Datastream Advance for Office 4.0

Introduction

Issue 1

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Introduction to Advance for Office

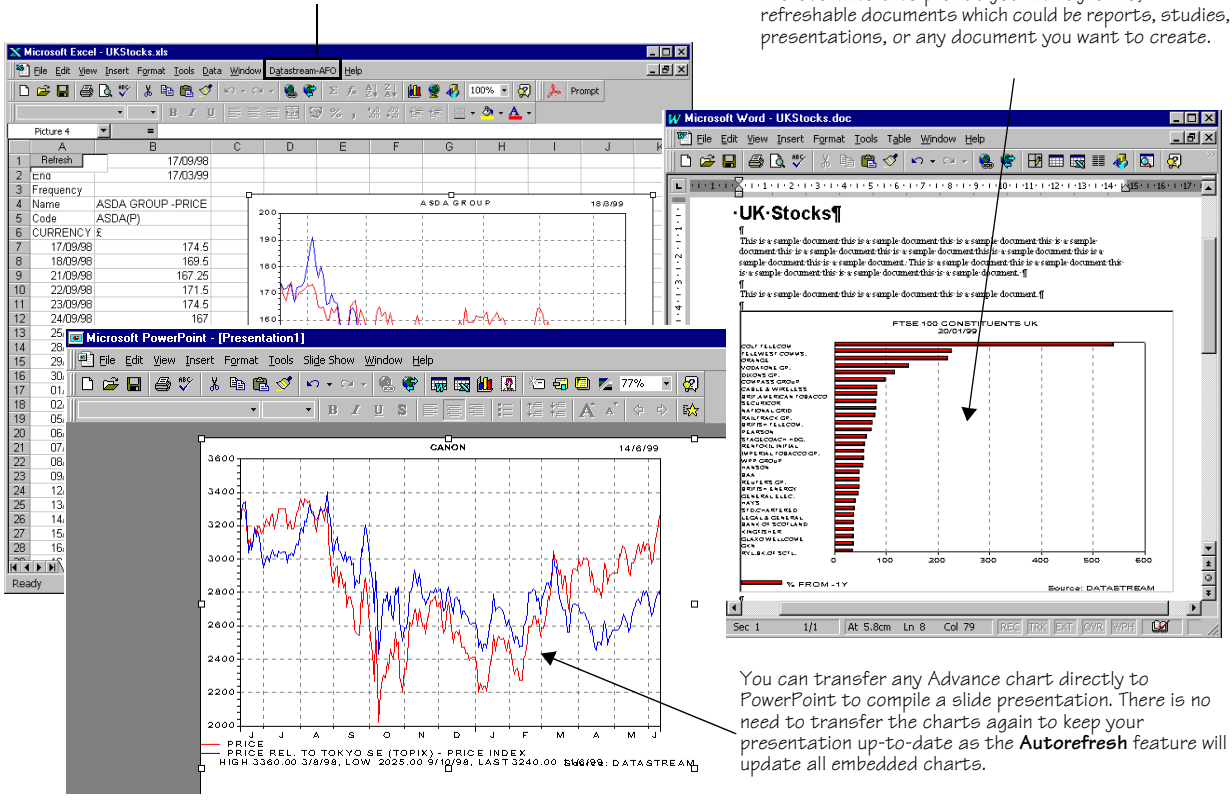
What is Advance for Office?

Advance for Office is the collective name of a number of facilities that enable you to embed and create Advance requests within Microsoft Office. These facilities extend the functionality of Microsoft Excel, Word and PowerPoint so you can retrieve and display data directly from Datastream without the need to use Advance. These facilities bring the ease-of-use and power of Advance directly into your everyday use of Microsoft Office.

Practical uses of Advance for Office

The Advance for Office Add-Ins give you a host of data request creation and management facilities available for selection from the Excel, Word, and PowerPoint main menus. Once you have created your data requests, they can remain as embedded, editable and refreshable objects.

Advance chart requests can be embedded into Microsoft Word to provide you with dynamic, refreshable documents which could be reports, studies, presentations, or any document you want to create.



You can transfer any Advance chart directly to PowerPoint to compile a slide presentation. There is no need to transfer the charts again to keep your presentation up-to-date as the **Autorefresh** *feature will update all embedded charts.*

Advance for Office core features

The Add-Ins to Microsoft Excel, Word, and PowerPoint, available with Advance 4, provide the following features:

- Transfer data and chart requests to Excel and chart requests to Word and PowerPoint as dynamic refreshable objects. Dynamic chart and data objects can be refreshed when the document is opened (**Autorefresh**) or when you choose to update them (**Refresh**).
- Creation of static, time series, and company accounts data requests in Excel, Word, and PowerPoint with series and datatype selection facilities. You can access the same global and user created expressions (for static data requests only), and company accounts formats that are available in Advance.
- Facilities to resize and reposition charts in Excel, Word, and PowerPoint.
- Time series data can be returned for constituents of local lists stored on your PC, and for Datastream lists and user created lists stored on Datastream. Time series requests for constituents of lists are issued as a single request.
- You can use the **Request Manager** to view and edit the properties of all embedded data and chart objects in Excel, Word, and PowerPoint. You can choose to refresh or delete individual requests or all requests that are embedded in a document.
- The **Request Table** enables you to create and easily maintain many requests from Datastream in Excel without writing VBA code. Request tables could contain all your regularly used data requests and can be scheduled to be processed ‘out of hours’ or processed just when you want the results.
- A conversion wizard is provided to convert your existing DSDDE request tables into Advance for Office tables. The wizard also enables you to convert DSDDE linked workbooks into Advance for Office data controls or Advance for Office request tables.
- You can view and edit the properties that make up your embedded requests by using **Visual Basic for Applications** (VBA) which comes with Excel, Word, and PowerPoint.

What's new in Advance for Office 4

- **Central Navigation**
  Advance for Office now uses the new Datastream Navigator central navigation database for finding series and datatypes. This means that you will no longer need to update the local codes database as this will be done centrally.
- **MS Chart facilities**
  You are now able to display your requests as MS Charts in Word, Powerpoint and Excel.
- **Request Table Formatting**
  The formatting options in the request table have been extended to support the display of titles or the first series of expressions. Details of the time and duration of each request update have also been added.
- **Request Table VBA Macros**
  A new facility has been added to the request table to allow you to specify an Excel VBA Macro to run after the request table has finished updating, this could be used to sort or print the output.
- **Chart Transfer**
  Additional chart transfer options have been added to the Advance Tools Options to enable you to set the default size of a chart and whether you would like the chart to be transferred as an Office Picture. The background can also be set to transparent.

Installing Advance for Office

System requirements

In addition to Advance 4, you need to have Microsoft Office 2000 installed before you can run Advance for Office. All Advance for Office software components are installed when you install Advance 4.

Full system requirements are given in the *Advance Technical Facts.*

Installation

Advance for Office is a set of Add-In components for Excel, Word and PowerPoint. When installing Advance 4, the Add-In components for Excel (**AdvanceOffice.xla**), and PowerPoint (**DSAFO4PP.PPA**) are installed automatically. The Add-In for Word (**AFOWord.dot**) has to be copied to the Office startup directory. The installation configuration you choose for Advance 4 determines where the Add-In components are installed, this could be:

- **Install to this PC** - installs a full copy of Advance onto your PC's hard drive.
- **Install client from server** - installs a reduced set of files, leaving remainder on the server.

To use Advance for Office, after Advance 4 has been installed, you need to locate the relevant **add-in** component and open it within Excel, Word or PowerPoint.

Note:

Wherever you install the Advance for Office.xla you must make sure that the request table template (Adv_xl.xlt) is in the same directory location.

Installing the Microsoft Excel Add-In

Before installing the Excel Add-In, **AdvanceOffice.xla**, you must ensure that you have installed Advance 4.

Loading the Add-Ins using Fast Load

After installing the Add-In, you can select the **Fast Load** option from the **Datastream-AFO>Options** menu to speed up the initial load time.

There are three ways in which you can open the Advance for Office Add-In component for Excel. Each method has a different impact on the way you use Excel.

- **Permanent Add-In**

  This method loads the **AdvanceOffice.xla** each time you launch Excel, making the Advance for Office facilities always available from the **Datastream-AFO** menu.

To select this method:

1. Run Excel from the Windows Start menu.
2. Select **Add-Ins...** from the **Tools** menu.
   The **Add-ins** dialog is displayed.
3. Click the Browse button and navigate to the **Datastream Advance** directory, select **AdvanceOffice.xla,** and click **OK**.
4. Click the **Advance Office** check box.
5. Click **OK**.

- **File open**

  This method opens the **AdvanceOffice.xla** like any other spreadsheet, enabling you to launch the Advance for Office facilities only when you want them.

To select this method:

1. Select the **Open** option from the **File** menu.
2. Navigate to the **Datastream Advance** directory and select **AdvanceOffice.xla**
3. Click **Open**

- **Fast load**

  This method makes the **Datastream-AFO** menu available (and its options) for selection without loading the facilities each time you launch Excel. The .xla component is only loaded when a **Datastream-AFO** option is selected, enabling Excel to load faster upon start-up.

1. Follow the steps for *Permanent Add-In* above.
2. Select **Options** from the **Datastream-AFO** menu.
3. Click the **Fast Load** check box on the **Options** screen.
4. Click **OK**.

Installing the Microsoft Word Add-In

Before installing the Word Add-In, **AFOWord.dot**, you must ensure that you have installed Advance 4.

1 Navigate to where you installed Advance on your PC (or server). The default directory for the Advance 4 installation is **C:\Program Files\Datastream\ Datastream Advance**.

2 Copy the Word Add-In, **AFOWord.dot,** to the Office Startup directory. (The default directory is **C:\Program Files\Microsoft Office\Office\Startup**.)

The Add-In is now installed. When you run Word you should see the **Datastream-AFO** menu on the main Word menu bar. Use this menu to select all the Advance for office facilities within Word.

Installing the Microsoft PowerPoint Add-In

Before installing the PowerPoint Add-In, **DSAFO4PP.PPA**, you must ensure that you have installed Advance 4.

1 Select **Add-Ins...** from the PowerPoint **Tools** menu. The **Add-Ins** dialog is displayed.

2 Click the **Add New...** button to display the **Add New PowerPoint Add-In** dialog.

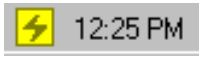
3 Navigate to where you installed Advance on your PC (or server) using the **Look in** list. The default directory for the Advance 3 installation is **C:\Program Files\Datastream\Datastream Advance**

4 Click on the PowerPoint Add-In **DSAFO4PP.PPA** and click **OK**. The add-in is displayed on the **Add New PowerPoint Add-In** dialog. Click **OK** to confirm use.

The Add-In is now installed and you should see the **Datastream-AFO** menu on the main PowerPoint menu bar. You will use this menu to select all Advance for Office facilities within PowerPoint.

Using the Datastream Advance Connection Manager

Once you have installed Advance 4 and have setup your Advance for Office Add-Ins, you may need to configure your Datastream logon ID and communications profiles. This can be done in Advance by using the **Configure Communications** option from the **Tools** menu. Full documentation is provided on this option in the *Reference* section of the *Advance User Guide*.



Access to this option can also be obtained in Excel, Word, and PowerPoint when the Advance for Office Add-Ins are loaded, by right clicking the lightning symbol in the Windows system tray.

When you right click the lightning symbol, the **Connection Manager** pop-up menu is displayed presenting you with a number of communications related options:

- **Force Exit** - this option closes the **Connection Manager** but leaves the Datastream Communications Server running if it is being used by Advance.
- **Force Exit and Shutdown Comms Server** - this option shuts down the Datastream Communications Server preventing any further communications with Datastream. When you select this option, the **Connection Manager** facilities (described here) will no longer be active. The **Connection Manager** and **Communications Server** will restart when you next make a request.
- **Error Log** - this option displays the **Datastream Communications Server** error log in Windows Notepad format. The error log contains historical details of the date, time and description of the communications error. This error log may be required when reporting communications failures to Datastream support staff.
- **Show Interactive Terminal** - this option is for expert users who want access to the Datastream Research Service via MS Office, for example to create company accounts formats.
- **Show Gateway Monitor** - This option enables you to view gateway information when you are queued in a gateway after making a request. You can use it to view the maximum number of user connections to Datastream, the number of currently connected users and the number of users queued.

- **Connect Now** - this option enables you to test your communications connection to Datastream. When you issue a data request, the connection is automatically made. This option enables you to test out the connection and view the connection details, via the **DSAccess Debug Monitor**, without issuing a request. Connection errors are reported in the **Error Log** (see above).
- **Disconnect from Datastream** - this option disconnects the communications link between Advance for Office and Datastream but leaves the **Connection Manager** and the **Datastream Communications Server** running. This might be useful if you want to send another request in the same MS Office session.
- **Configure Communications...** - this option enables access to the **Datastream Configuration** dialog which is used to set up the Datastream logon and communications configuration details. Full details of this dialog can be found in the *Reference* section of the *Advance User Guide*.
- **Cancel Pending Datachannels...** - this option cancels any Data Channel requests that are queued.
- **Suppress Autorefresh of Embedded Requests** - this option overrides the automatic refresh setting of any embedded requests.

Reference

VBA Developers Workbench for Advance for Office

Experienced users/developers can interface to any of Advance for Office's underlying functionality via utilising its ActiveX components. The user can use any COM enabled programming language (such as Excel Visual Basic, Microsoft Visual Basic or Delphi) to embed and request data and chart requests programmatically in any Microsoft Office application.

Examples for this advanced facility can be downloaded from the Datastream customer support Extranet site:

http://extranet.datastream.com

You will need, however, to be a Datastream user and have a Datastream logon ID and password, and have access rights to this extranet site. Applications for access to this site should be addressed to:

www.datastream.com/registration/registfm.htm

Advance for Office samples

A host of pre-formatted Advance for Office templates are available for downloading from the Datastream Extranet (see above). These templates include Excel spreadsheets with embedded AFO data requests and Request Tables, and Word documents with embedded charts. These samples contain parameters that can be changed using the Advance for Office facilities.

Converting DDE Request Tables for Datastream AFO

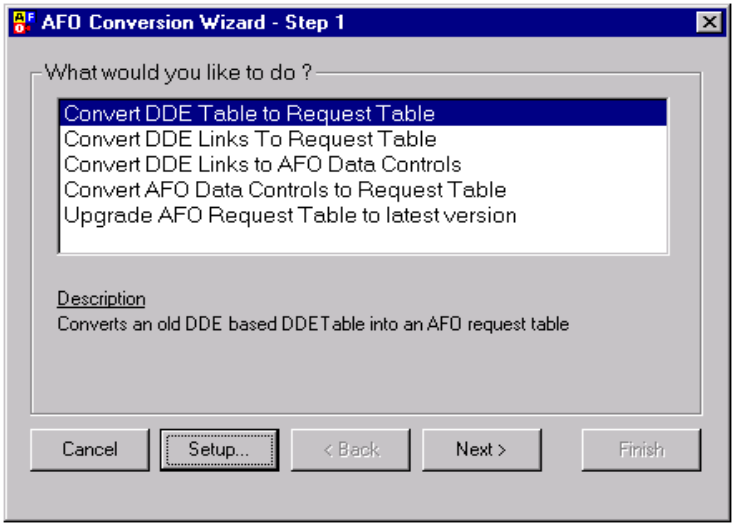
A **Conversion Wizard** is supplied with Advance for Office for users of DSDDE 2.0 (and above) who want to convert DDE Request Tables and DDE linked workbooks for use with Advance for Office. Five conversion types are available:

- Conversion of DDE Request Tables into Advance for Office Request Tables. Multiple tables can be converted in one go but are converted on a one for one basis.
- Conversion of Excel workbooks with DDE linked requests into an Advance for Office Request Table. Each DDE linked request becomes a new row in the Advance for Office Request Table.
- Conversion of DSDDE linked workbooks into workbooks containing Advance for Office data controls. Multiple DDE linked requests can be converted in one go.
- Conversion of AFO embedded requests to AFO request table.
- Conversion from AFO 2.0 request tables to AFO 3.5 request tables in order to use chart requests and the code button options.

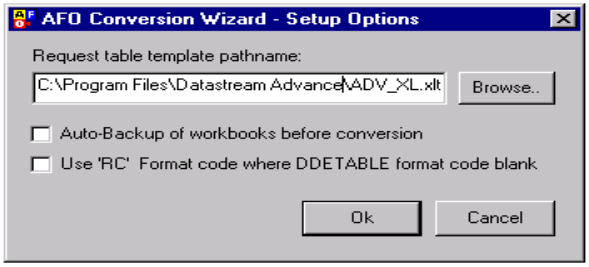
Converting DDE Tables to AFO Request Tables

1 Select **Conversion Wizard** from the **Datastream-AFO>Request Table** menu.

2 Click the **Convert DDE Table to Request Table** option, as shown below.



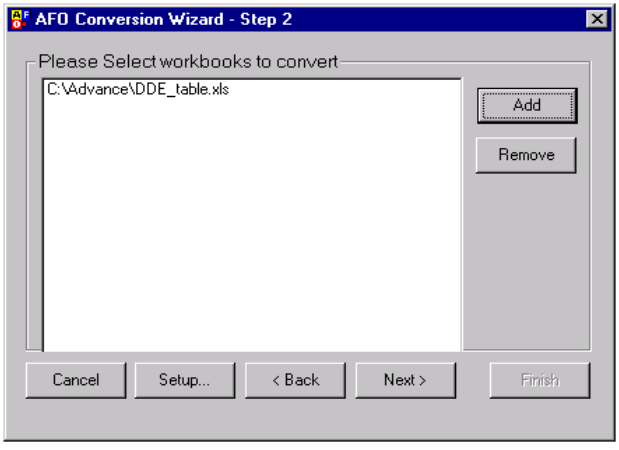
3 Click **Setup** to display the **Setup Options** screen. Enter the path on your PC where the Advance for Office Request Table template (Adv_xl.xlt) resides and click the backup option check box. For example:



4 Click **OK** to close **Setup Options**.

5 Click **Next**.

6 Click **Add** and navigate to where the DDE tables you wish to convert are located. Select the required tables and click **OPEN**. The tables you have selected will appear in the conversion wizard, for example:



7 Repeat step 6, if you require more tables to be converted. Click **Next** and then click **Finish**.

8 You are now asked to confirm the conversion. Click **OK**.

9 The message now appears - **Pasting new request into Request Table**. When the conversion process is complete, the message appears **Finished, no conversion errors encountered**. Click **OK** to quit the **Conversion Wizard**.

Converting DDE linked requests into an AFO request table

1 Select **Conversion Wizard** from the **Datastream-AFO>Request Table** menu.

2 Click the **Convert DDE Links to Request Table** option.

3 Click **Setup** to display the setup screen. Enter the path on your PC where the Advance for Office Request Table template (Adv_xl.xlt) resides and click the backup option check box.

4 Click **OK** to close **Setup Options**.

5 Click **Next**.

6 Click **Add** and navigate to where the Excel workbooks that contain the linked DDE requests are located. Select the required .XLS workbooks and click **OPEN**. The workbooks you have selected will appear in the conversion wizard.

7 Click **Next** and then click **Finish**.

8 You are now asked to confirm the conversion. Click **OK**. The conversion process now starts.

9 When the conversion process is complete, the message appears **- Finished, no conversion errors encountered**. Click **OK** to quit the **Conversion Wizard**.

Converting DDE linked requests into AFO Excel embedded requests

1 Select **Conversion Wizard** from the **Datastream-AFO>Request Table** menu.

2 Click the **Convert DDE Links to AFO Data Controls** option.

3 Click **Next**.

4 Click **Add** and navigate to where the Excel workbooks that contain the linked DDE requests are located. Select the required .XLS workbooks and click **OPEN**. The workbooks you have selected will appear in the conversion wizard.

5 Click **Next** and then click **Finish**.

6 You are now asked to confirm the conversion. Click **OK**. The conversion process now starts.

7 When the conversion process is complete, the message appears **- Finished, no conversion errors encountered**. Click **OK** to quit the **Conversion Wizard**

Converting AFO embedded requests to AFO request tables

1 Select **Conversion Wizard** from the **Datastream-AFO>Request Table** menu.

2 Click the **Convert AFOdata controls to Request Table** option.

3 Click **Setup** to display the setup screen. Enter the path on your PC where the Advance for Office Request Table template (Adv_xl.xlt) resides and click the backup option check box.

4 Click **OK** to close **Setup Options**.

5 Click **Next**.

6 Click **Add** and navigate to where the Excel workbooks that contain the AFO embedded links are located. Select the required .XLS workbooks and click **OPEN**. The workbooks you have selected will appear in the conversion wizard.

7 Click **Next** and then click **Finish**.

8 You are now asked to confirm the conversion. Click **OK**. The conversion process now starts.

9 When the conversion process is complete, the message appears **- Finished, no conversion errors encountered**. Click **OK** to quit the **Conversion Wizard**.

Upgrading AFO 2.0 request tables to AFO 4 request tables

1 Select **Conversion Wizard** from the **Datastream-AFO>Request Table** menu.

2 Click the **Upgrade AFOdata Request Table to latest version** option.

3 Click **Setup** to display the setup screen. Enter the path on your PC where the Advance for Office Request Table template (Adv_xl.xlt) resides and click the backup option check box.

4 Click **OK** to close **Setup Options**.

5 Click **Next**.

6 Click **Add** and navigate to where the Excel workbooks that contain the AFO 2.0 Request tables are located. Select the required .XLS workbooks and click **OPEN**. The workbooks you have selected will appear in the conversion wizard.

7 Click **Next** and then click **Finish**.

8 You are now asked to confirm the conversion. Click **OK**. The conversion process now starts.

9 When the conversion process is complete, the message appears **- Finished, no conversion errors encountered**. Click **OK** to quit the **Conversion Wizard**.