

# SMM Database-Pro Excel Add-in

## User Guide

The Excel Add-in is an auxiliary processing tool for Database-Pro of Shanghai Metals Markets (SMM).

### System Requirements

Available on: PC

Architecture: x86 x64

OS: Windows 7 or later (Windows10 recommended)

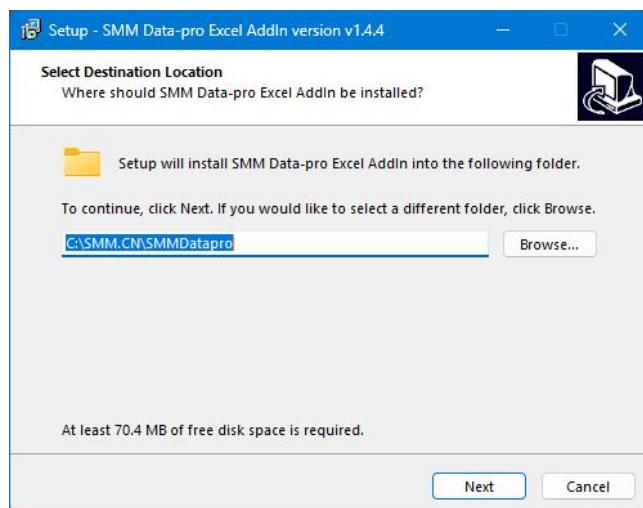
Office: Office 2007 or later (Office2016 recommended)

### Installation Guide

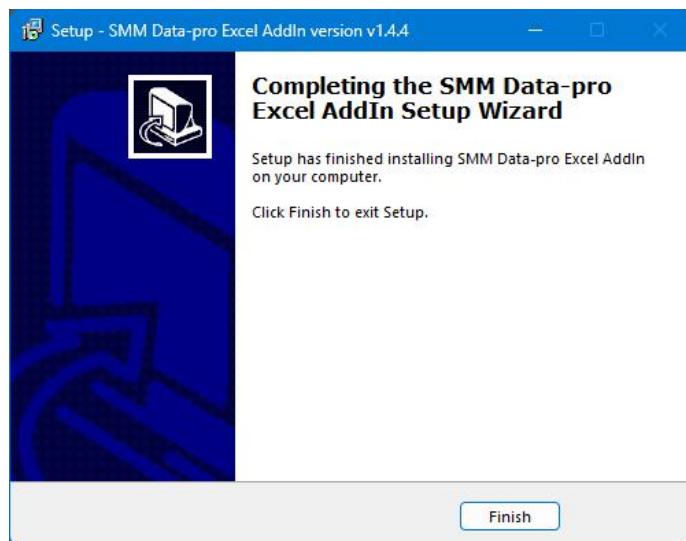
1. Choose your language for the installation process. Both English and Chinese are available.



2. Choose an installation directory. We recommend keeping the default setting.



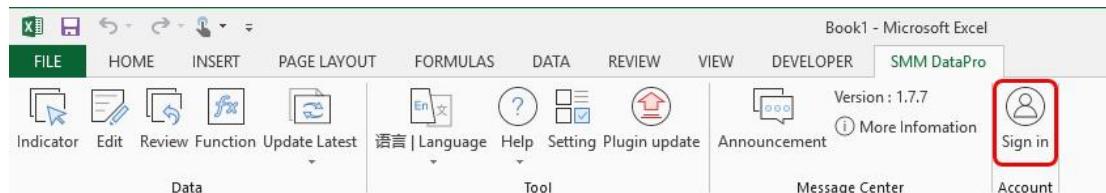
3. Click 'Finish'



## Sign in

Please sign in with the same account you use for signing into data-pro.metal.com. If you encounter any issues, please contact your SMM sales representative or customer service.

1. Click 'Sign in' to open the login pop-up window.



2. Enter your username and password, then click 'OK'. If the 'Remember me' is checked, the Excel add-in will sign in automatically upon the next startup, eliminating the need to manually enter your password again.

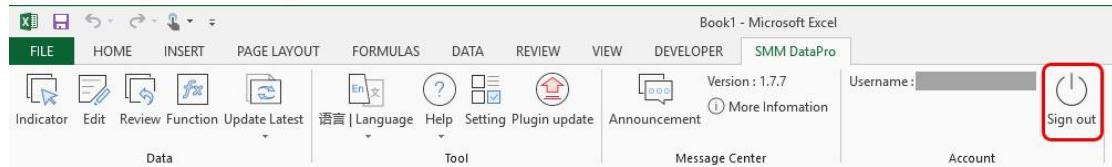


3. Click 'Login Settings' to set up a proxy for this login.



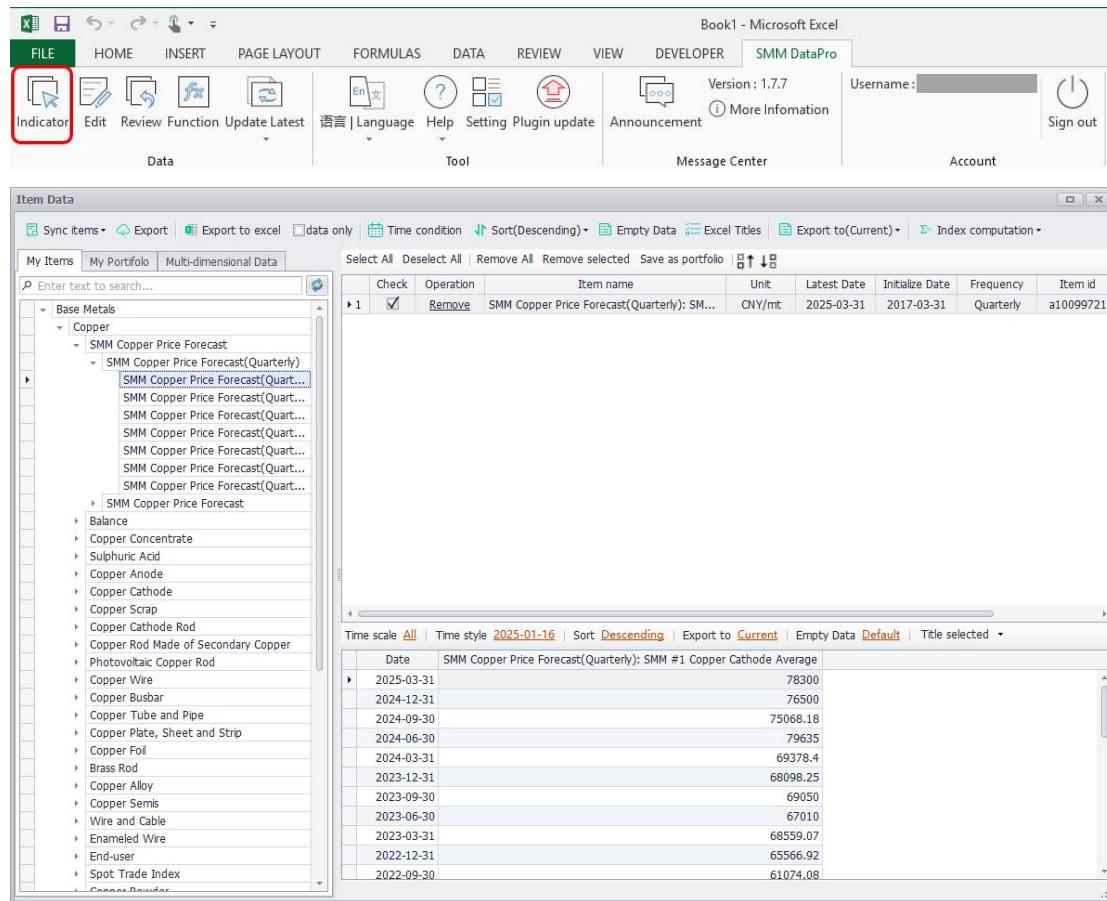
4. If the username and password are correct and the service has been activated, the login will be completed.

5. Click 'Sign out' to log out.



**Attention: You must be logged in to select indicators or update data.**

## Extract indicator



The screenshot shows the SMM DataPro Excel add-in interface. The 'Indicator' tab is highlighted with a red box. The main window displays 'Item Data' with a tree view of indicators, a list of selected items, and a data preview table.

**Item Data**

Sync items | Export | Export to excel | data only | Time condition | Sort(Descending) | Empty Data | Excel Titles | Export to(Current) | Index computation

My Items | My Portfolio | Multi-dimensional Data

Enter text to search...

Base Metals
 

- Copper
  - SMM Copper Price Forecast
    - SMM Copper Price Forecast(Quarterly)
      - SMM Copper Price Forecast(Quarterly)

Check Operation Item name Unit Latest Date Initialize Date Frequency Item id

1 ✓ Remove SMM Copper Price Forecast(Quarterly): SM... CNY/mt 2025-03-31 2017-03-31 Quarterly a10099721

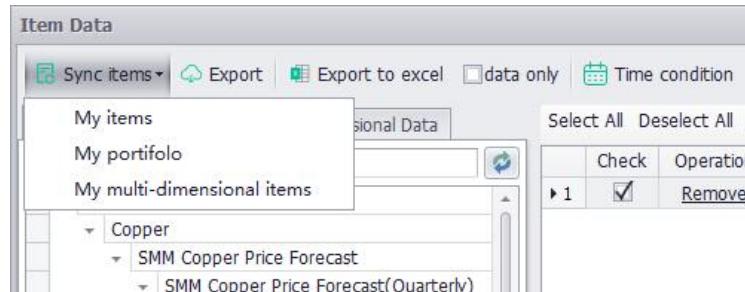
Time scale All | Time style 2025-01-16 | Sort Descending | Export to Current | Empty Data Default | Title selected

Date	SMM Copper Price Forecast(Quarterly): SMM #1 Copper Cathode Average
2025-03-31	78300
2024-12-31	76500
2024-09-30	75068.18
2024-06-30	79635
2024-03-31	69378.4
2023-12-31	68098.25
2023-09-30	69050
2023-06-30	67010
2023-03-31	68559.07
2022-12-31	65566.92
2022-09-30	61074.08

**Sync Items - My items:** Force refresh my list of indicators.

**Sync List - My portfolio:** Force refresh my portfolio list.

**Sync List - My multi-dimensional items:** Force refresh my multidimensional data list.



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**Item Data**

Sync items | Export | Export to excel | data only | Time condition

My items | My portfolio | My multi-dimensional items

Check Operation

1 ✓ Remove

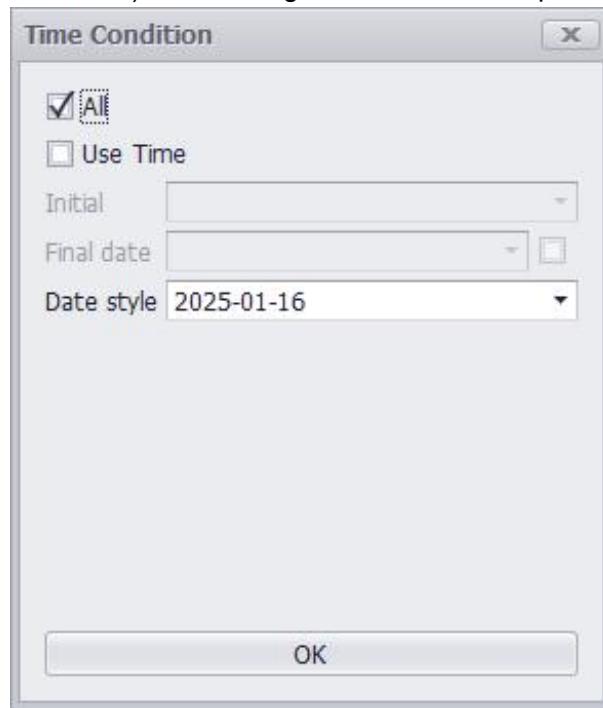
Time scale All | Time style 2025-01-16 | Sort Descending | Export to Current | Empty Data Default | Title selected

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2022-12-31	65566.92
2022-09-30	61074.08

**Export:** Retrieve the selected indicator data from the server and displays it in the data preview area.

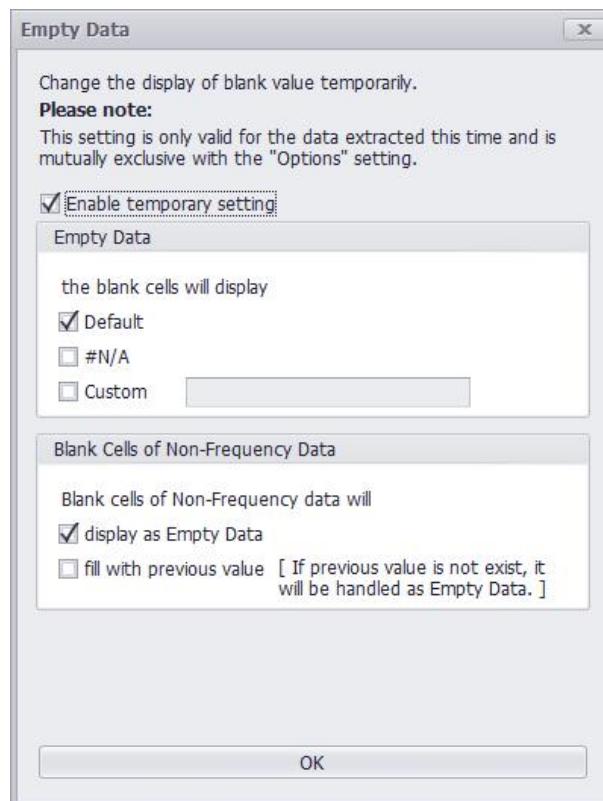
**Export to excel:** Export the selected indicator data from the server directly into an Excel worksheet.

**Time Condition:** Set the time range for data extraction (default is 'All' with no date restriction). This setting affects both the Export and Export to excel operations.

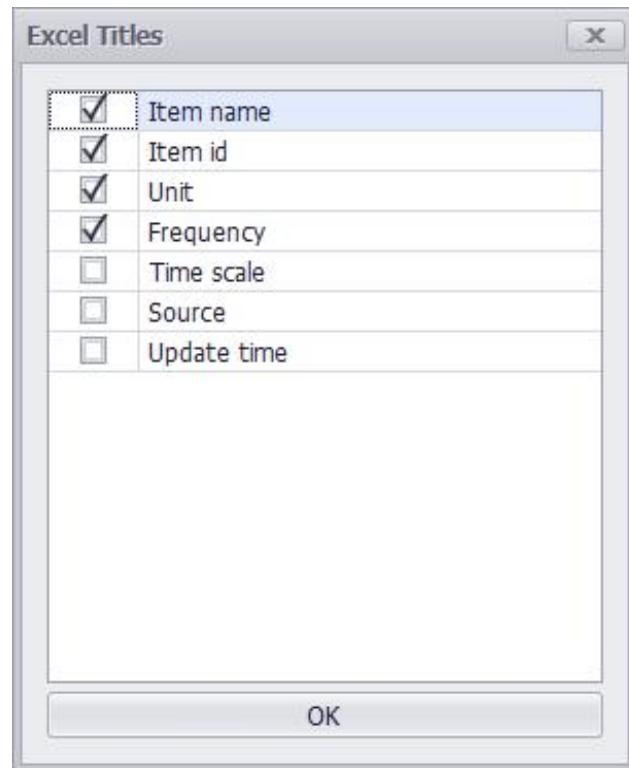


**Sort:** Configure the sorting order for data extracted to Excel. By default, data is sorted in descending order by date. This setting only affects the 'Extract to excel' operation.

**Empty Data:** Allow you to define a custom display method for empty values specifically for this export session. This setting is mutually exclusive with the 'Options' setting.

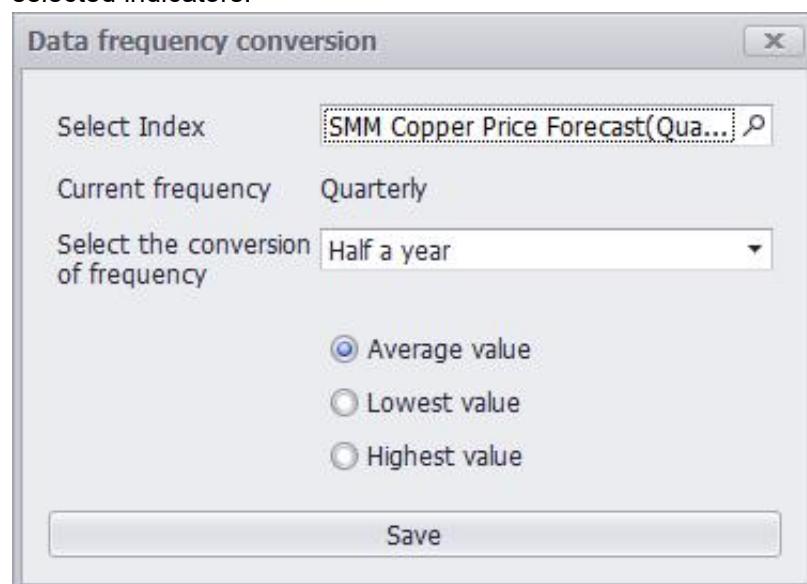


**Excel Titles:** Choose which indicator title to display in the Excel table. This setting only affects the 'Extract to excel' operation. The default selection is Item name, Item id, Unit, Frequency. The item name is mandatory.



**Export to(Current):** Set the target location in Excel for the current data extraction. It defaults to starting at the current cursor position and can be set to extract to a new worksheet. This setting only affects the 'Export to excel' operation.

**Data frequency conversion:** Perform frequency conversion calculations on the currently selected indicators.

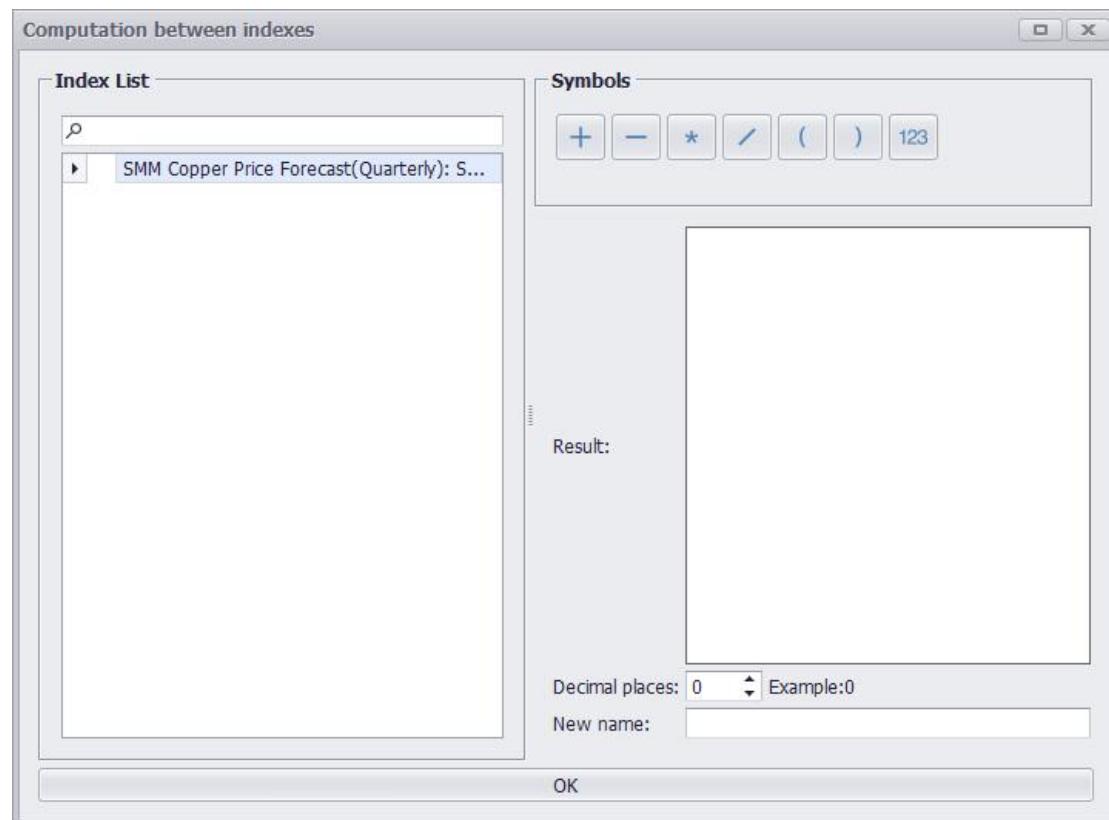


**Computation between indexes:** Perform calculation operations on selected indicators.

**Indicator Information Area:** Display the indicators you have permission to access (including those provided for free). The data here is loaded from the server when first opened, which may cause an initial delay in display.

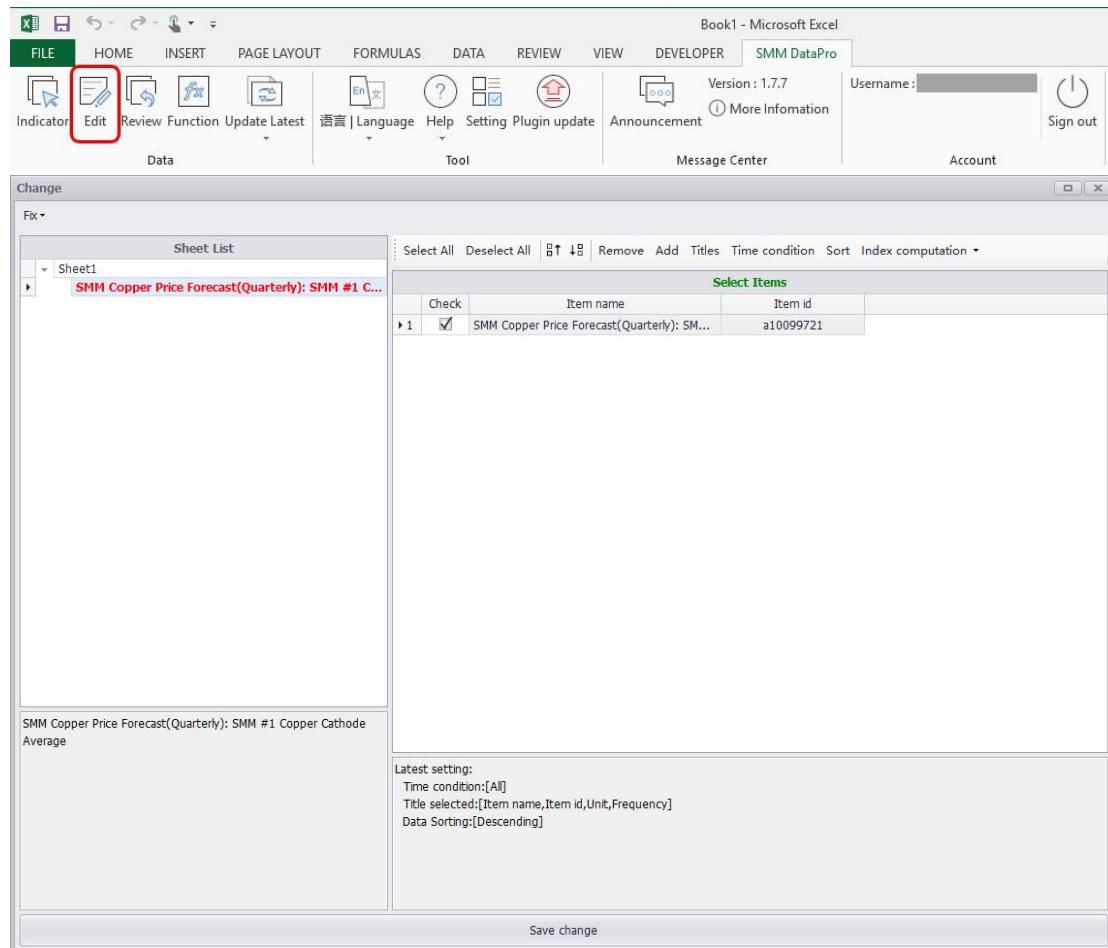
**Selected Indicators Area:** List the indicators pending data extraction.

**Data Preview Area:** Preview data filtered by conditions (currently time-based conditions only).



## Edit Indicator

**Edit:** Allow you to delete, add, and reorder selected indicators, while also supporting modifications to titles, time condition, and data sorting.



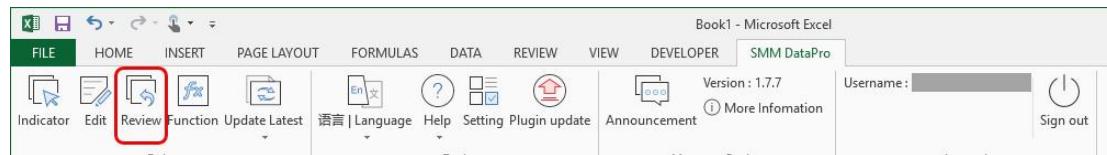
The screenshot shows the Microsoft Excel ribbon with the SMM DataPro tab selected. The 'Data' tab is also visible. A red box highlights the 'Edit' button in the 'Indicator' group of the ribbon. The main window displays a 'Change' dialog box. The 'Sheet List' pane shows 'Sheet1' and a preview of 'SMM Copper Price Forecast(Quarterly): SMM #1 Copper Cathode Average'. The 'Select Items' table contains one row with the following data:

Check	Item name	Item id
<input checked="" type="checkbox"/>	SMM Copper Price Forecast(Quarterly): SM...	a10099721

Below the table, the 'Latest setting:' section shows: Time condition:[All], Title selected:[Item name,Item id,Unit,Frequency], and Data Sorting:[Descending]. At the bottom of the dialog is a 'Save change' button.

## Review Indicator

**Review:** Review selected indicator information, perform operations such as deletion, addition, and reordering, and support modifications including titles, time condition, and data sorting. It only supports reviewing standard indicators.



Book1 - Microsoft Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DEVELOPER SMM DataPro

Indicator Edit Review Function Update Latest 语言 | Language Help Setting Plugin update Announcement Version : 1.7.7 Username : Sign out

Data Tool Message Center Account

F21

	A	B	C	D	E	F	G	H	I	J	K
1	Indicator Name	SMM Monthly Lead Concentrate Output									
2	Indicator ID	a10017031									
3	Unit	10,000 mt in metal c									
4	Frequency	Monthly									
5	201	1									
6	201	1									
7	201	0									
8	201	1									
9	201	0									
10	201	1									
11	201	8									
12	201	1									
13	201	1									

Item Data

Sync items Export Export to excel Daily Frequency data only Time condition Sort(Descending) Null Data Excel Titles Export to(Current)

My Items Enter text to search...

Select All Deselect All Remove All Remove selected

Select	Operation	Indicator Name	Unit	Latest Date	Initialize Date	Latest Update	Fr
<input checked="" type="checkbox"/>	Remove	SMM Monthly Lead Concentrate Output	10,000 mt in metal c	2025-08-31	2015-01-31	2025-10-14 12:03:56	

Time scale All | Time style 2025-10-22 | Sort Descending | Export to Current | Null Data Default | Title selected

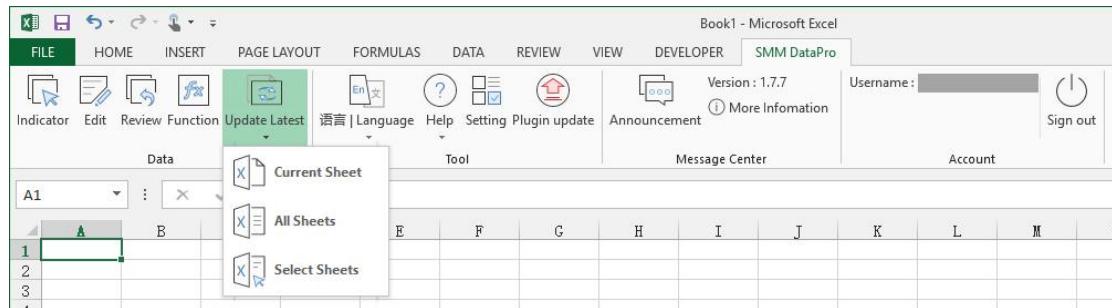
## Update Latest

**Update Latest:** Directly click to update the data for all indicators in the current sheet.

**Update Latest-Current Sheet:** Update data for all selected indicators in the current sheet.

**Update Latest-All Sheets:** Update data across all sheets in the current Excel file.

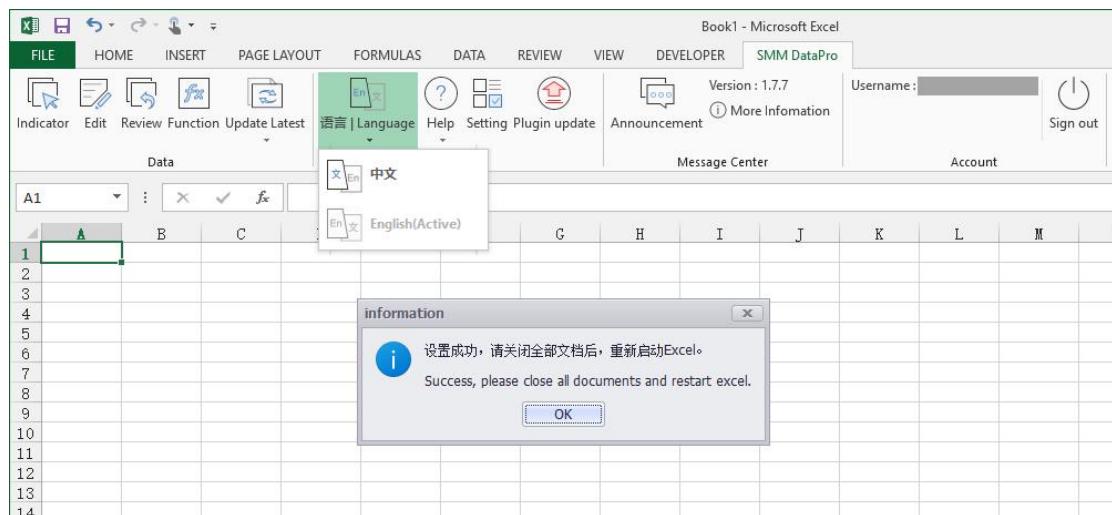
**Update Latest-Select Sheets:** Update data in the currently selected sheets.



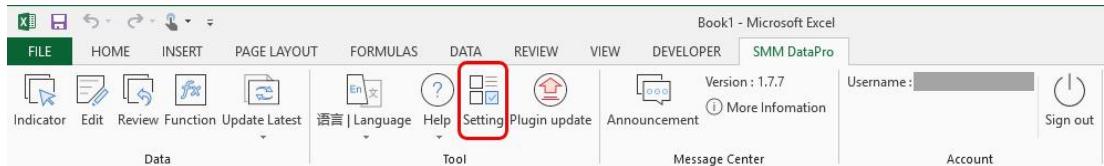
## Switch Language

**Chinese:** Switch the language to Chinese. After a successful switch, please restart Excel.

**English:** Switch the language to English. After a successful switch, please restart Excel.



# Setting



## Data Update Settings-Update Mode

**Full Update:** Update data by performing a full refresh.

**Incremental Update:** Update data incrementally.

## Data Update Settings-Title Items

**Keep:** Retain both the content and formatting of the original title.

**Update:** Update the title along with the data. The original formatting and content will be cleared.

## Data Style Settings-Non-Synchronous Data

**Display as Null Data:** Display null values from non-synchronous data according to the configured null value setting.

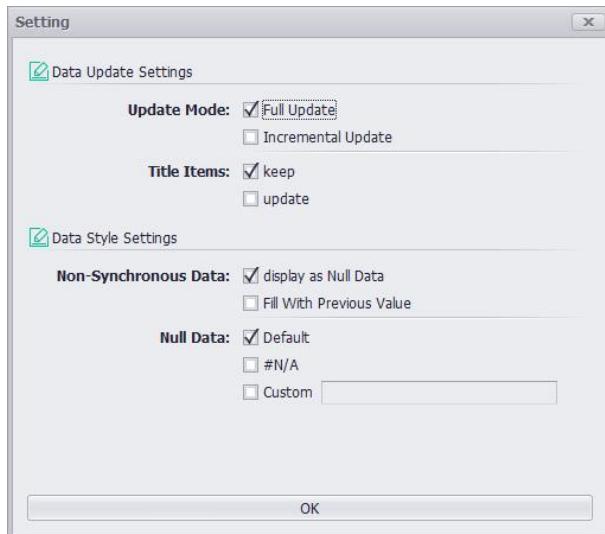
**Fill With Previous Value:** Fill null values from non-synchronous data with the previous available value. If no previous value exists, it will be handled according to the null value setting.

## Data Style Settings-Null Data

**Default:** Display null values as blank cells.

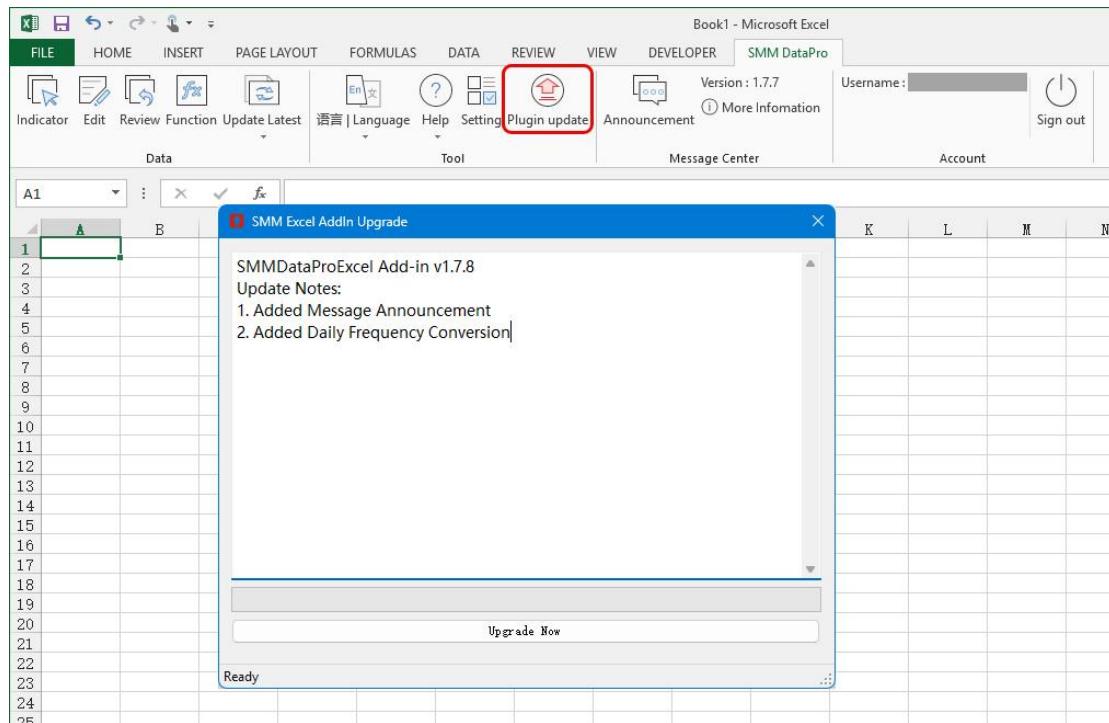
**#N/A:** Display null values as #N/A.

**Custom:** Display null values using a custom value.

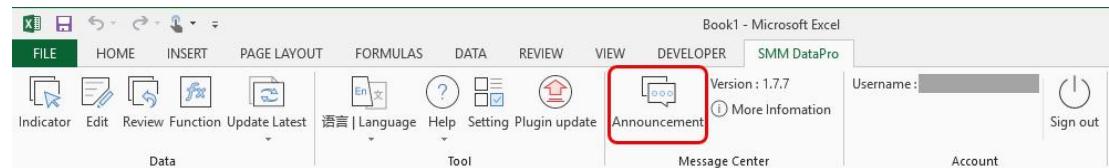


## Plugin update

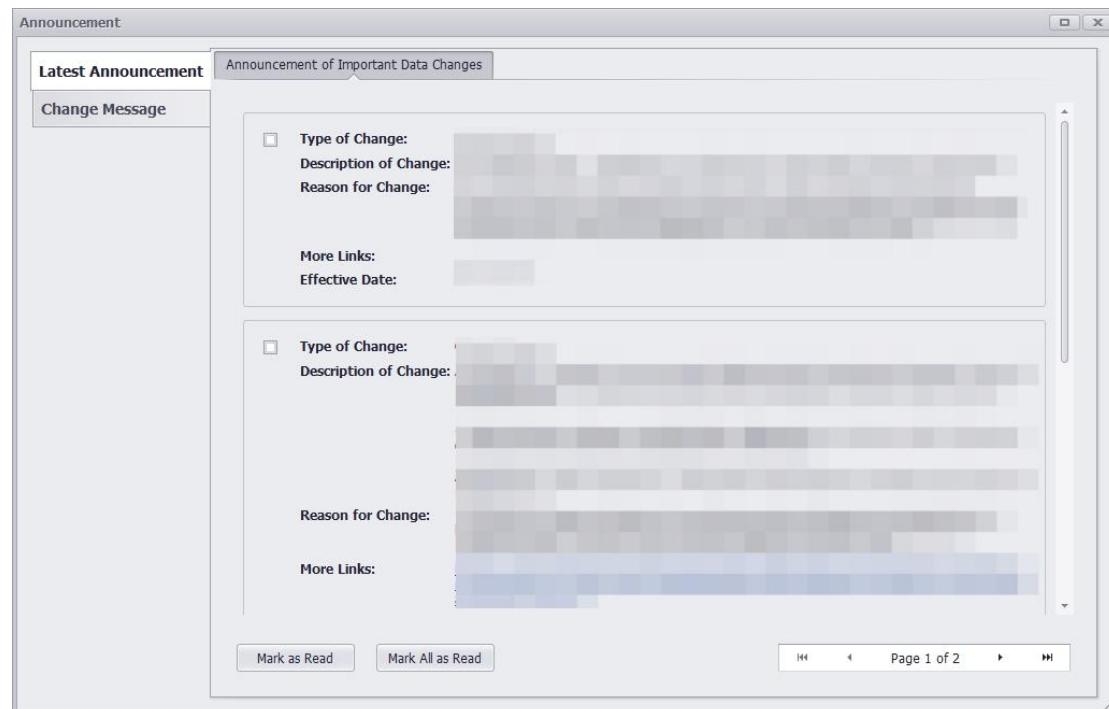
**Plugin update:** When a new version is available, the update icon will appear; otherwise, it remains hidden. Clicking the icon displays the latest version's update details. Click 'Update Now' to proceed with the installation.



# Announcement



**Announcements:** SMM announcements and site messages.



The screenshot shows the 'Announcement' window. It displays two announcement items. The first item is titled 'Announcement of Important Data Changes'. It includes fields for 'Type of Change', 'Description of Change', 'Reason for Change', 'More Links', and 'Effective Date'. The second item has similar fields. At the bottom of the window are buttons for 'Mark as Read' and 'Mark All as Read', and a page navigation bar showing 'Page 1 of 2'.