

Telemet IQ

Telemet Orion's Microsoft Excel Add-In

Executive Summary

Telemet puts research, analytics and real-time market data at your fingertips. Telemet IQ, bundled with the Telemet Orion investment platform, puts financial data into the world's most popular spreadsheet program, Microsoft Excel.

Telemet clients get stunning reports and charts that are 'presentation' ready. The data is 'up-to-date' with the latest real-time prices and financial information. Analysts save time and effort because no manual entry of financial data (income statements, balance sheets, ratios, and cash flows) is necessary. There is more time for company analysis, such as comparing financials and performing 'what if' analyses on expenses or revenue.

Telemet Orion software also bundles in several sample spreadsheets & templates that illustrate how Telemet IQ can be used for reporting. To access the pre-built reports: Open Telemet Orion, select the 'Display' menu, then 'Research', then 'Excel Templates'. Template information can be found on pages 7 – 8 of this document.

Telemet IQ is an enhancement on Telemet MarketLink. This is because Telemet IQ uses powerful, fast Real Time Data (RTD) technology from Microsoft whereas Telemet MarketLink used the older dynamic data exchange (DDE) standard.

Table of Contents

Introduction	2
Accessing Telemet IQ.....	2
Using Telemet IQ	2
Data Tab:	2
Symbol Selection.....	3
Field Selection.....	3
- Summary Data Fields	4
- SEC 10K/10Q Data Tab	4
Period Selection	5
Data Layout.....	6
Telemet IQ Template.....	7
Snap Data / Start At	8
Options Button.....	10
Telemet IQ Charts.....	12
Appendix 1.....	13
Telemet IQ Installation Instructions	13
To install Telemet IQ in Microsoft Excel XP (2002) or Microsoft Excel 2003	13
To install Telemet IQ Add-in in Microsoft Excel 2007:	13

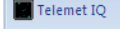
Introduction

Telemet IQ provides access to over 1,000 real-time market data and company financial data items from Telemet within Microsoft Excel. In addition, Telemet IQ puts over 50 charts into spreadsheets.

Telemet IQ software requirements:

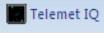
- Telemet Orion (version 8 or later)
- Microsoft Excel XP (2002 or later)
- Microsoft Excel & Telemet Orion must be running on the same computer.

Accessing Telemet IQ

When you open Microsoft Excel you should see a Telemet IQ icon in your toolbar .

If the Telemet IQ icon does not appear, refer to Appendix 1 for instructions.

Using Telemet IQ

Telemet Orion must be running *before* opening Microsoft Excel to use Telemet IQ. When you click the Telemet IQ icon  see the main Telemet IQ interface which has 2 tab options, 'Chart' & 'Data', as shown below.

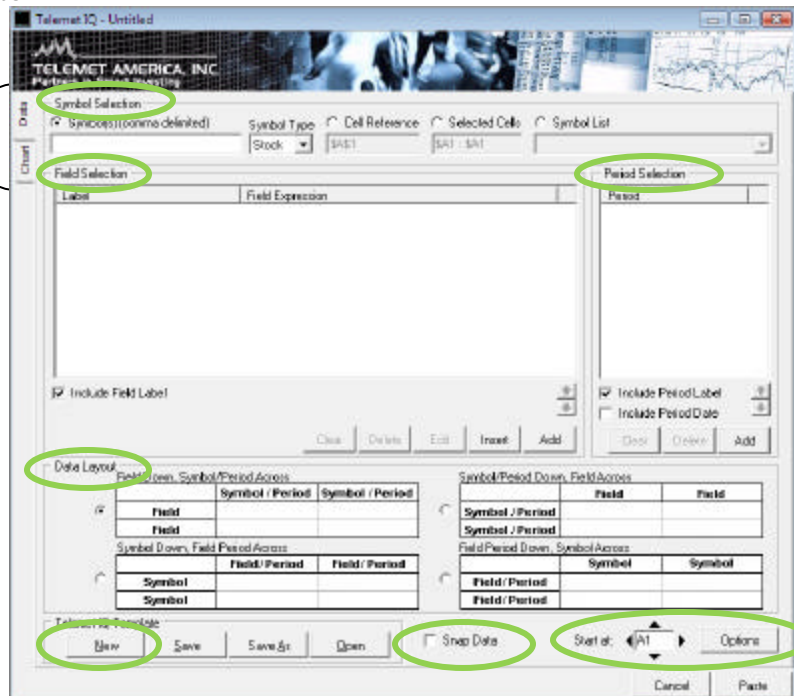
Data Tab:

The Data Tab is the default tab and has 5 sections:

- ✍ Symbol Selection
- ✍ Field Selection
- ✍ Period Selection
- ✍ Data Layout
- ✍ Telemet IQ Template
 - "Snap Data" check box
 - "Options" button

Get financial and market data items from the 'Data' tab: More on pages 3 – 11.

Get charts showing various financial items by clicking the 'Charts' tab: more on page 12.



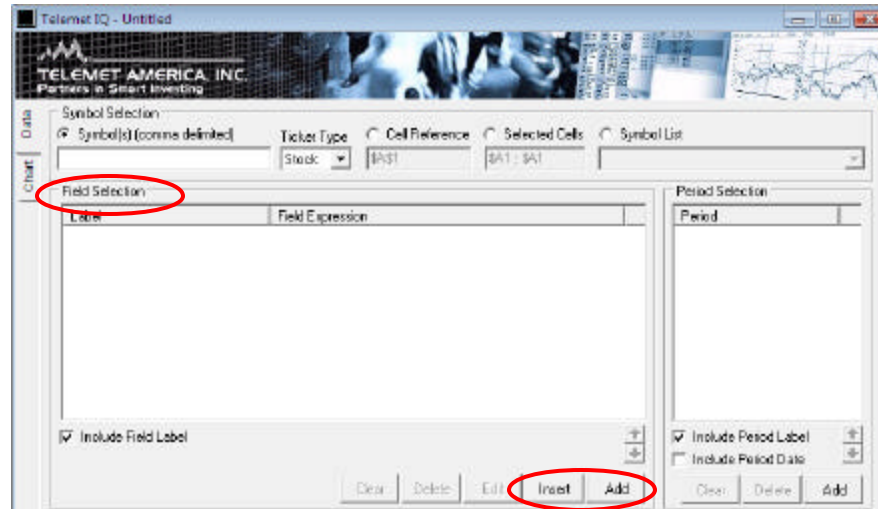
Symbol Selection – the ticker symbols desired



Symbol Selection section offers 4 choices: Symbol(s), Ticker Type (stock, index, future), Cell Reference, Selected Cells, & Symbol list.

- **Symbols:** Select this to manually enter 1 or more tickers. Multiple symbols are delimited by commas. For example: GE,MSFT *Note:* GE, MSFT with an extra space does not work.
- **Cell Reference:** Select this if you have one ticker on your spreadsheet that you want referenced. *Note:* Only one symbol is allowed. Referencing lets you change tickers on a spreadsheet, and all the data items referring to that ticker change.
- **Selected Cells:** Select this if you have more than one ticker already on your spreadsheet. Highlight the tickers (in the column or row) on your spreadsheet, then use 'Selected Cells' to reference the highlighted area.
- **Symbol List:** Select this if you want to use a previously created Telemet Ticker list. Select the 'Symbol List' choice then select a Telemet Ticker list from the drop-down menu.

Field Selection – the data items (fields) desired from Telemet's database.



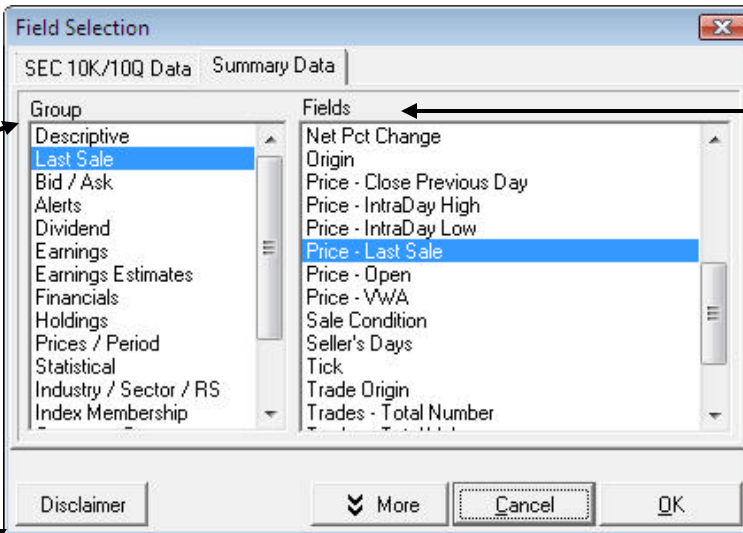
Click the 'Add' or 'Insert' button at the bottom right corner of the 'Field Selection' section to select various financial and market data fields. 'Insert' can also be used to modify an existing Field Selection list by inserting another field into any position. A Field Selection dialog appears (next page) and shows two tabs: 'SEC 10K/10Q Data' and 'Summary Data'.

The Summary Data tab is the default tab.

- **Summary Data Fields:**

'Group' area: Lists the available field groups.

Note: Most fields in the 'Group' area are also available as a Custom Price Page data fields in Telemet Orion.



'Fields' area: Shows the field chosen once a 'Group' is selected

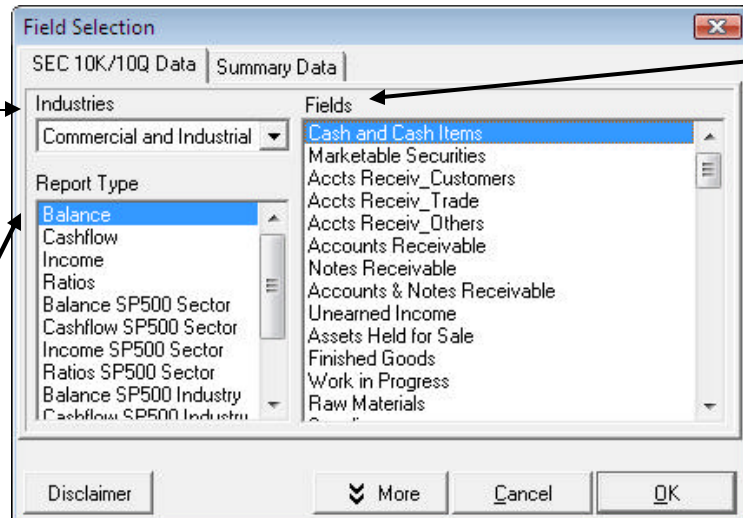
Note: Press and hold the SHIFT or CTRL keys and click on fields to select more than 1 at once.

'Disclaimer' button: Provides information & examples regarding timing and rounding items for fields.

'More' button: Allows combining data fields, such as adding two fields together.

- **SEC 10K/10Q Data Tab - fields from 10K & 10Q statements:**

'Industries' drop down menu: Changes the financial statement format. Companies report in one of four financial statement formats: Commercial and Industrial, Registered Investment, Insurance, or Bank Holding.
Note: Most companies use Commercial and Industrial financial reports.



'Fields' area: Shows the field choices once a 'Report Type' is selected. *Note:* Press and hold SHIFT or CTRL keys and click on fields to select several fields at once.

'Report Type' area: Choose the financial statement. For example, click "Balance" for Balance Sheet fields.

- o Once the SEC 10K/10Q fields and/or Summary Data fields are selected, click 'OK'.

The Telemet IQ screen after 'Symbol Selection' & 'Field Selection' choices have been made is below:

Remove(s) Field Label(s) if desired.

Re-arrange the field order by using up and down arrow buttons.

Modify a field by clicking the 'Edit' button or double click on the selected field. A dialog appears with more edit options. Modify field labels and create field expressions, i.e. Microsoft Excel formulas using Telemet fields.

Period Selection - accounting time period

Using SEC 10K/10Q Data fields requires a financial accounting time period. The Summary Data items are uniquely referenced by a time period so no time period is required.

To select the time period for the SEC 10k/10Q fields, click on the 'Add' button under 'Period Selection'. A window appears (please refer to the example below).

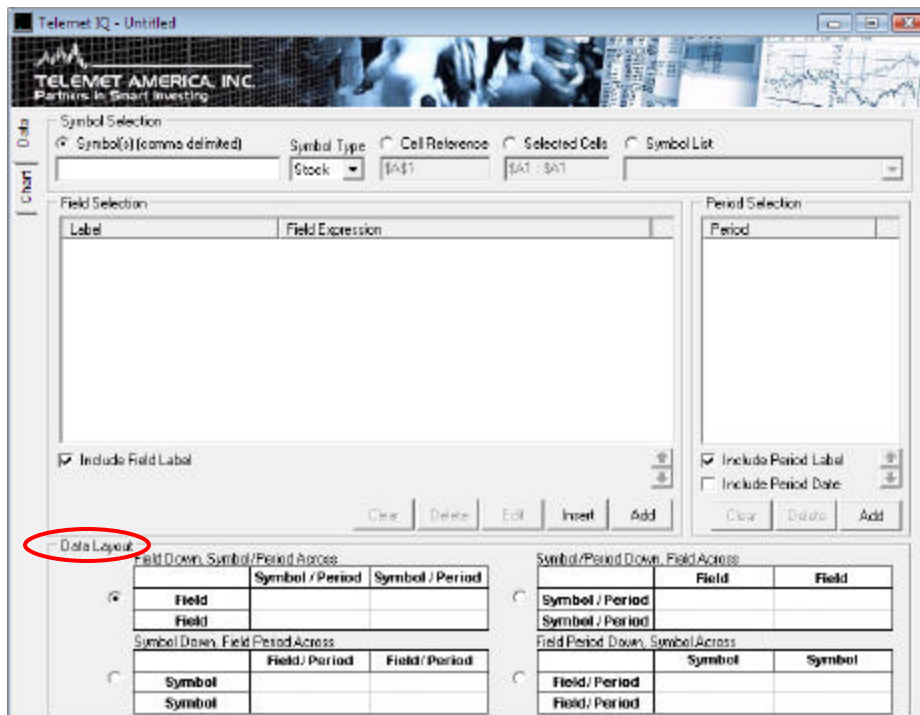
Select one or more periods from the list (use the Shift or Control key to select multiple periods).

Add or remove the period labels and the period dates.

Note: Telemet has up to 10 years of historical data for public companies with a market cap of \$100M or larger.

Data Layout - how the fields are put on the spreadsheet

There are four data format possibilities. The four formats are listed below (including page 7):



Field Down, Symbol/Period Across:

This layout is suitable for Summary Data fields. Below is an example of the *format*:

	GE
Price - Last Sale	11.85

Symbol/Period Down, Field Across:

This layout is suitable for Summary Data fields. Below is an example of the *format*:

	Price - Last Sale
GE	11.85

Symbol/Period Down, Field Across:

This layout is suitable for SEC 10K/10Q data or Summary Data fields. Below is an example of the *format*:

	Price - Last Sale	Cash and Cash Items
	Last Quarter	Last Quarter
GE	11.8727	46,830,000,000

🔗 Data Layout (Continued...)

Field Period Down, Symbol Across:

This layout is suitable for SEC 10K/10Q Data. Below is an example of the *format*:

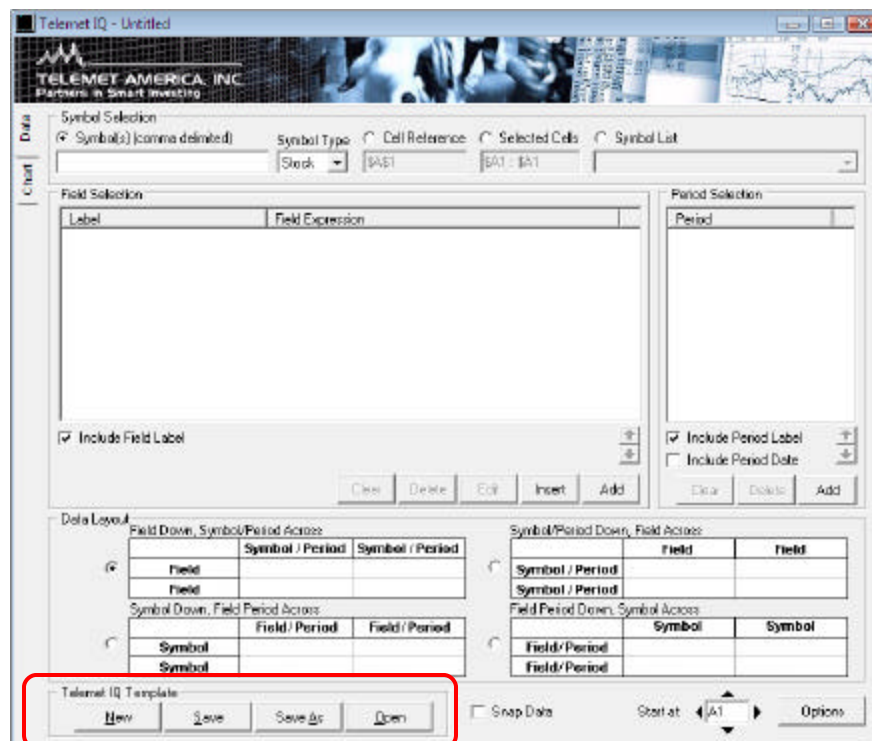
		GE
Price - Last Sale	Last Quarter	12
Cash and Cash Items	Last Quarter	46,830,000,000

🔗 Telemet IQ Template

To frequently select the same data items (SEC 10K/10Q or Summary Data), use a 'Template' to save time.

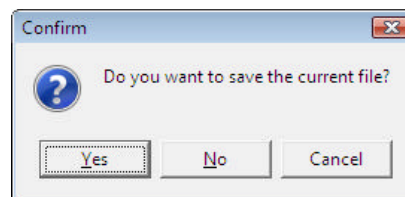
Four templates are bundled in Telemet IQ for your convenience:

Income Statement Report, Balance Sheet Report, Cash Flow Statement Report, & Ratios Report. These link financial data right into a Microsoft Excel spreadsheet.



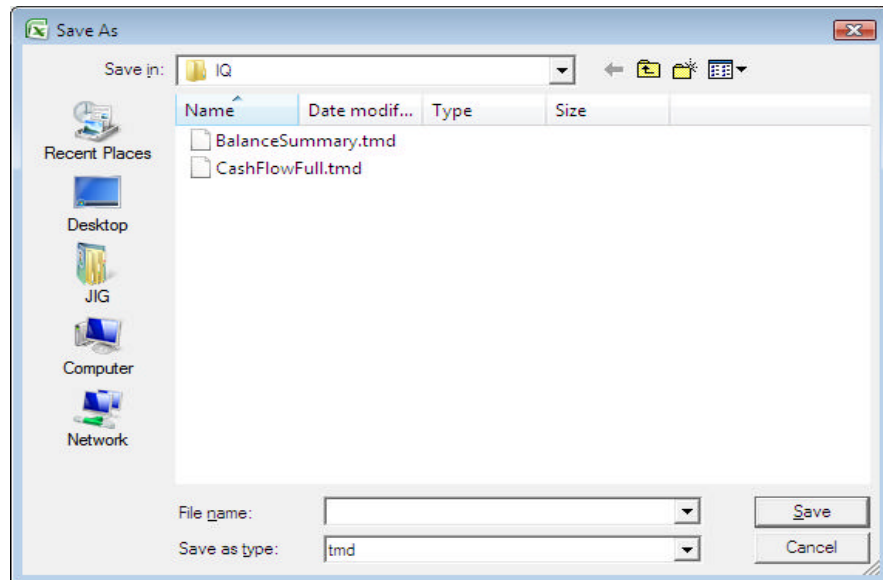
- **'New' Button:** Creates a new Template. Select the data fields, click 'New'.

A window opens to confirm saving a new template, click on 'Yes'



Telemet IQ Template (continued...)

After saving the new template, the window shown below opens. Give the template a name.
Note: Don't change the location where the template (.tmd) file is saved. The default location is: Telemet\IQ



- **'Save' Button:** Saves (overwrites) an existing template or creates a new template. Click Save and the window above (also used for 'New') opens.
- **'Save As' Button:** Saves (overwrites) an existing template or creates a new template by typing a new name. Click Save As and the window above (also used for 'New') opens.
- **'Open' Button:** Opens an existing Telemet IQ template file.

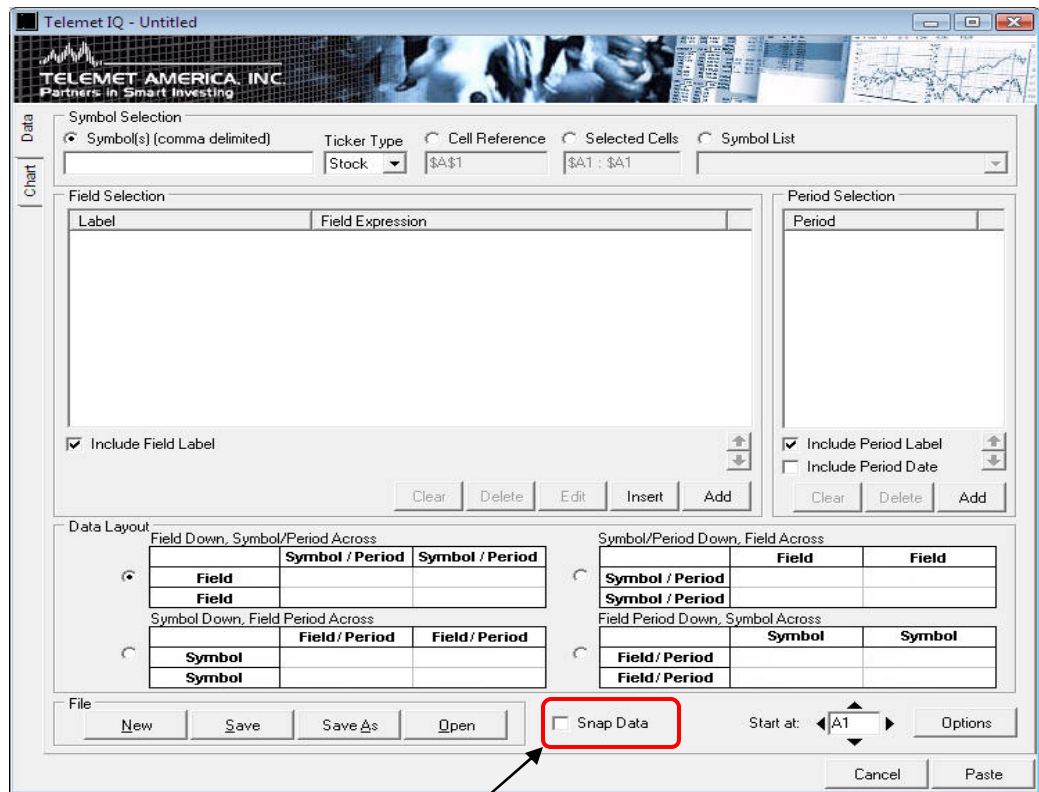
Snap Data / Start At

The Snap Data box is a refresh option. The fields will not update automatically with the Snap data box checked. A refresh button is used to update the fields instead.

The 'Snap Data' check box should be used if:

- 1) There are more than 1,000 data cells - refreshing automatically slows down the spreadsheet.
and/or
- 2) The requested data items change infrequently (such as quarterly financial statement data items) where a manual refresh once per quarter is sufficient.

🔗 Snap Data / Start At (continued...)



Use the 'Snap Data' box, for manual data refresh.

Example: A cell Formula *before* selecting 'Snap Data' is shown below:

	A	B	C	D	E	F	G	H
1		GE						
2								
3		Last Quarter						
4	Long Term Debt to Assets	0.43						
5								

Formula bar: `=RTD("telemet.iq",,"data",,B1,"Long Term Debt to Assets","Q")`

Example: A cell Formula *if* 'Snap Data' is selected is shown below:

	A	B	C	D
3	[snapstart]	[fd:Long Term Debt to Assets^Q]	[snapend]	
4		Long Term Debt to Assets - Last Quarter		
5				
6	GE	0.43		
7				

Formula bar: `0.430671642085312`

Update Data button: Update Data

For manual data refresh press here:

🔗 Snap Data / Start At (continued...)

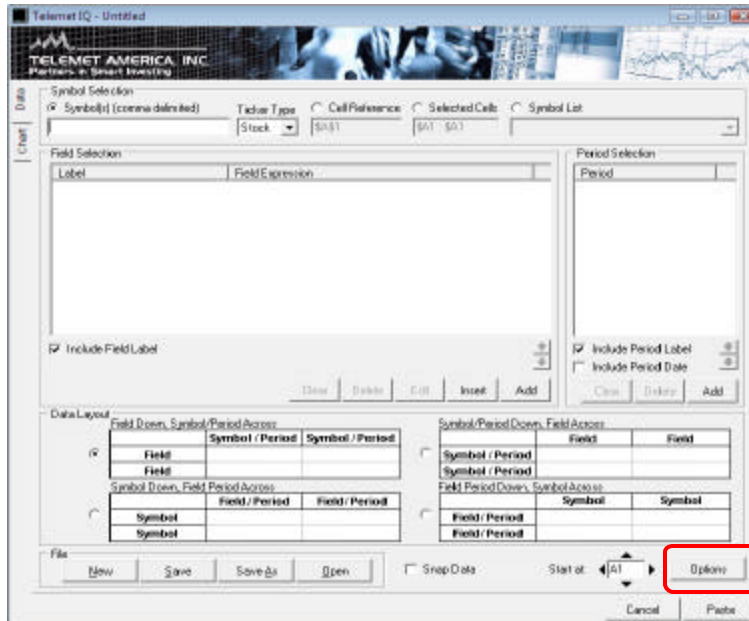
Note: The only data layout format available when using Snap Data is Symbol/Period Down, Field Across. Refer to pages 5 – 6 for more information.

Start At - the location where the fields appear in the spreadsheet

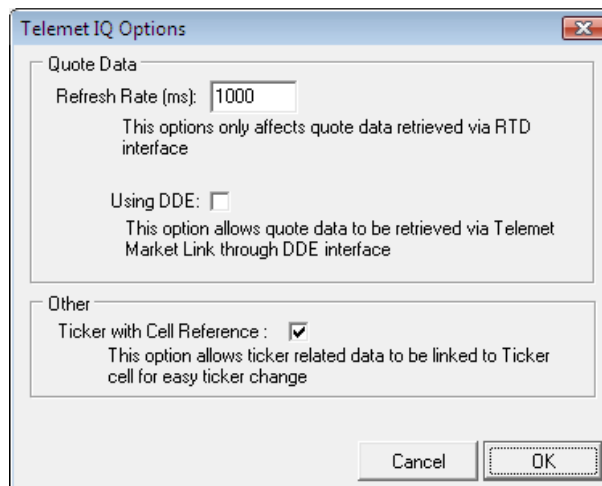
Use 'Start At' for the cell locations - where to put the data.

🔗 Options Button

Change settings for Telemet IQ including: quote data refresh rate & Telemet IQ formula format.



When the Options button is clicked the screen below opens.



? Quote Data:

- **Refresh Rate:** Telemet IQ data fields update (refresh) every second. The update frequency (Refresh Rate) is changed in the Options screen. Note: the Refresh Rate is shown in milliseconds: 1000 = 1 second.

Options Button (Continued...)

- **Using DDE:** Telemet IQ can paste DDE formulas (instead of RTD formulas) by checking the box 'Using DDE'. This option is for legacy applications - those clients that have previously built macros and links using Telemet previous Microsoft Excel link called 'MarketLink'. 'Marketlink' links (using DDE) are not as flexible as RTD links.

? Other

- **Ticker with Cell Reference:** Paste a ticker or a cell reference within the Telemet IQ formula. The default is box checked. When checked, there is a cell reference within the Telemet IQ formula – the cell contains a ticker and the data refers to the ticker in the cell. Changing the cell ticker, changes all the data on the spreadsheet that reference the cell. If the box is not checked, the data is fixed to a ticker inside each cell and no cell reference is available.

Pasting Data onto the spreadsheet

Once all selections are made, click the 'Paste' button and the data will populate the spreadsheet.

Telemet IQ Charts

Over fifty 'Snap' Charts illustrate various trends in financial data items.

Click the 'Charts' tab on the left side of the Telemet IQ setup screen (below).

Enter up to two ticker(s), choose a 'Chart Group', then choose a Chart, and click 'Paste'.

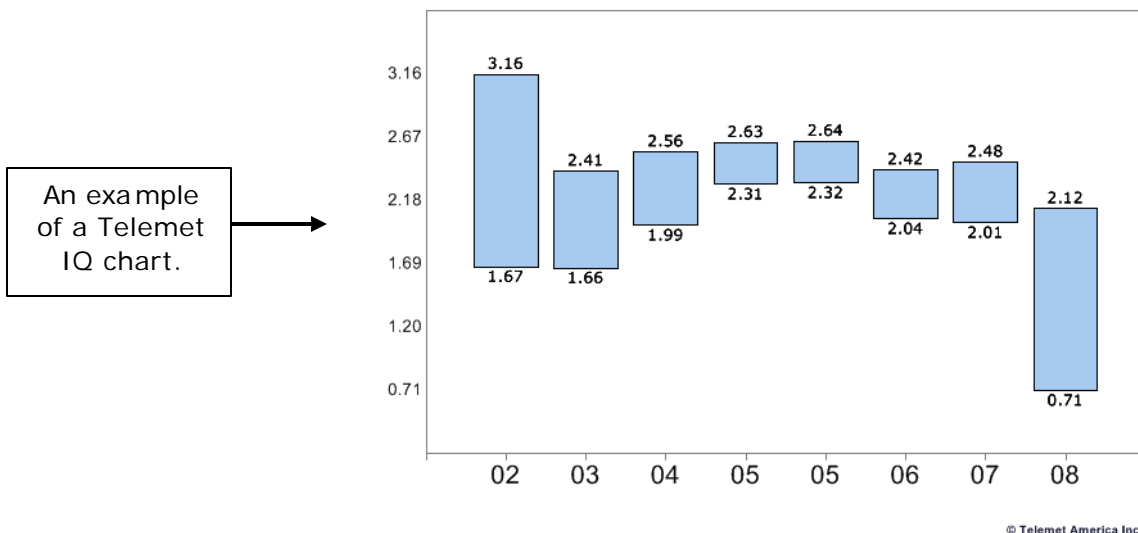
The chart options settings (if needed), including Fonts, colors, and Titles, can also be modified.

Enter tickers

Change chart types, items shown on the chart, chart colors, & fonts.

After choosing Chart settings click 'Paste'.

Price To Sales Yearly 7 Years - GE



Appendix 1

Telemet IQ Installation Instructions

To install Telemet IQ in Microsoft Excel XP (2002) or Microsoft Excel 2003:

1. Click Tools | COM Add-ins from Excel main menu.
~ If the 'COM Add-ins' is not on the Tools menu, add the menu item by clicking on Tools | Customize item.
2. Click on Command tabs from the dialog.
3. Look for Tools from the 'Categories'. Then drag the 'COM Add-ins' item on the right to the Tools pull down menu. Drop it to the desired location on the menu.
4. On the COM Add-ins dialog, click 'Add' then select the TelemetIQ.dll file from Telemet folder (usually located in C:\Telemet).
5. A floating 'Telemet IQ' button should appear. Drag the button to the menu bar.

To install Telemet IQ Add-in in Microsoft Excel 2007:

1. Click the Microsoft Office button at the top left corner of the MS Excel screen.
2. Choose 'Excel Options' at the bottom of the screen.
3. In the window that opens, click 'Add-ins' on the left side of the screen.
4. See the "Manage" drop down menu at the bottom of the screen. Choose "COM Add-ins" and click 'GO'.
5. In the window that opens click 'Add...' on the right side of the window.
6. Browse to your Telemet folder (usually located in C:\Telemet) and select the TelemetIQ.dll file, then click 'OK'.