shows all chart attributes to ensure easy identification of similar charts.
- List View allocates the maximum width to show just the chart name.
- Thumbnails View displays the chart images.

The screenshot displays the 'Charts' library interface. On the left is a navigation tree with folders like 'Datastream', '2.3 New Features', 'Charting Features', and 'Reuters News Charts'. The main area shows a grid of chart thumbnails. Each thumbnail includes a title, a small chart preview, and a checkbox to select it. The charts shown are: 'BRICS FX reserves', 'Regional earnings momentum', 'Correlation of bond and equity returns', 'China export growth vs. GDP growth', 'Australia GDP growth', and 'Global inflation rates'. At the bottom, there are navigation controls and a page indicator 'Pages 1 of 1(48 items)'.

Customise your view

Set a preferred layout in the Default View by dragging column edges to resize and emphasise the fields that matter to you most.

Chart Name ▲	Short Code	Style ▲	Created
Asset correlations with euro	ASSET1	TR White	02/05/2012
Asset correlations with the euro	ASSET2	TR Bar Chart	02/05/2012
Baltic dry index vs. equities		TR Bar Chart	02/05/2012

Choose static or live images

For faster performance, view a static image of the chart as you last saved it, or to see the latest data values select a refreshed view.

Static images are used in the Chart Browser, Thumbnails View and the Gallery. Use the Refresh button on the toolbar to update all charts in the folder with live data.



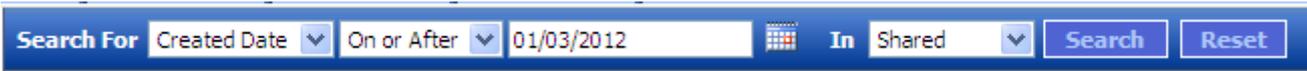
In the Details View the latest Refresh date is shown in a new column, while in the Thumbnail View and the Chart Browser the Refresh date is included in the tooltip.

Charts in the Gallery and Fathom Library are refreshed once a day – for intraday updates click the Refresh button.

Other Library enhancements

Improved searching

- Search for charts containing specific series or expressions
- Search on date of chart creation/last modification

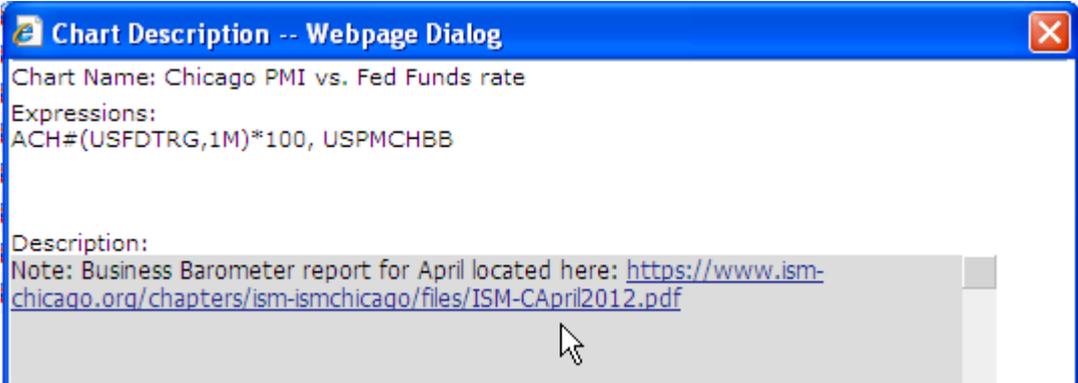


- The path name in the Search Results is now hyperlinked so you can navigate back to the original chart more easily.

Modified ▲	Refreshed ▲	Owner ID ▲	Path Name	<input type="checkbox"/>
02/05/2012 1...	02/05/2012 1...	ZREU032	Shared\Ne...	<input type="checkbox"/>
03/04/2012 1...	02/05/2012 1...	ZREU086	Data stream...	<input type="checkbox"/>
29/06/2010 1...	03/05/2012 0...	ADMIN	Datastream...	<input type="checkbox"/>
02/05/2012 1...	02/05/2012 1...	ZREU032	Shared\Ne...	<input type="checkbox"/>

Extended descriptions

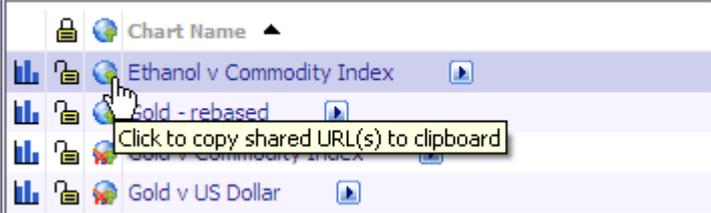
- Charts can now be saved with descriptions up to 1000 characters.
- The descriptions can include hyperlinks to relevant websites and further material.



- An inventory of the series and expressions used in the chart is now held separately from any free text description you have entered and is kept synchronised with any updates to the chart content so you can always find all the charts containing a specific mnemonic or expression.

Sharing a chart URL

When sharing from the Library using the icon next to the chart name, if the chart has already been shared, the URL will simply be copied to the clipboard a second time, rather than a second click disabling the URL.



To stop sharing a chart and disable the URL, use the option on the flyout.

Chart export

The tools for setting the export order of charts have been improved with the addition of easy move up/move down buttons.

Options		Export Order	
Chart	Folder		
Ethanol v Commodity Index	Spot Prices	[Move Up/Down Icons]	
Gold - rebased	Spot Prices	[Move Up/Down Icons]	
Gold v Commodity Index	Spot Prices	[Move Up/Down Icons]	
Gold v US Dollar	Spot Prices	[Move Up/Down Icons]	
Natural Gas v Commodity Index	Spot Prices	[Move Up/Down Icons]	

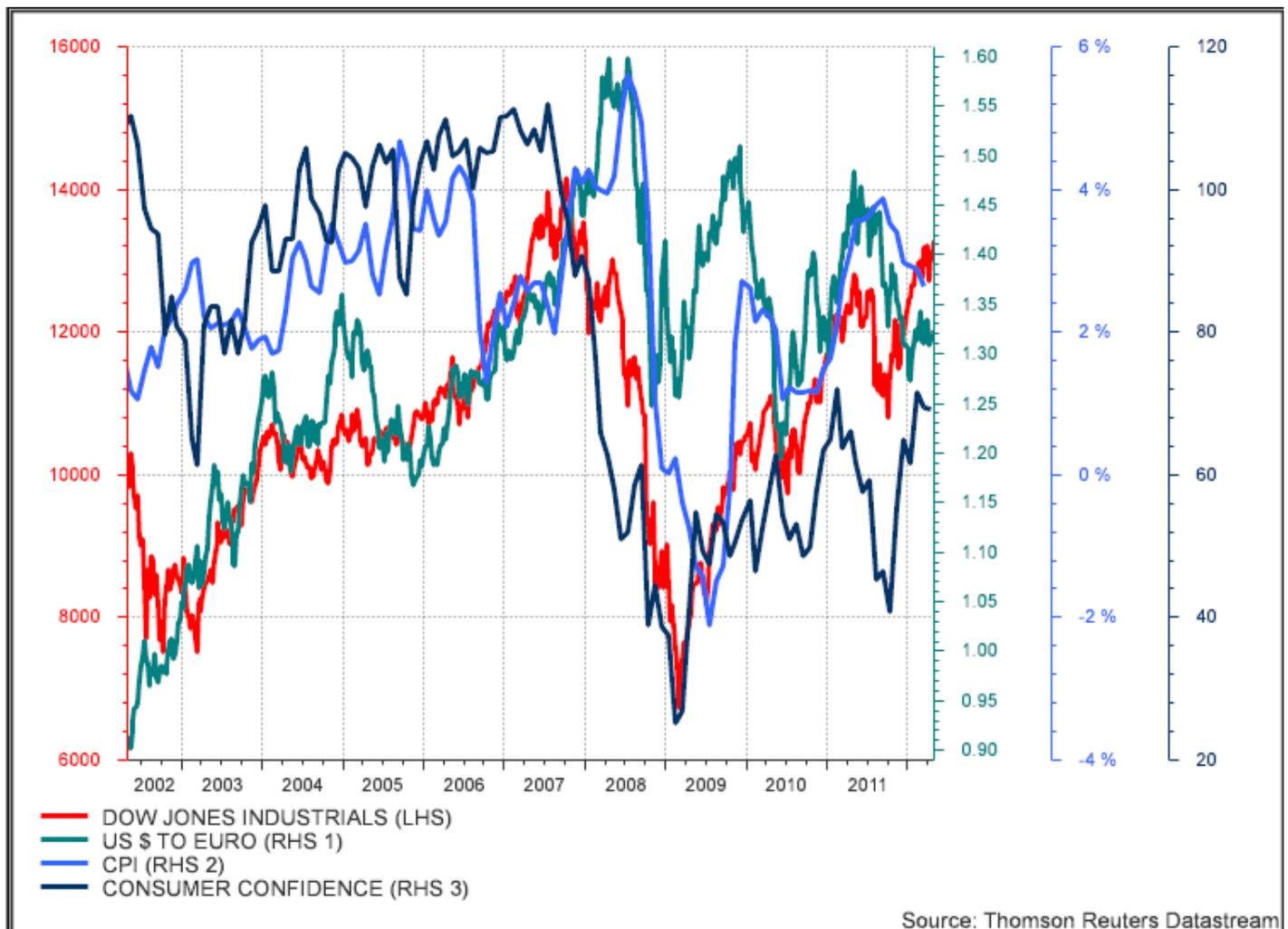
[Top](#)

CHART STYLING AND FORMATTING

Y axis options

- Plot up to 8 different Y axes to optimise the display of series with different scales. The 'Follow series colour' option will be selected by default when multiple axes are used, but you can override this.
- Show more or less detail as required by specifying the interval between ticks (labels).
- Append % to each value axis label.
- Display values of up to 6 digits on the axis without showing a multiplier at the top of the axis.

Tick Interval (Only for Linear)	<input type="text" value="0"/> <input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="Reset"/>	all
Append % to Labels	<input type="checkbox"/>	all
Calculate Values Without Multiplier	<input checked="" type="checkbox"/>	all



Date axis options

- 6 new date label formats have been added to the dropdown in the Date Axis editor:
 - Mmm-YY (Oct-08)
 - Mmm YY (Oct 08)
 - Month Number (10)
 - 5-Year (08)
 - 10-Year (08)
- Date labels will now automatically rotate through 90° when there is insufficient space to display the selected format horizontally.
- You can add padding at the start/end of your chart, e.g. to allocate space for annotations. The amount of padding can be saved in a user created style.



Scatter charts

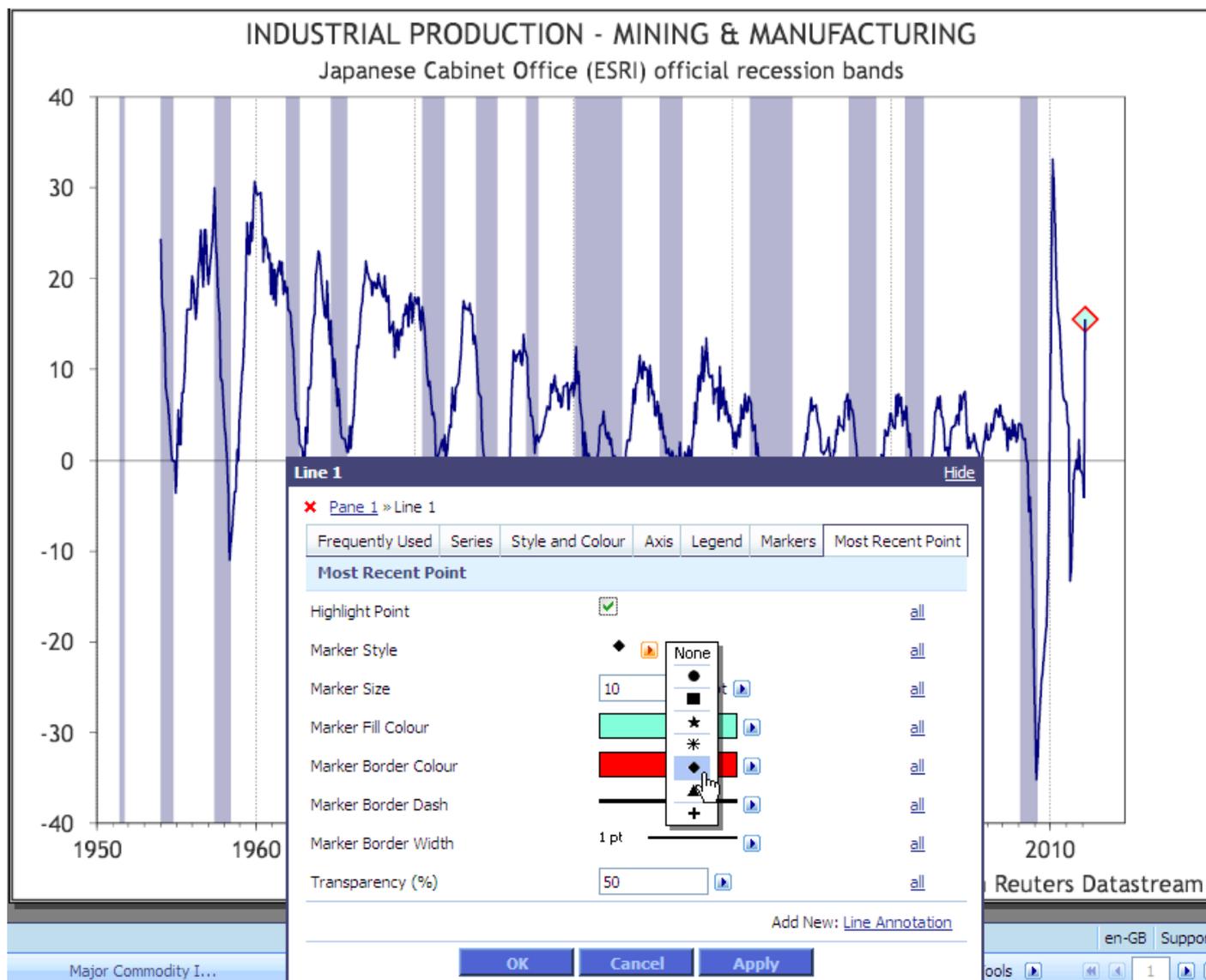
- Access formatting options for the connecting lines on your yield curves, futures curves and time series scatter charts
- You can now use independent controls for right and left hand axes on scatter charts.

Time series charts

- New settings have been added to style the colour and thickness of borders on your bar charts.
- A new tab in the series editor offers options for highlighting the latest point on a time series line chart.

Recession bands

- Japanese recession bands are now plotted using official dates from ESRI (Japanese Cabinet Office) with monthly data since 1951. These bands replace the previously quarterly bands which were calculated by Datastream and started in 1996.
- New recession bands have been added for Portugal, Greece and Spain.



New date parameters

Series End ("TIME") displays a chart up until the last value in the series - and for static charts displays the last value of each series. This can be useful where one series lags behind the others on the chart and does not yet have values for the latest date point. In such a case Series End can be used to pull the last available value for the lagging series.

Intraday ("TODAY") displays an intraday value for today, where available. The values are 15 minutes delayed equity and index prices from major exchanges.

The table below shows the availability of these and other useful end date parameters in different chart types:

Parameter	Syntax	Behaviour	Time Series	Time Scatter	Static	Static Scatter
Today	-0D	Last night's close	Y	Y	Y	Y
Intraday	TODAY	Intraday values (15 minutes delayed prices where available)	Y	Y	Y	Y
Latest Date	LATEST	Up to last night's close or a future date	Y	Y	Y	Y
Series End	TIME	Date of the last value in the series	Y	Y	Y	N
Comparable	COMPARABLE	Date of the last period where all displayed series had values	N	N	Y	Y

[Top](#)

ADD-IN

To benefit from the new features listed above, there is no need to install any new software. However, as part of this release we have updated the Charting add-in so that it can be installed without administrator rights.

Users of older versions of the add-in are recommended to upgrade to this latest version, which can be downloaded from the [Customer Zone](#).

Please follow the installation notes to ensure a smooth upgrade.

In version 2.4 the Chart Manager also shows the Last Refreshed Date for when the chart was last updated. Note that the date and time are shown in your local time (as determined by your desktop settings), whereas dates and times for when templates were Last Run are shown in GMT.

[Top](#)

OTHER

Gallery

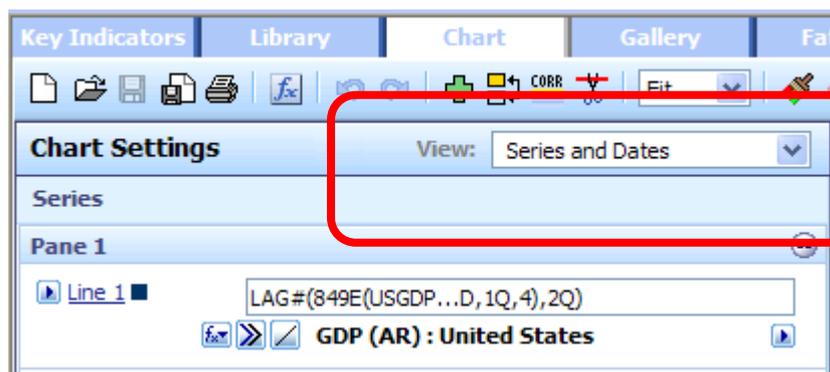
Click on the link above the chart to see a larger chart plus the full text of any commentary.

Layout change

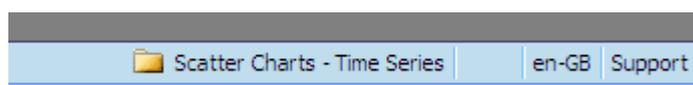
We have reorganised the layout of the Chart page to make more space available for series settings. So instead of these options at the bottom of the page...

Series and Dates
Chart Settings
Annotations and Forecasts
Template

...there is now one dropdown menu at the top:



The page footer including the Support link has moved to the right hand side:



Sample charts

The Datastream folder in the Chart Library contains examples of charts which can be created using the new features in version 2.4 as well as other charts illustrating the depth of content and functionality in the product.

To preview all the new charts, right-click on the “2.4 New Features” folder and select Preview.

[Top](#)

UPGRADING TO DATASTREAM CHARTING

If you would like to move from Advance or DSWindows to Datastream Charting, don't forget that you can convert Advance flexible charts or DSWindows 401X formats to Datastream Charting charts using our [migration tools](#).

A tool is also available to convert EcoWin documents to Datastream Charting. Click [here](#) for more information.

[Top](#)

FURTHER INFORMATION

For support materials for Datastream Charting, please click [here](#)

For context-relative help on using Datastream Charting, click on the Help icon  at the top right of each page.

Datastream Charting is available to all Advance 4.0, Datastream 5.0, Datastream Direct and Datastream Professional customers. For more information on Datastream Charting or on getting access to the Datastream Extranet, please contact your customer service representative.

[Top](#)