

MIM Excel Add-in User Guide



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CHAPTER 1

Introduction

Installing the MIM Excel Add-in

Go to the LIM "[Downloads](#)" Web page and download the latest MIM Excel® Add-in software file. For installation instructions, see the chapter "[MIM Excel Add-in Installation](#)" in the *Client Application Installation Guide*.



You must have Java version 1.4 or higher. To obtain a free Java download, go to: <http://www.java.com>.

Documentation

For additional information on using MIM Excel Add-in, see the lesson-based [MIM Excel Add-in Training Guide](#).

Overview

The MIM Excel Add-in software provides direct access to time series data from a MIM server. Using the MIM menu, users can extract daily futures prices and many other data series. The MIM add-in is a client application for the MIM server. The MIM server provides time series data to the enterprise over the network.

The MIM Excel Add-in creates the **MIM** menu on the Excel menu bar. Using the **MIM** menu, users can create requests for data and populate Excel worksheets with values. The requests are saved in the Excel workbook using a hidden worksheet.

Highlights of the MIM Excel Add-in:

- Data requests are created and edited using a step-by-step wizard dialog.
- Includes an integrated MIM schema browser and schema search to locate data.
- Includes support for units of measure conversions.
- Features several types of futures contract reshaping, including prompt contract offsets and several switching day policies.
- Data requests are stored in the Excel workbook in a hidden sheet. Data refresh is a single click menu operation.

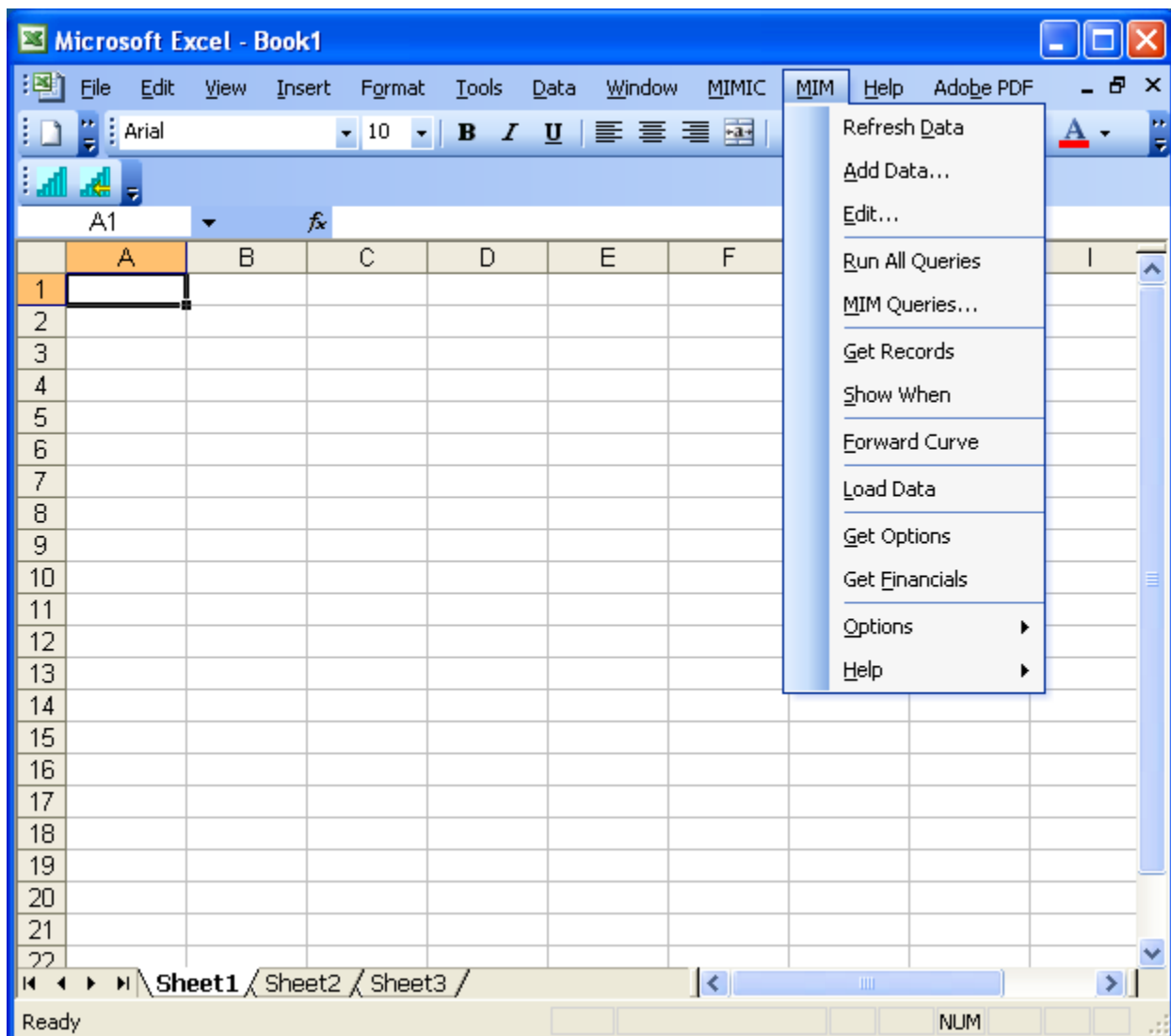
- Workbooks with data requests can be attached to e-mails and used by any other user with the MIM Excel Add-in software.
- The functionality of MIMIC is available while working within Excel.

The steps for creating data are:

1. Request data using the data browse, symbol search or description search.
2. Refine data using date delimiters.
3. Refresh the worksheet to display the data.
4. Specify the location on the Excel worksheet to create data.

Once the MIM Excel Add-in is installed, Excel will have a new menu item labeled **MIM**.

The following provides details on each menu item.



The MIM Excel Add-in menu items perform the following tasks:

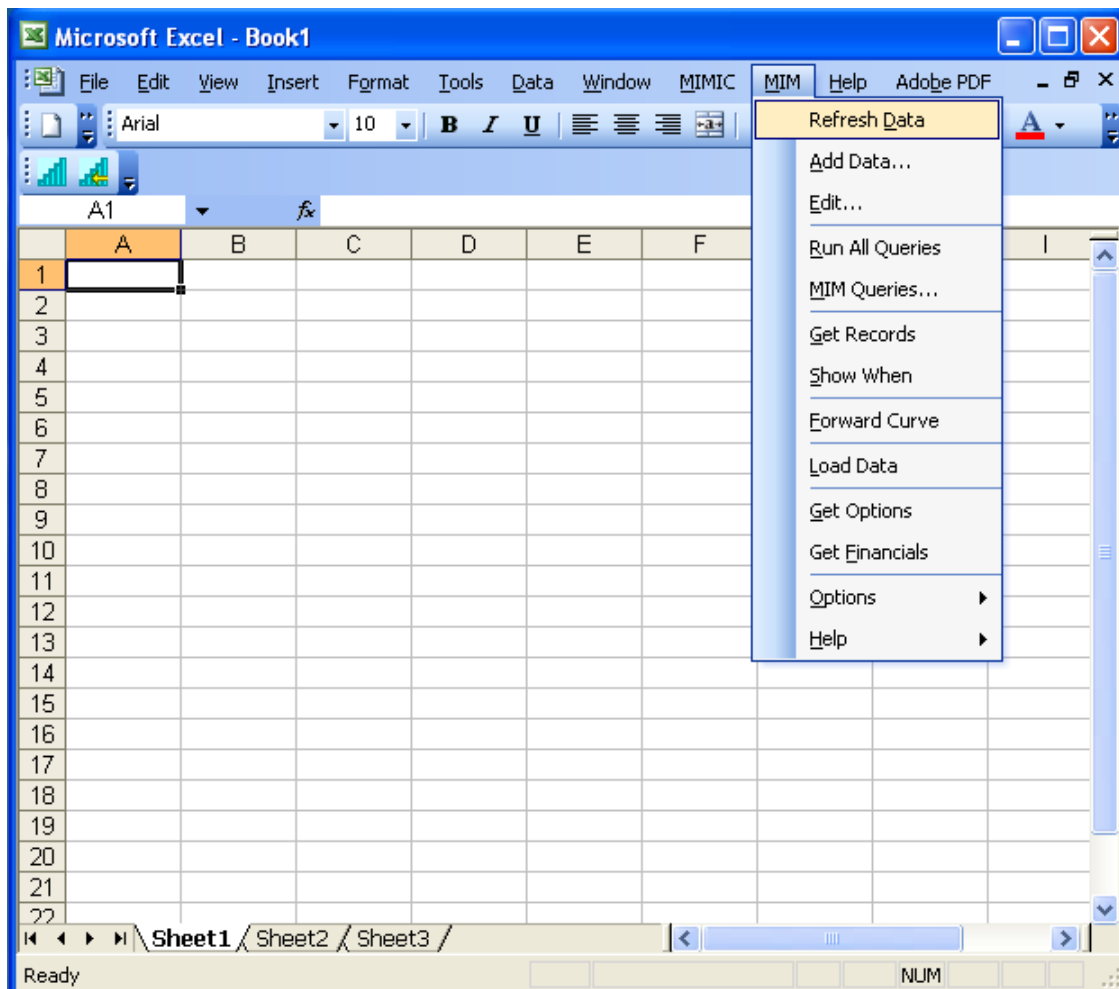
- **Refresh Data** - Refresh the data in the workbooks by downloading the data from the MIM server.
- **Add Data** - Add a new data item to the MIM. Data requests are configured in the workbook.
- **Edit** - Change the parameters of previously created MIM data requests.
- **Run All Queries** - Runs all queries setup by the user.
- **MIM Queries** - Create and edit queries in this menu.
- **Get Records** - Run queries on multiple data blocks.
- **Show When** - Create Show/When queries easily within one dialog menu.
- **Forward Curve** - Create a Forward Curve chart from a user selected futures contract.
- **Load Data** - Enter data from an Excel spreadsheet into the MIM database.
- **Get Options** - Use Get Options to access the special columns established for analyzing options.
- **Get Financials** – Functionality no longer available.
- **Options** - Set network parameters and decimal place settings.
- **Help** - Information about the MIM Excel Add-in such as version number and access to the Excel Web pages and Online Tour on the LIM Web site.

CHAPTER 2

Refresh Data

Refresh Data from the MIM Menu Bar

Refresh Data runs all data requests that have been setup with **Add Data** (they go into **MIM>Edit** as a list). These are normal data retrieval requests. In addition, all MIM queries that have been stored are run. Remember that all data requests and MIM queries are stored locally in the .xls spreadsheet file. If nothing is present in **MIM>Edit** or **MIM>MIM Queries** nothing will be returned.



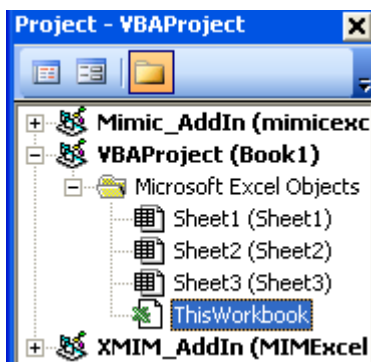
Auto-Refresh Data

By following the Visual Basic instructions below, a user can set the **Add Data** and query results to automatically refresh when an Excel spreadsheet is opened.

Visual Basic Instructions for Auto-Refresh

To auto-refresh the MIM data, you need to run a Visual Basic subroutine with a **RunAll** statement within an Excel Object. To accomplish this, do the following steps:

1. From the menu bar in Excel, select **Tools>Macro>Visual Basic Editor**.
2. Double click the **ThisWorkbook** icon (as shown in the graphic below).



3. Insert the following code:

```
Private Sub Workbook_Open()  
    Application.Run ("MIMExcel1_1.xla!RunAll")  
End Sub
```

4. Save the changes.

The workbook (.xls file) you have made the changes to will now automatically refresh when opened. The auto refresh only applies to the workbook you have saved the settings to. Repeat these steps on any workbook files you would like to automatically auto refresh when opened.

CHAPTER 3

Add/Edit Data

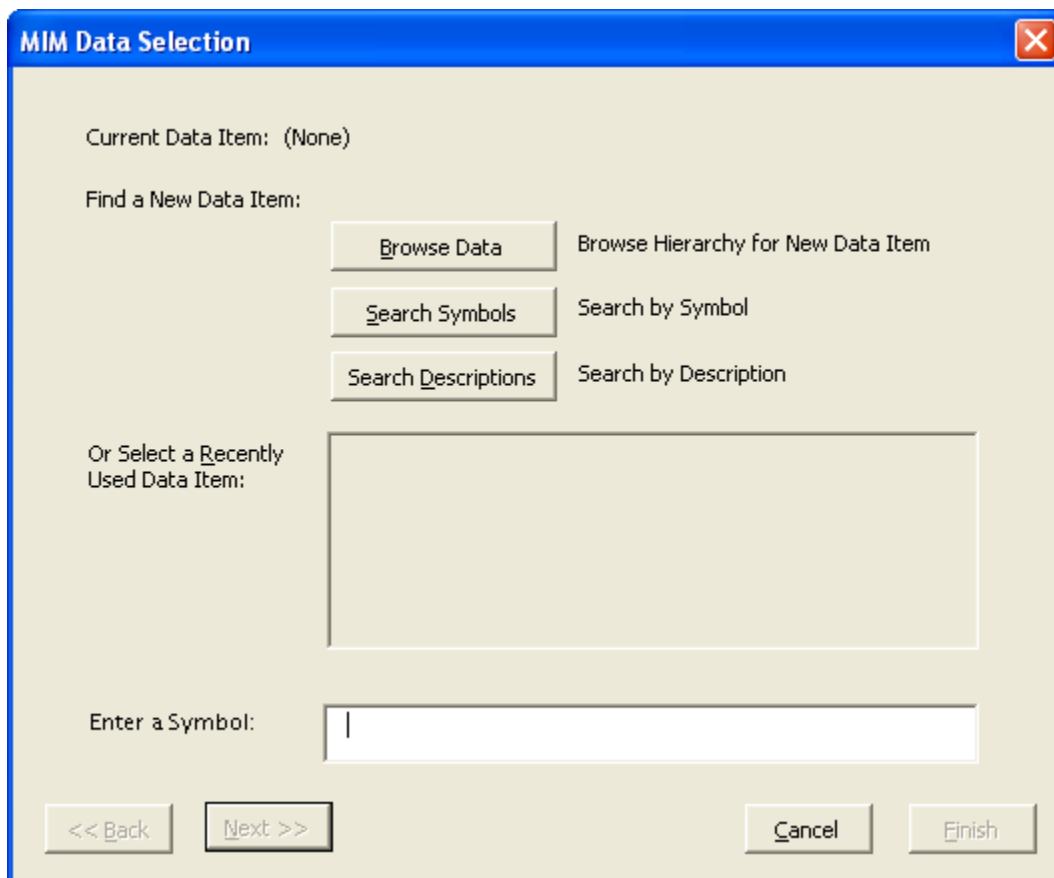
The Add Data functionality allows simple data retrieval requests to be setup. The first step to begin requesting data is to select **Add Data** from the **MIM** menu.

Documentation

For additional information on adding and editing Data using MIM Excel Add-in, see the "[Add Data](#)" chapter in the lesson-based *MIM Excel Add-in Training Guide*.

Find a New Data Item

This is the first dialog in the add data process. There are four ways to determine the MIM symbol and corresponding column information for the data request. This lesson will take you through each data request method, beginning with a **Browse Data** example.



The four data request methods are:


- **Browse Data** - allows you to look through the database manually. This is a visual map to all data contained in the MIM database. You are placed at the top level of the database i.e., TopRelation. Double-click through the categories to navigate. The database is organized by market area. You can also use the folder buttons to go up and down through the categories.
- **Search Symbols** - performs a search on MIM symbols contained in your database. Enter a symbol to search for and the symbol along with its description will be returned. You can direct the search to be case sensitive and also limit the number of answers returned.
- **Search Descriptions** - performs a search on MIM symbol descriptions. You can direct the search to be case sensitive and also limit the number of answers returned.

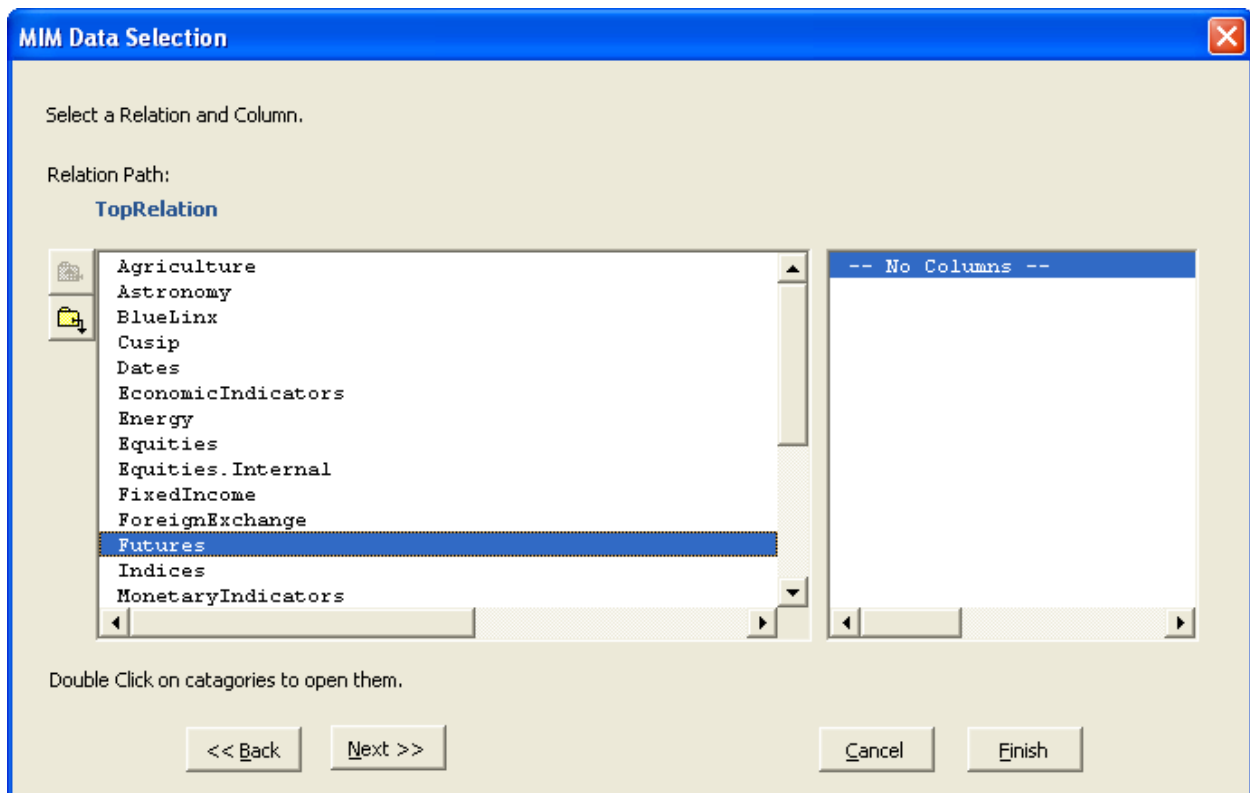
- **Select a Recently Used Data Item** - If data requests have already been made, you can request a recently created data item.



To clear the display of the Recently Used Data Items, delete the **WzRcItms.xmi** file located in the C:\LIM\XLA1.1 folder. This file will be re-created when a new Data Item is used.

Browse Data

The MIM browser displays the schema of the MIM server. The schema consists of categories (folders), relations (symbols) and columns (fields). By double-clicking on the categories or selecting a category and clicking on the folder button with the down arrow , you can drill down into the folders and locate the symbols available there. Once you reach a symbol, the browser will display the available columns.



After selecting a category and column, you can select the desired date and time range.

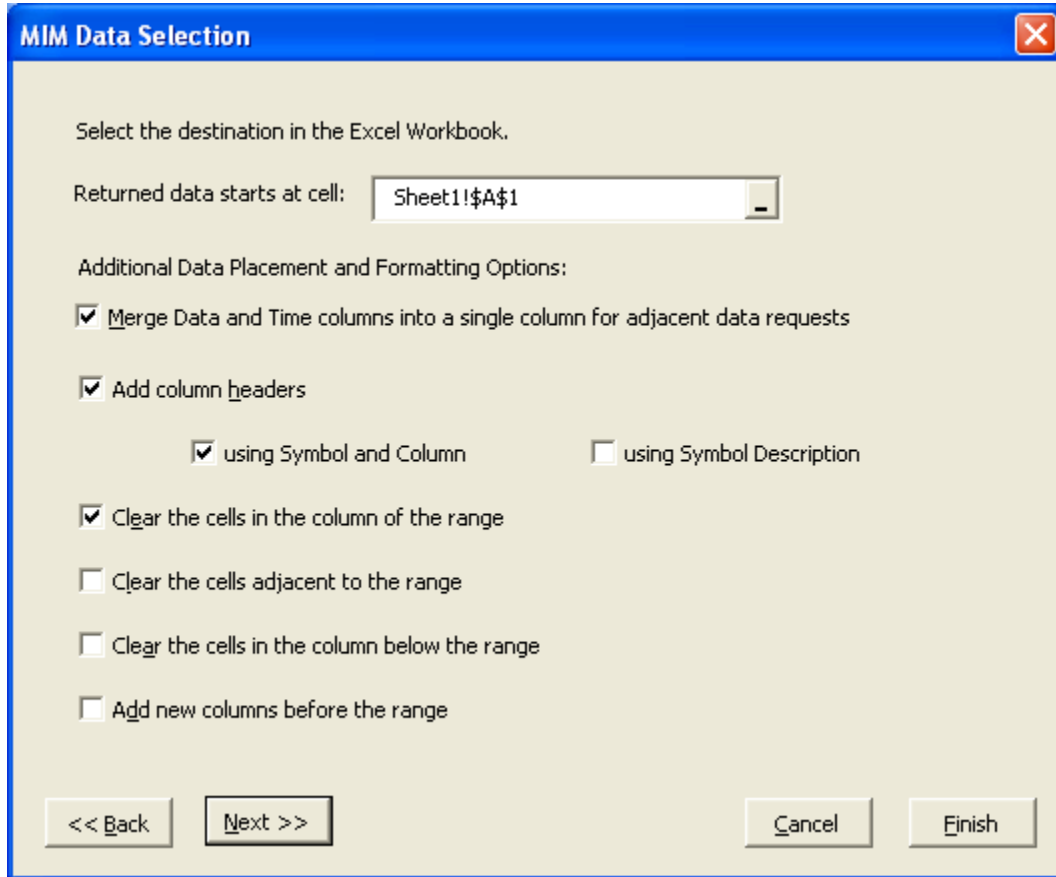
The screenshot shows the "MIM Data Selection" dialog box. It has a blue title bar with a close button. The main area is light beige and contains the following elements:

- Instruction: "Select the date and time range for which to extract data."
- "Get data from" section with three radio button options:
 - the start of the available data
 - the last [1] year(s) [dropdown]
 - a specific date [01-01-1998] and time (if req'd) [7:20am]
- "Get data to" section with two radio button options:
 - the end of the available data
 - a specific date [12-31-1998] and time (if req'd) [7:20am]
- "Additional data retrieval options:" section:
 - Use data resolution of [1] day(s) [dropdown]
 - Fill missing data points with [a NaN] [dropdown]
 - Use Current Tick Data if the XMIM server is connected to a data feed.
 - Include Summary Statistics
 - Decimal Places [5] [dropdown]
- Navigation buttons at the bottom: "<< Back", "Next >>", "Cancel", and "Finish".

The following outlines the date, time and data retrieval options:

Option	Function
Get Data From	
the start of the available data	The start date will be the first available data point date.
the last N Time Period	Start date will be determined by your selection (e.g. 3 months, 10 years, 7 quarters). Use the drop-down list to change the time period value.
a specific date and time	Start date can be entered in mm/dd/yyyy format. If a specific time is required, check the box and enter the time.
Get Data To	
the end of the available data	The end date will be the last data point in the database.
a specific date and time	End date can be entered in mm/dd/yyyy format. If a specific time is required, check the box and enter the time.
Additional data retrieval options	
Use data resolution of	Sets data resolution. Default is 1 day (i.e. Daily). The time period can be changed from the pull-down menu.
Fill missing data points with	Sets what to fill in when there is no data point available for a given date. The default is NaN. Other options on the drop-down menu include: Fill Forward, Fill Backward, Linear Interpolated Values, Geometric Interpolated Values or Logarithmic Interpolated Values.
Use Current Tick Data if the XMIM server is connected to a data feed	Uses current tick data from the XMIM server. (Consult your LIM System Administrator since this is not a common configuration.)
Include Summary Statistics	Creates MIM generated summary statistics to accompany the data request. The statistics included are: Sum, Average, Average Positive, Average Negative, Percent Positive, Percent Negative, Highest, Lowest, Standard Deviation, Z stat, and Variance.
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

The subsequent screen is where you define the destination in the Excel workbook, the data placement and formatting options.



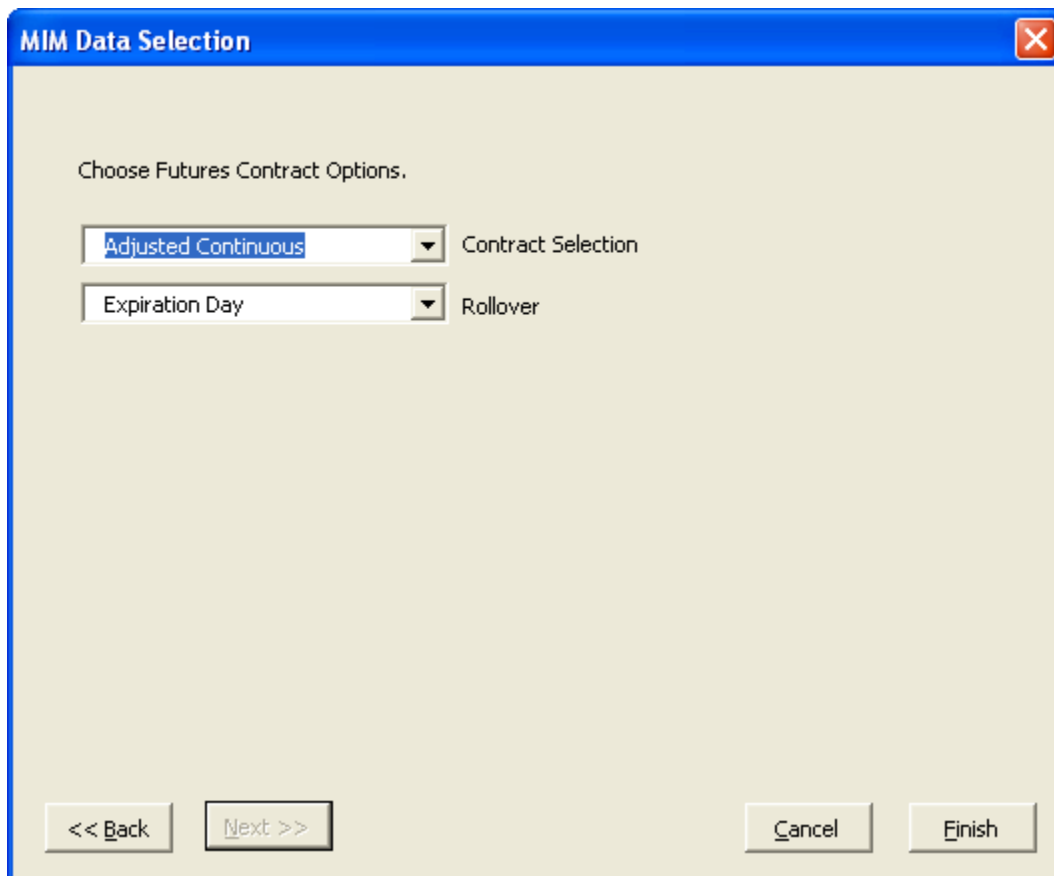
Returned data starts at cell

This is where the first data will be placed. The first data point will be in the cell immediately to the left. You can type the location directly (e.g., Sheet1!\$B\$1), select the cell in the Excel spreadsheet or select the button.

The following defines the rest of the options:

Option	Function
Merge Data and Time columns into a single column for adjacent data requests	By default, all adjacent requests with the same time parameters are merged to have a single data column. If this box is unchecked, the requests will overwrite the data into the sheet.
Add column headers using Symbol and Column or using Symbol Description	Displays the column headers using either a Symbol and Column (e.g., MSFT (Close)) or using a Symbol Description (e.g., Microsoft Corp (CUSIP 59491810)).
Clear the cells in the column of the range	Clears any other data contained in the destination column every time the request is made.
Clear the cells adjacent to the range	Clears data that is not separated by empty cells around the range. This is used to put data into areas on a spreadsheet.
Clear the cells in the column below the range	Clears the data in the cells below the range.
Add new columns before the range	Adds new columns for every request. To use this feature, all of the data requests should have the same cell target. This is useful to create a portfolio of values and avoid editing several requests to remove a single request.

The final step in the data selection process is to choose the futures contract options.



The following defines the options:

Option	Function
Contract Selection	
Adjusted Continuous	The resultant series is represented by continuous prices that are not subject to expiration dates like the individual delivery month contracts.
Prompt (front, back, and far)	These represent quotes for one, two and three delivery periods out from the publication date. The MIM also calculates continuation series up to Prompt + 40, depending on the number of delivery months quoting for a particular commodity over time.
Rollover	
Expiration Day	Sets the rollover to occur on the contract expiration day.
Volume Crossover and Open Interest Crossover	Sets the rollover to occur when the volume or open interest is greater in the next contract. Many speculators believe the best time to roll is when open interest becomes greater in the next contract, because this usually means the following contract is the more liquid contract.
Backwards Adjusted Prices	The main difference between backward adjusted and forward adjusted is that the current contract is unadjusted. This means that the previous history will be adjusted by the difference between the new contract and the current contract. After the roll occurs the most current contract is the same as "actual prices", however the past prices will be adjusted (and can become negative).
Roll X Days Before Expiration	Users can set the rollover to occur from 1 to 10 days before the expiration day.
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

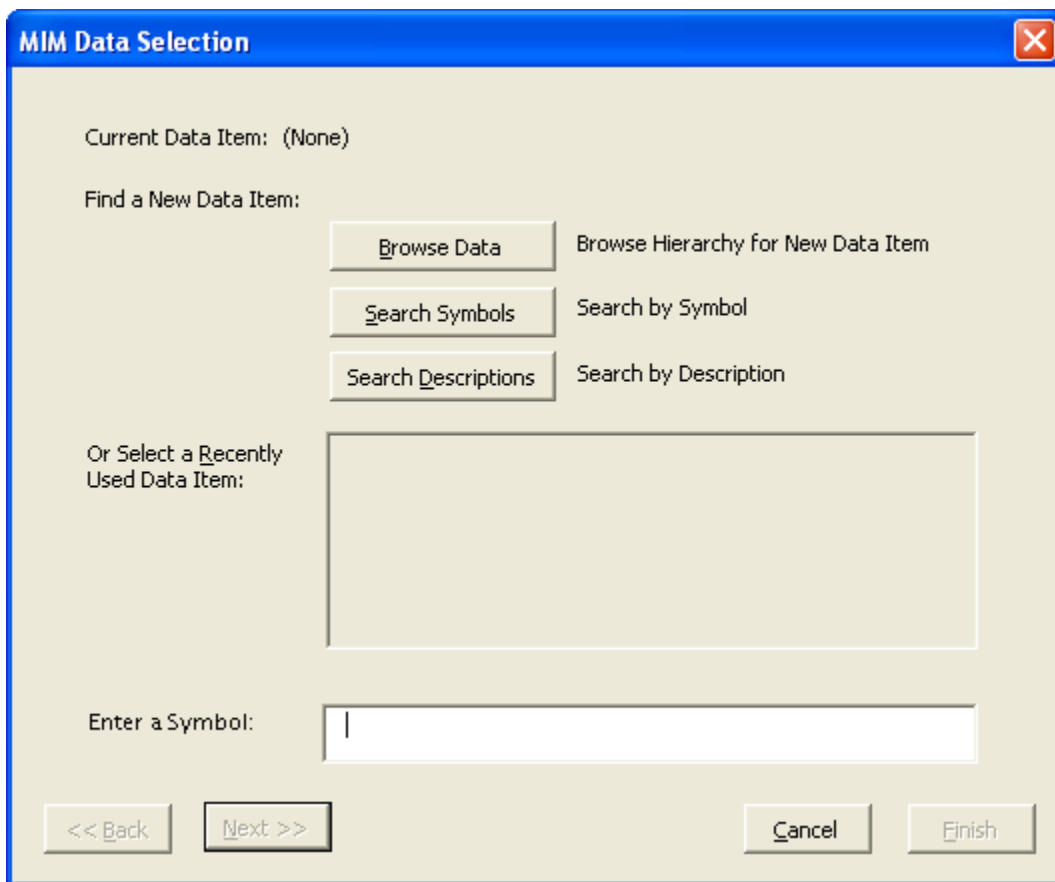


For more information about rollovers, see the [Rollovers](#) document on the LIM "[Documentation](#)" Web page.

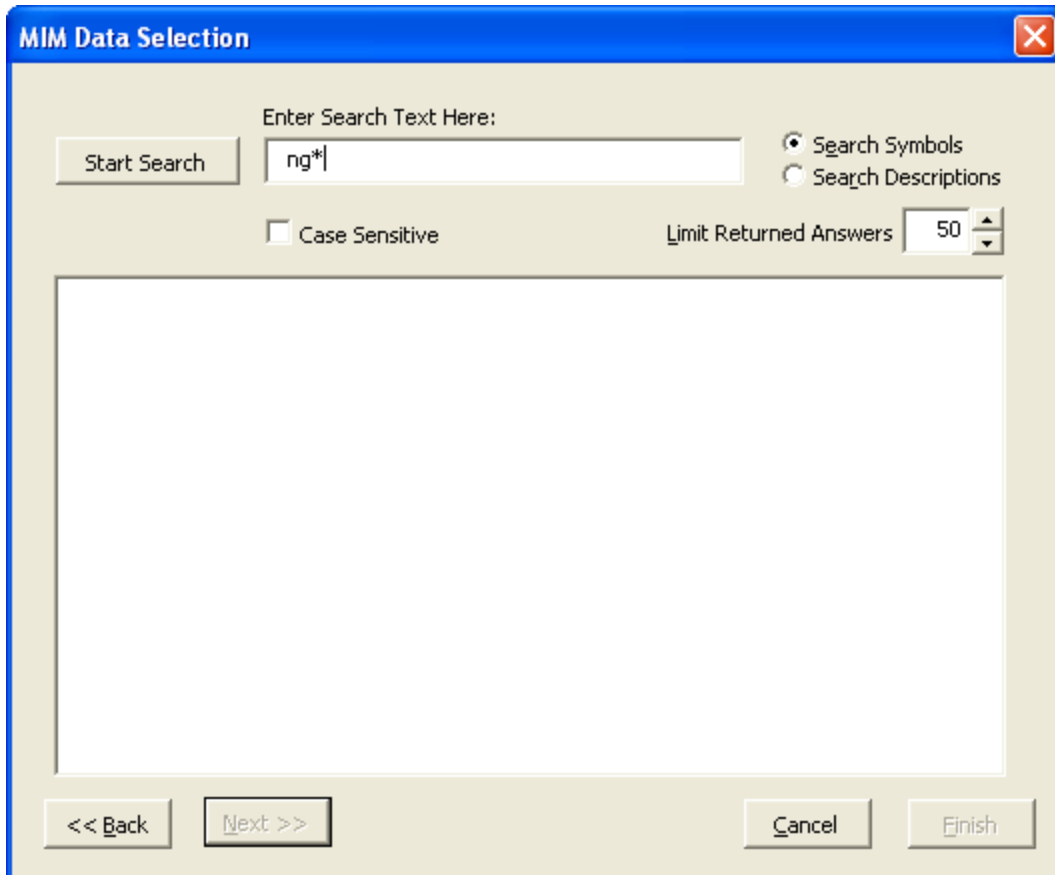
In order to see the data, you must select **Refresh Data** from the **MIM** menu. The MIM Excel Add-in runs the request and places the data in the selected column.

Search Symbols

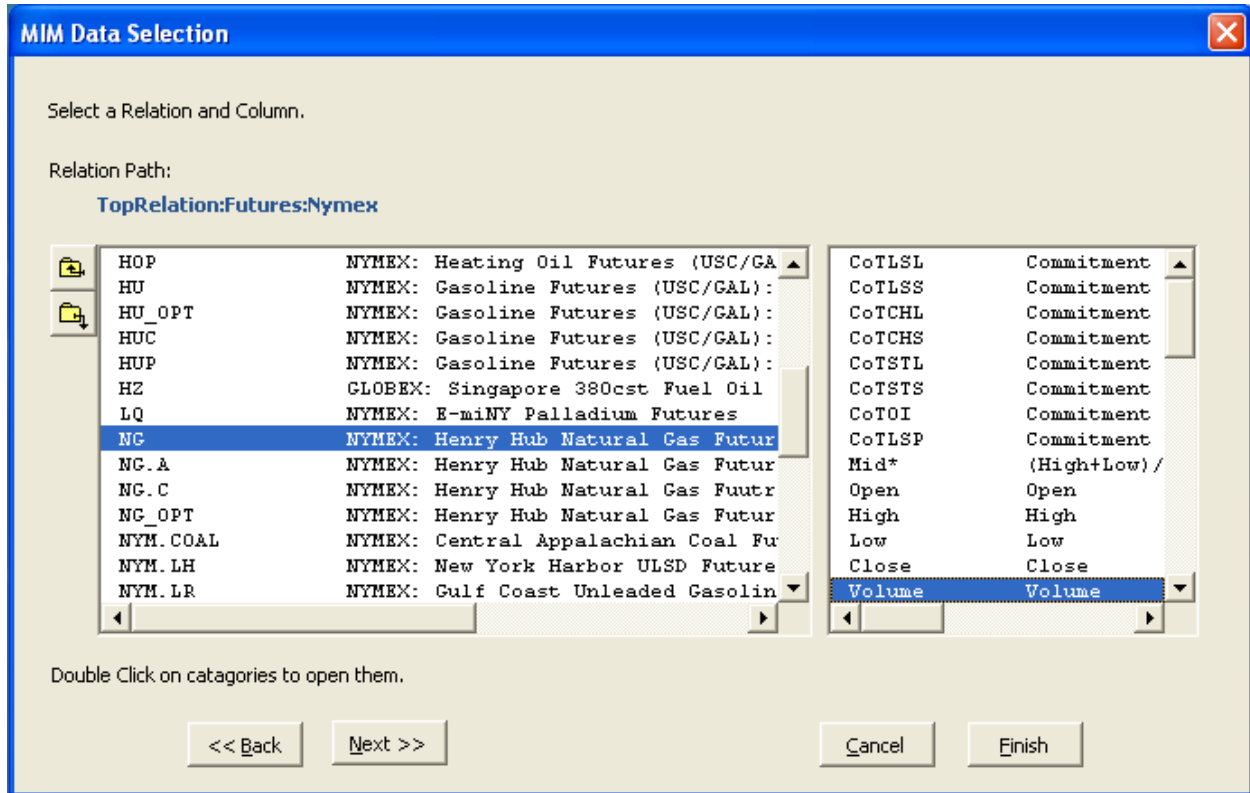
Select **Search Symbols** from the **MIM Data Selection** dialog.



Enter the search term and select whether to **Search Symbols** or **Search Descriptions**. Use an asterisk (*) as a wildcard character. If you want case sensitivity for your search term, check the **Case Sensitive** box. Set the number of returned answers (50 is the default). Then, select **Start Search**.



Select a relation and column from the search results.



After selecting a category and column, you can select the desired date and time range.

MIM Data Selection

Select the date and time range for which to extract data.

Get data from the start of the available data

the last year(s)

a specific date and time (if req'd)

Get data to the end of the available data

a specific date and time (if req'd)

Additional data retrieval options:

Use data resolution of day(s)

Fill missing data points with

Use Current Tick Data if the XMIM server is connected to a data feed.

Include Summary Statistics

Decimal Places

<< Back Next >> Cancel Finish

The following outlines the date, time and data retrieval options:

Option	Function
Get Data From	
the start of the available data	The start date will be the first available data point date.
the last N Time Period	Start date will be determined by your selection (e.g. 3 months, 10 years, 7 quarters). Use the drop-down list to change the time period value.
a specific date and time	Start date can be entered in mm/dd/yyyy format. If a specific time is required, check the box and enter the time.
Get Data To	
the end of the available data	The end date will be the last data point in the database.
a specific date and time	End date can be entered in mm/dd/yyyy format. If a specific time is required, check the box and enter the time.
Additional data retrieval options	
Use data resolution of	Sets data resolution. Default is 1 day (i.e. Daily). The time period can be changed from the pull-down menu.
Fill missing data points with	Sets what to fill in when there is no data point available for a given date. The default is NaN. Other options on the drop-down menu include: Fill Forward, Fill Backward, Linear Interpolated Values, Geometric Interpolated Values or Logarithmic Interpolated Values.
Use Current Tick Data if the XMIM server is connected to a data feed	Uses current tick data from the XMIM server. (Consult your LIM System Administrator since this is not a common configuration.)
Include Summary Statistics	Creates MIM generated summary statistics to accompany the data request. The statistics included are: Sum, Average, Average Positive, Average Negative, Percent Positive, Percent Negative, Highest, Lowest, Standard Deviation, Z stat, and Variance.
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

Select the destination in the Excel Workbook. Click in the cell in the Excel Workbook where you want the data to start. The entry will display in the Excel dialog. Unless merging data, it is a good idea to separate the data columns in the Excel workbook with a blank column.

MIM Data Selection

Select the destination in the Excel Workbook.

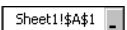
Returned data starts at cell: Sheet1!\$D\$1

Additional Data Placement and Formatting Options:

- Merge Data and Time columns into a single column for adjacent data requests
- Add column headers
 - using Symbol and Column
 - using Symbol Description
- Clear the cells in the column of the range
- Clear the cells adjacent to the range
- Clear the cells in the column below the range
- Add new columns before the range

<< Back Next >> Cancel Finish

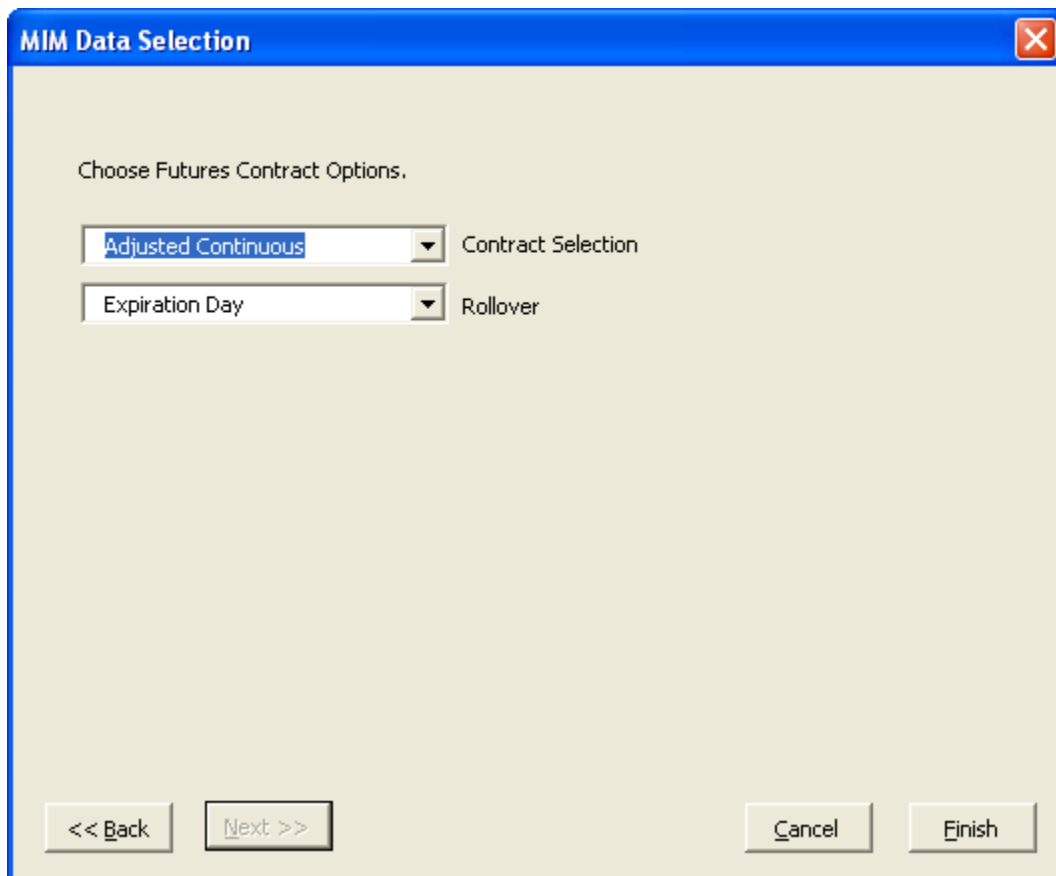
Returned data starts at cell

This is where the first date will be placed. The first data point will be in the cell immediately to the left. You can type the location directly (e.g., Sheet1!\$D\$1), select the cell in the Excel spreadsheet or select the  button.

The following defines the additional options:

Option	Function
Merge Data and Time columns into a single column for adjacent data requests	By default, all adjacent requests with the same time parameters are merged to have a single data column. If this box is unchecked, the requests will overwrite the data into the sheet.
Add column headers using Symbol and Column or using Symbol Description	Displays the column headers using either a Symbol and Column (e.g., MSFT (Close)) or using a Symbol Description (e.g., Microsoft Corp (CUSIP 59491810)).
Clear the cells in the column of the range	Clears any other data contained in the destination column every time the request is made.
Clear the cells adjacent to the range	Clears data that is not separated by empty cells around the range. This is used to put data into areas on a spreadsheet.
Clear the cells in the column below the range	Clears the data in the cells below the range.
Add new columns before the range	Adds new columns for every request. To use this feature, all of the data requests should have the same cell target. This is useful to create a portfolio of values and avoid editing several requests to remove a single request.

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The following defines the options:

Option	Function
Contract Selection	
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Roll X Days Before Expiration	Users can set the rollover to occur from 1 to 10 days before the expiration day.
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

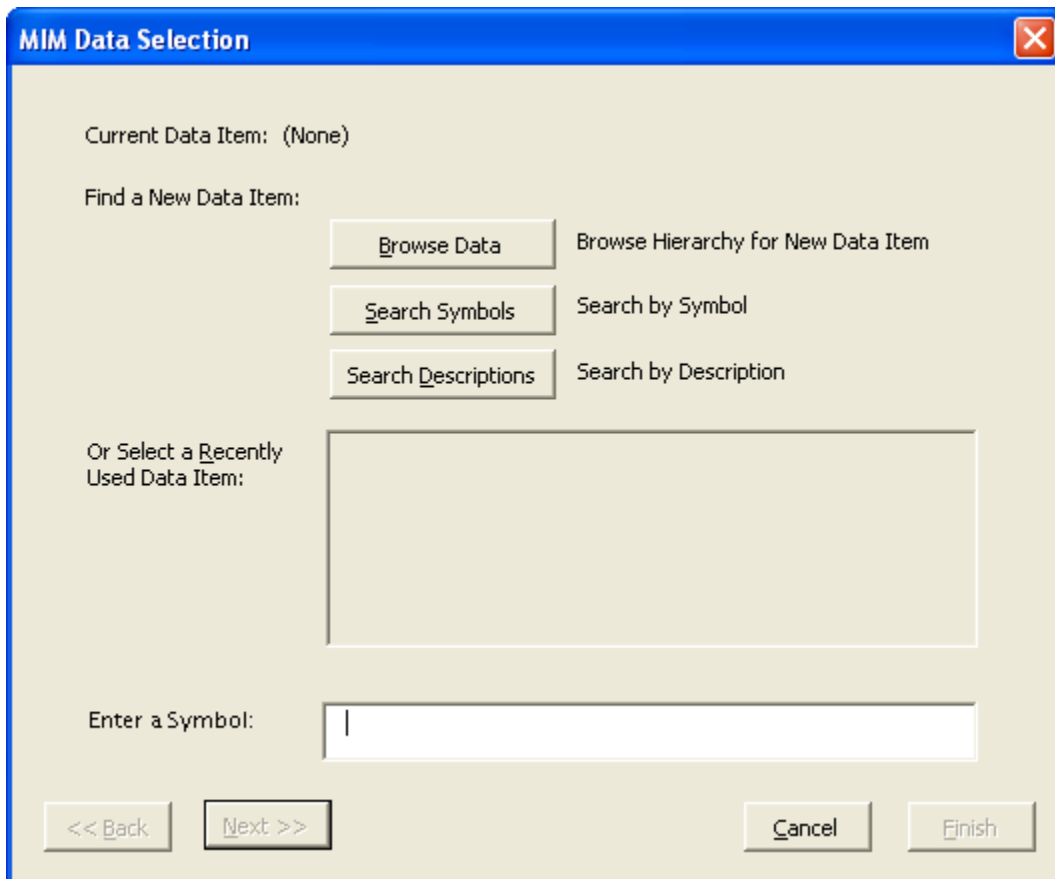


For more information about rollovers, see the [Rollovers](#) document on the LIM "[Documentation](#)" Web page.

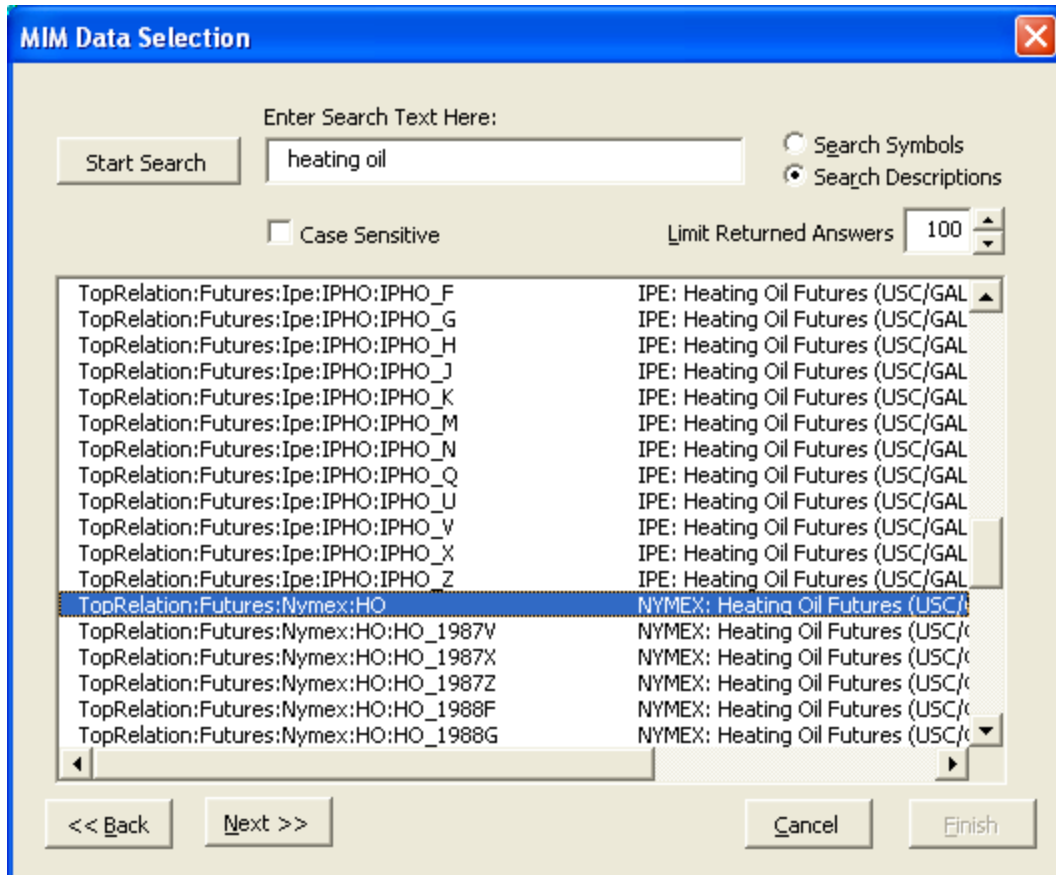
In order to see the data, you must select **Refresh Data** from the **MIM** menu. The MIM Excel Add-in runs the request and places the data in the selected column.

Search Descriptions

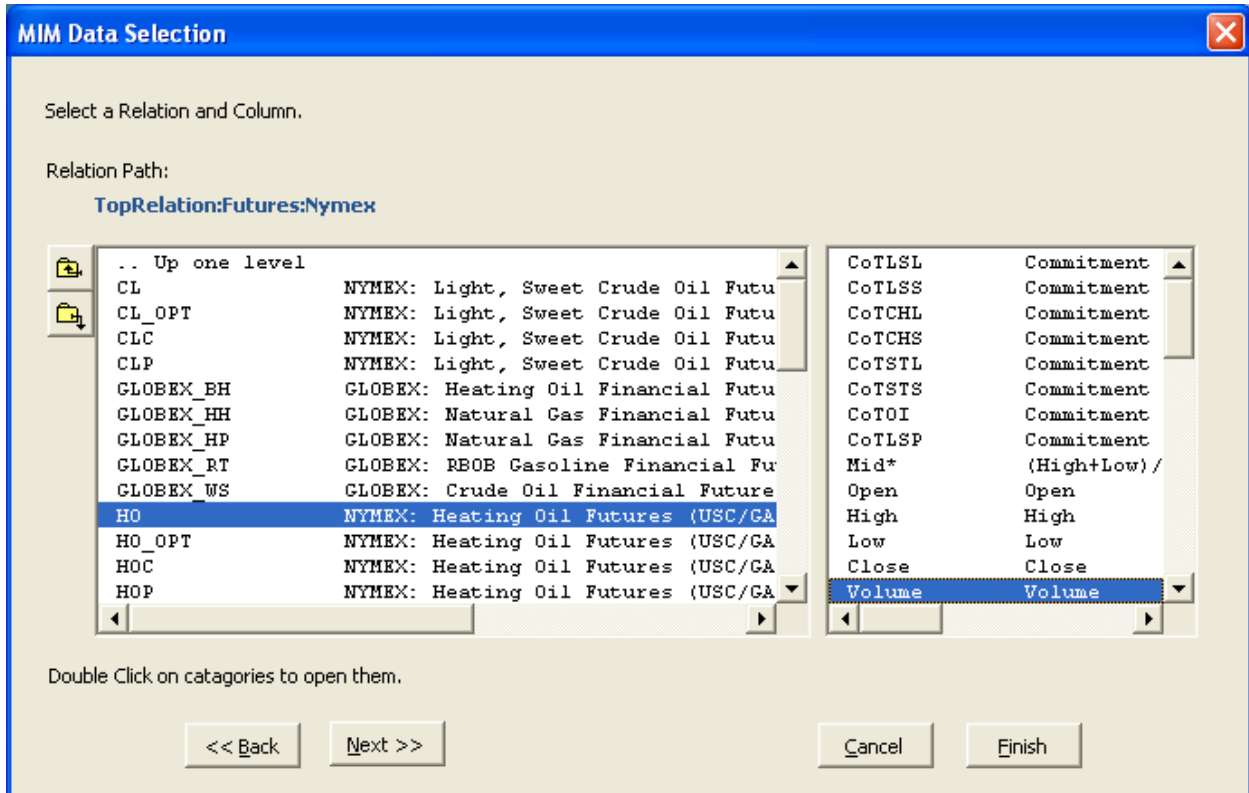
Another method to find a new data item is searching by description. Select **Search Descriptions** from the MIM Data Selection dialog.



Enter the search term and select whether to **Search Symbols** or **Search Descriptions**. Use an asterisk (*) as a wildcard character. If you want case sensitivity for your search term, check the **Case Sensitive** box. Set the number of returned answers (50 is the default). Then, select **Start Search**.



Select a relation and column from the search results.



After selecting a category and column, you can select the desired date and time range.

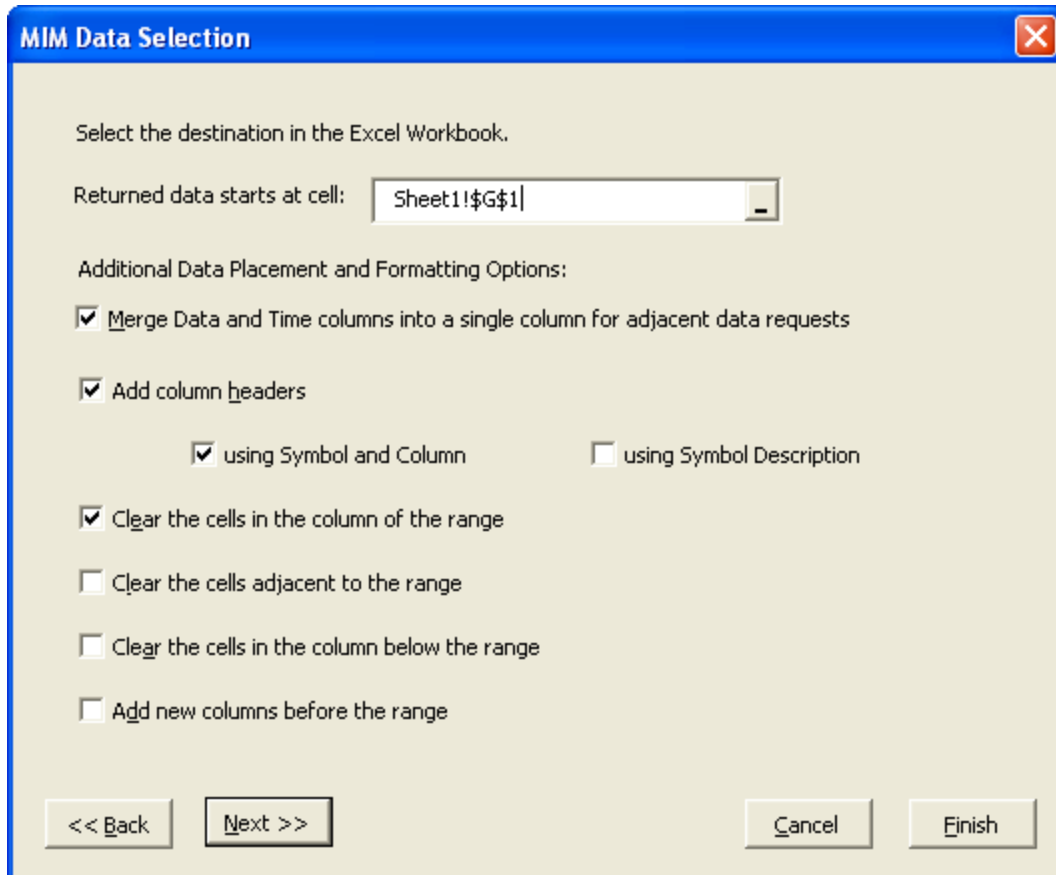
The screenshot shows a dialog box titled "MIM Data Selection" with a close button in the top right corner. The dialog contains the following elements:

- Instruction: "Select the date and time range for which to extract data."
- "Get data from" section with three radio button options:
 - the start of the available data
 - the last [1] year(s) [dropdown]
 - a specific date [01-01-1998] and time (if req'd) [7:20am]
- "Get data to" section with two radio button options:
 - the end of the available data
 - a specific date [12-31-1998] and time (if req'd) [7:20am]
- "Additional data retrieval options:" section:
 - Use data resolution of [1] day(s) [dropdown]
 - Fill missing data points with [a NaN] [dropdown]
 - Use Current Tick Data if the XMIM server is connected to a data feed.
 - Include Summary Statistics
 - Decimal Places [5] [dropdown]
- Navigation buttons at the bottom: "<< Back", "Next >>", "Cancel", and "Finish".

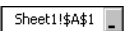
The following outlines the date, time and data retrieval options:

Option	Function
Get Data From	
the start of the available data	The start date will be the first available data point date.
the last N Time Period	Start date will be determined by your selection (e.g., 3 months, 10 years, 7 quarters). Use the drop-down list to change the time period value.
a specific date and time	Start date can be entered in mm/dd/yyyy format. If a specific time is required, check the box and enter the time.
Get Data To	
the end of the available data	The end date will be the last data point in the database.
a specific date and time	End date can be entered in mm/dd/yyyy format. If a specific time is required, check the box and enter the time.
Additional data retrieval options	
Use data resolution of	Sets data resolution. Default is 1 day (i.e., Daily). The time period can be changed from the pull-down menu.
Fill missing data points with	Sets what to fill in when there is no data point available for a given date. The default is NaN. Other options on the drop-down menu include: Fill Forward, Fill Backward, Linear Interpolated Values, Geometric Interpolated Values or Logarithmic Interpolated Values.
Use Current Tick Data if the XMIM server is connected to a data feed	Uses current tick data from the XMIM server. (Consult your LIM System Administrator since this is not a common configuration.)
Include Summary Statistics	Creates MIM generated summary statistics to accompany the data request. The statistics included are: Sum, Average, Average Positive, Average Negative, Percent Positive, Percent Negative, Highest, Lowest, Standard Deviation, Z stat, and Variance.
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

Select the destination in the Excel Workbook. Click in the cell in the Excel Workbook where you want the data to start. The entry will display in the Excel dialog. Unless merging data, it is a good idea to separate the data columns in the Excel workbook with a blank column.



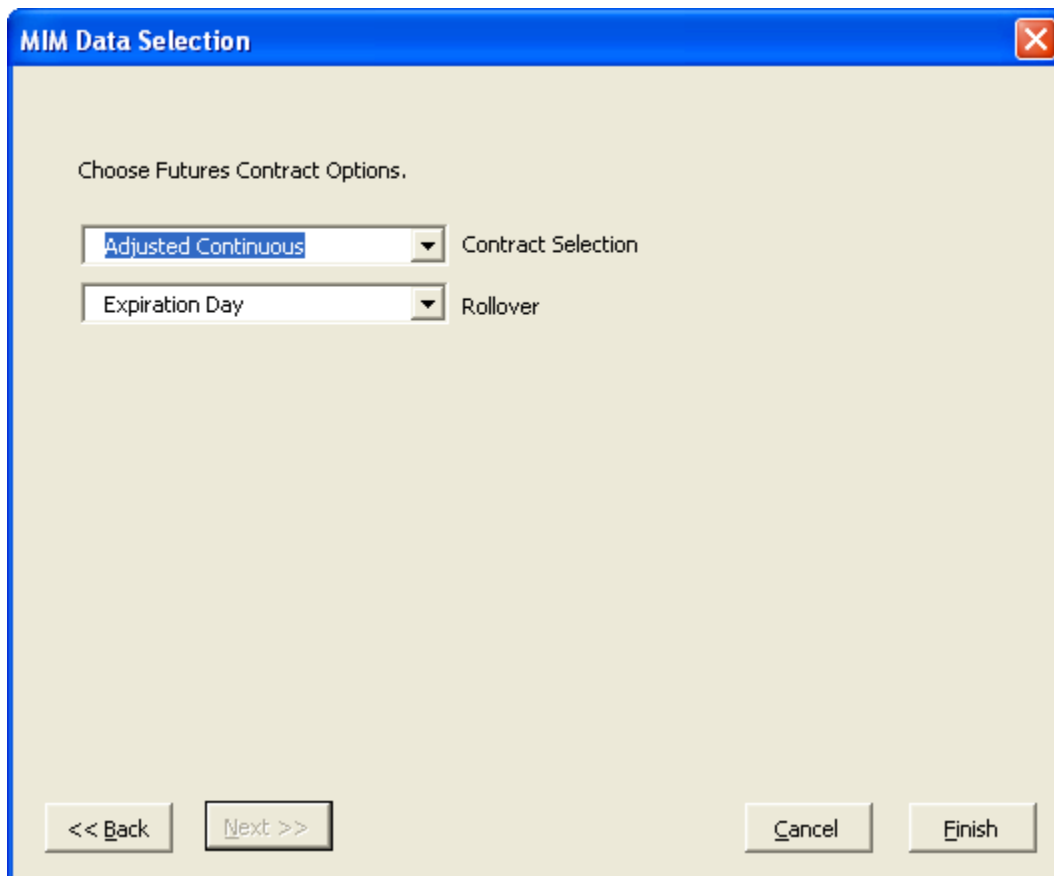
Returned data starts at cell

This is where the first date will be placed. The first data point will be in the cell immediately to the left. You can type the location directly (e.g., Sheet1!\$G\$1), select the cell in the Excel spreadsheet or select the  button.

The following defines the additional options:

Option	Function
Merge Data and Time columns into a single column for adjacent data requests	By default, all adjacent requests with the same time parameters are merged to have a single data column. If this box is unchecked, the requests will overwrite the data into the sheet.
Add column headers using Symbol and Column or using Symbol Description	Displays the column headers using either a Symbol and Column (e.g., MSFT (Close)) or using a Symbol Description (e.g., Microsoft Corp (CUSIP 59491810)).
Clear the cells in the column of the range	Clears any other data contained in the destination column every time the request is made.
Clear the cells adjacent to the range	Clears data that is not separated by empty cells around the range. This is used to put data into areas on a spreadsheet.
Clear the cells in the column below the range	Clears the data in the cells below the range.
Add new columns before the range	Adds new columns for every request. To use this feature, all of the data requests should have the same cell target. This is useful to create a portfolio of values and avoid editing several requests to remove a single request.

The final step in the data selection process is to choose the futures contract options.



The following defines the options:

Option	Function
Contract Selection	
Adjusted Continuous	The resultant series is represented by continuous prices that are not subject to expiration dates like the individual delivery month contracts.
Prompt (front, back, and far)	These represent quotes for one, two and three delivery periods out from the publication date. The MIM also calculates continuation series up to Prompt + 40, depending on the number of delivery months quoting for a particular commodity over time.
Rollover	
Expiration Day	Sets the rollover to occur on the contract expiration day.
Volume Crossover and Open Interest Crossover	Sets the rollover to occur when the volume or open interest is greater in the next contract. Many speculators believe the best time to roll is when open interest becomes greater in the next contract, because this usually means the following contract is the more liquid contract.
Backwards Adjusted Prices	The main difference between backward adjusted and forward adjusted is that the current contract is unadjusted. This means that the previous history will be adjusted by the difference between the new contract and the current contract. After the roll occurs the most current contract is the same as "actual prices", however the past prices will be adjusted (and can become negative).
Roll X Days Before Expiration	Users can set the rollover to occur from 1 to 10 days before the expiration day.
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

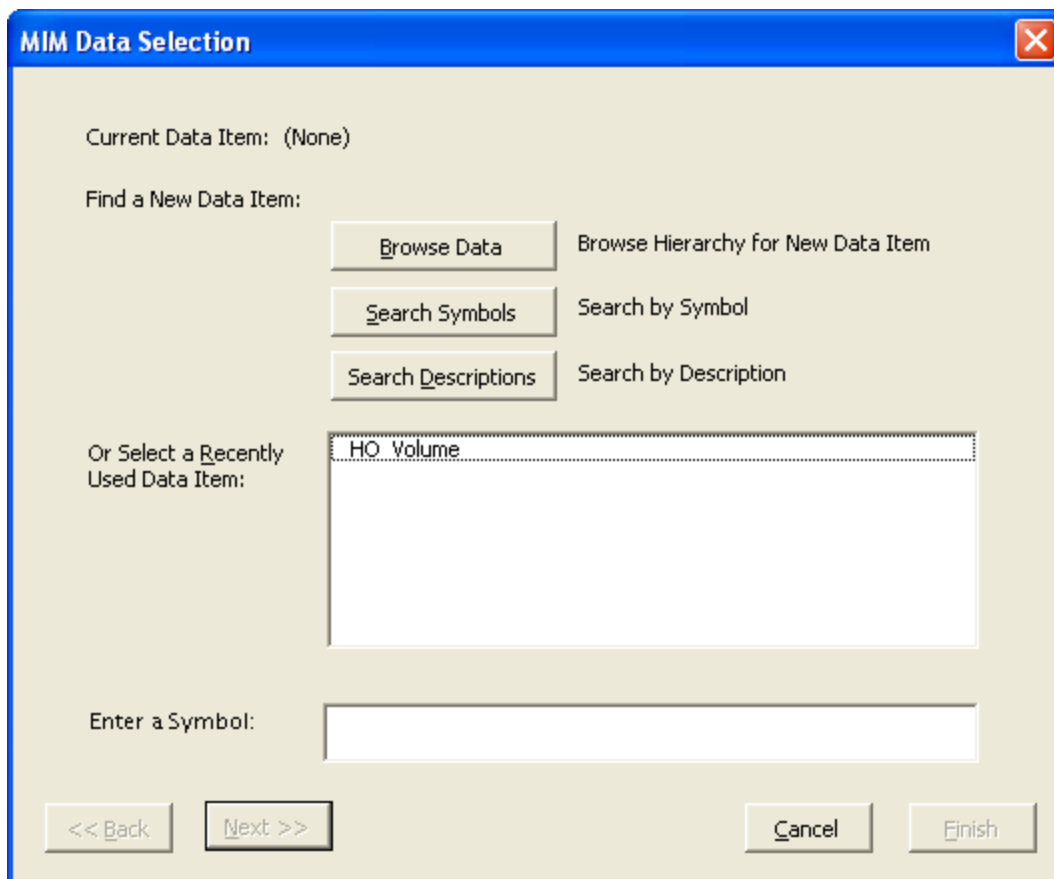


For more information about rollovers, see the [Rollovers](#) document on the LIM "[Documentation](#)" Web page.

In order to see the data, you must select **Refresh Data** from the **MIM** menu. The MIM Excel Add-in runs the request and places the data in the selected column.

Recently Used Data Item Example

You can reuse a data request by selecting an entry in the **Recently Used Data Item** field. Just select one of the entries, then select the **Next>>** button. Change the date entries and corresponding column information as needed.



The screenshot shows the "MIM Data Selection" dialog box. It has a blue title bar with a close button (X) in the top right corner. The main area is light beige and contains the following elements:

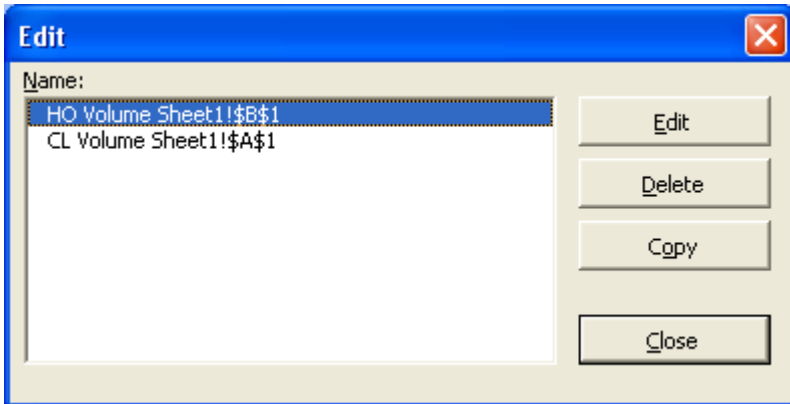
- Current Data Item:** (None)
- Find a New Data Item:** This section contains three buttons with their corresponding actions:
 - Browse Data**: Browse Hierarchy for New Data Item
 - Search Symbols**: Search by Symbol
 - Search Descriptions**: Search by Description
- Or Select a Recently Used Data Item:** This section contains a list box with one entry: "HO Volume".
- Enter a Symbol:** A text input field.
- Navigation Buttons:** At the bottom, there are four buttons: "<< Back", "Next >>", "Cancel", and "Finish".

Edit Data Requests

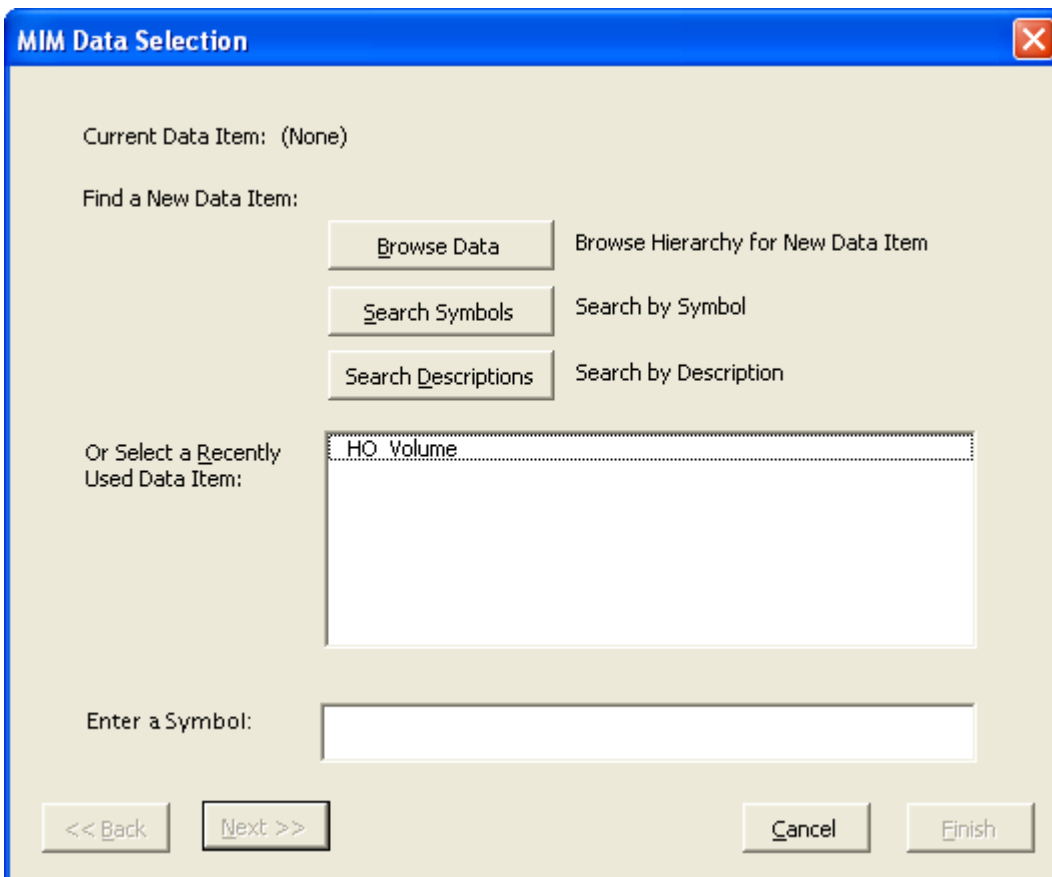
Users can modify data requests that have been previously setup with **MIM>Add Data**. There will be a list of items, assuming requests have been setup previously.

To edit a data request:

1. In Excel, select **MIM>Edit**.
2. From the Edit dialog, select the data request you want to edit. Then, select the **Edit** button. You may also retain the original data request and create a copy by selecting the **Copy** button. Then, select the copied data request and edit it instead.



3. From the Recently Used Data Item list, select the data request you want to edit. Then, select **Next >>**.



4. Edit the data request and select **MIM>Refresh Data** to update the Excel worksheet.

CHAPTER 4

MIM Queries/Run All Queries

These two functions allow users to create and edit queries as well as run all the queries at one time.

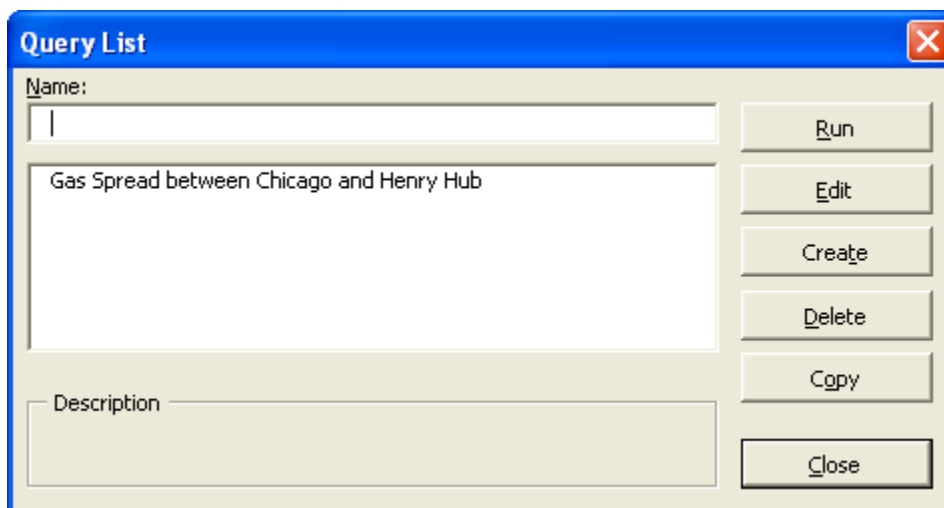
For additional information on using MIM Queries, see the "[MIM Queries/Run Queries](#)" chapter in the lesson-based *MIM Excel Add-in Training Guide*.

MIM Queries

The first step in creating an advanced MIM query is to select **MIM Queries** from the **MIM** menu.

Query List Dialog

The Query List Dialog is the location to create a new MIM query or edit an existing query.

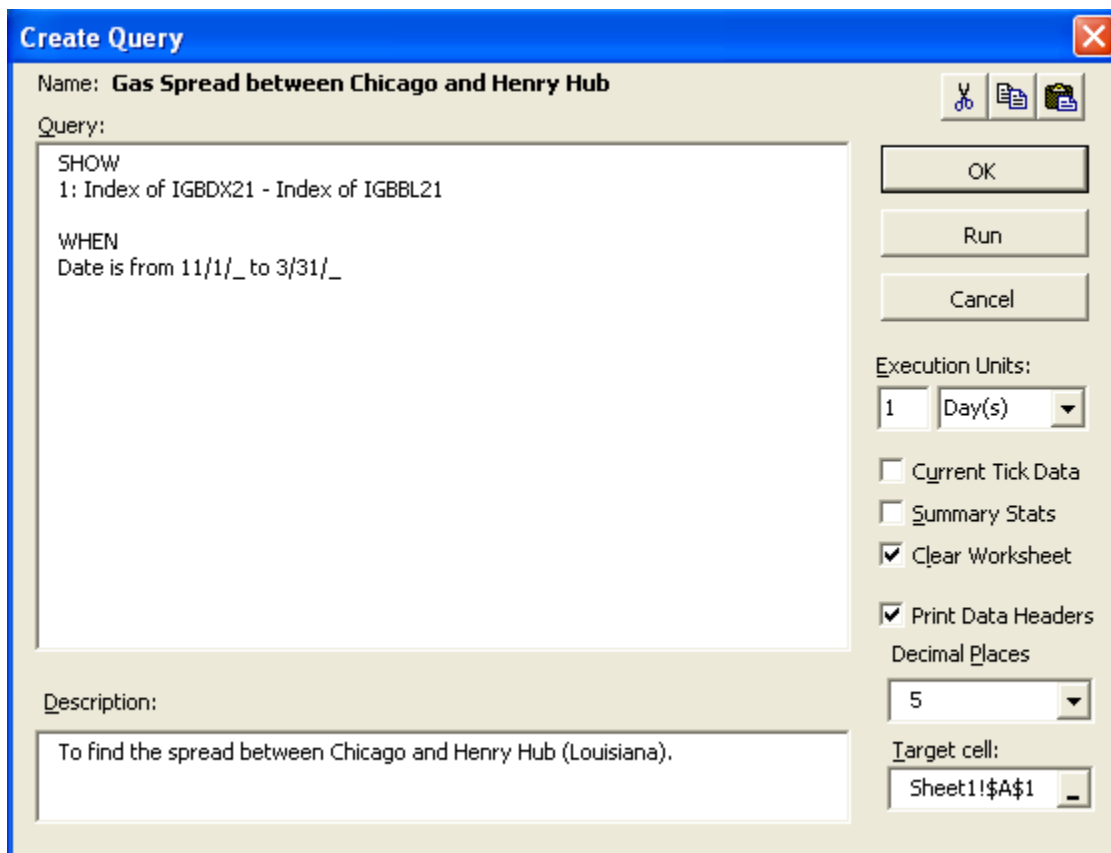


The following defines the options:





Option	Function
Name	Enter the name of the MIM query. The first character must be a letter.
Description	Displays the description of the query. Enter the description in the Create Query dialog.
Run	Run the MIM query and populate the Excel spreadsheet with the results.
Edit	Change the parameters of the MIM query.
Create	Create the MIM query. Launches the Create Query dialog.
Delete	Deletes the selected MIM query.
Copy	Copies the MIM query, which can then be edited and saved with a new name.
Close	Closes the dialog. No changes are saved.

Create Query Dialog

The Create Query Dialog allows you to enter a MIM query and set various options for display.



The following defines the options:

Option	Function/Description
Name	Displays the name of the MIM query. Edit this field in the Query List dialog.
Query	Enter the MIM query in this field.
	 <p>A query can be developed and tested using the XMIM, then copy/pasted into this query box.</p>
Description	Enter a description of the MIM query.
	 <p>Cut, copy and paste icons.</p>
OK	Saves the MIM query.
Run	Runs the query and populates the Excel spreadsheet with the results. The Create Query dialog continues to be displayed.
Cancel	Closes this dialog and returns to the Query List dialog. Any changes to the query are not saved.
Execution Units	Pick the time frame units for the data (seconds, minutes, days, years, etc.
Current Tick Data	If you have a real-time feed connected to the MIM server, check Current Tick Data . (Consult your LIM System Administrator as this is not common.)
Summary Stats	In order for the MIM to generate summary statistics to go along with the data request, check Summary Statistics . The statistics included are: Sum, Average, Average Positive, Average Negative, Percent Positive, Percent Negative, Highest, Lowest, Standard Deviation, Z stat, and Variance.
Clear Worksheet	Clears the worksheet of any data before displaying the new query data.
	 <p>If several queries have been created, they will execute in alphabetical order and only the first one should have this box checked. If the second, third, etc. queries had Clear Worksheet checked, then the first query's results will be erased.</p>
Print Data Headers	This option prints the assigned label names at the top of the columns in the spreadsheet.
Decimal Places	Set the decimal place precision. The default is 5.
Target Cell	Select the bar next to the destination cell: <input type="text" value="Sheet1!\$D\$1"/>
	The Create Query dialog closes and the Excel Worksheet opens. Select the desired cell to store the data then select the  button to return to the Create Query dialog.

Run All Queries

After creating queries, you can run them all at once by selecting the **Run All Queries** from the **MIM** menu. After running a query, you can go back and edit the query or make a new query by selecting **MIM Queries** from the **MIM** menu.

CHAPTER 5

Get Records Function

The **Get Records** function is a fast method for fetching and analyzing data. This function takes the data that is entered on the spreadsheet and populates the relation, column, date and time fields in the program.

Documentation

For additional information on the Get Records Function in the MIM Excel Add-in, see the "[Get Records Function](#)" chapter in the lesson-based *MIM Excel Add-in Training Guide*.

Entering Relation Data

Enter relation data on any row of the spreadsheet. On the next row enter the column data. The following row is reserved for the date fields in the first two columns and the time fields in the next two columns. The data in the spreadsheet must be aligned in a contiguous manner so that all the data will be selected.















After entering the data in the spreadsheet you will select the cell containing the first relation name entry and then you will select **Get Records** from the menu bar. All the data entered will automatically populate the corresponding fields in the display box.

Fetch Historical Data from XMIM Server

Source Ranges	Date Range
Relation Name cells: \$A\$1:\$C\$1	From: mm/dd/yyyy: \$A\$3
Column Name cells: \$A\$2:\$C\$2	To: mm/dd/yyyy: \$B\$3
Destination Range	Time Range
Target cell: \$A\$4:\$I\$4	From: hh:mm am/pm: \$C\$3
Num rows: -1	To: hh:mm am/pm: \$D\$3
Reshaping	Missing Data Handling
Number of Units: 1	Fill Option: NaN
Units: Hours	<input checked="" type="checkbox"/> Skip all-NaN records
Options	
Decimal Places: 5	

OK Cancel

The following defines the options:

Option	Function
Source Ranges	
Relation Name cells	Enter the relation name cells directly or click the  button to select the cells from the spreadsheet, then click the  button to use that range of cells.
Column Name cells	Enter the column name cells directly or click the  button to select the cells from the spreadsheet, then click the  button to use that range of cells.
Date Range	
From: mm/dd/yyyy	Enter the cell which represents the From date or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
To: mm/dd/yyyy	Enter the cell which represents the To date or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Destination Range	
Target cell	Enter the Target cell or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Num rows	Enter the number of rows to display. The default is -1 which represents display all rows.
Time Range	
From: hh:mm am/pm	Enter the cell which represents the From time or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
To: hh:mm am/pm	Enter the cell which represents the To time or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Reshaping	
Number of Units	Enter the number of units to use when reshaping.
Units	Enter the time units to use when reshaping.
Missing Data Handling	
Fill Option	Enter how to treat the case where there is no data point available for a given date. The default is NaN, but other options include Filled Forward, Backward, Linear, Geometric or Logarithmic.
Skip all-NaN records	Check this box to skip all NaN records.
Options	
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

CHAPTER 6

Show When Function

Create **Show When** queries quickly by pulling data entered on a spreadsheet. Enter the **Show** statements in a column on the spreadsheet. Enter the **When** statements in the next column.

For additional information on the Get Records Function in the MIM Excel Add-in, see the "[Show When Function](#)" chapter in the lesson-based *MIM Excel Add-in Training Guide*.







The program will automatically fill in the **Show-When Query Server** dialog box with your fields. The program will skip a row and put the answers at the beginning of the next row.

Execute Show-When Query Server

Source Ranges		Exec Units	
Attr cells	\$A\$1:\$A\$2	Num of Units	1
Cond cells	\$B\$1:\$B\$2	Units	Days
Destination Ranges		Options	
Target cell	\$A\$4:\$C\$4	Decimal Place	5
Num rows	-1		

OK Cancel

The following defines the options:

Option	Function
Source Ranges	
Attr cells	Enter the Attr cells directly or click the  button to select the cells from the spreadsheet, then click the  button to use that range of cells.
Column Name cells	Enter the Column Name cells directly or click the  button to select the cells from the spreadsheet, then click the  button to use that range of cells.
Exec Units	
Number of Units	Enter the number of units to use when executing.
Units	Enter the time units to use when executing.
Destination Ranges	
Target cell	Enter the Target cell range or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Num rows	Enter the number of rows to display. The default is -1 which represents display all rows.
Options	
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

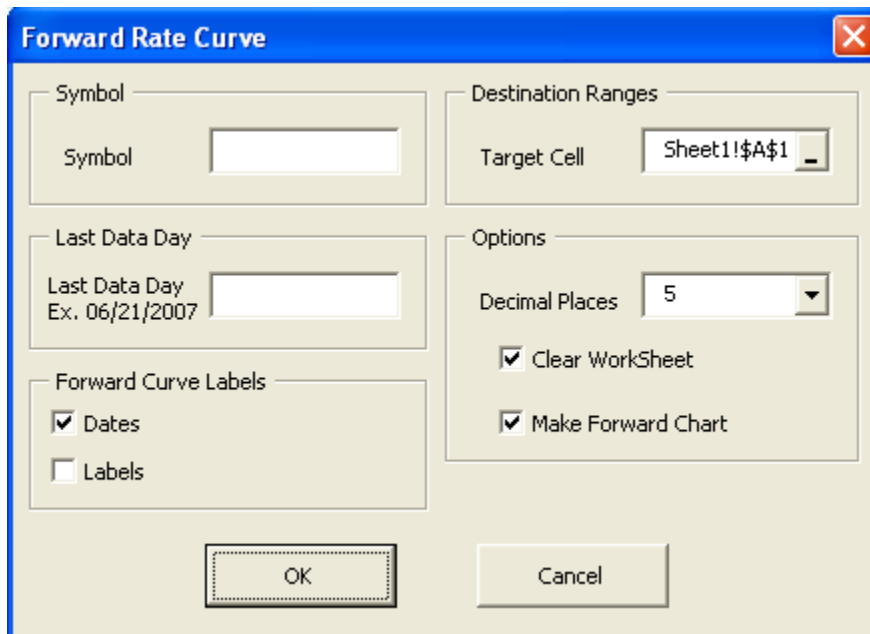
CHAPTER 7

Forward Curve



Use the **Forward Curve** function to create a study where multiple contracts can be charted over several years easily on a single chart. The following will show how to set the options for a forward curve.

For additional information on the Get Records Function in the MIM Excel Add-in, see the "[Forward Curve](#)" chapter in the lesson-based *MIM Excel Add-in Training Guide*.

From the **MIM** menu, select **Forward Curve**. The **Forward Rate Curve** dialog box displays.



The following defines the options:

Option	Function
Symbol	Enter the symbol to use in the forward rate curve study.
Target Cell	Enter the Target Cell range or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Last Data Day	Enter the last data day to display.
Forward Curve Labels	Check the appropriate box to display Dates or Labels on the forward curve.
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.
Clear Worksheet	When selected, any existing data on the Excel worksheet is cleared before performing the forward rate curve.
Make Forward Chart	When selected, a forward chart will be calculated.

CHAPTER 8

Load Data

Data can be loaded into the MIM via the MIM Excel Add-in. It is first necessary to install the data load servlets to setup the Web server. For instructions on setting up the Web server, please see the “[Data Loader: Server Setup Instructions](#)” chapter in the *MIM Data and Development Guide*.

Documentation

For additional information on the Get Records Function in the MIM Excel Add-in, see the “[Load Data](#)” chapter in the lesson-based *MIM Excel Add-in Training Guide*.

How to Use the Data Loader

The following gives detailed instructions on how to load data using the **Load Data** selection on the **MIM** menu.

Enter Data on the Spreadsheet

The first step in using the data loader feature is to enter the data on the Excel spreadsheet in the following format:

- First cell contains the relation name.



The relation name can either be a new name, or one that is currently in the database.

- The next cell, moving horizontally across the spreadsheet, contains the column name.



The column name must be a name that is already assigned in the MIM database. To see what column names can be used, see the column catalog located at: http://customers.lim.com/menu/column_catalog.htm

- The third cell should contain the date in any format that Excel will accept. If you add a time to this column, the data loader will assume the data is of an intra-day format (i.e., minutely).



Data at less than minute frequency (tick) is not supported. The time entry is optional and the format should be HH.MM.

The data will usually be loaded by default into TopRelation:User but custom locations may be configured for some systems. For more information see the “[Data Loader: Server Setup Instructions](#)” chapter in the *MIM Data and Development Guide*.

- The fourth cell contains the data. The data can be either an integer or a float, depending on the column assigned. The data will be converted to the correct format by the system if necessary.
- The fifth cell contains the description for the symbol. If more than one description is entered for a symbol only the first entry will be used, any other entries will be ignored.



Column F must be left blank otherwise you will get an error message. You may enter text in Column G and beyond, but in order for the data loader to work you must have a blank column after the description column (fifth column).

- In the last blank row type `END_OF_DATA` exactly as shown in the first column. This marker designates to stop loading data at this point.

	A	B	C	D	E	F	G
1	WID.LONESTAR_3	Close	08/02/2003 1:00	8.02	Lonestar Pipeline3 - Widgets Inc.		
2	WID.LONESTAR_3	Close	08/03/2003 2:00	8.03			
3	WID.LONESTAR_3	Close	08/04/2003 3:00	8.02			
4	WID.LONESTAR_3	Close	08/05/2003 4:00	8.02			
5	WID.LONESTAR_3	Close	08/06/2003 0:01	8.02			
6	WID.LONESTAR_3	Close	08/07/2003 14:00	8.02			
7	WID.LONESTAR_3	Close	08/08/2003 15:00	8.02			
8	END_OF_DATA						
9							
10							
11							
12							

The following scenarios may apply:

- The relation name is one that is already in the system.
- The relation name is a new name.
- The column name does not exist.
- The updates package is running and the data is waiting in the queue to load.

Each of these scenarios will be covered in further detail.

Load Data from the MIM Menu

The following shows the steps for running the data loader from the MIM menu.

1. After the data is entered in the spreadsheet, click off of the cell containing the last entry and then click back anywhere on the spreadsheet.
2. From the MIM menu, select **Load Data**. Each of the items below shows a possible scenario when loading data:
 - a. If the relation name is new, the dialog box will prompt the user to **Submit the Data as 5 Day Series**, **Submit the Data as 7 Day Series** or **Cancel**.
 - b. If the relation name is not new and no problems are found, the user is prompted to **Submit the Data** or **Cancel**.

After the data is submitted, the data will be put into the queue for loading. If an updates package is running, the data will remain in the queue until the package has finished loading. When the data has loaded successfully, a confirmation window will display.

CHAPTER 9

Get Options and the Options Facility

Introducing the Options Facility

The Options Facility refers to a portion of the MIM Data Warehouse that has been organized to allow specialized analysis of options data. There are several LIM applications developed for extracting data from the Options Facility. This section specifically outlines how to use the Get Options feature in the MIM Excel Add-in. For more information on extracting data using other tools, please see the [Options Facility](#) document.

Documentation

For additional information on the Get Options and the Options Facility in the MIM Excel Add-in, see the "[Get Options and the Options Facility](#)" chapter in the lesson-based *MIM Excel Add-in Training Guide*.

Spreadsheet Entries

The following outlines the process of setting up the spreadsheet entries.



An older version of the Options Facility allowed the user to enter as many relations as they wanted, but because of the new formatting functionality in the latest version, the user can only enter and view data for one relation at a time.

1. Enter the symbol names in the first row.
2. Next, enter the column data. If you wanted more than one column, then you would enter the next column data in cell **B:2**, then **C:3** etc.
3. On the next row, enter the dates, expiration dates, strike price ranges and the put/call options. Enter **P** or **p** for Put and **C** or **c** for Call. If left blank the default is to display both Puts and Calls. The following graphic details the entries:



In Excel, sometimes the cells pickup the formatting of a previous cell entry. The Strike Price entries may get reformatted as Date entries. To fix this, right-click on the Strike Price cells and select **Format Cells**, then change the formatting to **General**.

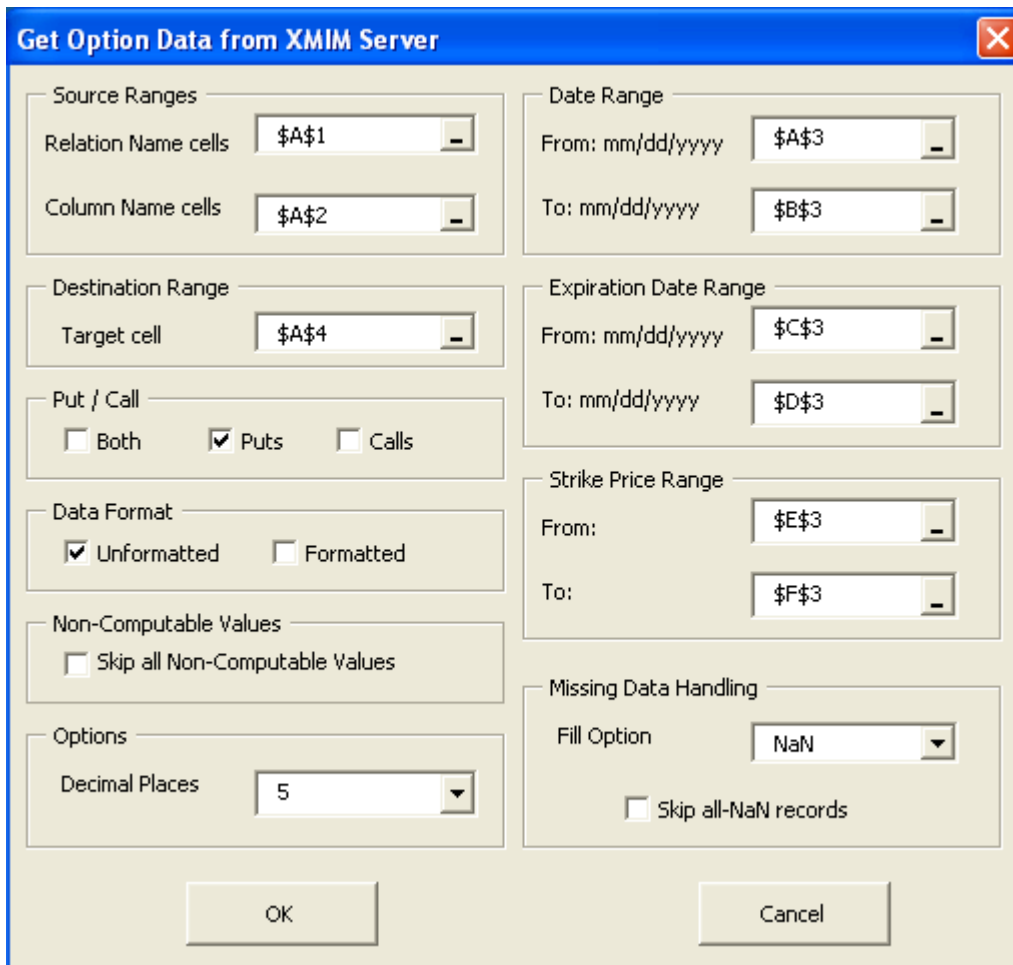
	A	B	C	D	E	F	G
1	IBM_Options						
2	OptionGamma						
3	05/07/2002	06/12/2002	05/02/2002	06/02/2002	50	70	P
4							

From Date To Date Expiration From Date Expiration To Date Strike Price From Strike Price To Put/Call or Both







4. Select cell A:1 then select **Get Options** from the **MIM** menu.










You must select the first relation cell entry to designate where the program will start pulling the data from the spreadsheet.

The following screen displays:



The following defines the options:

Option	Function
Source Ranges	
Relation Name cells	Enter the relation name cells directly or click the  button to select the cells from the spreadsheet, then click the  button to use that range of cells.
Column Name cells	Enter the column name cells directly or click the  button to select the cells from the spreadsheet, then click the  button to use that range of cells.
Date Range	
From: mm/dd/yyyy	Enter the cell which represents the From date or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
To: mm/dd/yyyy	

Option	Function
	Enter the cell which represents the To date or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Destination Range	
Target cell	Enter the Target cell or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Expiration Date Range	
From: mm/dd/yyyy	Enter the cell which represents the From date or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
To: mm/dd/yyyy	Enter the cell which represents the To date or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Put / Call	
Both, Puts, Calls	Check the appropriate selection to get option data for puts, calls or both.
Data Format	
Unformatted	Data format for option data is unformatted.
Formatted	Data format for option data is formatted.
Strike Price Range	
From:	Enter the cell which represents the From date or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
To:	Enter the cell which represents the To date or click the  button to select the cell from the spreadsheet, then click the  button to use that cell.
Non-Computable Values	
Skip all Non-Computable Values	Check this option to skip all non-computable values
Missing Data Handling	
Fill Option	Enter how to treat the case where there is no data point available for a given date. The default is NaN, but other options include Filled Forward, Backward, Linear, Geometric, Logarithmic or Nearest.
Skip all-NaN records	Check this box to skip all NaN records.
Options	
Decimal Places	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.

CHAPTER 10

Using MIMICExcel

Overview



MIMICExcel is an applet or application that you use from within Microsoft Excel®. When you open Excel and then run MIMICExcel, you have all the functionality of MIMIC from within the Excel environment. With MIMICExcel, you can seamlessly incorporate table data from your queries into your Excel spreadsheet.

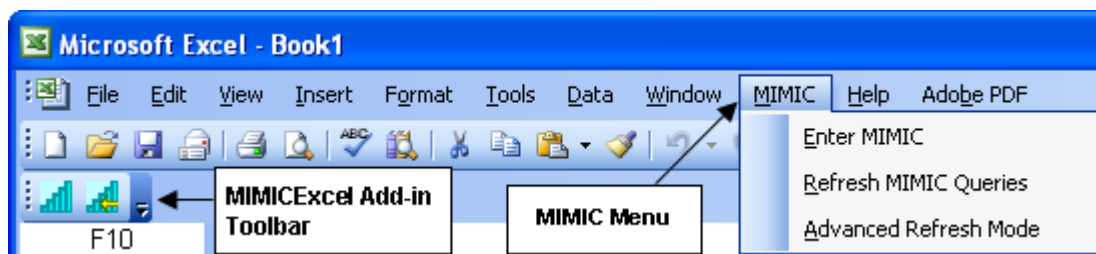
To obtain this functionality, make sure you have MIMIC version 3.0 or higher installed on your system. For details on installing the MIMIC application, see the “[MIMIC Installation and Purchase Options](#)” chapter in the *Client Application Installation Guide*.





You must have Java version 1.4 or higher. To obtain a free Java download, go to: <http://www.java.com>.

After installing MIMIC 3.0 or higher, start Microsoft Excel. You will notice the addition of the **MIMIC** menu in the Excel menu bar, and the addition of the MIMICExcel Add-in toolbar, which contains two buttons:

- The **Enter MIMIC**  button. (MIMIC>Enter MIMIC from the Excel menu bar.)
- The **Refresh MIMIC Queries**  button. (MIMIC>Refresh MIMIC Queries from the Excel menu bar.)



To open MIMICExcel, select the **Enter MIMIC**  button. The first time you enter MIMICExcel, an authentication message displays. Select **Yes** if you want the authentication window to come up each time you select the **Enter MIMIC**  button. Select **Always** to always authenticate MIMICExcel (recommended choice – you will not see this dialog again unless the MIMIC software is upgraded).

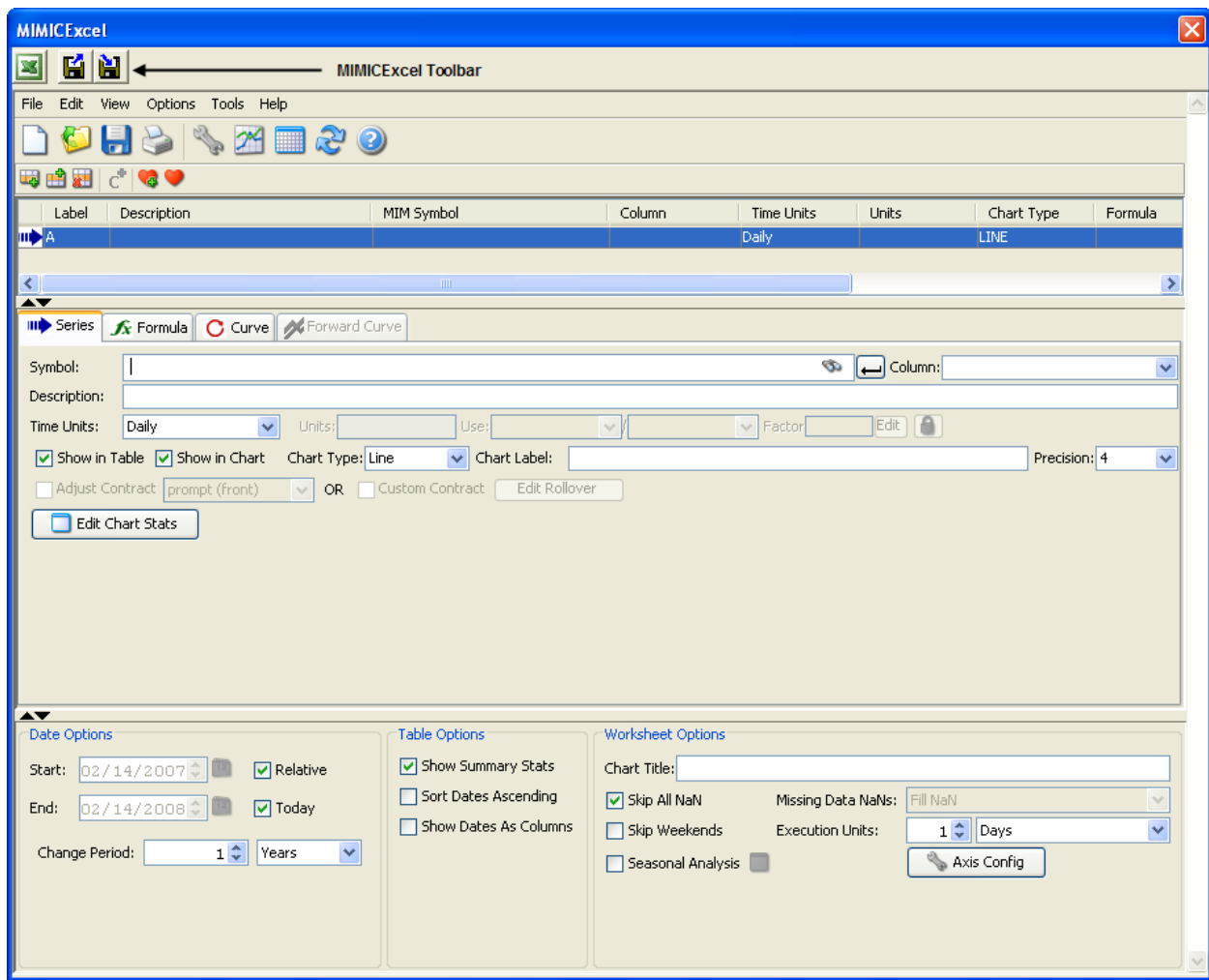


The MIMIC Java Certificate expired as of February 21, 2005. If you selected **Always** to trust the certificate, you will not see the expired certificate message and you will not be required to take any action. To upgrade your certificate, so that you do not receive an expired certificate message, please go to the LIM “[Downloads](#)” Web page.




Note the following information regarding expired certificates:

- If the certificate displays with an expired message, MIMICEExcel can still be started by selecting **Yes** or **Always**.
- Users who have selected **Always** to trust the certificate will not see the expired certificate message and will not be required to take any action.
- MIMIC stand-alone is not affected by the expired certificate.

Once authenticated, the **MIMICEExcel** window displays:



The MIMICEExcel toolbar includes the following buttons:

	Back to Excel	Returns to the Excel worksheet.
	Query Manager	Manages previously saved embedded queries.
	Embed Query	Saves or embeds an active query within MIMICExcel.

CHAPTER 11

XmimGetData

With XmimGetData you can pass the results of a MIM query into the cell of a worksheet. There are four input parameters for XmimGetData:

relation, column, start date, end date (optional)

The following is an example of how to enter the string:

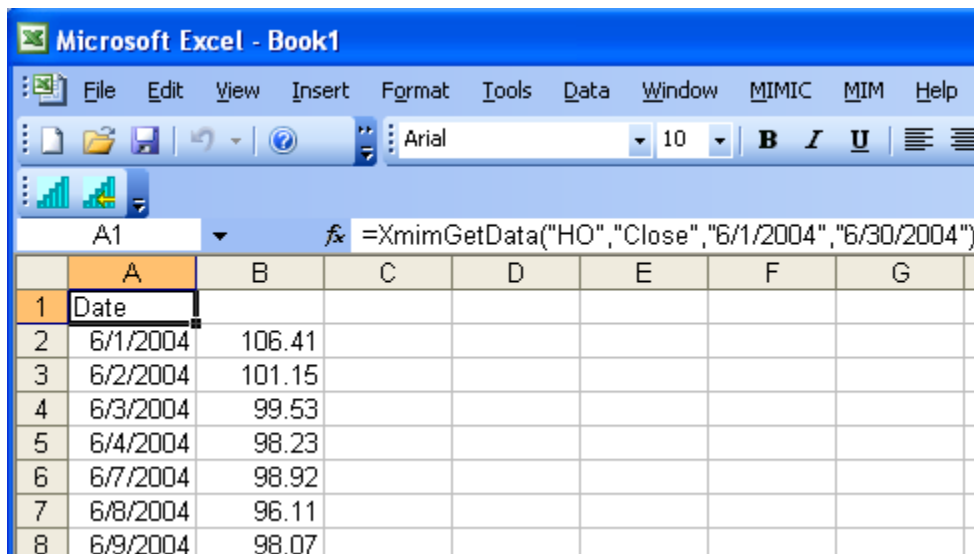
```
=XmimGetData("HO", "Close", "6/1/2004", "6/30/2004")
```

where:

- “HO” is the relation name
- “Close” is the column name
- “6/1/2004” is the start date
- “6/30/2004” is the end date

Select **MIM>Refresh Data** from the Excel menu bar to return a value back into the selected cell on the worksheet.

The following graphic shows the XmimGetData string entry and how the data result is returned back into the selected cell. The MIM query equivalent to this entry would be **Show Close of HO When date is 6/1/2004 to 6/30/2004**.



The user can also just pass the start date and no end date. The graphic below shows an example of only entering a starting date:

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G
1	1/2004")						
2	6/1/2004	106.41					
3	6/2/2004	101.15					
4	6/3/2004	99.53					
5	6/4/2004	98.23					
6	6/7/2004	98.92					
7	6/8/2004	96.11					
8	6/9/2004	98.07					

Each argument can be passed to XmimGetData directly or indirectly. In the example above the argument is passed directly as the symbol, column and date information is entered directly in the string field.

To pass an argument indirectly, a user can specify the relation, column, start and end dates on another location in the spreadsheet. In the example below, the user is indirectly referencing the argument strings in cells D1, E1, D2 and E2.

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G
1	Date			CL	Close		
2	3/1/2004	36.86		3/1/2004	3/15/2004		
3	3/2/2004	36.66					
4	3/3/2004	35.8					
5	3/4/2004	36.64					
6	3/5/2004	37.26					
7	3/8/2004	36.57					
8	3/9/2004	36.28					
9	3/10/2004	36.1					
10	3/11/2004	36.78					
11	3/12/2004	36.19					
12	3/15/2004	37.44					

An argument may be passed both directly and indirectly by entering some of the information in the string field and referencing some of the information from the worksheet cells. In the example below, the relation name **CL** and the column name **Close** is entered in the string field. The start date **3/1/2004** is referenced in cell **D2** and the end date **3/15/2004** is referenced in cell **E2**.

The screenshot shows the Microsoft Excel interface with the following data table:

	A	B	C	D	E	F	G
1	Date			CL	Close		
2	3/1/2004	36.86		3/1/2004	3/15/2004		
3	3/2/2004	36.66					
4	3/3/2004	35.8					
5	3/4/2004	36.64					
6	3/5/2004	37.26					
7	3/8/2004	36.57					
8	3/9/2004	36.28					
9	3/10/2004	36.1					
10	3/11/2004	36.78					
11	3/12/2004	36.19					
12	3/15/2004	37.44					

CHAPTER 12

Option & Help Settings

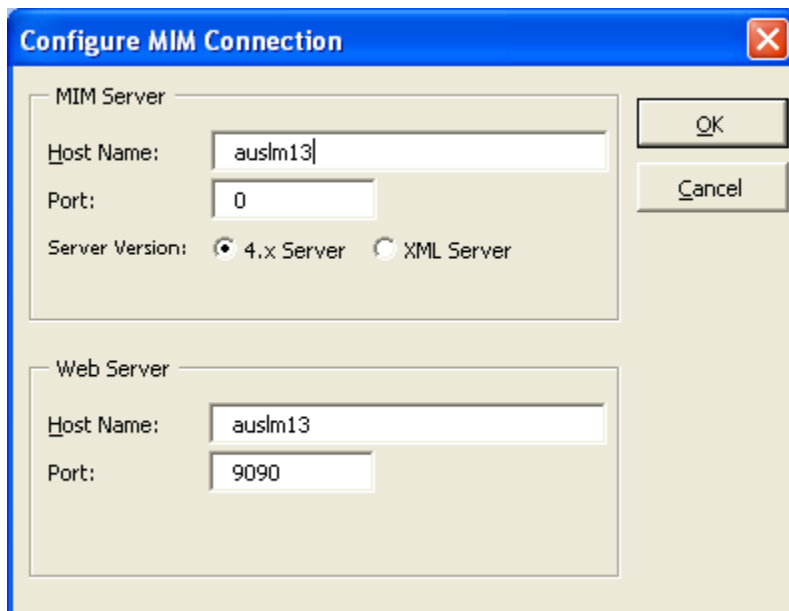
MIM>Options

In the **MIM** menu, there are two choices next to the **Options** heading: **Config MIM Connection** and **Preferences**.

Options>Configure MIM Connection

The **MIM Server** pane shows the MIM server and port that you are pointing to. These parameters are filled in during the installation process. You can change these setting to point to a different host or port number. For **Host Name**, specify the machine by host or IP address. A **Port** number is required.

The **Web Server** pane allows you to change the Web host and port for loading data.



The screenshot shows a dialog box titled "Configure MIM Connection". It is divided into two sections: "MIM Server" and "Web Server".

MIM Server section:

- Host Name: auslm13
- Port: 0
- Server Version: 4.x Server XML Server

Web Server section:

- Host Name: auslm13
- Port: 9090

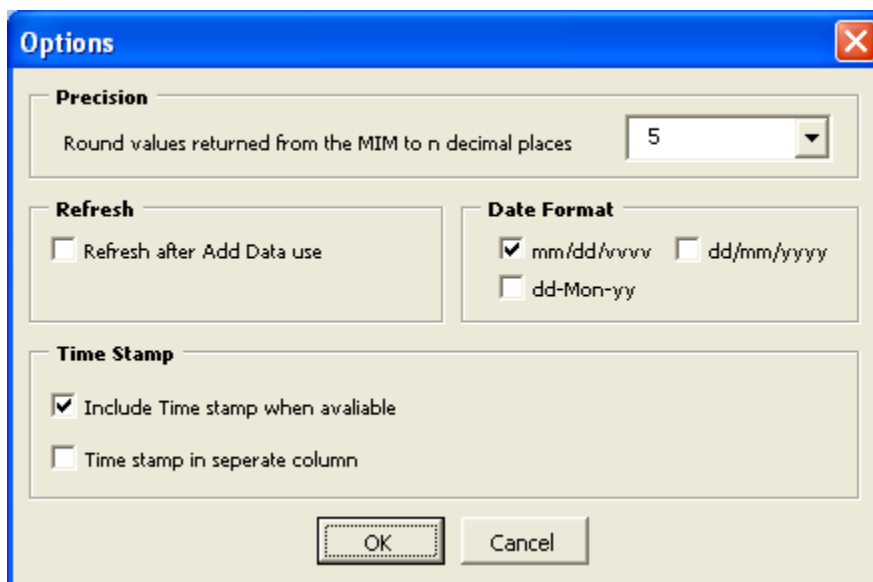
Buttons: OK, Cancel

The following describes each field:

Option	Function
MIM Server	
Host Name	Specify the MIM Server by host or IP address.
Port	Port number for the MIM server. This is a required field.
Server Version	Select the server version, either 4.x or XML.
Web Server	
Host Name	Specify the Web Server by host or IP address.
Port	Port number for the Web Server. This is a required field.

Options>Preferences

In the **Preferences** dialog box the user can set the precision of the decimal place, control when the data is refreshed, choose a date format and choose whether to have a time stamp.



The following describes each field:

Option	Function
Precision	Sets the precision of decimal places to display. The default is 5. Possible values are 0-9.
Refresh after Add Data use	Refreshes the worksheet after the Add Data option is selected from the MIM menu. If this box is not checked, user must select MIM>Refresh Data to run the queries and populate data in the spreadsheet.
Date Format	Select the date format to be used.
Time Stamp	Time will display in the format hh:mm:ss am/pm. The time will display in the same column as the date unless the Time stamp in separate column box is checked.

MIM>Help

In the MIM menu, there are two choices next to the **Help** heading: **About MIM Excel AddIn** and **Goto MIM Excel Web site**

Help>About MIM Excel Add-In

This returns the MIM Add-in version number, date of release and support options.

Help>Goto MIM Excel Web site

The MIM Excel Web site will open in your browser. See the on-line tour and movie for more information on the features in the MIM Excel Add-in.

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