

# Use PC-SPAN

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## Starting PC-SPAN

Like any Windows program, PC-SPAN version 4 can be initiated in any of several different ways, including:

- by selecting it from the **Start** menu
- through a shortcut to it which may be installed on your desktop, or which has been placed as an icon directly on your Task Bar
- by directly executing the **span.exe** program which is located in the **bin** subdirectory of the directory where you have installed the program
- by selecting a **SPAN document** -- a file whose name ends in **.spn**. (More on this below.)

## PC-SPAN Version 4's Three-Tabbed User Interface

When you first run PC-SPAN, you'll see that the main window has three sub-windows, which appear as tabs.

- The **Data** window: this is where you load SPAN risk parameter files, define portfolios and their positions, and calculate performance bond requirements.
- The **Reports** window: this is where you view reports online, and choose to print them if desired.
- The **Documentation** window: this is where online documentation for the program can be found.

You can switch between these three windows at any time by clicking on the desired tab, or by using the **View** command on the menu.

## PC-SPAN as a Windows application, and the concept of the "SPAN document"

When you first run PC-SPAN version 4, you will be in the Data window, and PC-SPAN will show you a blank "SPAN document".

As you work -- loading risk parameter files, entering portfolios, calculating performance bonds, etc. -- you are editing that SPAN document.

Just as with Microsoft Word, Excel, and many other Windows applications, your document is actually held in memory (RAM.) It is not automatically saved to disk. It's up to you if and when to save your document to disk.

When you do save it to disk, you can give it any filename, but the last part of the filename -- also known as the "filetype" or "extension" -- will be **.spn**. The default name for your SPAN document, which you can accept or change, is **span.spn**.

(When you install PC-SPAN, the **.spn** filetype is "registered" with Windows. So Windows knows that any file that has a name ending in **.spn** is a SPAN document. If you're in Windows Explorer, for example, if you double-click on a SPAN document, PC-SPAN version 4 will be launched and that SPAN document will be opened in it.)

You can have as many SPAN documents as you want stored on your disk(s), named any way you want. At any time, if you want to resume working with a SPAN document saved on disk, you can either:

- Using Windows Explorer or similar program, find the SPAN document file and execute it. As indicated above, PC-SPAN version 4 will be launched, and the selected SPAN document opened within it.
- From within PC-SPAN version 4, select the "File Open" command from the menu, or just click on the "Open" button in the toolbar. The "Open" dialog box will display. Find the desired SPAN document file, and either double click on it, or select it and then click on the "Open" button in the dialog.

By default, PC-SPAN version 4 will save your SPAN documents in the **data** subdirectory of the main directory where the program is installed. You can save SPAN documents anywhere, however.

PC-SPAN version 4 has a "single document interface". You can have only one document open at a time in a copy of PC-SPAN 4. You can have as many copies of PC-SPAN running at the same time as you want, however. For example, if you want to work on a new SPAN document without closing the one you're currently working on, just start another copy of PC-SPAN.

Suppose you have a SPAN document already open in PC-SPAN 4, and you have made some changes to that document since you last saved it. If you now tell PC-SPAN 4 to open a new document, it will ask you whether you want to save the current document, before clearing it out of memory and loading the new document.

## Working in the Data window

When you work in the Data window, you will see your SPAN data arranged in a **"tree view."** This works very much like the tree view in Windows Explorer and many other programs. You see your data in a hierarchical structure.

If you see a data element -- called a "node" -- which has a plus sign ("+") to the left of it, that means that the node is expandible. Click on the plus sign to **expand** the node, to see the data beneath it. When the node is expanded, the symbol will change to the minus sign ("-"). Click on the minus sign to **contract** the node -- to make the data beneath it invisible again.

You can use the keyboard to work with the tree view if you choose. Simply use the **Up** arrow and the **Down** arrow to browse up or down. If you are on a node which is expandible, press the **Right** arrow to expand it, or the **Left** arrow to contract it.

Some data items on the tree -- for example -- portfolios, or contracts, -- have "Properties" dialog boxes associated with them. You can bring up the dialog box associated with an item in several different ways. If the item is selected, press either **Enter** or **Alt-Enter**. Or you can **double click** on the item. Or you can single click on the item to select it, right-click on it to bring up its associated "object" menu, and then select "Properties."

The structure of the data in the tree view is as follows:

- At the very top level, you'll see a node for the **overall SPAN document**.
- Beneath this, there will be nodes for each **point in time** for which any data has been loaded.
- For each point in time, you will see two overall sections, one for **portfolios** defined at that point in time, and another for **exchange complexes** for which data is loaded for that point in time.

## Basic operations: Opening and saving SPAN documents, and loading SPAN risk parameter files

- To load data from a SPAN risk parameter file into the current SPAN document: click on the Load button on the toolbar, or select File Load from the menu, or press Ctrl-L. The Load File dialog box will display. Select the file to be loaded, and click Open. The selected file is loaded.
- **To open a SPAN document previously saved to disk:** Click the **Open** button on the toolbar, or select **File Open** from the menu, or press **Ctrl-O**. The **Open** dialog box displays. Select the SPAN document you wish to open -- the filename will end with **.spn** -- and click the **Open** button. When you do this, if there is a SPAN document already loaded which has been modified since its last save, you will be prompted to save that previously-loaded document, before it is cleared and the new one opened.
- **To save a SPAN document:** click the **Save** button on the toolbar, or select **File Save** from the menu, or press **Ctrl-S**. If you are saving the SPAN document for the first time, the **Save As** dialog box will display so that you can name the document and select the disk and directory where you want to save it.

The default location for SPAN documents is the **data** directory underneath the main application directory, but you can save SPAN documents anywhere.

For previously-existing documents, you can use the **Save As** command to save them under a new name and/or location.

- **To clear the currently loaded SPAN document and start a new one:** Click the **New** button on the toolbar, or select **File New from the menu, or press Ctrl-N**.
- **To delete data for a particular point in time from the current SPAN document:** select the desired point in time on the tree. Right-mouse click on the point-in-time to display the associated menu, and select **Delete**.

## Using the Log View

Use the **Log** command on the **View** menu to display or hide the **Log View**. This is the new-and-improved equivalent of the old calculation log and load log. You can also change the relative size of the log view by dragging the top of the view up or down.

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- [Defining Portfolios](#)
- [Defining Positions](#)
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