

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

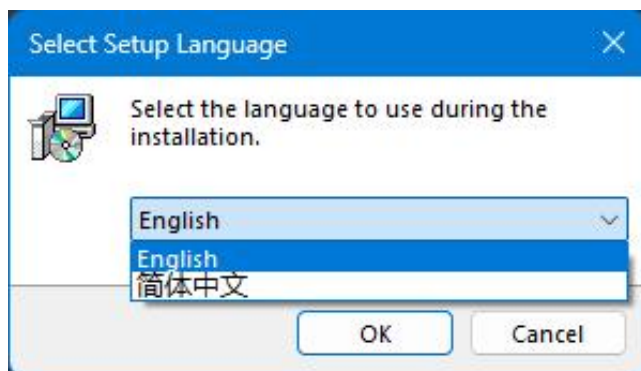
Architecture: x86 x64

OS: Windows 7 or later (Windows10 recommended)

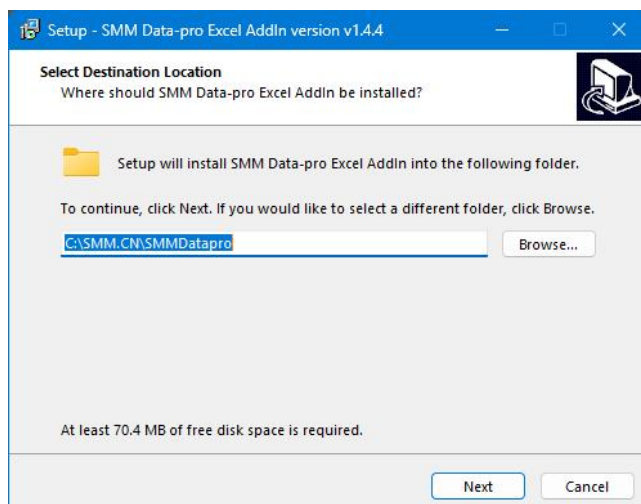
Office: Office 2007 or later (Office2016 recommended)

Installation Guide

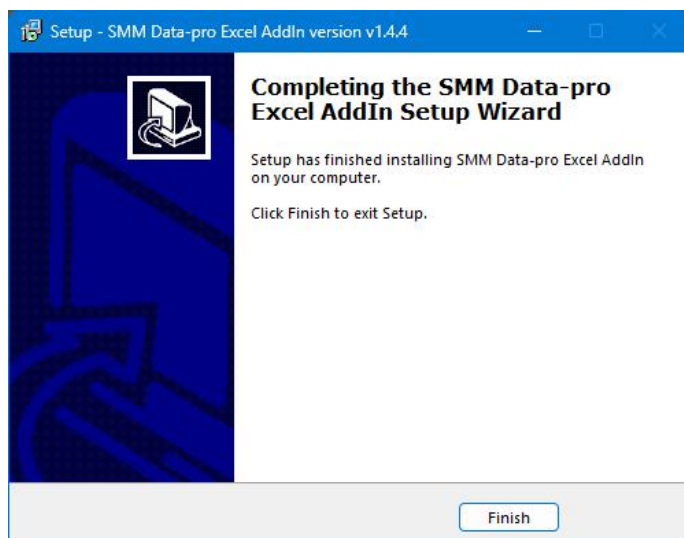
1. Choose your language for the installation process. Both English and Chinese are available.



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



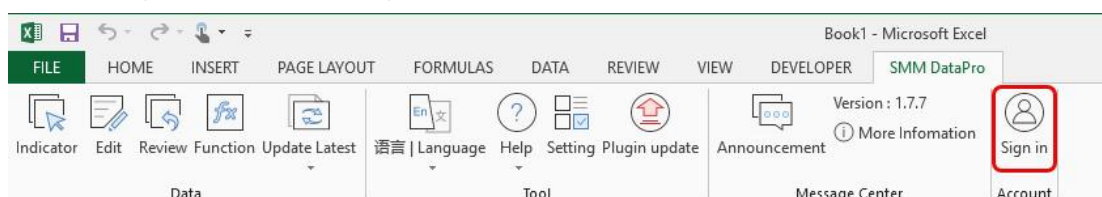
3. Click 'Finish'



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.



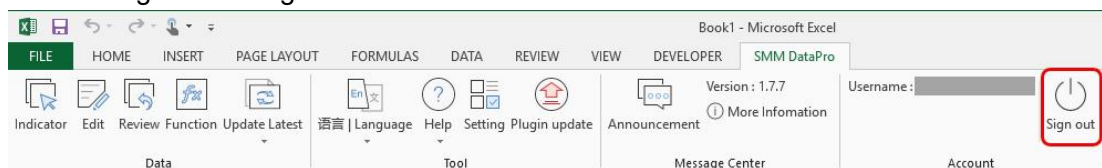
3. Click 'Login Settings' to set up a proxy for this login.



The image shows a 'Sign in' dialog box with a 'Proxy Settings' section. On the left is the SMM logo with the text '上海有色网' and '中国权威金属门户'. The 'Proxy Settings' section includes a 'Type' dropdown menu set to 'HTTP1.0/1.1 Proxy', and input fields for 'Address', 'Port' (set to 80), 'User', 'Password', and 'Domain'. At the bottom are 'No Proxy' and 'Confirm' buttons.

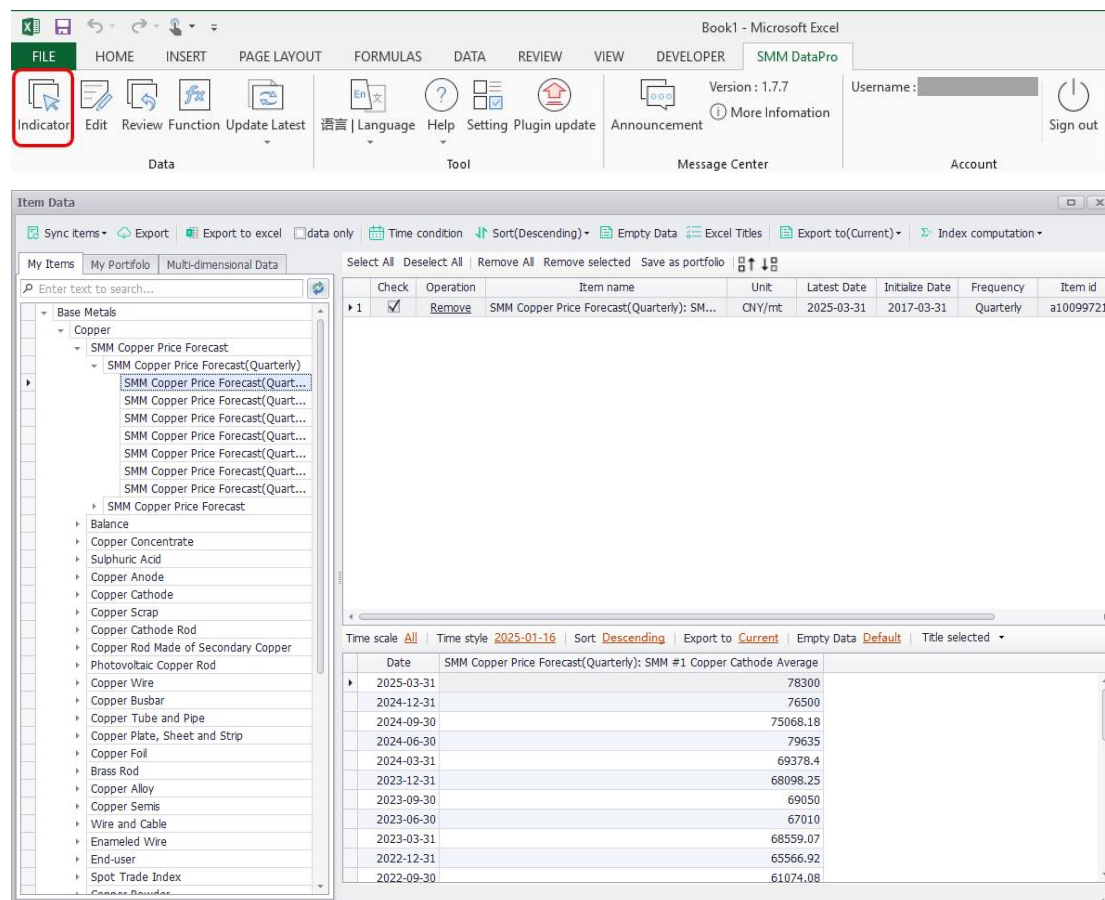
4. If the username and password are correct and the service has been activated, the login will be completed.

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 application interface. The top menu bar includes 'FILE', 'HOME', 'INSERT', 'PAGE LAYOUT', 'FORMULAS', 'DATA', 'REVIEW', 'VIEW', 'DEVELOPER', and 'SMM DataPro'. The 'Indicator' button is highlighted in the 'FILE' menu. The main window is titled 'Item Data' and contains a search bar, a list of indicators on the left, and a data table on the right. The data table shows the following information:

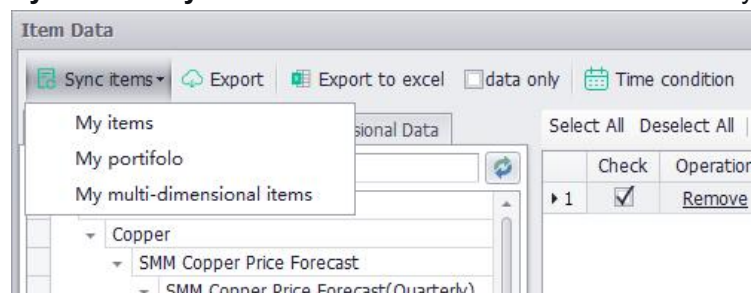
Check	Operation	Item name	Unit	Latest Date	Initialize Date	Frequency	Item id
<input checked="" type="checkbox"/>	Remove	SMM Copper Price Forecast(Quarterly): SM...	CNY/mt	2025-03-31	2017-03-31	Quarterly	a10099721

Below the table, there is a section for 'Time scale' and 'Time style' with a dropdown menu for 'Sort' (Descending) and 'Export to' (Current). The data table also includes a 'Title selected' dropdown.

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.



The screenshot shows the SMM DataPro application interface. The top menu bar includes 'FILE', 'HOME', 'INSERT', 'PAGE LAYOUT', 'FORMULAS', 'DATA', 'REVIEW', 'VIEW', 'DEVELOPER', and 'SMM DataPro'. The 'Export' and 'Export to excel' buttons are highlighted in the 'FILE' menu. The main window is titled 'Item Data' and contains a search bar, a list of indicators on the left, and a data table on the right. The data table shows the following information:

Check	Operation	Item name	Unit	Latest Date	Initialize Date	Frequency	Item id
<input checked="" type="checkbox"/>	Remove	SMM Copper Price Forecast(Quarterly): SM...	CNY/mt	2025-03-31	2017-03-31	Quarterly	a10099721

Below the table, there is a section for 'Time scale' and 'Time style' with a dropdown menu for 'Sort' (Descending) and 'Export to' (Current). The data table also includes a 'Title selected' dropdown.

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.

Time Condition

☒ All

☐ Use Time

Initial: [Date Picker]

Final date: [Date Picker]

Date style: 2025-01-16

OK

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.

Empty Data

Change the display of blank value temporarily.

Please note:
This setting is only valid for the data extracted this time and is mutually exclusive with the "Options" setting.

☒ Enable temporary setting

Empty Data

the blank cells will display

☒ Default

☐ #N/A

☐ Custom [Text Field]

Blank Cells of Non-Frequency Data

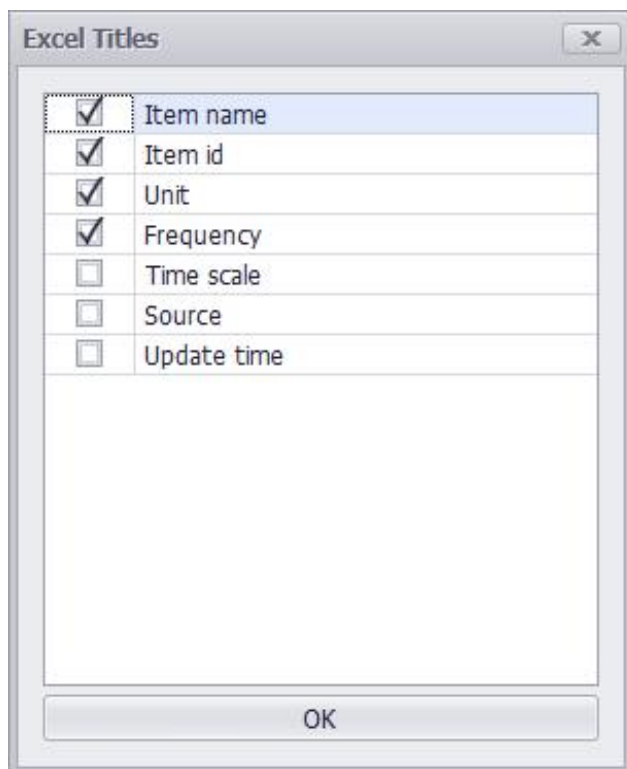
Blank cells of Non-Frequency data will

☒ display as Empty Data

☐ fill with previous value [If previous value is not exist, it will be handled as Empty Data.]

OK

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.

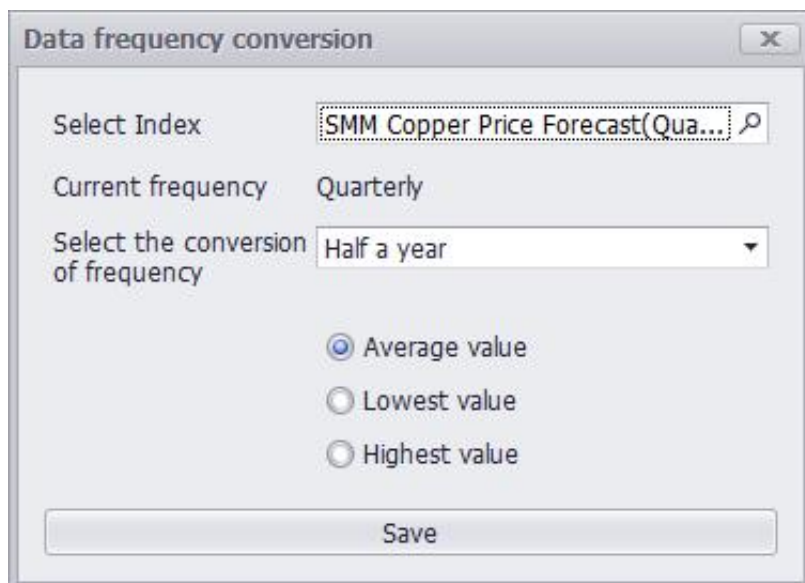


The 'Excel Titles' dialog box contains a list of indicators with checkboxes. The first four are checked: Item name, Item id, Unit, and Frequency. The last three are unchecked: Time scale, Source, and Update time. An 'OK' button is at the bottom.

Indicator	Selected
Item name	<input checked="" type="checkbox"/>
Item id	<input checked="" type="checkbox"/>
Unit	<input checked="" type="checkbox"/>
Frequency	<input checked="" type="checkbox"/>
Time scale	<input type="checkbox"/>
Source	<input type="checkbox"/>
Update time	<input type="checkbox"/>

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.



The 'Data frequency conversion' dialog box has the following settings: 'Select Index' is 'SMM Copper Price Forecast(Qua...', 'Current frequency' is 'Quarterly', and 'Select the conversion of frequency' is 'Half a year'. Under the conversion options, 'Average value' is selected with a radio button. 'Lowest value' and 'Highest value' are also options. A 'Save' button is at the bottom.

Select Index: SMM Copper Price Forecast(Qua... 🔍

Current frequency: Quarterly

Select the conversion of frequency: Half a year ▼

☒ Average value
☐ Lowest value
☐ Highest value

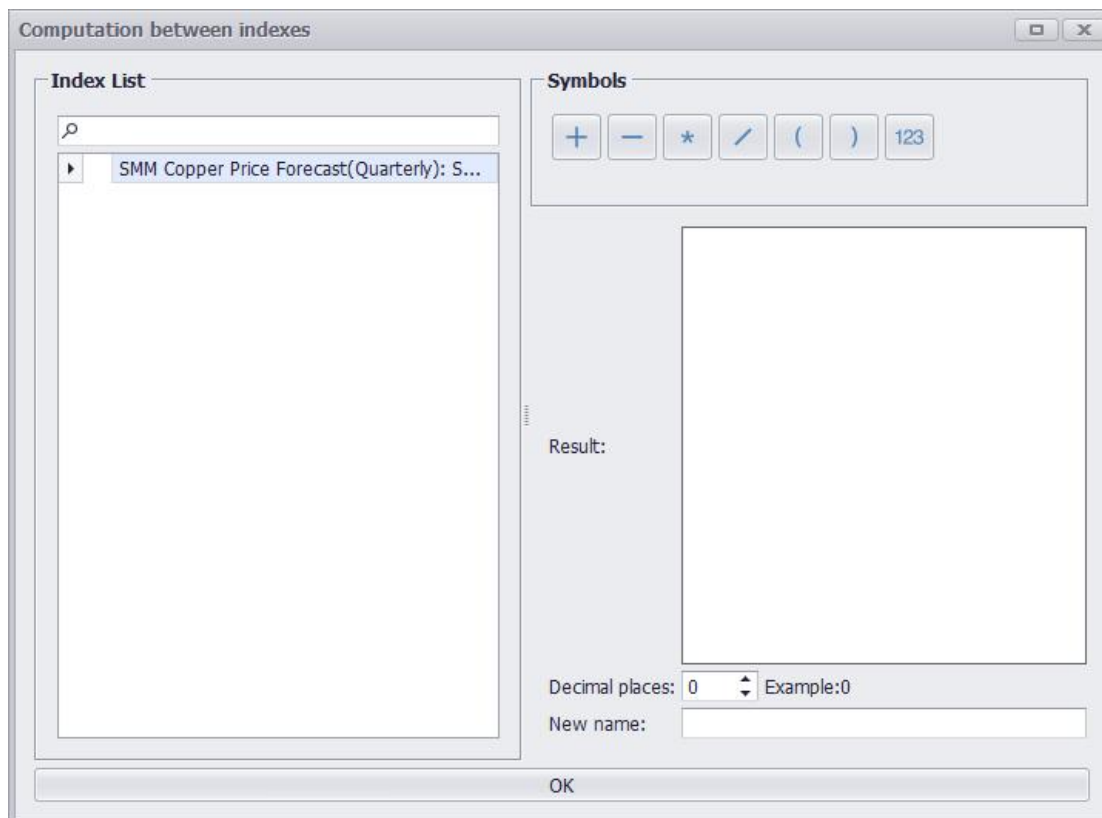
Save

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).



Computation between indexes

Index List

Search:

SMM Copper Price Forecast(Quarterly): S...

Symbols

+ - * / () 123

Result:

Decimal places: 0 Example:0

New name:

OK

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 SMM DataPro Excel interface. The 'Edit' button in the ribbon is highlighted with a red box. The 'Change' dialog box is open, showing the 'Sheet List' on the left and the 'Select Items' table on the right. The 'Select Items' table has columns for 'Check', 'Item name', and 'Item id'. The 'Latest setting' section at the bottom shows the current configuration for the selected item.

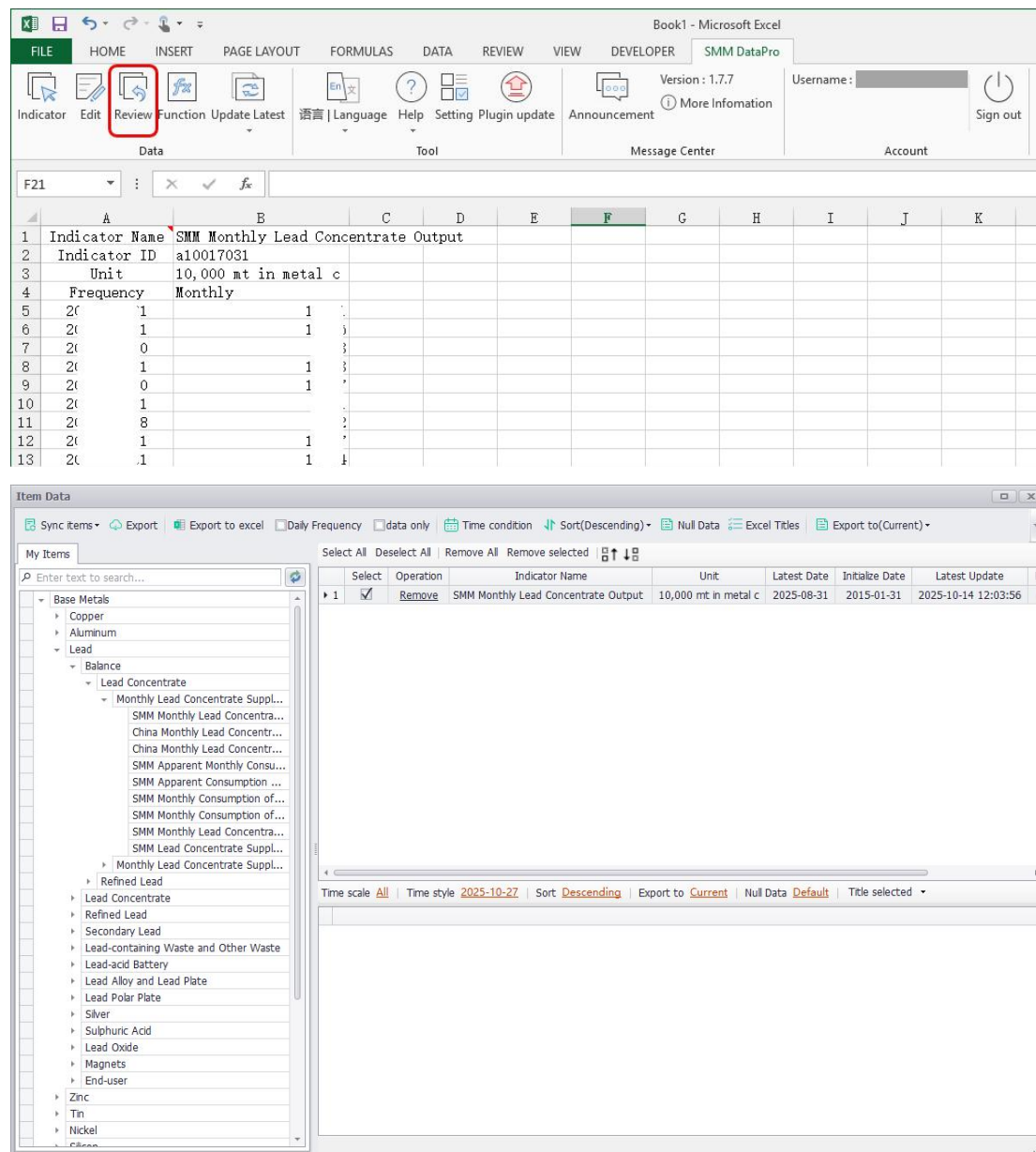
Check	Item name	Item id
<input checked="" type="checkbox"/>	SMM Copper Price Forecast(Quarterly): SM...	a10099721

Latest setting:
Time condition:[All]
Title selected:[Item name,Item id,Unit,Frequency]
Data Sorting:[Descending]

Save change

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.



The screenshot displays the SMM DataPro application interface. The top section shows an Excel spreadsheet with the following data:

Indicator Name	Indicator ID	Unit	Frequency
SMM Monthly Lead Concentrate Output	a10017031	10,000 mt in metal c	Monthly

The bottom section shows the 'Item Data' dialog box. It includes a tree view on the left with the following structure:

- Base Metals
 - Copper
 - Aluminum
 - Lead
 - Balance
 - Lead Concentrate
 - Monthly Lead Concentrate Suppl...
 - SMM Monthly Lead Concentra...
 - China Monthly Lead Concentr...
 - China Monthly Lead Concentr...
 - SMM Apparent Monthly Consu...
 - SMM Apparent Consumption ...
 - SMM Monthly Consumption of...
 - SMM Monthly Consumption of...
 - SMM Monthly Lead Concentra...
 - SMM Lead Concentrate Suppl...
 - Monthly Lead Concentrate Suppl...
 - Refined Lead
 - Lead Concentrate
 - Refined Lead
 - Secondary Lead
 - Lead-containing Waste and Other Waste
 - Lead-acid Battery
 - Lead Alloy and Lead Plate
 - Lead Polar Plate
 - Silver
 - Sulphuric Acid
 - Lead Oxide
 - Magnets
 - End-user
 - Zinc
 - Tin
 - Nickel

The right side of the dialog box shows a table of selected items:

Select	Operation	Indicator Name	Unit	Latest Date	Initialize Date	Latest Update
<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

At the bottom of the dialog box, there are settings for the table view:

- Time scale: All
- Time style: 2025-10-27
- Sort: Descending
- Export to: Current
- Null Data: Default
- Title selected

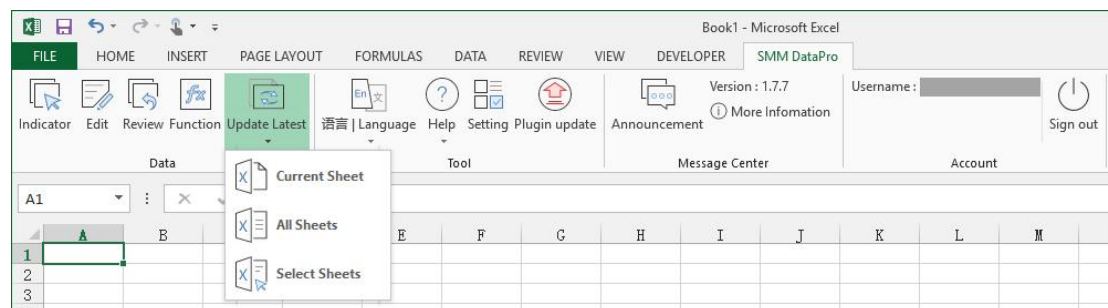
Update Latest

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.

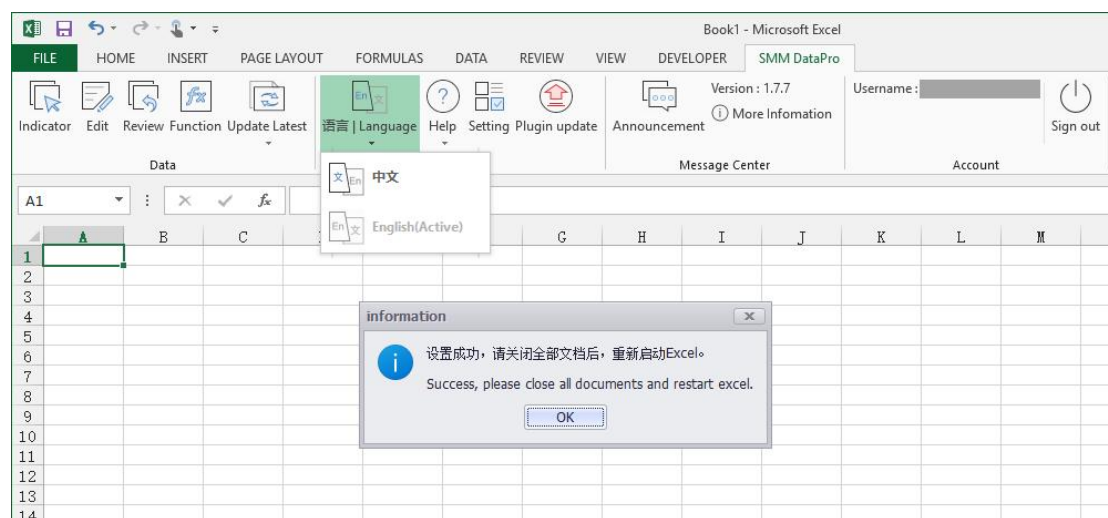
Update Latest-Select Sheets: Update data in the currently selected sheets.



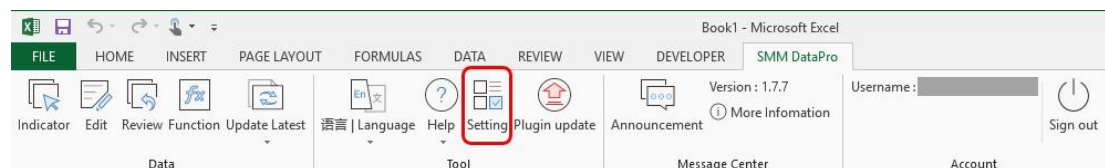
Switch Language

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.

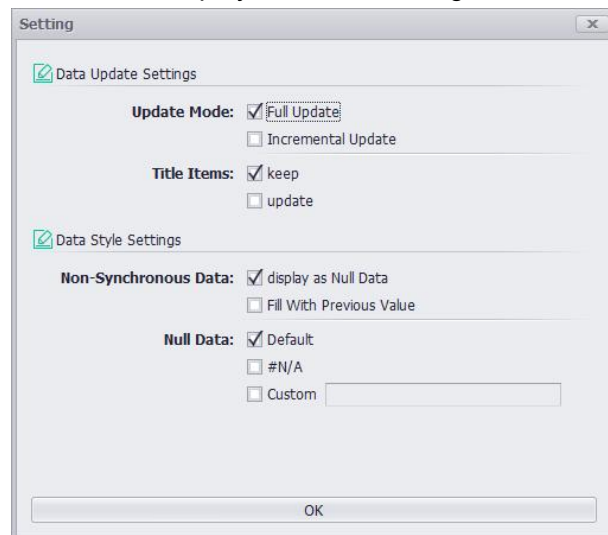
Fill With Previous Value: Fill null values from non-synchronous data with the previous available value. If no previous value exists, it will be handled according to the null value setting.

Data Style Settings-Null Data

Default: Display null values as blank cells.

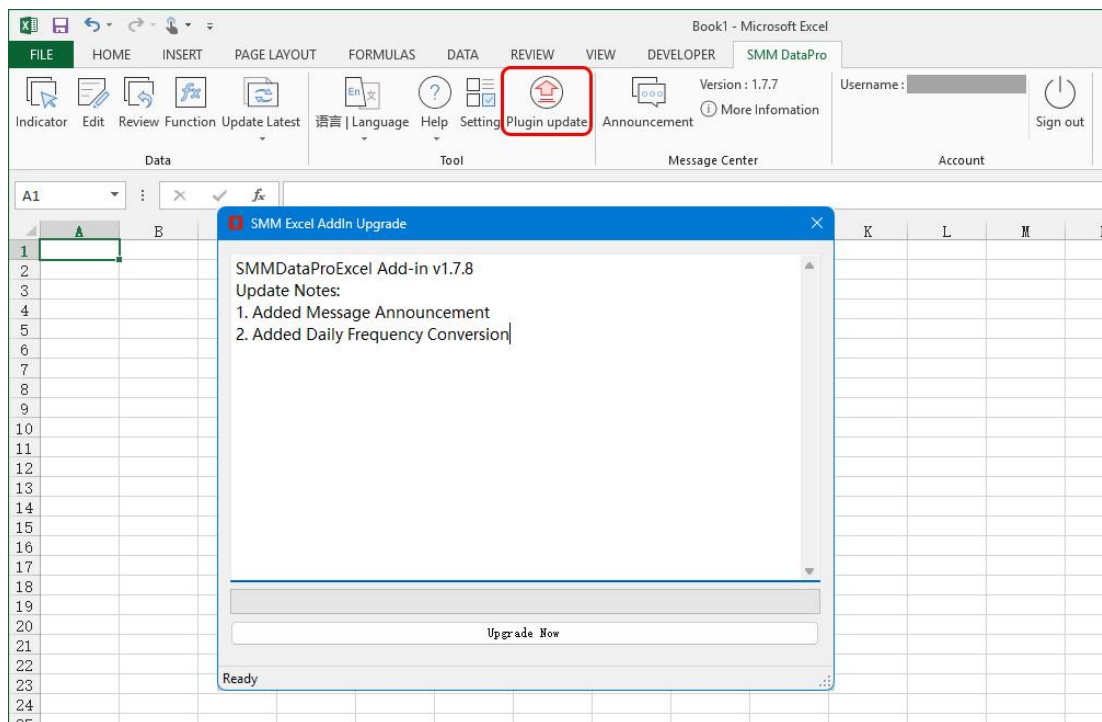
#N/A: Display null values as #N/A.

Custom: Display null values using a custom value.

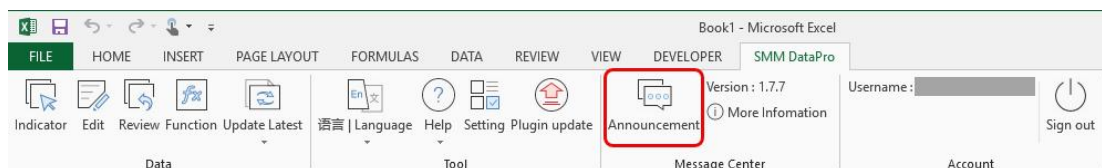


Plugin update

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.

