

Client Application Installation Guide

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CHAPTER 1

Installing Morningstar Commodity Data, Inc Applications

There are three client applications to install (excluding the APIs): Commodity Query, Commodity Charts and the Commodity Add-in (Microsoft Excel).

- Commodity Query is designed to model and evaluate trade opportunities. The software uses a near-English query language to build queries (questions) about historical data.
- Commodity Charts is a software package that provides a point-and-click interface to access data on the Commodity DataServer. Use Commodity Charts to create comprehensive price graphs and charts, including technical analysis overlays and seasonality studies. Build formulas and easily do units of measure and currency conversions.
- Commodity Add-In (Microsoft Excel) allows for easy data retrieval within an Excel spreadsheet.

Commodity Query and Commodity Charts are Java clients. The Commodity Add-in (Microsoft Excel) is a native Windows client. See for information on installing the Commodity Query client, see ??? for information on installing the Commodity Charts client.



The Jobs application is accessible as a menu selection from the Commodity Query (version 5.x or higher) application.



If you need to work remotely you can use the IMIM product. Please see the [IMIM Setup Instructions](#) for details on installing and setting up remote access via the [VPN](#) or [Citrix](#) software.

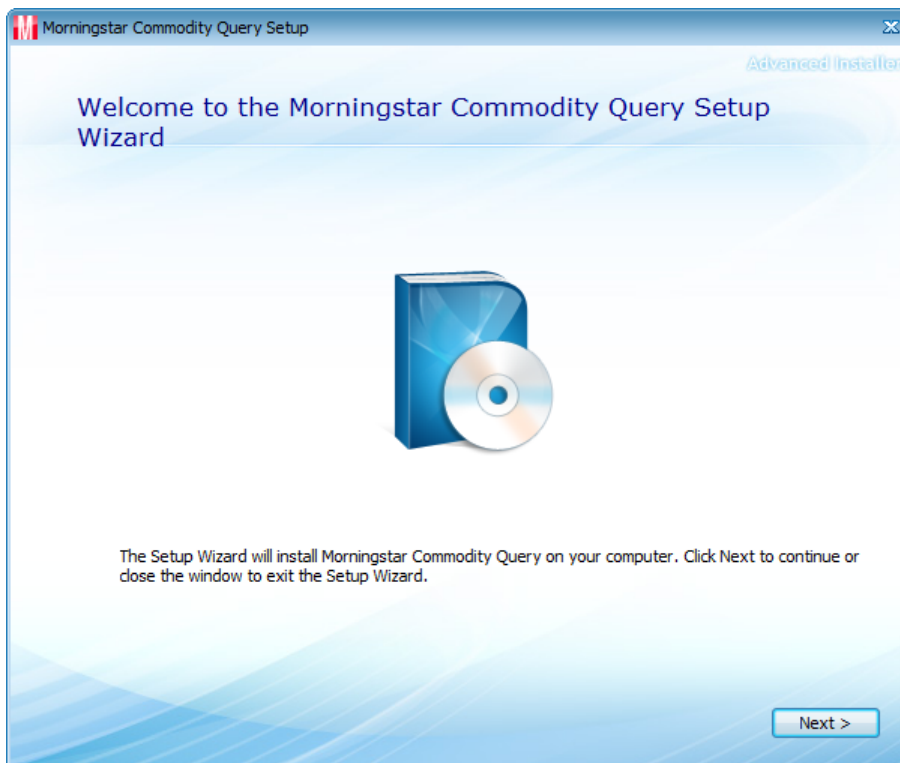
CHAPTER2

Commodity Query Installation

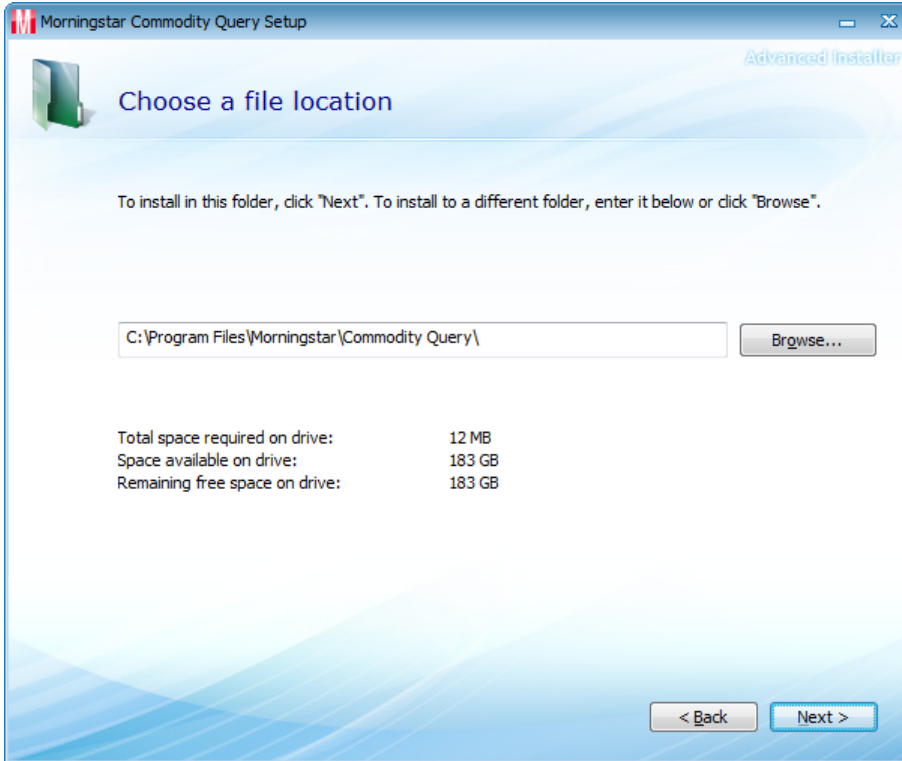
Commodity Query requires Java 1.4.2 or higher. Java may be downloaded and installed from www.java.com. A valid license key must be obtained from Morningstar Commodity Data, Inc in order to run the Commodity Query client. During installation a serial number will be provided. Send this serial number to commoditydata-support@morningstar.com and a license key will be emailed to authorized users.

Commodity Query Installation Instructions

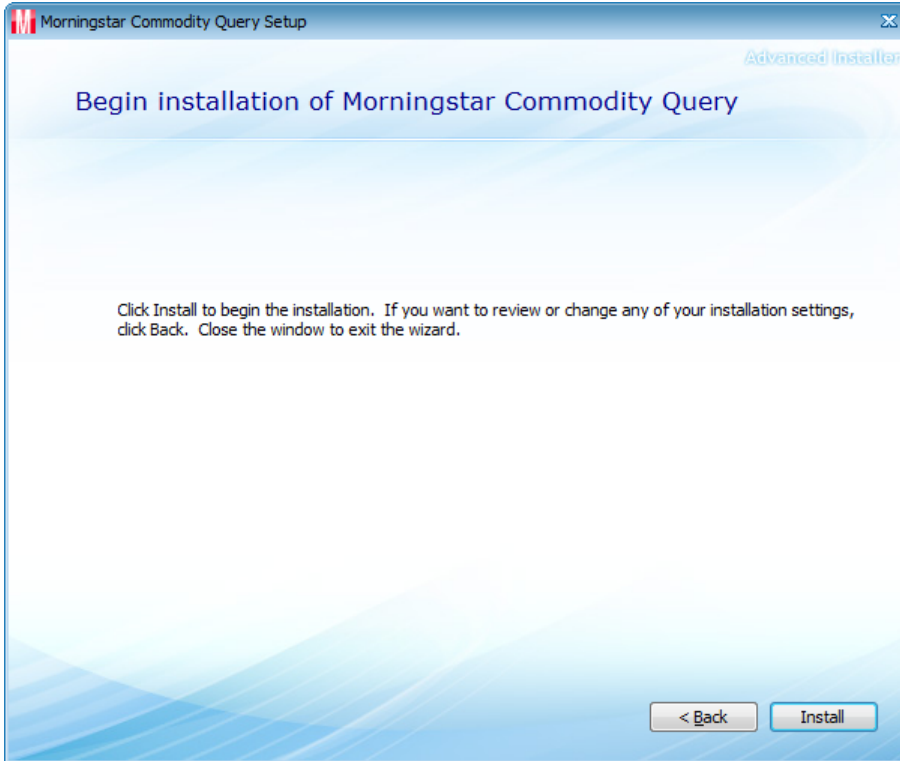
1. To download the Commodity Query application, go to the Morningstar Commodity Data, Inc [Commodity Query Downloads](#) Web page and download the latest executable for Commodity Query. Run the executable to start the installation process. You will see the display below. Select **Next**.



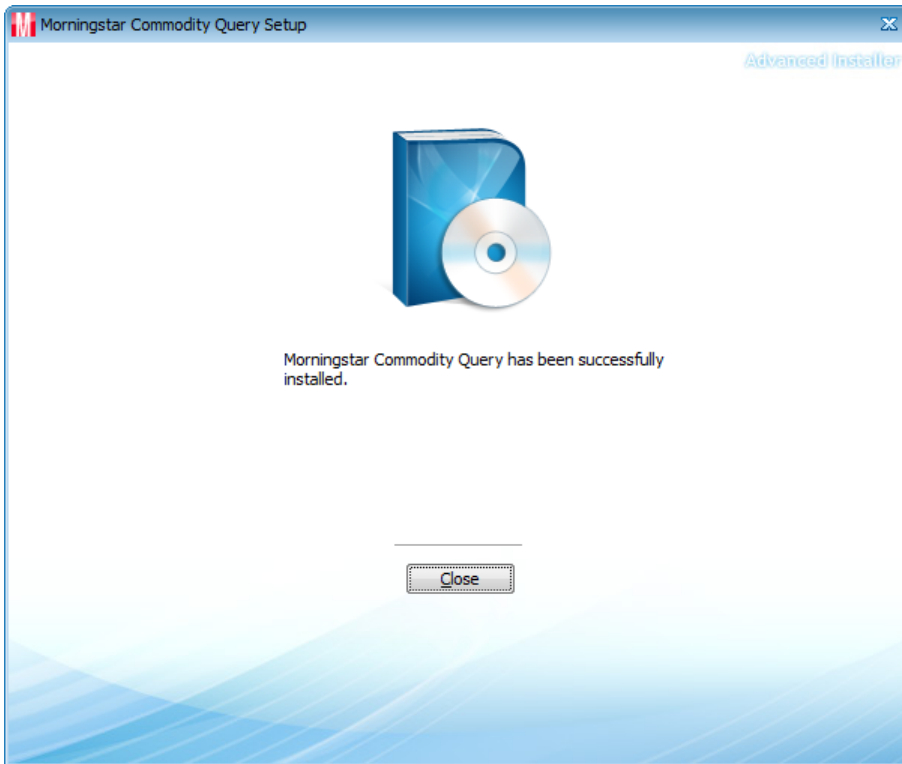
2. Select the destination folder. The default is C:\Program Files\Morningstar\Commodity Query. Select **Next**



3. Select **Next** if you are ready to install the application otherwise select **Back** to make any changes.



- The Commodity Query client was installed successfully. Select **Finish** to complete the installation.



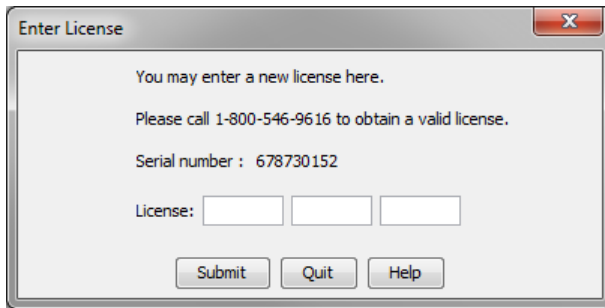
Starting Commodity Query

The following information only needs to be entered once.

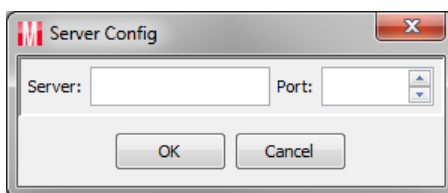
- In order to run Commodity Query you will need to obtain a license key. Make a notation of the serial number listed in the **License Installation** window (example below). You will need to send this serial number to a Morningstar Commodity Data, Inc Customer Support Representative at commoditydata-support@morningstar.com to obtain a license key.



Use **Ctrl+C** and **Ctrl+V** to copy/paste the license key into the **License** field.



2. Next, enter the server and port information:



3. The Commodity Query interface displays.



The next time Commodity Query is restarted the license and server/port screens will be bypassed. If a different server/port setting is needed, select **Options>Connection>Server Config** from the **Commodity Query** menu bar.

CHAPTER3

Commodity Charts Installation

Commodity Charts (Microsoft® Excel®)

Commodity Charts and Commodity Charts (Microsoft® Excel®) share the same installation program.

To run Commodity Charts you must:

1. have Java version 1.4.2 or higher. To obtain a free Java download, go to: <http://www.java.com/>.
2. install the Commodity Charts software and activate the **Install Commodity Charts (Microsoft® Excel®)** **Addin** will install automatically.

Commodity Charts Installation Instructions

Follow these instructions to install the Commodity Charts application.

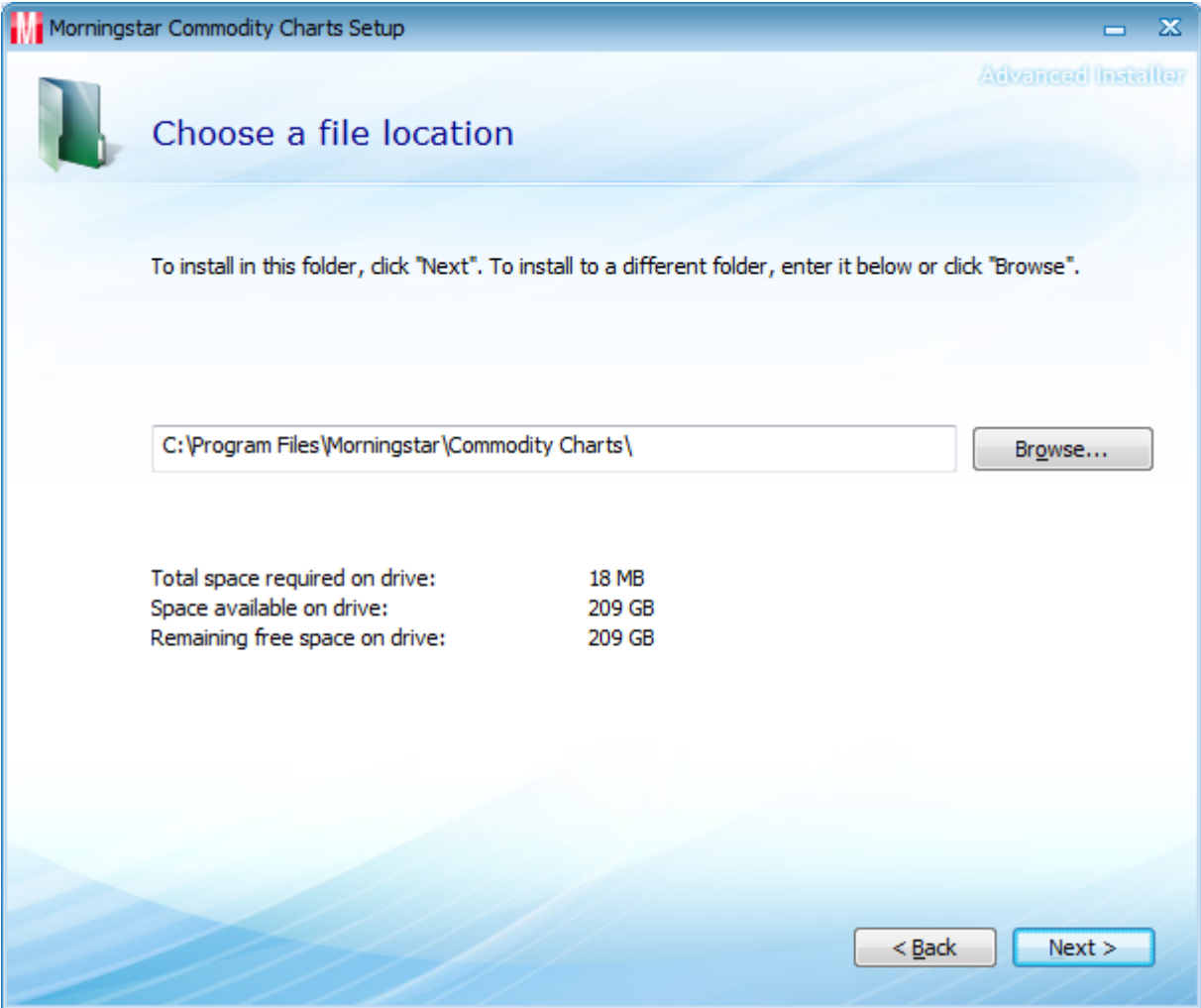
1. You must have Java 1.4.2 or higher to run the Commodity Charts application. Go to <http://www.java.com> and select the **Free Java Download** button to download and install the latest version of Java for free.
2. You can access the Commodity Charts program file from the Commodity Charts "Download" Web page. The program executable will appear as "Windows Installer". We suggest that you close all other Windows programs before running the program executable.

3. Run the executable, the program will start and give you a couple of warnings. Click **Next** to continue.

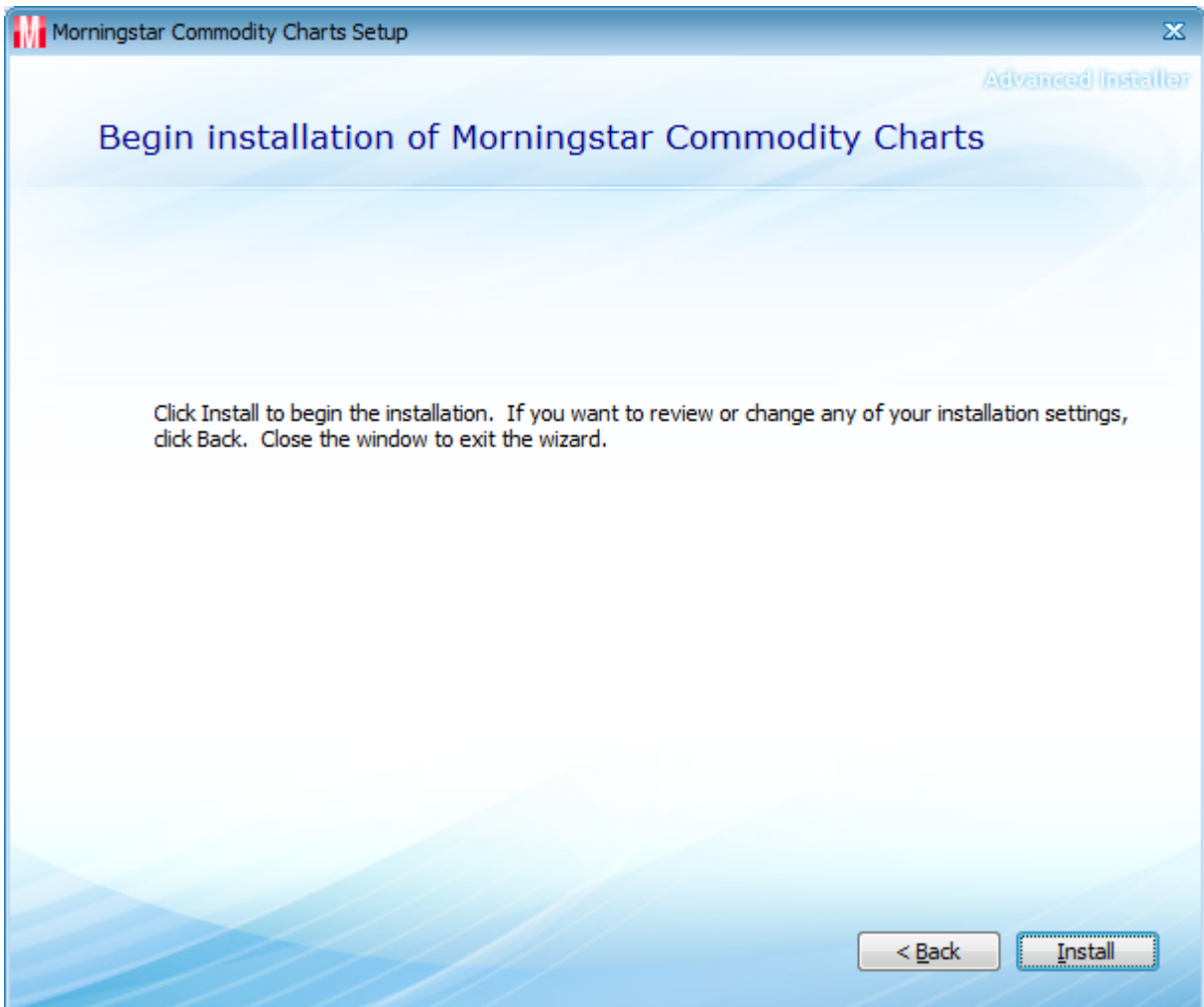


4. Now the program's installation path is selected. The default path should be fine. Commodity Charts Excel will be installed by default.

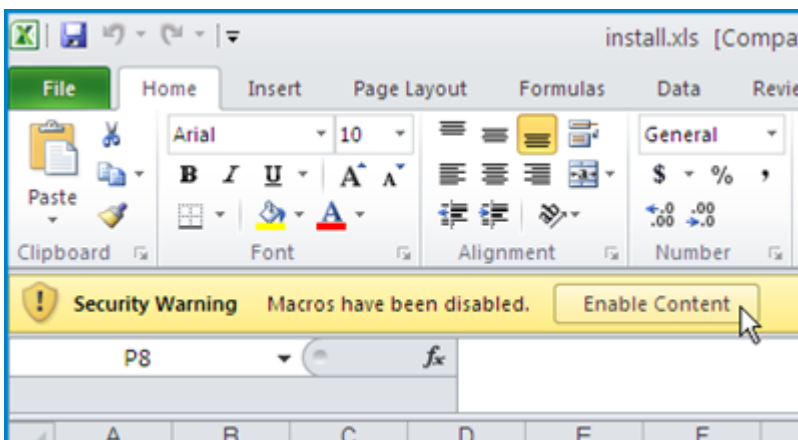
Then, click **Next**.



5. Now click **Install** and the program installation will begin.

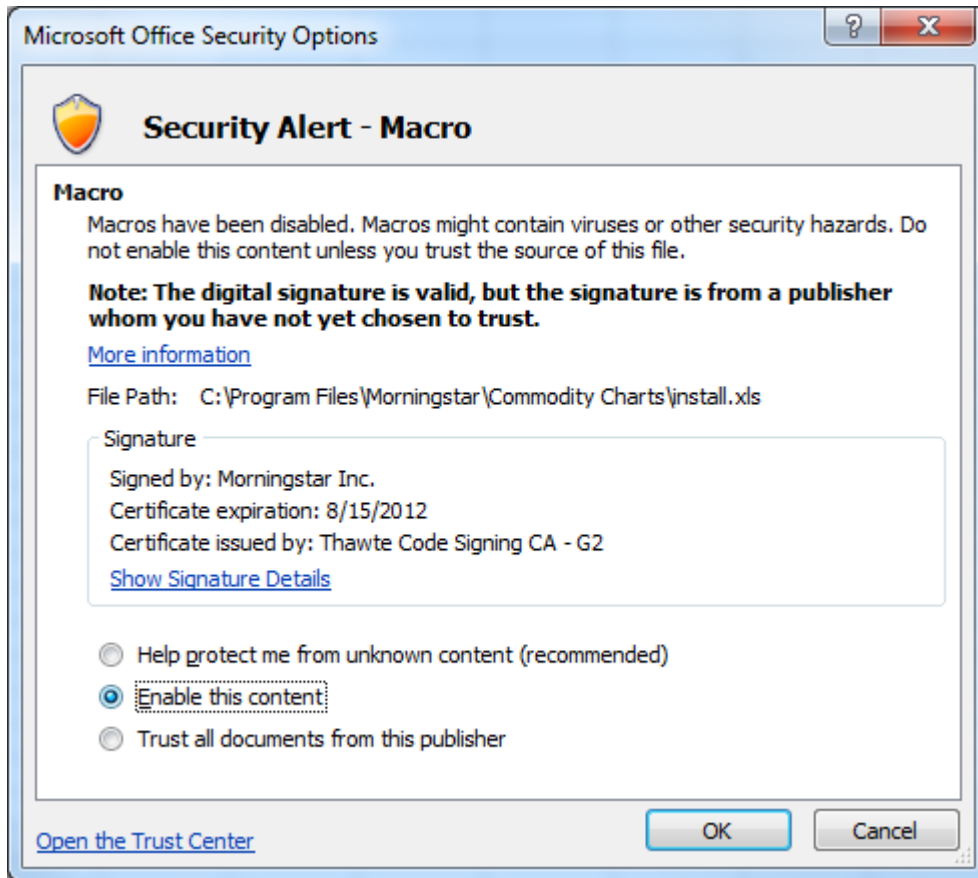


6. Commodity Charts (Microsoft® Excel®) will install. Microsoft Excel will open and the following dialog box will confirm the installation. Click **Enable Content**.

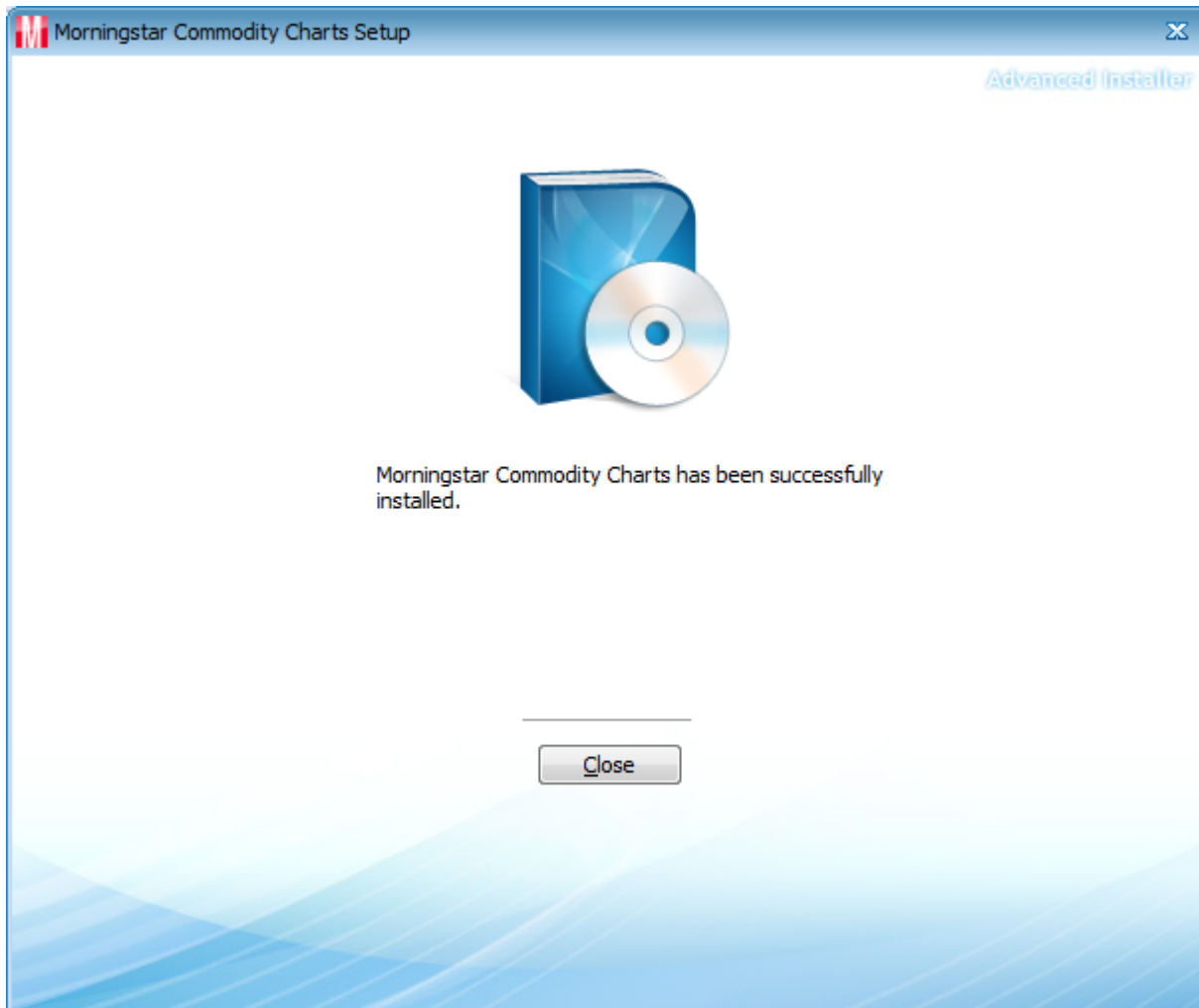


In the Security Alert window, Click **Enable this Content**.

Click **OK**.



7. Commodity Charts and the Commodity Charts (Microsoft® Excel®) functionality (if selected) are now installed. Click **Finish** to exit the installation.

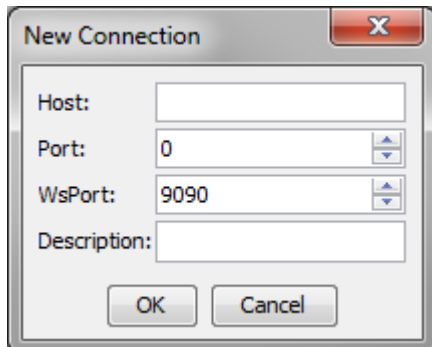


8. Commodity Charts can now be accessed through your start menu.

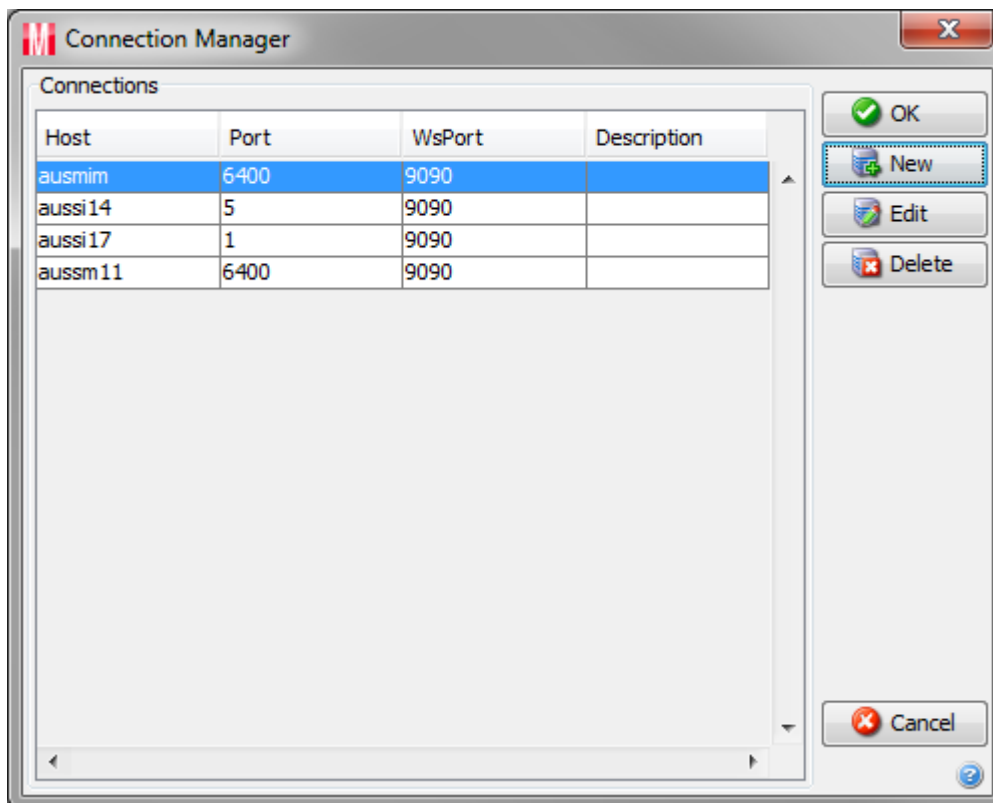
Troubleshooting

Host Not Defined

The Commodity Charts installer does not require configuration. However, if the host and port cannot be found the user will be prompted with the following dialog box:



Enter the host, port number and a description. Click **OK** to enter the connection. The Connection Manager dialog box displays the new connection. Click **OK** to establish the connection.



CHAPTER4

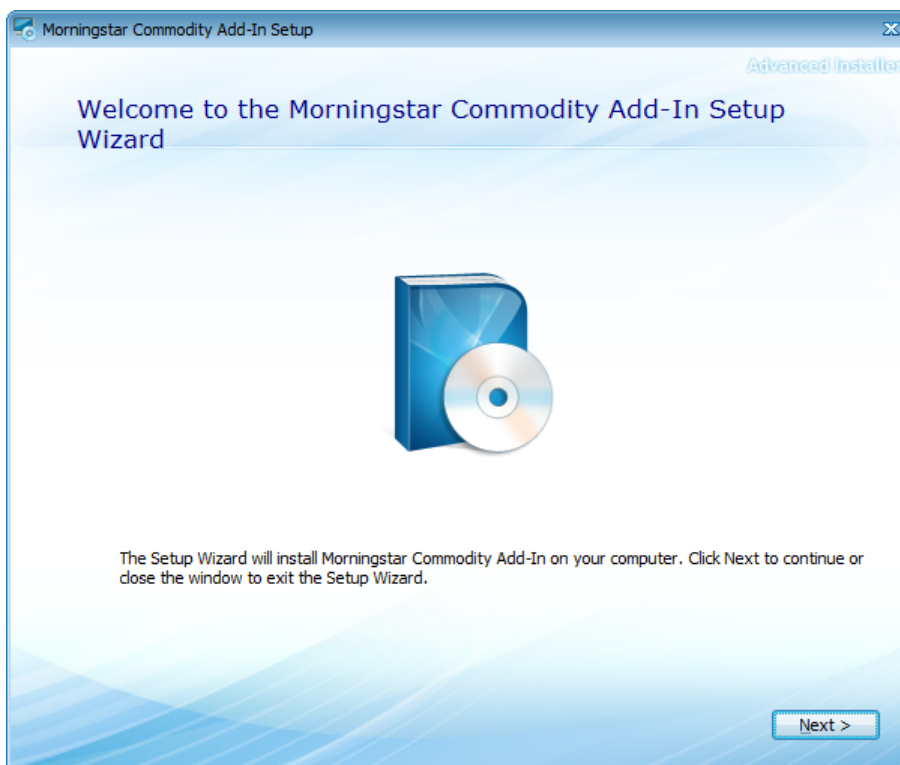
Commodity Add-in Installation

Do the following steps to setup the Commodity Add-in:

1. Run the installation program for the Commodity Add-In.

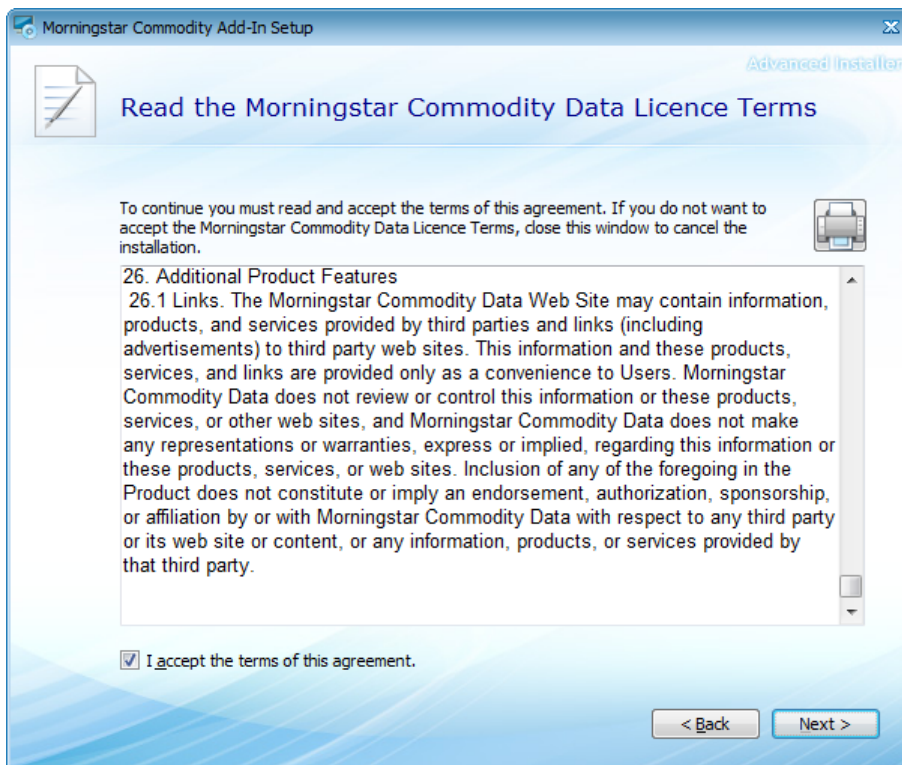


See the "[Download](#)" page for the latest installation version. The program starts and gives you a few warnings. Close all other Windows programs, especially Microsoft Excel, then select **Next** to continue.



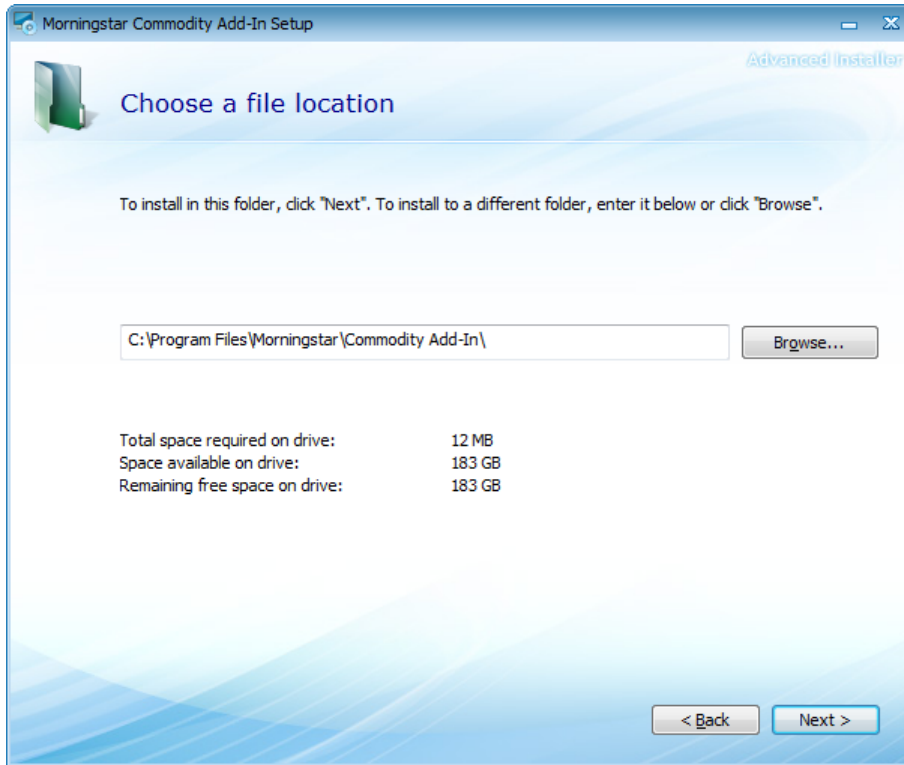
2. The next screen is a license to terms agreement. Please read the terms carefully. When finished, check the box: **Accept the terms of the agreement.**

Select **Next**



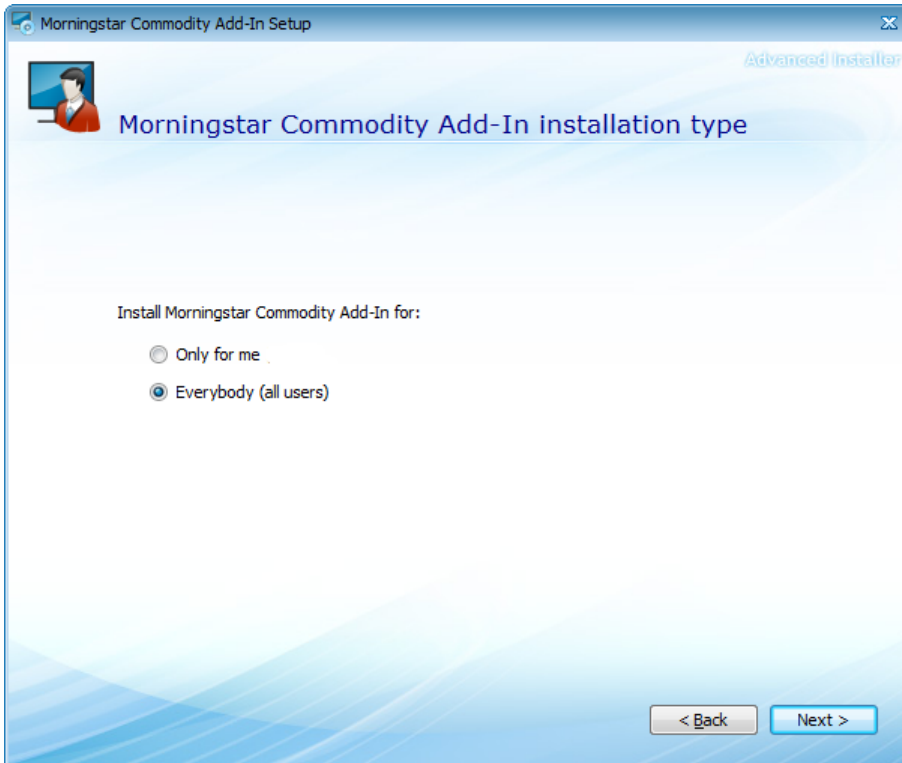
3. The next screen provides the default download location. The default location is recommended. If a new location is desired, please select **Browse**, Then select a new location.

Select **Next**

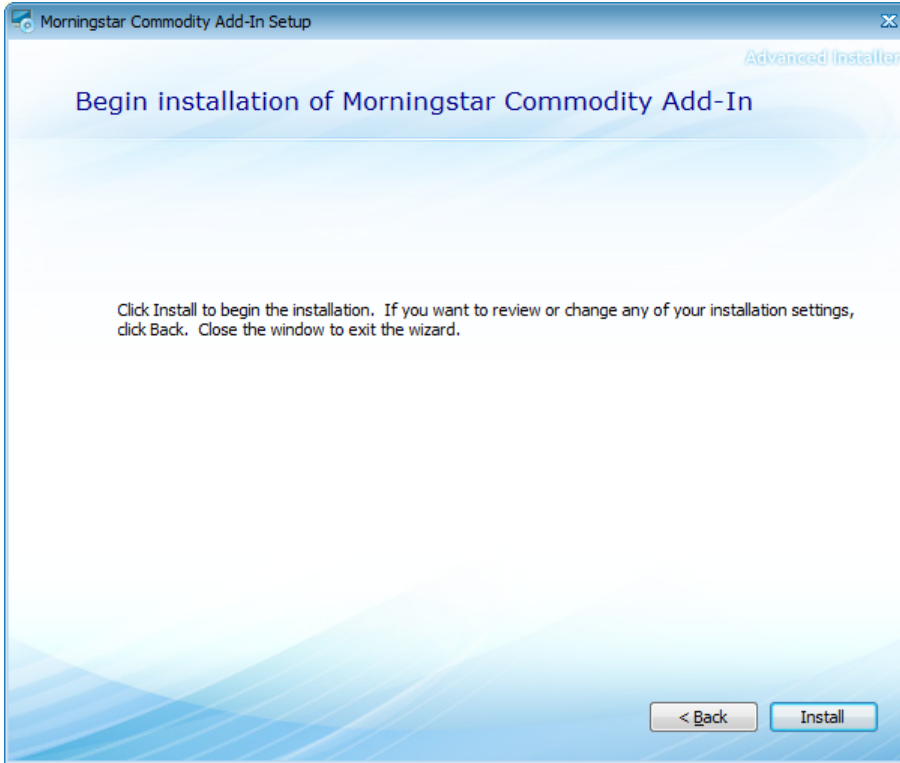


4. The next screen provides a user control on who can access the application on the PC.

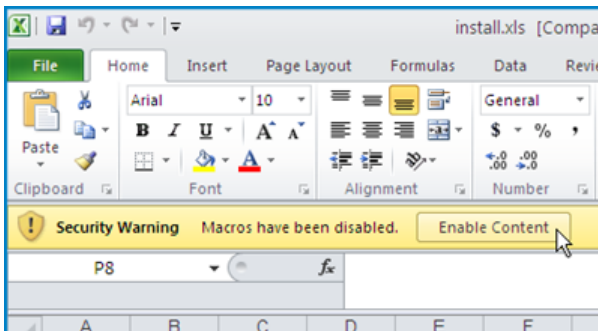
Select **Next**



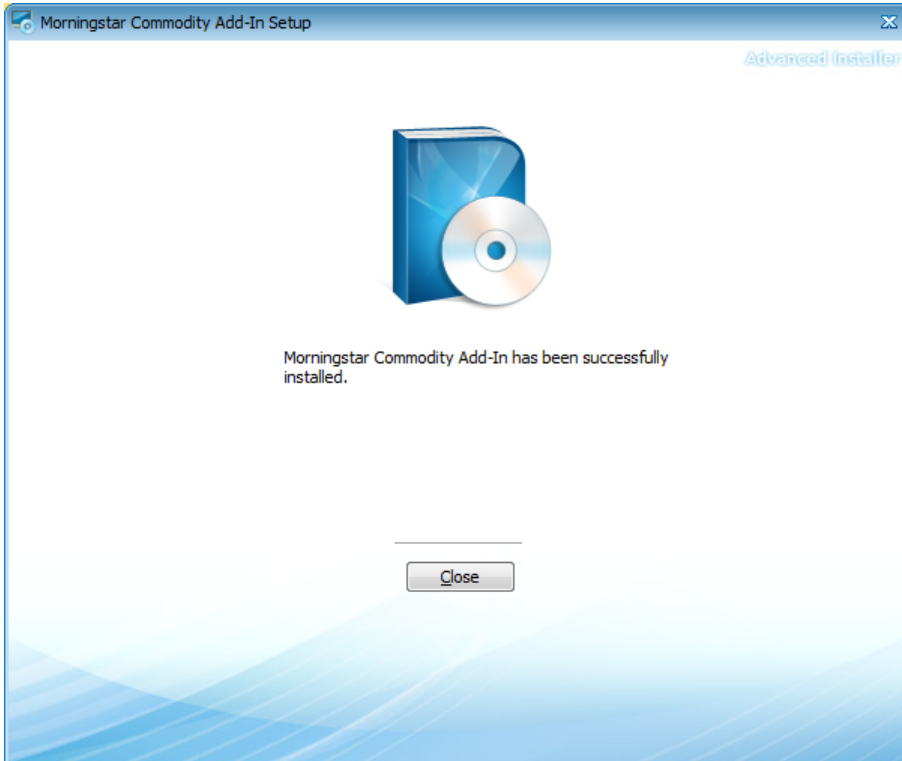
5. Select **Install**, to begin installation.



6. When the program attempts to add the add-in, you may be prompted to **Enable Content**. The must be content must be enabled for the program to add the add-in to Excel.



7. Select **Close**. The Commodity Add-in is now installed on your machine.



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