

# Infront Investment Manager

Quick Guide

Extensive market data on our cloud-based platform

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# 1 Infront Investment Manager - At a glance

- Browser-based terminal with access to global market data, reference data, news, equity analysis, portfolio information and regulatory documents
- Add-in for Excel to easily make your own analysis
- Multi-asset in-depth screening possibilities
- Platform-independent and available on mobile devices
- Dashboards can be centrally pre-configured or customized
- Multiple handy calculators for bonds, swaps, investments and other
- Modular content packages to suit your needs
- Integration with other Infront regulatory and portfolio products
- Customizable PDF instrument factsheets
- Widget-based state-of-the-art technology
- Scalable, secure microservice-based, multi-tenant capable design for cloud-native deployment
- White labelling possible together with client specific customizations and data integration

## 2 Introduction

On these help pages, you will learn about the various possibilities that Infront Investment Manager offers.

Infront Investment Manager is a web-based responsive tool supporting the most important current browsers and runs on tablets and smart phones. The workspace consists of configurable dashboards where you can freely add widgets with particular functions and analyses.

The [general user interface and navigation of the dashboards](#) is explained first. The [Widget Gallery](#) is then used to outline the general structure of the widgets, before the individual functions are presented in the [Widget overview](#) chapter.

A separate chapter is dedicated to (50-en) Screener.

See chapter (50-en) Administration to learn more about login, system requirements or general profile settings.

## 3 Navigation and standard elements

In this chapter, the navigation and structure of the graphical user interface is presented in more detail.

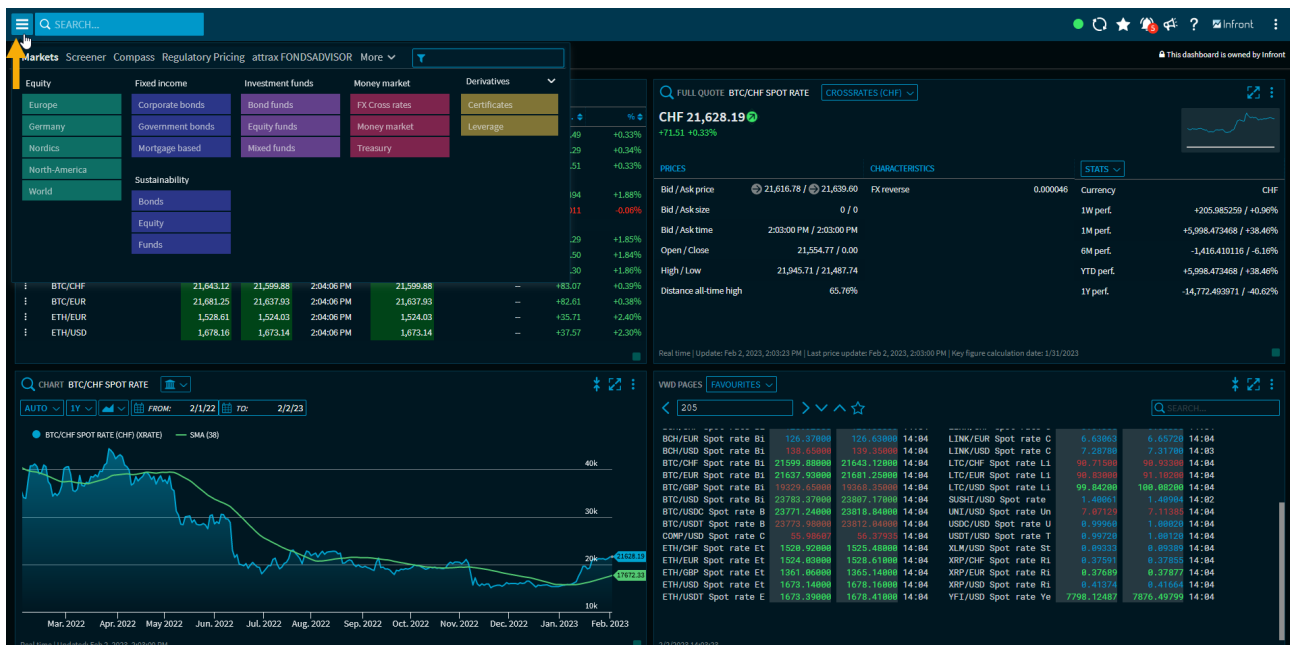
### See also:

- [Main menu](#)
- [Elements in the title bar](#)
- [Dashboards](#)
- [Favourites](#)
- [Context menus](#)
- (50-en) Instrument portraits and PDF instrument profiles
- (50-en) Note for new versions
- (50-en) Help Center and Infront Investment Manager
- (50-en) App Switcher
- [Settings menu](#)
- [Widget Gallery](#)

### 3.1 Main menu



Use the main menu icon on the far left of the Infront Investment Manager title bar to open a menu with standard commands.



In detail, you can open the following functions by using the commands at the top of the main menu:

Command	Description
Compass	If the "Compass" function is available to you, select this command to open the page.

Command	Description
<b>Data Manager Compact</b>	Select this command to open the product "Data Manager Compact" (with appropriate permission).
<b>ESG module</b>	Open the ESG module.
<b>Markets</b>	Closes the menu and returns to the current dashboard in Infront Investment Manager.
<b>Regulatory pricing</b>	Select this command to open the "Regulatory Pricing" module (if you have the appropriate permission).
<b>Screener</b>	Select this command to open the screener in Infront Investment Manager. For more information, see (50-en) Screener.

The commands available from the main menu support opening pages in a new browser tab. Press and hold the <CTRL> (Windows) or <CMD> (Mac) key while clicking the command. This function is also supported when selecting [Favourites](#) or links from context menus. On smaller output devices such as smartphones, you will also find the main menu icon on the title bar. In this case, the main menu shows all available icons.



Using the (coloured) quicklinks described below, you can also directly open dashboards optimised for the individual asset classes.

#### See also:









- (50-en) Quick links in the main menu

## 3.2 Elements in the title bar




Between the main menu icon on the left and the settings menu icon on the right you will find (in the browser version of Infront Investment Manager) further elements in the title bar.

Element	Description
<b>App Switcher</b> 	At the top left of the Infront Investment Manager, this icon provides you an (50-en) App Switcher that allows you to access all unlocked browser-enabled Infront products directly from the Infront Investment Manager.

Element	Description
<b>Main menu icon</b> 	Use the next icon on the left side of the title bar to open the main menu. For more information about the individual functions in the menu, see Elements in the title bar.
<b>Quick search</b>	A quick search for securities is available via the "Search..." input field. See also the section <a href="#">Search</a> .
<b>"Favourites" icon</b> 	Use the "Favourites" icon to open the list of favourites. For more information, see <a href="#">Favourites</a> .
<b>Online status indicator</b> 	This symbol indicates the status of the connection.
<b>"Reload" icon</b> 	Refreshes the display of your Infront Investment Manager.
<b>"Alerts" icon</b> 	This icon opens the notifications of the triggered alerts in the "Log" view of the "Alert" widget. If there are current alerts, the number of alerts is indicated by the icon. See also the section (50-en) Alerts.
<b>"Communication Center" icon</b> 	In future, you can use this icon to open the "Communication Center", which is not yet available.
<b>"Help" icon</b> 	Click the "Help" icon to open the Help Center with the online help of your Infront Investment Manager in a new browser tab. In the online help, you find information on how to work efficiently with Infront Investment Manager and details on each widget and the modules. The Help Center also provides comprehensive information about other products such as Infront Investment Manager.
<b>Infront logo</b>	On the top right side of the title bar, you see the Infront logo. <div style="border: 1px solid green; padding: 5px; margin-top: 10px;">  Point to the logo to display the exact version number of the Infront Investment Manager.         </div>



Element	Description
<b>Settings menu icon</b> 	Use the icon on the right side of the title bar to open the settings menu. For more information about the various commands, see <a href="#">Settings menu</a> .

## 3.3 Dashboards

The dashboards in Infront Investment Manager allow you to freely arrange up to 50 widgets. You can configure and save your own dashboards. You can share these private dashboards with other users.

You can save changes to your private dashboards and then also compare or revert to older (50-en) Dashboard versions.



Directly in the main menu, many optimised dashboards are also available to you for quick access by using the so-called quicklinks.

In addition, the [Dashboard Explorer](#) also offers some pre-defined standard dashboards.

By default, you can use up to 100 dashboards.

Depending on the size of the browser window, some quick access favourites are displayed in the upper dashboard bar.

This chapter covers most of what you need to know about dashboards.

### See also:

- [Elements in the upper dashboard bar](#)
- (50-en) Quick access to Dashboard favourites
- (50-en) Open dashboards
- (50-en) Edit dashboards
- (50-en) Copy dashboards
- (50-en) Discard changes in dashboard
- (50-en) Save dashboards
- (50-en) Dashboard templates
- (50-en) Dashboard versions
- (50-en) Delete dashboards
- (50-en) Share dashboards
- (50-en) Short portrait templates (Overlay templates)
- [Dashboard Explorer](#)
- (50-en) Dashboard properties
- [Create dashboards](#)






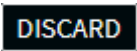
### 3.3.1 Elements in the upper dashboard bar




In the upper part of the dashboard (below the title bar with the central menu icon), you find the [Dashboard Explorer](#) and other basic functions.



Depending on the size of the browser window, some quick access favourites are displayed in the upper dashboard bar.

By default, the following functions are also available in the dashboard bar:

Element	Description
 <p>Dashboard Explorer</p>	<p>Use the drop-down list at the top left of the dashboard (next to the title "Markets") to open <a href="#">Dashboard Explorer</a> to select and configure the dashboards.</p> <p>In addition, you see the name of the currently selected dashboard. You can edit this name directly here. To do this, click in the field, enter the desired name and confirm the entry with &lt;RETURN&gt;.</p> <p>For more information, see <a href="#">Create dashboards</a>, (50-en) <a href="#">Open dashboards and (50-en) Edit dashboards</a>.</p>
 <p>"Add to favourites" button</p>	<p>Click this button to mark the current dashboard as favourites.</p> <p>You can then see from the "shining star" whether a currently open dashboard is marked as a favourite. To remove it from your favourites, click the button again.</p> <p>See also (50-en) <a href="#">Add dashboards to favourites</a>.</p>
 <p>"Share dashboard" button</p>	<p>Click this button to open the "Manage dashboard access" dialogue box and share it with other users of Infront Investment Manager.</p> <p>If the dashboard is currently shared with at least one other user, you will see the "Manage" button described in the next line here.</p> <p>See also (50-en) <a href="#">Share dashboards</a>.</p>
 <p>"Manage" button</p>	<p>Click this button to open the "Manage dashboard access" dialogue box and manage dashboard access by other users.</p> <p>This button is visible if the dashboard is currently shared with at least one other user, otherwise you will see the "Share dashboard" button described in the line above.</p> <p>See also (50-en) <a href="#">Share dashboards</a>.</p>
 <p>"Properties" button</p>	<p>Click this button to open the "Dashboard properties" dialogue window.</p> <p>For more information about the settings, see (50-en) <a href="#">Dashboard properties</a>.</p>
<p>"This dashboard was created by user XY" text</p>	<p>This information appears if the currently open dashboard was created by another user. "Superordinate" dashboards such as standard Infront or standard company dashboards cannot be edited (lock symbol).</p>
 <p>"Discard" button</p>	<p>If you have made changes to <b>private dashboards</b> but have not yet saved them, you can reset the changes to the last saved status of the dashboard using this button, which is only visible if you have done so.</p>

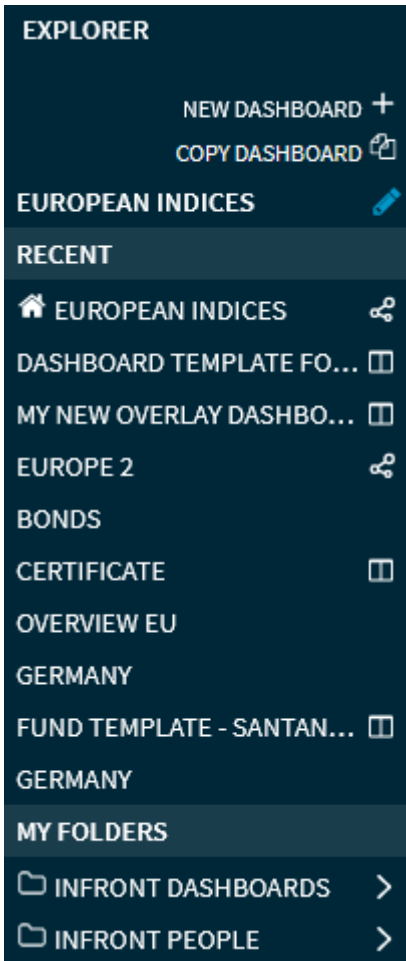
Element	Description
 <p>"Versions" drop-down list</p>	Click this button to open the history of the saved (50-en) Dashboard versions.
 <p>"Save dashboard" button</p>	This button allows you to save the current dashboards configuration. If there are currently no changes to be saved, the button is disabled ("greyed out").
 <p>"Open widget gallery" icon</p>	At the height of the header of the private dashboard, you will also find the icon for opening the <a href="#">Widget Gallery</a> on the right-hand side.

### 3.3.2 Dashboard Explorer

Use the Dashboard Explorer to manage your dashboards. With the corresponding permission, you can create a folder and menu structure for your dashboards on several levels.



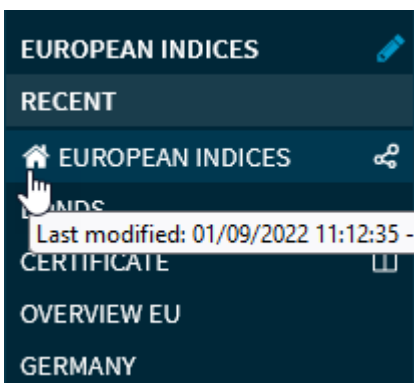
Use the drop-down list at the top left of the dashboard (next to the title "Markets") to open the Dashboard Explorer to select and configure the dashboards.



In the open Dashboard Explorer at the top, you find the commands for creating and copying dashboards.

In the "Recent" area, you find the recently opened dashboards (up to 10) allowing you to quickly select them. The area can be closed, and the status for the condition is saved.

Point to an entry to see the date of the last saved changes of the corresponding dashboard:




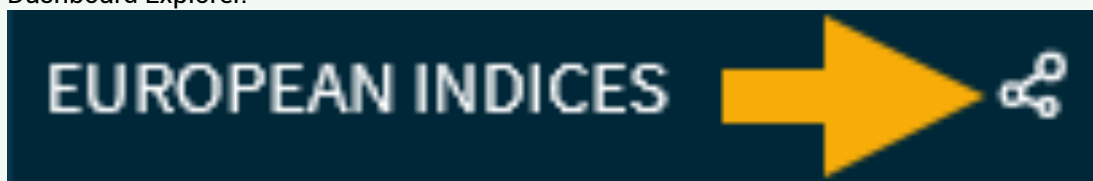
Dashboard templates are indicated by an icon on the right side (in the example above, it's the "TEST RK1" dashboard).

In the "Folder" area, you find all dashboards that you have access to. The top folder area divides the dashboards in the following folders:

- vwd dashboards
  - In this folder, you find the default dashboards created by Infront Financial Technology GmbH.

- **Company dashboards**  
In this folder, you find the dashboards globally defined by the corresponding client.
- **Shared dashboards**  
Here, you find all dashboards that other users have shared with you. When you point to these entries with the mouse, the corresponding user names are displayed in a tooltip. See also (50-en) Share dashboards.
- **Private dashboards**  
In this folder, you find your private dashboards that only you have access to.

 In the Dashboard Explorer, you can create further subfolders (if you have the corresponding permission). Dashboards that you currently share with other users are indicated by this symbol in the Dashboard Explorer:




You can drag dashboards directly from Dashboard Explorer and drop them into the favourites bar. This automatically open the editing view for [Favourites](#).

### 3.3.3 Create dashboards

To create a new dashboard:

1. Open the Dashboard Explorer in the upper left corner of the dashboard bar.
2. Select the "New dashboard" item in the corresponding folder or subfolder of your private dashboards.
3. In the "Create dashboard" dialogue window that appears, enter a descriptive name in the "Name" input field.
4. In the "Description" field, you can specify the content or purpose of the dashboard in more detail. This field can then also be used in future to better identify dashboards, e.g. in Explorer or an AI assistant.
5. To use the dashboard as a template, select the "As template" option. For more information, see (50-en) [Create new dashboard as template](#).
6. If you want to use the new dashboard as a short portrait template for search results, select the "As short portrait template" option. For more information, see (50-en) [Create new dashboard as short portrait template](#).
7. Then click the "Create" button.  
The new (empty) dashboard opens.


For more information about working with dashboards, see [Dashboard Explorer](#).

 For more information about how to create a new dashboard based on an existing dashboard, see (50-en) [Copy dashboards](#). For more information about editing dashboards, see (50-en) [Edit dashboards](#). For more information about widgets in dashboards, see [Working with widgets](#) and [Widget overview](#).

## 3.4 Favourites

In all dashboards, you can select your favourites and store them for quick access in the favourites bar in the title bar at the top of Infront Investment Manager.



 Depending on the size of the browser window, some quick access favourites are displayed in the upper dashboard bar.

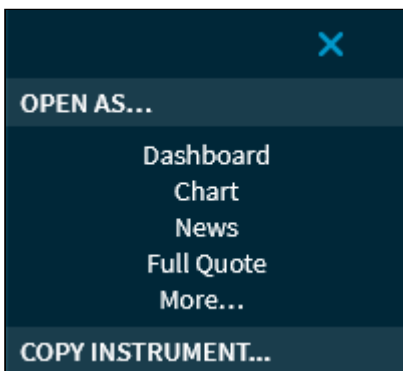
The sections below explain how to organise your favourites.

**See also:**

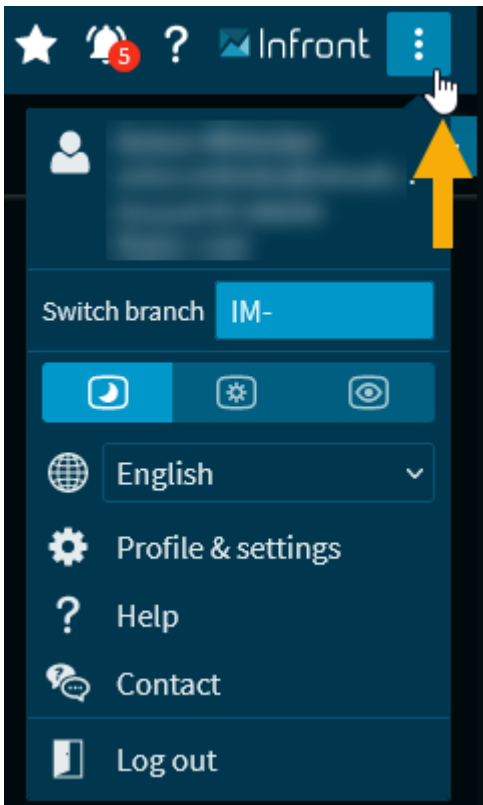
- (50-en) Add dashboards to favourites
- (50-en) Open favourites
- (50-en) Sort list of favourites
- (50-en) Remove dashboards from favourites

### 3.5 Context menus

A context menu is available in many places in Infront Investment Manager, allowing you to quickly open widgets, search for securities and configure your settings.




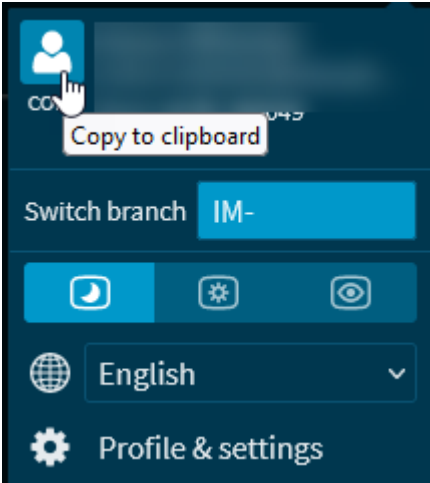
### 3.6 Settings menu



Use the settings menu icon on the far right of the title bar of the Infront Investment Manager to open a menu with standard commands for settings, help and contact.

You can find the following functions in the settings menu:

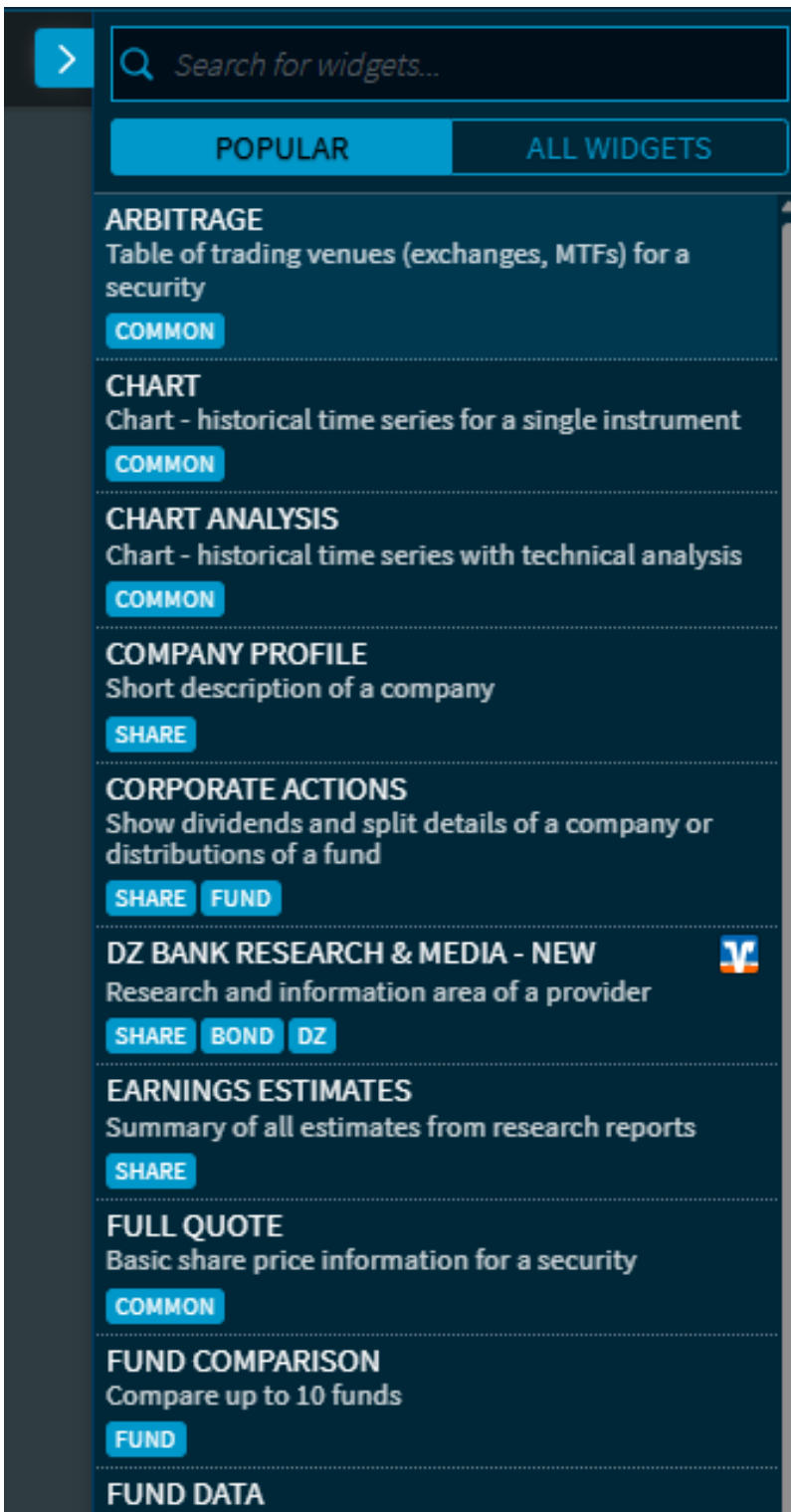
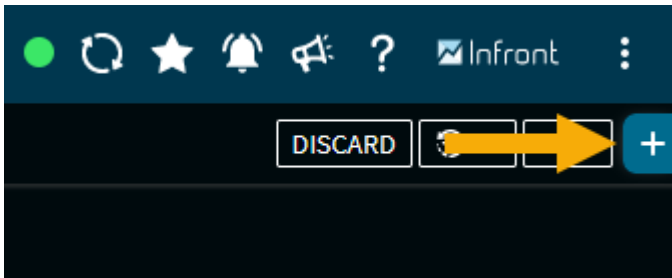
Command	Description
<b>Contact</b>	Opens the contact form.
<b>Generate support log</b>	If necessary, you can use this command to quickly copy all relevant data (e.g. user, dashboard, screener, etc.) to the clipboard as a log and make it available to support.
<b>Help</b>	This command takes you directly to the Help Center, which opens in a new browser tab. Here you can find the extensive online user documentation for Infront Investment Manager including release notes and various downloads.
<b>Language selection</b>	Select the relevant language type from the drop-down list. For more information, see (50-en) Language selection.
<b>Log out</b>	Logs out from Infront Investment Manager and closes the work session. For more information, see (50-en) Log out.

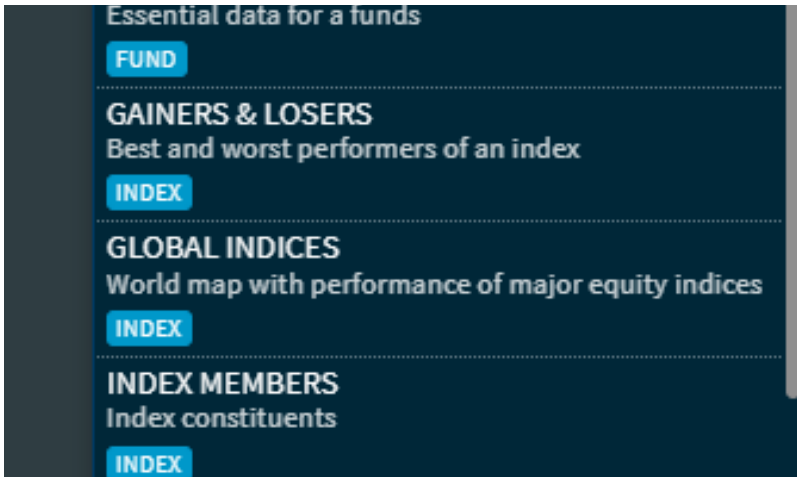
Command	Description
<b>Send feedback</b>	Send us your wishes, ideas and suggestions about Infront Investment Manager. This menu item may be hidden. See also (50-en) Send feedback.
<b>Settings &amp; profile</b>	Opens the global settings. For example, you can see your profile settings or change the theme of Infront Investment Manager. For more information about the settings, see (50-en) Settings and profile.
<b>Theme</b>	Use the icons "Dark", "Light" and "Colour Assist" to change the theme of Infront Investment Manager.  For more information, see (50-en) Select theme and (50-en) Enable Colour Assist.
<b>User information</b>	At the top of the menu you will find the most important information about the user currently logged in: Name, e-mail address, account ID and realm. You can copy this user information to the clipboard for support purposes, for example. Information on the system environment is also copied, for example to make it easier to analyse display errors. Simply click the user icon: 

### 3.7 Widget Gallery

In the Widget Gallery, you select the Widgets that you want to add to your **private dashboards**. The widgets available depend on your licence. You can find the Widget Gallery on the right side of Infront Investment Manager.







If you have opened the Widget Gallery by clicking the "Add widget" icon, you can search for widgets by using the upper search field or directly open widgets.

By default, the most frequently used widgets are displayed in the "Popular" section. You can switch to the complete list of widgets by clicking on the "All Widgets" button. The search function, which is still located at the top of the widget gallery, searches all widgets. It is also possible to filter by assigned categories. To do this, simply click on the respective category (e.g. "Share", "Common", "Bond", "Portfolio", etc.).

In the sections, the widgets are sorted alphabetically.

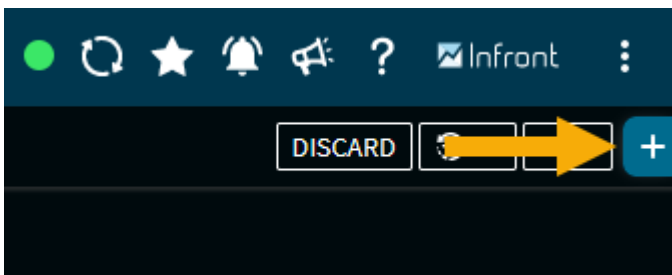
To open a widget in the dashboard, just click the widget in the Widget Gallery. The widget appears at the bottom of the dashboard.

#### See also:

- [Open Widget Gallery](#)
- [\(50-en\) Keyboard shortcuts in the Widget Gallery](#)
- [Search widgets in the Widget Gallery](#)
- [Close Widget Gallery](#)

### 3.7.1 Open Widget Gallery

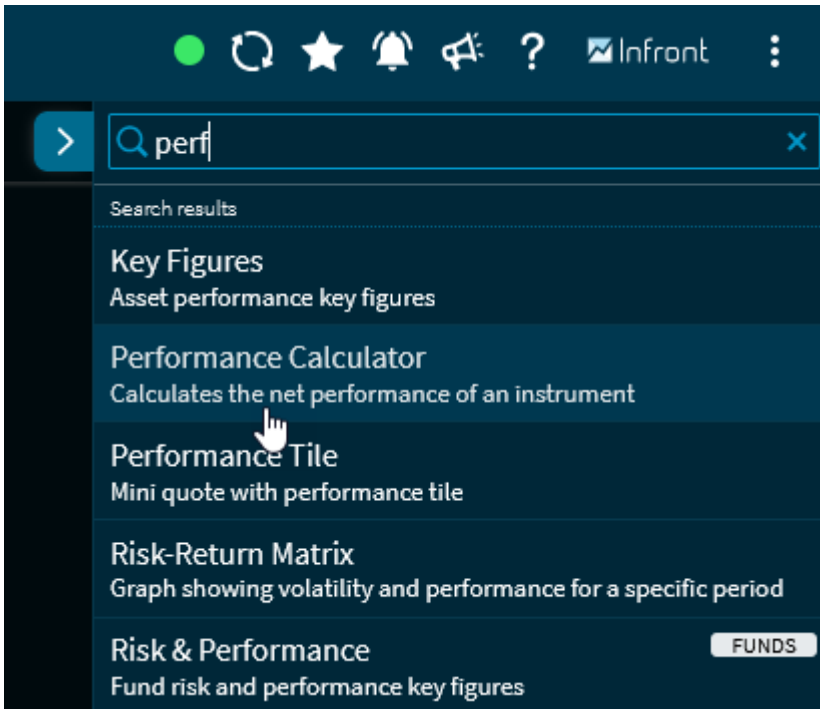
To open the Widget Gallery in **private dashboards**, click the "Add widget" icon on the right side of Infront Investment Manager.



The Widget Gallery opens on the right side of the browser window.

### 3.7.2 Search widgets in the Widget Gallery

Use the search field in the upper part of the widget gallery to search for a particular widget.



Click a search result to open the widget in the dashboard.

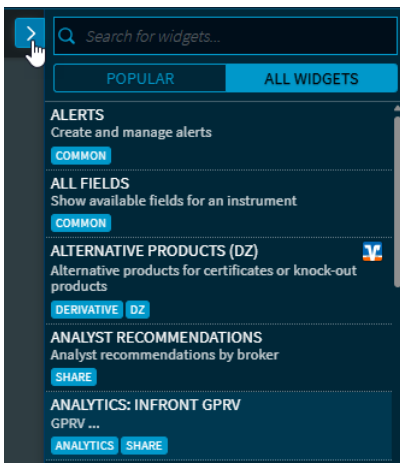
Click the "(x)" icon to clear the search field and enter a new search term.



Various widgets can also be found using related keywords. For example, you can enter the term "PDF" for the "Related Documents" widget.

### 3.7.3 Close Widget Gallery

To hide the Widget Gallery, click the "Hide Widget Gallery" icon or press <ESC>.



## 4 Working with widgets

Learn how to work effectively with widgets.

### See also:

- [Open widgets](#)
- (50-en) Arrange widgets on the dashboard
- [Drag securities to widget](#)
- [Group widgets](#)
- (50-en) Export widget data to CSV file
- (50-en) Print widgets
- (50-en) Export widget data as "INFRONTXL" file
- (50-en) Widget collections
- [Export data of the widgets to Excel Add-In](#)
- (50-en) Remove widgets from dashboard
- (50-en) Copy widgets
- [Widget structure](#)

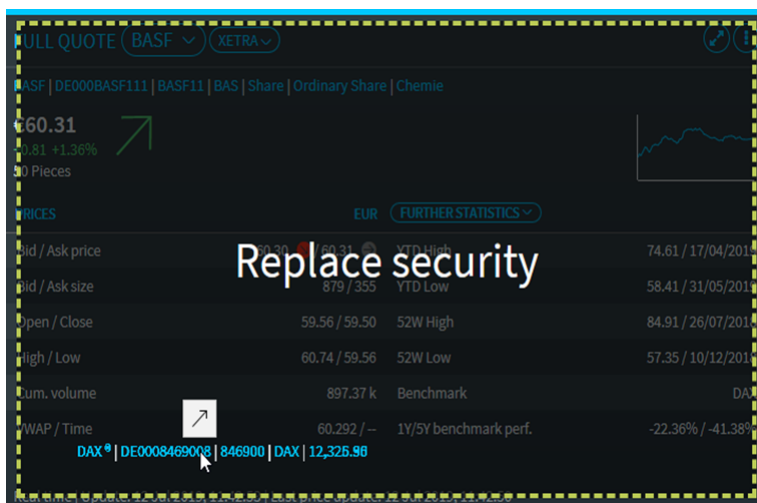
### 4.1 Open widgets

In Infront Investment Manager, you have various ways to create or open widgets in a (private) dashboard:


- Open widget from [Widget Gallery](#)
- Open new widget using the menu icon in a widget for individual securities
- Open single widget in a list using the menu icon in the row of the security (for example, in watchlists, index lists or portfolios)
- Place widgets directly from hits in search result
- [Duplicate open widgets](#)

### 4.2 Drag securities to widget

In Infront Investment Manager, you can drag securities (for example, from Watchlists or other widgets) to other appropriate widgets. To do this, hold down the left mouse button and drag the security name into the desired widget:

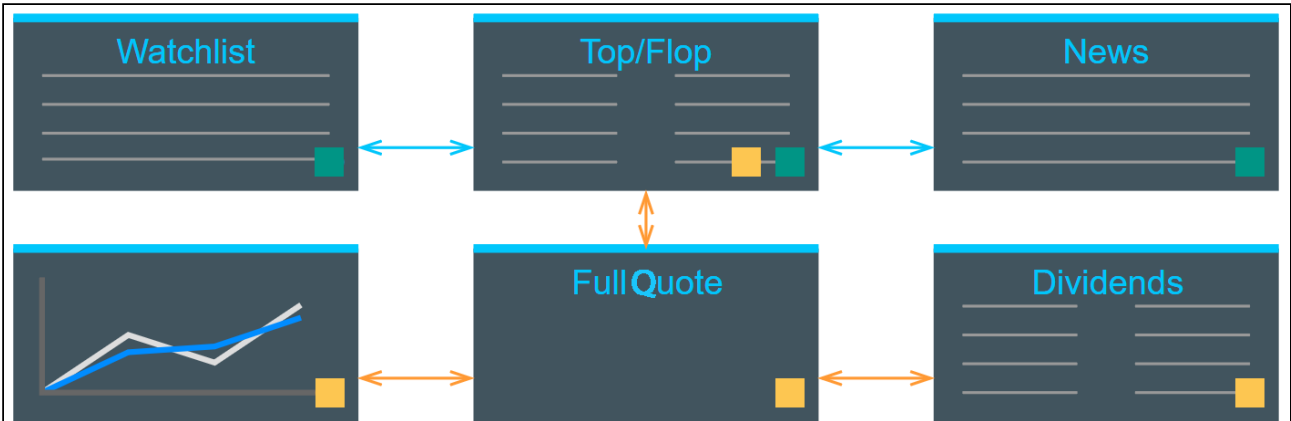


As a rule, these securities replace the previously displayed ones. In a chart, for example, you can also include the securities as a comparison value. In other widgets, too, the incoming securities are always used as sensibly as possible, for example, as an underlying in the (50-en) Option Matrix.

 Widgets that are not suitable for the security (or type of security) will display corresponding note.

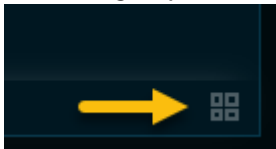
### 4.3 Group widgets

You can configure up to 4 different widget groups for each dashboard. Use this functionality to exchange securities quickly across several widgets.

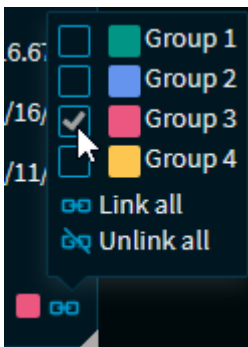


To add widgets to groups:

1. Click the group icon in the lower right corner of the widget.



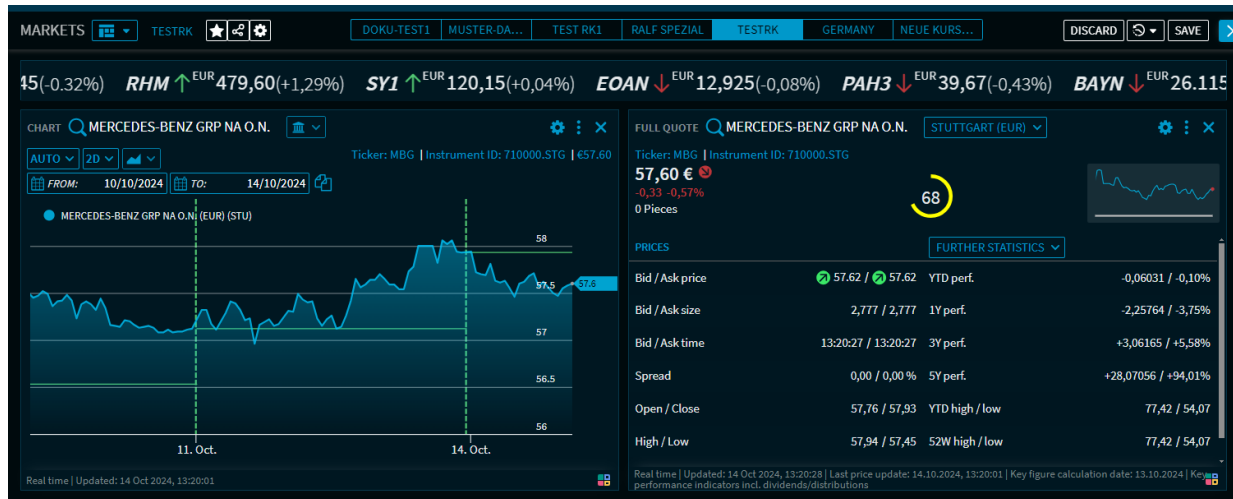
2. In the dialogue window that appears, select the relevant group(s) by selecting the corresponding checkboxes. This displays the coloured group symbols:



3. Proceed in the same way for other widgets you want to link.  
 In all selected widgets, the icons of the groups appear in the lower right corner. The colour of the symbols indicates the widget group.  
 If you now select a new security as an input object in one of the widgets, it is automatically exchanged in all grouped widgets of this group.  
 Use the command "Link all" to select all groups for this widget, use "Remove all" to clear all checkboxes.

- You can also assign a widget to multiple groups. Thus, if you change the security in one widget assigned to three groups, then the security is used in all three groups. Grouped widgets with incompatible instruments show corresponding hints.

### Example: Dashboard with grouped widgets



Both widgets are in group 1 (green) and group 3 (red).

- (50-en) Multi-instrument linking

## 4.4 Export data of the widgets to Excel Add-In

If you have licensed the Infront Excel Add-In, a corresponding command EXPORT, EXCEL for the export is available in the "Chart" and "Full Quote" widgets as well as in watchlists.

## 4.5 Widget structure

The elements and functions described here can be found in many standard widgets.




The standard elements in detail:


Element	Description
<b>Select security</b>	The selection at the top left of the widget opens the quick search for security selection. In addition to using the securities search field, you can also select from the previously selected instruments below the search field.
<b>Security name</b>	Pointing to the security name displays a "drag & drop" symbol. Hold down the left mouse button to drag the security into other widgets.  For more information, see <a href="/wiki/spaces/imc/pages/90213027">/wiki/spaces/imc/pages/90213027</a> .
<b>Select trading venue, security type, calculation type...</b>	In addition to the security selection, there are usually one or more further drop-down lists. In many widgets, you can select the trading venue for a security, change the calculation method or select the security type.  The menu allows you to configure the content of the widget.
<b>Current price dates</b>	Here you find the current price information, for example, the last traded price of the security with the currency at the trading venue selected.  You see the absolute and percentage change to the close price of the previous day. The direction and colour of the arrow next to the price illustrate the current price development.

Element	Description												
<p><b>Security master data</b></p>	<p>in the upper right corner of the widget selection, you will find further information on the currently selected security, for example in a "Full Quote" widget:</p> <ul style="list-style-type: none"> <li>• ISIN</li> <li>• WKN</li> </ul> <p> <span style="color: green; font-weight: bold;">✔</span> Clicking the ISIN or WKN copies them directly to the Clipboard. Pointing to the "ISIN "or "WKN displays an info window showing further details. Clicking the info window keeps it in the foreground:         </p>  <p>The screenshot shows a line chart for Apple (USD) (NAS) from March 2022 to January 2023. The price starts around 120 and ends at 154.63. An information window is open over the chart, displaying the following details:</p> <table border="1"> <tr> <td>Short name:</td> <td>Apple</td> </tr> <tr> <td>ISIN:</td> <td>US0378331005</td> </tr> <tr> <td>WKN:</td> <td>865985</td> </tr> <tr> <td>Group name:</td> <td>Share</td> </tr> <tr> <td>Group:</td> <td>Ordinary Share</td> </tr> <tr> <td>Sector:</td> <td>Computer manufacturers/hardware</td> </tr> </table>	Short name:	Apple	ISIN:	US0378331005	WKN:	865985	Group name:	Share	Group:	Ordinary Share	Sector:	Computer manufacturers/hardware
Short name:	Apple												
ISIN:	US0378331005												
WKN:	865985												
Group name:	Share												
Group:	Ordinary Share												
Sector:	Computer manufacturers/hardware												



Element	Description
<p><b>"Show/hide header" icon</b></p> 	<p>[Only for selected widgets, for example, "/wiki/spaces/imc/pages/89214304", "/wiki/spaces/imc/pages/89411515" or "/wiki/spaces/imc/pages/89280023"]</p> <p>Expands or collapsed the header of the widget.</p> <div data-bbox="491 495 1425 1630" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Example: Chart with an expanded and collapsed header</b></p>  </div>
<p><b>"Maximise widget" icon</b></p> 	<p>Maximises the widget. The widget then takes up the entire dashboard. Click the icon again to restore the original dashboard view.</p>
<p><b>"Widget settings" icon</b></p> 	<p>Clicking this icon opens the widget settings. If the widget is very small, this icon disappears. In these cases, however, the <a href="#">Widget structure</a> available to you as an alternative at any time.</p>

Element	Description
<b>Menu icon</b> 	Click this icon to open the menu with the standard commands, for example, the settings.  For more information, see <a href="/wiki/spaces/imc/pages/89442839">/wiki/spaces/imc/pages/89442839</a> .
<b>"Close" icon</b> 	Click this icon to remove the widget.  For more information, see <a href="/wiki/spaces/imc/pages/90312175">/wiki/spaces/imc/pages/90312175</a> .
<b>Basic information in the footer</b>	In the footer of the widgets, you find further information: <ul style="list-style-type: none"> <li>• Real time or delayed?</li> <li>• Time of the last price update</li> <li>• Calculation date of the key figures</li> </ul>
<b>Page navigation</b> 	If a table in a widget contains many rows, then the rows are split across several pages.  Use the controls below the list to go through the pages.

 Up to 5 decimal places are displayed for the price data in the widgets and up to 6 decimal places for exchange rates.

#### See also:

- (50-en) Sort tables in widgets
- (50-en) Change and save column width
- (50-en) Commands in the widget menu

## 5 Widget overview

Here, you will find detailed descriptions of all widgets available in Infront Investment Manager.

### See also:

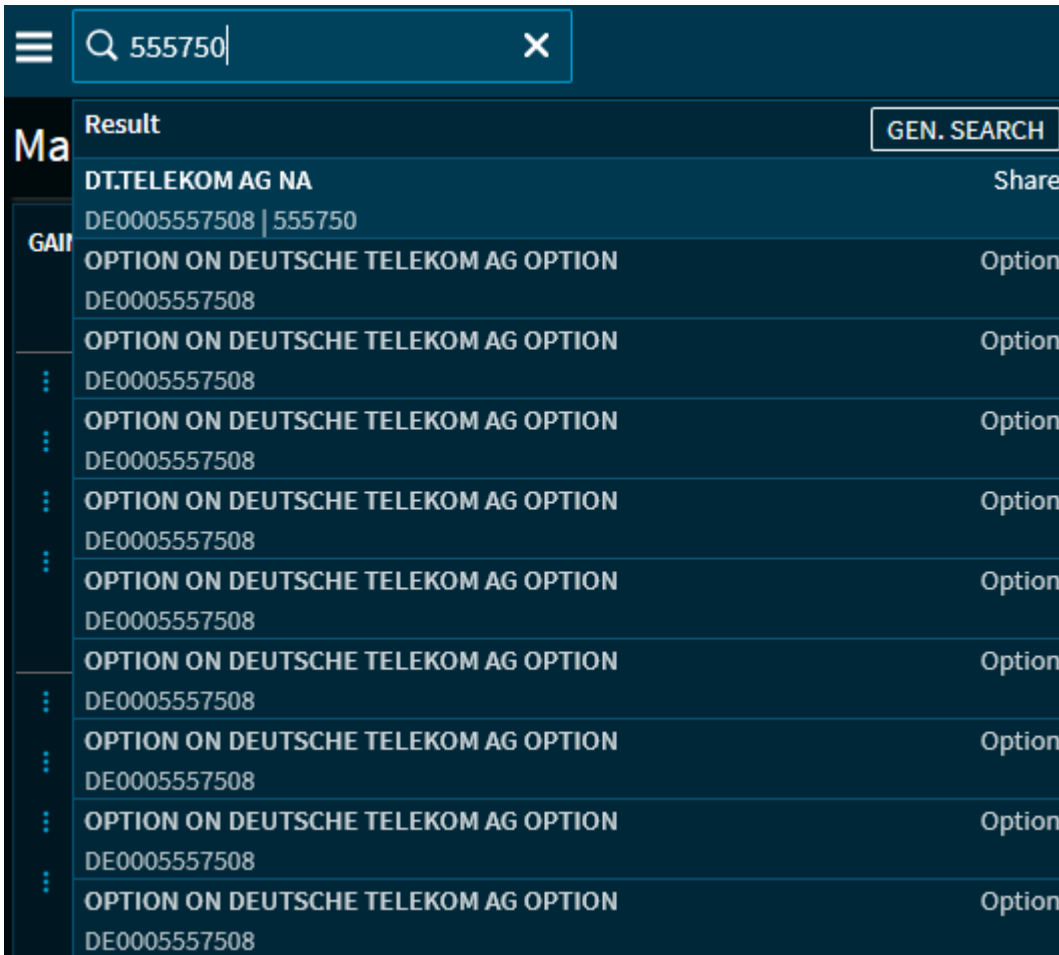
- (50-en) Alerts
- (50-en) All Fields
- (50-en) Analyst Recommendations
- (50-en) Analytics widgets (WTK)
- (50-en) Arbitrage
- (50-en) Assetmax Portfolio
- (50-en) Benchmark Bond Spread Calculator
- (50-en) Bond Calculator
- (50-en) Bond Comparison
- (50-en) Bond Data
- (50-en) Bond Spread Calculator
- (50-en) Broken Date Calculator
- (50-en) Cap Floor Calculator
- (50-en) Chart
- (50-en) Chart Analysis
- (50-en) Certificate Comparison
- (50-en) Certificate Data
- (50-en) Commodity Spread Calculator
- (50-en) Company Profile
- (50-en) Corporate Actions
- (50-en) Correlation Matrix
- (50-en) Derivative Matrix
- (50-en) Earnings Estimates
- (50-en) Economic Data
- (50-en) ESG Risk
- (50-en) ESG Sector Scores
- (50-en) Exchange Calendar
- (50-en) Fair Value Calculator (Option)
- (50-en) Fair Value Calculator (Share)
- (50-en) Financials (balance sheet data)
- (50-en) Focus Tile
- (50-en) Free Text
- (50-en) Full Quote
- (50-en) Fund Comparison
- (50-en) Fund Data
- (50-en) FX Calculator
- (50-en) FX Matrix
- (50-en) FX Option Calculator
- (50-en) Gainers & Losers
- (50-en) Global Indices
- (50-en) Historical Prices
- (50-en) Index Members
- (50-en) Index Membership
- (50-en) Interest Rate Calculator
- (50-en) Investment Calculator
- (50-en) Key Figures
- (50-en) Knock-Out Map
- (50-en) Macroeconomic Calendar
- (50-en) Market Depth

- (50-en) MiFID
- (50-en) News
- (50-en) Option Matrix
- (50-en) Performance Calculator
- (50-en) Performance Tile
- (50-en) Portfolio
- (50-en) Related Documents
- (50-en) Related Instruments
- (50-en) Risk-Return Matrix
- (50-en) Screener results
- (50-en) Swap Calculator
- (50-en) Swaption Calculator
- (50-en) theScreener Company Analysis
- (50-en) Ticker tape
- (50-en) Time and Sales
- (50-en) Time and Sales Vertical
- (50-en) Trading Quote
- (50-en) Top Derivatives and New Issues
- (50-en) Trading Signals
- (50-en) Volatility Chart
- (50-en) VWAP Calculator
- (50-en) vwd Pages
- (50-en) Warrant Matrix
- (50-en) Warrants Calculator
- (50-en) Watchlist
- (50-en) Wealth Portal
- (50-en) Yield Curves

## 6 Search

Use the many options for searching securities in Infront Investment Manager.

In the upper part of Infront Investment Manager, an input field is always available for a quick search for securities.



Result		GEN. SEARCH
DT.TELEKOM AG NA		Share
DE0005557508   555750		
OPTION ON DEUTSCHE TELEKOM AG OPTION		Option
DE0005557508		
OPTION ON DEUTSCHE TELEKOM AG OPTION		Option
DE0005557508		
OPTION ON DEUTSCHE TELEKOM AG OPTION		Option
DE0005557508		
OPTION ON DEUTSCHE TELEKOM AG OPTION		Option
DE0005557508		
OPTION ON DEUTSCHE TELEKOM AG OPTION		Option
DE0005557508		
OPTION ON DEUTSCHE TELEKOM AG OPTION		Option
DE0005557508		
OPTION ON DEUTSCHE TELEKOM AG OPTION		Option
DE0005557508		
OPTION ON DEUTSCHE TELEKOM AG OPTION		Option
DE0005557508		

Enter your search term in the input field and select the relevant hit from the list.

If the matching hit is not available in the search results, you can use the "General search" button to switch to the general search, using help of which you can search and filter in detail for securities, pages and news.

In addition to the powerful (general) search, you find special menus and widgets to carry out a context-sensitive quick search. In this chapter, you find information about the various search functions.

### See also:

- [Quick search](#)
- [General search](#)

## 6.1 Quick search

At the top of Infront Investment Manager, you need to search for securities in menus and widgets, you can use context-sensitive search fields. Thus you can quickly find the correct security.

Enter your search term in the search field and select the relevant hit. Or quickly select a security from the list of your last search terms ("History") or currently trending securities ("Trending").

### 6.1.1 Quick search via the input field in the title bar

Proceed as follows to search securities:

1. Enter the search term in the search field.

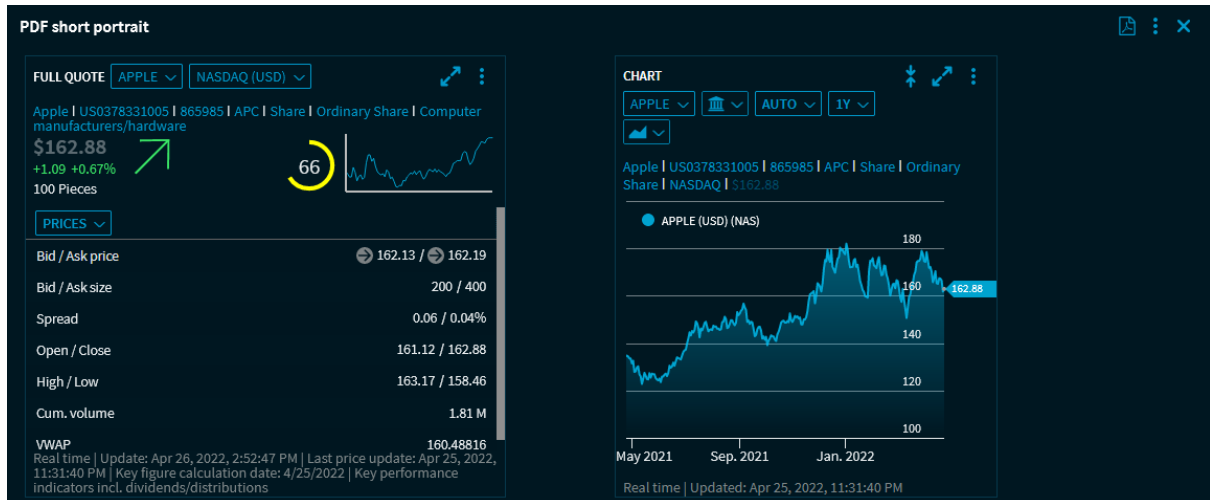


The quick search shows you results as soon as you start typing the second letter and refines the search with every additional character.

Below the search field, these search results are shown with the name, asset class and WKN of the security. You can use the arrow keys to go through the search results.

2. Select the hit you are looking for.

This is then first opened in a Short portrait and can be processed further, for example by using the menu icon.



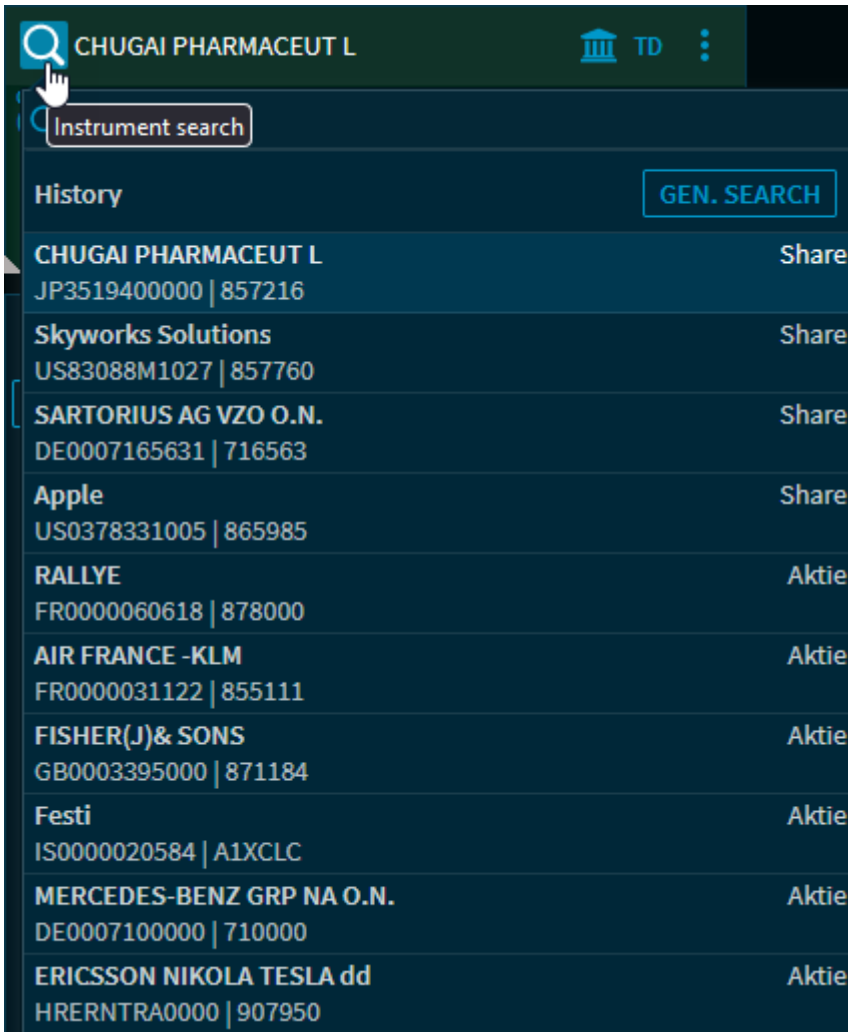
As an alternative to selecting the hit by mouse click, you can also drag and drop it directly from the search results into a widget on the dashboard.



If you do not find the desired result via the quick search in the title bar, switch to [General search](#) by using the "General search" button.

## 6.1.2 Quick search in menus and widgets

A quick search is also integrated in numerous widgets, analogous to the quick search via the title bar described above. For example, you always open a quick search for selecting the input object by click the "Instrument search" icon at the top left in widgets.



The screenshot shows a search interface with a dark theme. At the top, there is a search bar containing 'CHUGAI PHARMACEUT L' and a magnifying glass icon. Below the search bar, there is a dropdown menu with 'Instrument search' selected. To the right of the search bar, there are icons for a building, 'TD', and a vertical ellipsis. Below the search bar, there is a 'History' section with a 'GEN. SEARCH' button. The main area displays a list of search results, each with the company name, its ticker symbol, and its share class.

Company Name	Share Class
CHUGAI PHARMACEUT L JP351940000   857216	Share
Skyworks Solutions US83088M1027   857760	Share
SARTORIUS AG VZO O.N. DE0007165631   716563	Share
Apple US0378331005   865985	Share
RALLYE FR0000060618   878000	Aktie
AIR FRANCE -KLM FR0000031122   855111	Aktie
FISHER(J)& SONS GB0003395000   871184	Aktie
Festi IS0000020584   A1XCLC	Aktie
MERCEDES-BENZ GRP NA O.N. DE0007100000   710000	Aktie
ERICSSON NIKOLA TESLA dd HRERNTA0000   907950	Aktie



If you do not find the relevant result via the quick search in the title bar, switch to [General search](#) by using the "Gen. Search" button.

#### See also:

- (50-en) Open results of the quick search via drag
- (50-en) Quick search - History
- (50-en) Quick search - Trending

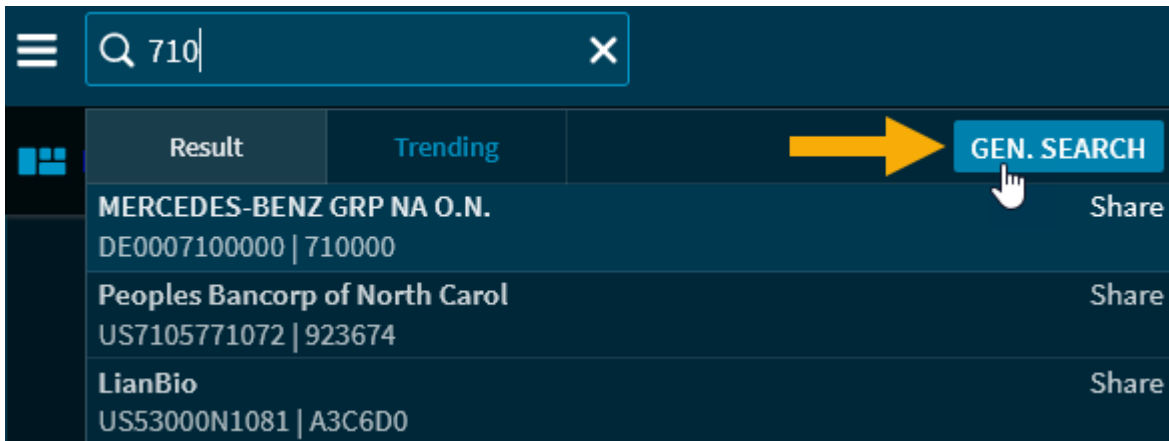
## 6.2 General search

In the (general) search, the securities databases are searched for hits. To start a search:

1. Enter the search term in the quick search at the top.



- Select the appropriate hit in the search result of the quick search or start the detailed search by using the "General search" button.



- Refine your search in the search screen of the general search. You start each search process here with the <RETURN> key or the search icon ("magnifying glass") to the right of the input field.

The screenshot displays a detailed search results screen for the query '710'. At the top, there is a search bar with '710' and a magnifying glass icon. Below the search bar, there are tabs for 'Instruments' and 'Quotations'. A table of search results is shown, with columns for WKN, ISIN, INSTRUMENT ID, COUNTRY, TRADING VENUE, NAME, CURRENT CY, TIME, PRICE, NET CHANGE, %, B-SIZE, BID, ASK, A-SIZE, CUM. VOLUME, and CLOSE PRICE. The table contains multiple rows of data, with the first row highlighted in blue. A 'SELECTED (1)' dropdown is visible on the left side of the table.

- The hits are displayed in the search results.

The search results are subdivided in areas for each individual type. Use the buttons above to switch to the type of security you are looking for. Below on the buttons, the number of securities found for a type is shown in brackets. The columns displayed are optimised for the individual types of securities. By using the "Instrument/Quotes" switch, you can decide whether you want to display all quotes of the securities at the respective trading venues or only the instruments.

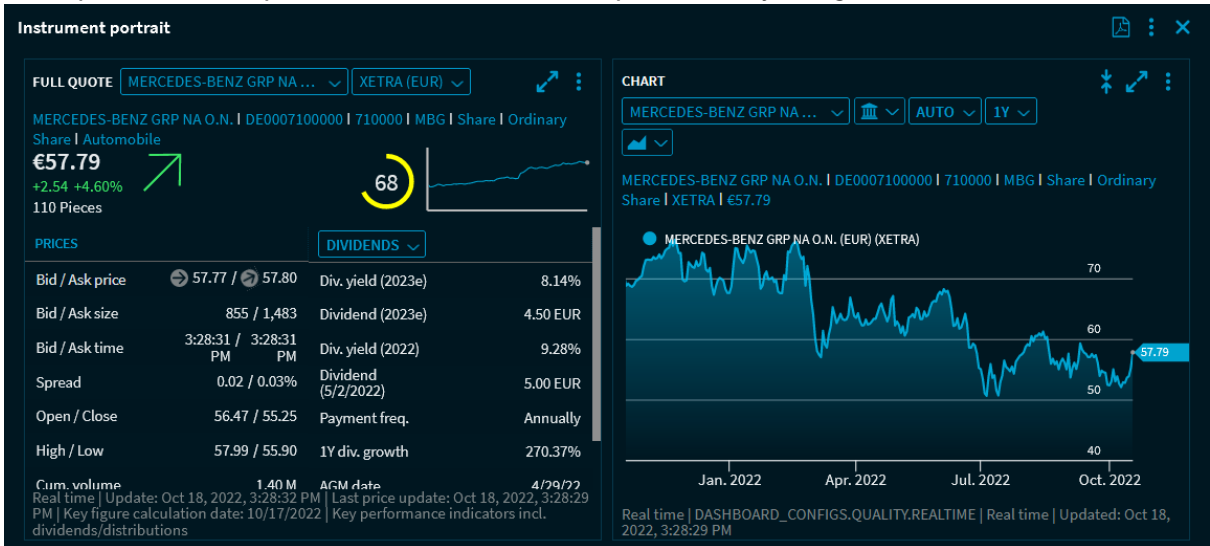
#### Tips

Click the "Open in screener" button to open the currently displayed search result in the corresponding (50-en) Screener (in the example above, in the share screener). Use this functionality to refine your search when there is a great number of hits in the screener. Directly below the input field, you can also search for securities without a current price that are ignored by default in the search using the "Include securities without first price or with outdated prices" button.

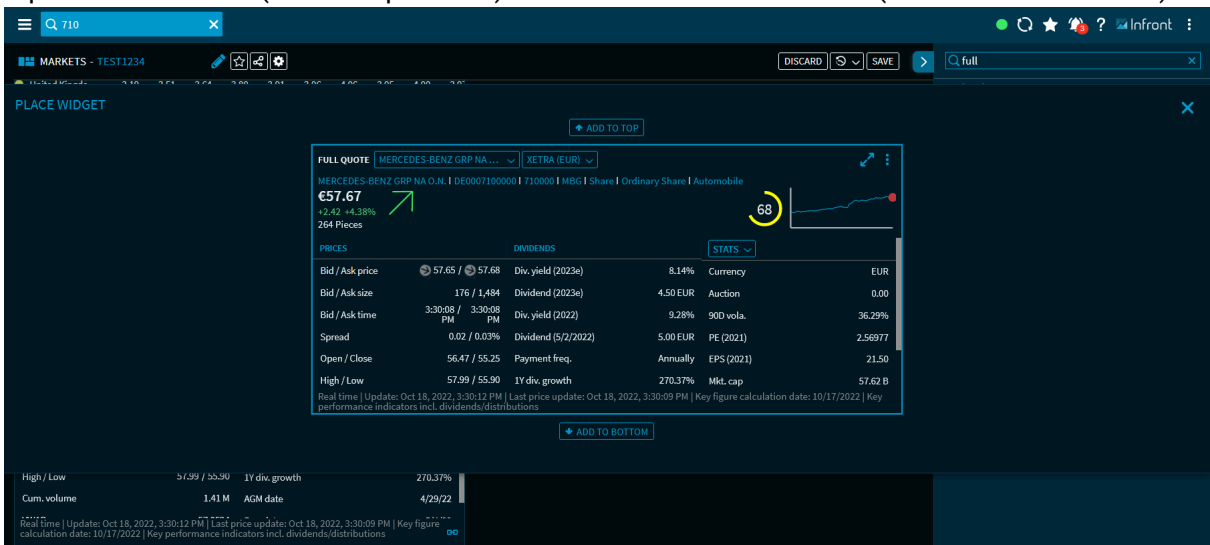
For the hits in the search result, you can decide in the User profile settings whether the hit at the default trading venue should be displayed first when searching for securities in the search result. This setting is selected by default. If this setting is cleared, then for example for German standard shares, "XETRA" is displayed as the first search result (however, this also depends on the activations).

5. Select the corresponding search result by clicking it.

This opens in a Short portrait, which can be further processed by using the menu icon.

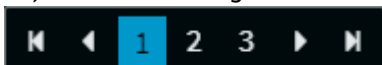


6. In the "Place widget" dialogue box that appears, specify whether you want to place the widget at the top of the dashboard ("Add to top" button) or at the end of the dashboard ("Add to bottom" button):



The new widget, for example, the "Full Quote" - widget, will then open at the corresponding place in the dashboard.

Securities selected by clicking them are displayed in the dashboard at the selected position in a "(50-en) Full Quote" widget.



You can go through the pages by using the navigation elements that appear when you "mouseover". Use the "Mouseover" to show navigation elements that you can use to page through the list.

- You can also use the checkboxes in the first column to select multiple hits and add them to a watchlist or portfolio of your choice. For more information, see (50-en) Select several hits from the search results.

To close the search without selecting an instrument, click the "Close" icon to the right in the upper right corner of the search window and press <ESC>.

The screenshot shows a search results window with a table of instruments. A context menu is open over the first row, showing options like 'OPEN AS...', 'Dashboard', 'Chart', 'News', 'Full Quote', 'More...', 'COPY INSTRUMENT...', 'ISIN', 'WKN', 'ESG', and 'Go to ESG module'. A hand cursor is pointing at the 'Chart' option.

Instruments					
Certificate	ETF	Fund	Leverage		
203	23	4	1,034		
INSTRUMENT ID	COUNTRY	TRADING VENUE	NAME	CURRENCY	
710000...	Germany	Berlin	MERCEDES-BENZ GROUP AG NAM...	EUR	
DE000...	Germany	Banque Cant...	MERCEDES-BENZ GROUP AG NAM...	EUR	
710000...	Germany	Düsseldorf	MERCEDES-BENZ GROUP AG NAM...	EUR	
MBG_D...	Germany	CHI-X 4	MERCEDES-BENZ GROUP AG NAM...	EUR	
710000...	Germany	XETRA	MERCEDES-BENZ GROUP AG NAM...	EUR	
MBG_D...	Germany	BATS - BXE - D...	MERCEDES-BENZ GROUP AG NAM...	EUR	
710000...	Germany	Frankfurt	MERCEDES-BENZ GROUP AG NAM...	EUR	
MBG.CH	Germany	Switzerland	Mercedes-Benz	CHF	
710000...	Germany	Hamburg	MERCEDES-BENZ GROUP AG NAM...	EUR	
MBG-E...	Germany	Switzerland	Mercedes-Benz	EUR	
710000...	Germany	Hannover	MERCEDES-BENZ GROUP AG NAM...	EUR	
MBG.IT...	Germany	Milan After ho...	MERCEDES-BENZ GROUP	EUR	

Use the menu icon to the left of each row to Security type open securities in the default dashboard for this security type. The usual commands for opening the instrument in other widgets (chart, news...) are also available. Use the alert icon at the bottom of the "Tools" area to switch directly to the "Price alert" dialogue window. Commands are also available to open the security in Compass or the ESG module.

**See also:**

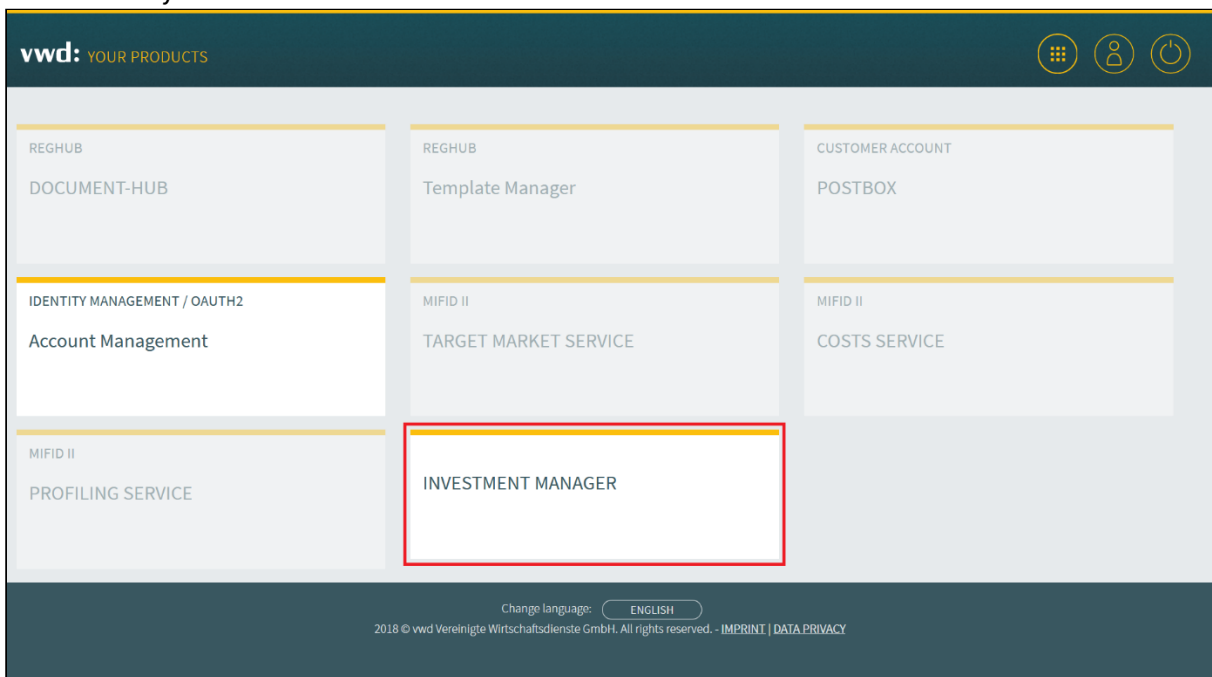
- (50-en) Select several hits from the search results

## 7 First login

When using the credentials received from Infront Financial Technology GmbH for Infront Investment Manager or another service for the first time, you are prompted to change your password (for security reasons).

To log in online for the first time, follow these steps:

1. Open the link you received for the log in.  
The log in page opens in the browser, where you can already select a different language. For more information, see the section (50-en) Language selection.
2. In the first input field, enter the user name you received or your e-mail address known to Infront Financial Technology GmbH.
3. In the second input field below, enter the temporary password you received.
4. Click the "Log in" button.
5. On the page that appears, enter the new password and confirm it. Make sure you follow the for the new password [Password rules](#).
6. After entering the new password, click the "Send" button.  
In the browser, the start page with all services and products appears. You can open the products activated for you.

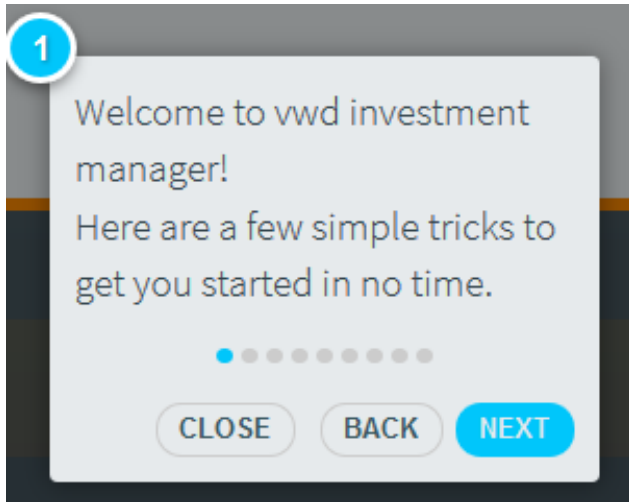



7. Select the "Infront Investment Manager" entry.
8. Infront Investment Manager opens. When you log in for the first time, you see the welcome page.
9. Accept the Privacy Policy, confirm the information about the usage of cookies and, optionally, consent to receiving advertisement material.

The welcome page allows you to specify or edit the "WP2 advisor number", "Position" and "E-mail" on your first login. This data is transferred to the "Settings & Profile" module and can be changed there again, if necessary.

After you confirm the Privacy Policy, you see the actual user interface of Infront Investment Manager. When you open the application for the first time, you will see introductory tooltips ("intros") to get you up and running in Infront Investment Manager.

You can control these intros by using the "Close", "Back" and "Next" buttons or directly jump to one of the steps by clicking the small dots:



 To start Infront Investment Manager, you must confirm the Privacy Policy when you log in for the first time.

## 8 Password rules

Please note the minimum requirements when setting a password:

- The password is at least 9 characters long.
- The password has at least one capital character.
- The password has at least one small character.
- The password has at least one special character.
- The password differs from the last 12 passwords of the user.

## 9 System requirements

To use Infront Investment Manager effectively, you only need a modern up-to-date browser where the cookies, JavaScript and the local storage are enabled. You will also need a memory of 4 GB RAM or more.

The system requirements in detail:

Element	Description
<b>Browser</b>	<ul style="list-style-type: none"> <li>• Google Chrome (current version)</li> <li>• Mozilla Firefox (current version or current ESR)</li> <li>• Microsoft Edge (current version)</li> <li>• Safari (2 last major versions)</li> </ul>
<b>Browser settings</b>	<ul style="list-style-type: none"> <li>• Cookies enabled</li> <li>• localStorage enabled</li> <li>• JavaScript enabled</li> </ul>
<b>RAM</b>	>= 4 GB
<b>CPU</b>	To be evaluated / defined
<b>Access URLs</b> (firewall configuration may need to be adjusted)	<b>General URLs:</b> <ul style="list-style-type: none"> <li>• <a href="https://gateway.cloud.eu.infrontservices.com">https://gateway.cloud.eu.infrontservices.com</a></li> <li>• <a href="https://&lt;realm&gt;.cloud.eu.infrontservices.com">https://&lt;realm&gt;.cloud.eu.infrontservices.com</a></li> <li>• <a href="https://idm.cloud.eu.infrontservices.com">https://idm.cloud.eu.infrontservices.com</a></li> <li>• <a href="https://gateway.eu.infrontfinance.com">https://gateway.eu.infrontfinance.com</a></li> <li>• <a href="https://idm.eu.infrontfinance.com">https://idm.eu.infrontfinance.com</a></li> <li>• <a href="https://fonts.gstatic.com">https://fonts.gstatic.com</a></li> <li>• <a href="https://fonts.googleapis.com">https://fonts.googleapis.com</a></li> <li>• <a href="https://analytics.vwd.com">https://analytics.vwd.com</a></li> <li>• <a href="https://code.highcharts.com">https://code.highcharts.com</a></li> <li>• <a href="https://wsv3.vwd-webtech.com">https://wsv3.vwd-webtech.com</a></li> <li>• <a href="https://wtk.infrontservices.com">https://wtk.infrontservices.com</a></li> <li>• <a href="https://charts-api.vwd.com/">https://charts-api.vwd.com/</a></li> <li>• <a href="wss://wsv3.vwd-webtech.com">wss://wsv3.vwd-webtech.com</a></li> <li>• <a href="wss://login.infrontservices.com">wss://login.infrontservices.com</a></li> </ul> <p>Production URLs may vary for users. The URLs can be configured for each user so that other domains can be used.</p>
<b>IP addresses</b>	<ul style="list-style-type: none"> <li>• 128.127.8.48/28 (infrontservices.com)</li> <li>• 128.127.9.16/28 (infrontservices.com)</li> </ul>

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