GETTING STARTED

Updated with the changes in Navigator 4.0
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OVERVIEW

Datastream gives you access to the world’s largest and most respected historical financial numerical database. Datastream provides a range of charting and reporting tools that enable you to manipulate and display, or simply download that data in the way that you want. With Datastream you can also get a set of Microsoft Office add-ins that enable you to access the Datastream database directly from within Excel, Word, or PowerPoint - create and embed data requests that put the data you want straight into your spreadsheet, document, or presentation.

DATASTREAM’S DATA COVERAGE

Unrivalled depth and breadth of coverage across the full range of instrument types means immediate access to the data you need. Worldwide equity coverage direct from the stock markets, comprehensive market indices, economics data direct from national government sources as well as the OECD and IMF, fixed income securities and associated indices, commodities and derivatives data. Forecast earnings data from IBES, fundamental data from Worldscope and added value data sets from respected sources such as MSCI, DJ Stoxx and FTSE All World. And all data is quality checked and actively maintained by dedicated staff.
DATA SELECTION

Datastream provides an easy to use interface with most options for standard requests selectable by mouse click. Start by selecting a data category and follow this sequence to generate the output you require:
Before you use Datastream, or Advance for Office, your systems administrator should have configured your communications link with the Datastream host. If you have any problems connecting to Datastream, please contact your systems administrator, or see Configure Communications, Datastream Installation Guide.

STARTING DATASTREAM

- Double click on the Datastream icon.

When Datastream has loaded successfully, the Request screen is displayed.
CLOSING DATASTREAM

To exit from the Request, Project, or Equity Search screen, select Exit from the File menu.

Note:
Remember to save or export those reports, charts, and data that you want to use again before you exit Datastream.

STARTING AFO

To use Datastream Advance for Office, open Office application and use the AFO drop down menu.

CLOSING AFO

Datastream Advance for Office closes when you close your Office application.
Using Datastream

The Datastream Interface

Link to Thomson Reuters sites via browser, including Research Extranet access.

Navigation Tool bar

Series selection

Datatype selection

Datastream Charting - These charting options give you direct access to Datastream’s powerful new web delivered charting facilities. For more information visit: http://extranet.datastream.com/user%20support/pubdoc/datastreamcharting.htm

Report selection

Datastream Project tab
Currency selection

Results window

Settings button helps you to configure the parameters for charts or reports.

Currency selection

Date button
THE TOOL BAR

Create a new Project. Specify a name for the new Project when you Save the Project.

Open an existing Project. Choose from a list of Projects, save the details of the current Project before opening a new Project.

Save any additions or changes to the current Project.

Print the displayed request to the default Windows printer. If you want to specify another printer or change the printer settings, select File>Print to display the Windows Print dialog.

Export a chart, or a selected area of data, or a report in a format suitable for use with spreadsheets, word processors, etc.

Transfer the data or chart request to Excel, for regular updating in Excel.

Create, edit, merge, or download lists from Datastream for generating requests.

Display the Annotations tool bar. Click this button again to turn off the Annotations tool bar. Use the Show Annotations option from the View menu to show/hide any annotations added.
Click the Contact Us button to raise a query on Datastream content or functionality.

Datastream Research Extranet - provides access to information to help you get more from Thomson Reuters Datastream - updates on new data, issues with the data, user documentation and sample Excel tearsheets.

**Note:**
The Extranet is configured in the Datastream options dialog (from the Tools menu) to be displayed in the main window at start up.

Refresh the currently displayed request with the latest Datastream prices or values.

Refresh all requests in the current Project with latest Datastream prices or values.

Add request to Project for Scheduled Night Shift processing. Use the Add New Request button to add any number of requests to a Project so all requests can be processed together when you connect to Datastream.

Delete the displayed request from the current Project.
MAKING A REQUEST

To make chart, report, and data format requests, follow this sequence of steps to select the data you require:

1. Select the type of series you want from the Data Category window - holding the mouse over the data category will display quick links to Navigator.

2. Find and select your series.
   - Click the Series navigation button to open Navigator.
   - Check the Expert entry box and type the exact mnemonic or code in the Series field.
   See Selecting the series, page 15.

3. Select a datatype (optional).
   You can:
   - Click the Datatype Navigation button to open Navigator.
   See Datatypes, page 24.

4. Select the type of request.
   Select a request type tab. For example, a single chart.
   Select the type of chart, report or data format from the list displayed.
   See Selecting types of request, page 20.
Refine your request. Change the display period, select a relative date option or click the Date button. See Dates, page 22.

Change the currency, click the Currency drop down box. See Currency, page 26.

Run your request. Click the Run Now button. You can create a project and use the Schedule Night Shift Facility to run your project at a later date. You can save the parameters as a Favourite to save you time setting up the details again. See Making your request, page 27.

You can also make additional graph layout and data settings for some requests using the Settings button. See Settings, Datastream Help.

Run your request.

View your results. You can Print, Export, or Copy the results of your request, and for a data request, transfer the data to your spreadsheet for future refreshing within Excel.

To locate the series you want, you can use: the Find field, see Using Find, page 16; the Filter, see Using the Filter, page 18; and Equity Search, see the Datastream Help.
SELECTING A DATA CATEGORY

Datastream series codes are stored in a database and are accessed using Datastream Navigator. The series are grouped into 17 data categories, which are selected from the Category drop down list. Selecting a data category gives you access to all the series within that category.

<table>
<thead>
<tr>
<th>Data Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Datastream series</td>
</tr>
<tr>
<td>Equities</td>
</tr>
<tr>
<td>Equity indices</td>
</tr>
<tr>
<td>Unit trusts</td>
</tr>
<tr>
<td>Investment trusts</td>
</tr>
<tr>
<td>Bonds &amp; convertibles</td>
</tr>
<tr>
<td>Bond indices &amp; CDS</td>
</tr>
<tr>
<td>Economics</td>
</tr>
<tr>
<td>Economic reports/charts</td>
</tr>
<tr>
<td>Exchange rates</td>
</tr>
<tr>
<td>Interest rates</td>
</tr>
<tr>
<td>Commodities</td>
</tr>
<tr>
<td>Derivatives</td>
</tr>
<tr>
<td>Warrants</td>
</tr>
<tr>
<td>Futures</td>
</tr>
<tr>
<td>Options</td>
</tr>
<tr>
<td>Constituent lists</td>
</tr>
<tr>
<td>User created</td>
</tr>
<tr>
<td>Indices</td>
</tr>
<tr>
<td>Local lists</td>
</tr>
<tr>
<td>Time series</td>
</tr>
</tbody>
</table>

You can select:

- Equities
- Equity indices
- Unit Trusts
- Investment Trusts
- Bonds and convertibles
- Bond indices & CDS
- Economic reports and charts
- Exchange Rates
- Interest Rates
- Commodities
- Warrants
- Futures
- Options
- Constituent lists
- User created Indices
- User created Local lists
- User created Time series

TO SELECT A DATA CATEGORY:

- Click the plus sign to expand the list and select a category from the list displayed.
SELECTING THE SERIES

Use Datastream Navigator to find and select the series you want, or if you know the Datastream mnemonic or code, SEDOL, ISIN, or other Datastream supported code, check the Expert entry check box and type the mnemonic or code in the Series field to select your series.

TO SELECT A SERIES:

- Click the Series navigation button to find and select your series from Datastream Navigator.
- To view recent series use the drop down to select from the last 12 series used.
- Check the Expert entry box and type the mnemonic or code in the Series field.

You can also use the Datastream Help Browser.
Series search is the most basic search. Use this to search by the name, DS mnemonic, DS code, SEDOL, ISIN, local code, or IBES ticker of the series you are looking for. Alternatively you can use the 'Explorer' hierarchies to drill down to the series (or the 'Help browse' pages that provide access to the datatypes available for the series).

TO FIND AND SELECT A SERIES USING SET CRITERIA PAGE:

1. Click the Search button to open Datastream Navigator.
2. Click the Series Search button if it is not already selected.
3. Select the kind of series you require.
4. You can narrow down the search by selecting different other criteria like Market.
5. You can add a second criteria of search.

Type the first few characters of the name, mnemonic, or code in the respective field.
Click on the series that is required.

You can select related series and get more data on the series using the flyout.

You can export the list to excel using Export to Excel button.

The series is displayed in Datastream.
Below example illustrates the steps to use Explorer to find a series.

1. Select Economics data category.

2. Click the plus sign to expand the options.

3. Click the Explorer link.
Move the cursor over the flyout button to obtain the options. Click the Explorer option to know where else in the hierarchies the series is displayed.
SELECTING TYPES OF REQUEST

Datastream gives you access to a wide range of reports, charts, summaries, overviews, and comparison requests.

Over 100 Datastream reports, charts, and data formats are stored in Datastream's database. You can access these by selecting a report/chart type node on the Request screen.

**TO SELECT A REQUEST:**

1. Select a request type node of the tree.
2. Select a request from the list displayed.
REQUEST TYPES

**Single Series - Overview** - You can request Datastream company, commodity, warrant, trust, and bond performance overviews, and a range of fixed format IBES forecast overviews.

**Multiple Series / Flexible Chart** - You can display information on multiple series, enabling you to create comparisons across different data category types, and use flexible charts for multiple chart requests. For example, you can compare an equity with an index such as the CAC40 and with an economic series such as the RPI.

**Single Series - Chart** - You can request any of the standard Datastream graphics, including Line, Moving Average, Stochastics, High-Low-Close, Candlesticks, and Bollinger Bands.

**Single Series - Report** - You can select from a range of pre-formatted report types including Profit & Loss, Dividend & Earnings, Key Accounts Ratio, and Company Profiles.

**Single Series - Data** - You can download time series, static, and company accounts data, which you can export or transfer to your spreadsheet.

**Codes and Information** - You can use the Remote Search as an alternative way to find codes for active and dead equities, unit, investment trusts, bonds, warrants and convertibles. There is also an option to set Datastream to run requests and update projects in English, French and German.

**Favourites** - You can save frequently used projects as **Favourites** so that next time you can run the request quickly.

**Equity Screening** - search the Datastream global equity universe for companies that match your chosen criteria.
REFINING YOUR REQUEST

DATES

Each data category has a default date range. You can choose your own from four display period options:

- **Fixed start and end dates** - a fixed period. For example, the whole of last year.
- **Relative start and end dates** - a fixed period relative to today's date.
- **Datastream base date** - a period starting with the date of the earliest data available on the database for a series.
- **Today** - a period ending with the latest available price or value.

Intra-day prices are available for many markets. To receive the latest intra-day price or value, you must subscribe to the intra-day service.

Datastream enables you to combine these start and end date options.

TO SELECT A DATE PERIOD:

Click the **Time Period** button. The **Configure Dates** dialog is displayed.

- **Fixed date option.**
- **Relative date option.**
- **Base date option.** Displays data from the earliest date that data is available.
- **Year ends - to request the number of year ends for company accounts reports and data.**
- **Today's date option.** (To receive the latest intra-day price or value, you must subscribe to the intra-day service.)
Select the date options.

**2**

**Fixed date option**

- Use the spin buttons to select a date.
- Click the Calendar button to display an interactive calendar.

- Type a date.
- To select both start and end periods before today.

**Relative date option**

- Use the spin buttons to select a date.
- To select both start and end dates after today, for projected series.
- Select day, week, month, quarter or year.

- To specify year ends for Company Accounts Report only.

**3**

Click OK.
DATATYPES

The datatype defines the type of data. For example, the default datatype for equities is Price (Adjusted).

For some data categories and report/chart types, you can select the datatype. For example, for an Equity line chart request you can change from the default Price (Adjusted) datatype to Market Value.

When the Datatype navigation button is enabled, click to display the datatypes available for your data category.

Datatypes are grouped by their type; for example, Datastream IBES datatypes, MSCI datatypes, and Worldscope data items.

To select a datatype:

1. Click the Datatype navigation button. Datastream Navigator is displayed.

2. Select Name or Mnemonic from the find drop down box.

3. Select Equals Starts With or Contains from the drop down box.

Check this box if default datatype is required.

Datatype navigation button.
5. Select the type of datatype, Static or Time Series.

4. Type the search criteria.

7. Click the Filter / Search button.

6. Select the group of datatypes to select from.

8. Select the datatype from the list displayed. The datatype is displayed in Datastream.

9. Check the Navigator definition to ensure that the correct datatype has been selected.
CURRENCY

You can select which currency you want to display your results in.

Click the Currency drop down list and select a currency from the list displayed.

Note:
The parameters that you can change are dependent on the data category and chart, report, or data format chosen. For example, you can change the date, datatype, and currency for an Equity - Line Chart request, but only the date for a Constituent - Bar Chart request. If you cannot change the currency, the currency option is greyed out.
MAKING YOUR REQUEST

Once you have selected the criteria for your request and made your display date, datatype, and currency adjustments, you can make your request:

**Run Now:**

Request the report, chart, or data straight away.

This connects you to Datastream and displays the result. You can change the request criteria and click the button again, or save the request for future use.

**Note -**

*Double clicking on the request in the Explorer hierarchy will also run the request.*

**Add New Request:**

Add the request to the open Project to refresh later.

This does not connect you to Datastream, but stores the request in the open Project. This enables you to work off line and send all your requests at the time of your choice.

Please see *Using Projects, Datastream Help.*
Using your results

Printing reports, charts, and data
Copying reports, charts, and data
Transferring charts to MS Office
Exporting charts, reports, and data
When you request reports, charts, and data formats from Datastream, they are displayed within Datastream and are automatically added to the current open Project. You can:

- Print your charts and selected pages of reports through any Windows printer.
- Copy reports, charts, and data formats to the Windows clipboard for further use in Windows applications.
- Export reports, charts, and data in a variety of formats for use with other applications such as word processors.
- Transfer data to Microsoft Excel. Data downloaded from Datastream can be transferred to spreadsheet for regular updating.
- Transfer charts to Microsoft Office applications like Excel, Word, and PowerPoint. You can transfer your chart requests directly into these applications as embedded, dynamic objects. Once embedded, the requests can be refreshed, and within Excel and PowerPoint - you can right click on the chart to re-edit the chart in Datastream - then transfer it back, with any edits, to Excel and PowerPoint.
PRINTING REPORTS, CHARTS, AND DATA

You can print any displayed report, chart, or data format through the default Windows printer, (in addition you can print a set of charts with several charts on page using the Print Project (Chart Layout) option).

To print your report, chart, or data:

- Select **Print** from the **File** menu,
- OR
- click the **Print Current Request** button to print the request displayed.

To change the printer or printer settings, select **Print Setup** for either Report or Chart from the **File** menu.
COPYING REPORTS, CHARTS, AND DATA

You can copy the displayed report, chart, or data format to the clipboard and paste it into other Windows applications.

TO COPY A REPORT:

1. Select the area to be copied; this can be:
   - A range of cells - click the left mouse button and drag the cursor over the display area to define the cell area to be copied.
   - The whole report (default) - the whole report is selected automatically when it is displayed.
2. Select Copy from the Edit menu.

Note:
The report text will be held on the clipboard in text format with TAB formatting, but without font and text formatting.

TO COPY A CHART:

- Select Copy from the Edit menu.

Note:
The chart will be held on the clipboard as a Windows Meta File.
TO COPY DATA:

1. Select the area to be copied; this can be:
   - A range of cells - click the left mouse button and drag the cursor over the displayed spreadsheet to define the cell area to be copied to the clipboard.
   - All the data (default) - the whole data request is selected automatically when it is displayed.

2. Select **Copy** from the **Edit** menu.

---

Note:

The data selected will be held on the clipboard in text format with **TAB** delimiting for direct pasting into a spreadsheet or word processor.

You can use the right click menu to copy.
TRANSFERRING CHARTS TO MS OFFICE

Chart requests can be transferred directly into Excel, Word, and PowerPoint as refreshable objects.

TO TRANSFER A CHART REQUEST TO MS OFFICE:

1. Select Transfer to Excel (Word, PowerPoint) from the Tools menu. Excel (Word, PowerPoint) is opened with a new worksheet (document, slide). Your chart is displayed.
2. You can display the chart:
   - as a single element
   - OR
   - as an Office Picture - right click and select Display as Office Picture. This gives you the Office Picture format options.

Note:
To display the chart as transparent, right click over the Refresh button and de-select Display original background (the chart format must be as an Office Picture). To re-edit a chart once transferred to Excel or PowerPoint - right click on the chart and select the Edit Chart option.

You can use the right click menu to transfer and export.
EXPORTING CHARTS, REPORTS, AND DATA

You can export the displayed report, chart, or data as a file in a format suitable for use with other software packages. The default formats are: .XLS (Excel spreadsheet) for reports and data, and .WMF (Windows meta-file) for charts.

TO EXPORT A CHART, REPORT, OR DATA:

1. Select Export from the Tools menu. The Export Viewport As dialog is displayed.

2. Select the export details:
   - Type an export file name
   - Select a drive or a server destination
   - Select an export format

3. Click OK.
Using Datastream Advance 
for Office

The Datastream Advance for Office (AFO) interface
Making a static request
Making a time series request
Using the Request Manager
THE DATASTREAM ADVANCE FOR OFFICE (AFO) INTERFACE

To use Advance for Office, use the Datastream menu in your Office application.

AFO menu in Excel.

AFO menu in PowerPoint.
USING DATASTREAM ADVANCE FOR OFFICE

In AFO you can make static, time series, and company accounts requests.

**Static requests**
To request data for a specific date.

For example, the price, PE and dividend yield for Pepsico and Coca-Cola for 01/01/05

<table>
<thead>
<tr>
<th>Refresh</th>
<th>12/31/2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>P</td>
</tr>
<tr>
<td>PE</td>
<td>52.2</td>
</tr>
<tr>
<td>DY</td>
<td>21.9</td>
</tr>
<tr>
<td>CURRENCY</td>
<td>U$</td>
</tr>
<tr>
<td>U.PEP</td>
<td>1.76</td>
</tr>
</tbody>
</table>

**Time series requests**
To request data over a specific period, defined by a start date, end date, and frequency of data.

For example, the daily price for Pepsico from 01/01/05 to 01/01/06

<table>
<thead>
<tr>
<th>Refresh</th>
<th>12/31/2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>End</td>
<td>12/30/2005</td>
</tr>
<tr>
<td>Frequency</td>
<td>D</td>
</tr>
<tr>
<td>Name</td>
<td>Code</td>
</tr>
<tr>
<td>PEPSICO</td>
<td>U.PEP(P)</td>
</tr>
<tr>
<td>CURRENCY</td>
<td>U$</td>
</tr>
<tr>
<td>12/31/2004</td>
<td>52.2</td>
</tr>
<tr>
<td>1/3/2005</td>
<td>51.94</td>
</tr>
<tr>
<td>1/4/2005</td>
<td>51.57</td>
</tr>
<tr>
<td>1/5/2005</td>
<td>51.63</td>
</tr>
</tbody>
</table>

**Note:**

Since the replacement of Datastream company accounts with the normalised Worldscope fundamentals database - fundamentals data can now be retrieved using Static and Time Series requests.

**Request Manager**
Use the Request Manager to manage your embedded requests. All the chart and data requests in your Excel work book are listed with their details. You can edit, delete, or refresh the requests individually or together.
MAKING A STATIC REQUEST

Select Static Request from the AFO menu.

Select the series. Click the Series navigation button to display Datastream Navigator.

Select the Editor button to edit multiple series (or expressions).

Select the Fx button for immediate access to the Datastream functions.

You can also select lists of series, and expressions.

The series chosen is displayed in the Series field.

Select the series you want from the list. See Selecting the series, page 15.
Select the datatype. Click the **Datatype navigation** button to display Datastream Navigator.

Currency option helps you to choose the currency.

The datatypes chosen are displayed in the **Datatype** field.

Select the datatype you want from the list. See **Datatypes**, page 24.
Select the date. Type the date of the data you want in the **Date** field in the format mm/dd/yy, or as a relative date from today.

For example, -6m for 6 months ago from today.

Select the display options.

**Row Titles**
Displays the series code at the left of each series.

**Column Titles**
Displays the datatype mnemonic or expression at the top of the column for each datatype.

**Headings**
Displays a general heading for row and column headings. For example, the date of the request.

**Currency**
Displays the traded currency for each selected series.

**Expression**
Display the expression description or number.

**Transpose**
Displays the series data in rows instead of columns.

**Display Thomson ONE code**
Displays the Thomson ONE code for the series selected.

**Embed**
The request is embedded as a dynamic, refreshable object when saved. If this is not selected, the results cannot be refreshed.

**Auto Refresh**
Refreshes the request automatically when you open the spreadsheet.

**Visible button**
Displays the **Refresh** button with the request results. You can use the **Request Manager** to refresh requests, see page 49.

**Series Metadata**
Adds a hyperlink to the series code to link to the classifications and metadata pages from Navigator for the series (also enable series that are now dead or inactive to be identified in your workbook).

**Hyperlink to Datatype Definition**
Add links to the datatype to display the definition from Navigator.
The values for the datatypes selected are displayed for the date selected.

To refresh the request, click on the **Refresh** button. To edit the request, right click on the button and select the Edit option.
MAKING A TIME SERIES REQUEST

Select **Time Series Request** from the AFO menu.

Select the series. Click the **Series navigation** button to display **Datastream Navigator**.

You can also select lists of series and expressions.

The series chosen is displayed in the **Series** field.

Select the series you want from the list. See Selecting the series, page 15.
Select **Time Series Request** from the AFO menu.

To display time series for a list of series:

1. Click on the **List Picker** button.
2. Select a list by clicking on the required list and click **OK**.

Click **TS for each item in list** to get Time Series for each item in the list.
Select the datatype. Click the Datatype navigation button to display Datastream Navigator.

Currency option helps you to choose the currency.

The datatype chosen is displayed in the Datatype field.

Select the datatype you want from the list. See Datatypes, page 24.
Select the date. Type the date of the data you want in the **Date** field in the format dd/mm/yy, or as a relative date from today. For example, -2Y for 2 years ago from today.

**Custom headers**
A set of static datatypes can be selected to display as the column headings.

**Row Titles**
Displays the series code at the left of each series.

**Column Titles**
Displays the datatype mnemonic or expression at the top of the column for each datatype.

**Headings**
Displays a general heading for row and column headings. For example, the date of the request.

**Currency**
Displays the traded currency for each selected series.

**Expression**
Display the first series mnemonic or description.

**Transpose**
Displays the series data in rows instead of columns.

**Display Latest Value First**
Displays the most recent value first.

**Embed**
The request is embedded as a dynamic, refreshable object when saved. If this is not selected, the results cannot be refreshed.

**Auto Refresh**
Refreshes the request automatically when you open the spreadsheet.

**Visible button**
Displays the **Refresh** button with the request results. You can use the **Request Manager** to refresh requests, See page 49.

**Series Metadata**
Adds a hyperlink to the series code to link to the classifications and metadata pages from Navigator for the series (also enable series that are now dead or inactive to be identified in your workbook).

**Hyperlink to Datatype Definition**
Add links to the datatype to display the definition from Navigator.
The values for the datatypes selected are displayed for the date selected.

To refresh the request, click on the Refresh button.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>11/28/2003</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End</td>
<td>11/29/2005</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>CURRENCY</td>
<td>82609.81</td>
<td>83622.69</td>
<td>82644.13</td>
<td>81888.75</td>
<td>82661.31</td>
<td>83262.19</td>
</tr>
</tbody>
</table>
USING THE REQUEST MANAGER

Use the Request Manager to manage the requests in your worksheet. The Request Manager lists all the requests in your worksheet. You can find, edit, refresh, and delete requests.

Select Request Manager from the AFO menu.

Select either data or chart requests.

Select the request and click the appropriate button to Goto, Edit, Delete, or Refresh the request.

Click to turn Autorefresh on or off for the selected requests.

Click to select all the requests displayed. This is useful if you want to refresh, or delete, all requests.

Click to turn Autorefresh on or off for the selected requests.

Click to locate and display the selected request in the worksheet.

Click to display the Request Details dialog for editing.

Click to delete the selected request.

Click to refresh the data in the selected requests.
To edit a request, for example, select the request you want to edit.

The Editor option enables multiple series or datatypes/functions/expressions to be easily reviewed, edited and extended with links to the metadata.

Click the **Edit** button. The **Request Details** dialog is displayed.

Make your changes and click **Submit**. The original request is overwritten with the new one.
Worked examples

Creating Datastream lists
Creating a flexible chart
Creating an equity screen
CREATING DATASTREAM LISTS

Lists are a good way to make report, chart, and data requests for group of series that you use frequently. Instead of making individual requests, you can make one request to get results of all the series you are interested in. Once you have created your lists, you can edit them to reflect any changes in the group of series. You can use the Request or Project screens to refresh your lists in Datastream, or the Request Manager to refresh them in AFO.

This worked example shows you how to create a list of series. For more information about lists and what you can do with them, see the Datastream Help.

CREATING A LIST OF AUTOMOBILE COMPANIES

1. Click the User Created option in Data Category window.
2. Select the Local Lists data category.
3. Click the List Wizard button.

**Local lists**

<table>
<thead>
<tr>
<th>Name</th>
<th>Mnemonic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banks UK</td>
<td>RTR</td>
</tr>
<tr>
<td>Chemicals FR</td>
<td>PSN</td>
</tr>
<tr>
<td>French Automobile Industry</td>
<td>UTCO</td>
</tr>
</tbody>
</table>

**Data Category**

- Datastream series
  - Equities
  - Equity indices
  - Unit trusts
  - Investment trusts
  - Bonds & convertibles
  - Bond indices & CDS
- Economics
  - Exchange rates
  - Interest rates
  - Commodities
- Derivatives
- Constituent lists
- User created
  - Indices
  - Local lists
  - Time series
Select Create a new list.

Click the Next button.

Click the Series navigation button to display Datastream Navigator.
Search for the series you want in your list.

Click the Explorer option in the flyout to display related series.
Click the check box to select the series.

Click the Use Selected link to view the selected series.
Select the **Upload** option to add the list to the Datastream database, where it is stored as an L# list. You can also save as a UCI (X#) list. If you do not upload, the list is stored on your local drive or server.

Click the **Finish** button.

Again there is an option to remove the series from the list. Click the minus sign to remove the series.
CREATING A FLEXIBLE CHART

Flexible chart enables you to create multi-graph charts. This example shows you how to create a chart of three graphs showing the performance of Coca-Cola and Pepsi. It includes a Price chart against the S&P 500 index for non-alcoholic beverages, a Dividend Yield chart, and a Market Value chart.

1. Select the data category. 
   Equities for Coca-Cola and Pepsi, and Equity indices for the S&P 500 Index.

2. Select the series. 
   See Selecting the series, page 15.

3. Select the datatypes. 
   See Datatypes, page 24.

4. Select the series. 
   See Selecting the series, page 15.

5. Select the datatypes. 
   See Datatypes, page 24.

6. Select the date.
Repeat steps 3-5 for each series, you should have:
Coca-Cola - Price
Pepsi - Price
Coca-Cola - Dividend Yield
Pepsi - Dividend Yield
Coca-Cola - Market value
Pepsi - Market value
S&P EUROPE 350 FOOD BEV & TOB - Price Index

Click the Add button to add the selected series to the list, with the required datatype (Remember the last series and datatype dropdowns allow these to be easily re-selected).
Select three graphs and click **OK**.
Type the Chart Title.

Select the Series for Graph 1 and add them to Graph 1.

Click Next. The Assign Series to Graphs dialog is displayed.

Click the Properties button. The Properties for Graph 1 dialog is displayed.
Click OK.

17 Series Settings
Select the type of chart for each series:
Composite bar chart.

18 Graph Settings
Select Use my Graph Title and type your graph title.

19 Select the data
Frequency:

20 Click OK.
Select the Series and Graph settings for graphs 2 and 3.

Select Use my graph title and type the title.

Rebase to 100 for graph 2. (Do not rebase graph 3)

Click OK.
Click Finish.

Click Run Now.
The results are displayed.

You can:
- Change the chart properties: Right Click on the chart and select Properties... - then select Icharts from the Scheme dropdown at the top
- Edit the chart settings; click the Settings button
- Edit the chart using Annotations; Click Annotations icon in the tool bar.
- Save the flexible chart as a Project; select File>Save As
- Transfer or Export it; select Tools>Transfer or Tools>Export
For more information, see the Datastream Help.
CREATING AN EQUITY SCREEN

Equity screening enables you to search the entire global equities database of over 60,000 stocks, or across a region, such as the euro zone, or a single market. You can store your search to edit and re-run at a later date. You can save the results in a list for analysis in Datastream or AFO.

For more information about equity screening and what you can do with them, see the Datastream Help.

CREATING AN EQUITY SCREEN

Select the **Equity Screening** tab.
Select France from the Country tab.

4. Click the Add button.

5. Click the Next button.
Click the Industry & Sector Mnemonic tab.

Select the limitations: over 1 Billion.

Click the Add button.

Click the Datatype navigation button to search for and select a datatype. See Selecting a datatype, page 24.
Select automobiles from the Find equities in 1st industry box.

10

Select auto parts from the 2nd industry box.

11

Click the Add button

12

Click the Sort Order & Currency tab.

13
Select euro from the Currency box.

Select Ascending and Market value.

Click the Search Now button.
Click the **Save As List** button.
To store the results of your search as a list and report, click Finish.

- Allow Search List & Result to be refreshed
- The list will be stored in your lists directory. The file name must end with .LLT
- List File: [Automobile_0007.LLT]
- List Description: French Automobile Industry

Click Upload to store this List on the Datastream service

Click the **Upload** button to save your search on Datastream.

Type the file name and description for your search and click the **Finish** button.
Datastream lists
Expressions and functions
Flexible charts
Projects
Schedule Night Shift
Equity screening
Customising charts and reports
Web browser
Favourites
AFO request table
User created indices
User created time series
Ribbon based UI for AFO (in MS-Office 2007 and above)
DATASTREAM LISTS

Datastream provides flexibility in creating lists of series, such as a portfolio, a watch list, or a set of related indicators. One can analyse the series as a set or individually. Lists are a convenient way to make report, chart, and data requests using multiple series. One can create copies of Datastream’s index constituent lists, remove unwanted series, reorder the list, or merge two lists to create one. The List Wizard takes you through the process effortlessly.

Online help: Select Help >Contents >Using Datastream >Local Lists, OR Click the Help button on the list wizard dialog box.

EXPRESSIONS AND FUNCTIONS

Datastream’s expression picker gives you access to over 50 standard functions and expressions, which one can use to form part of one’s chart, report, or data requests. For example, find the percentage change in share price over 12 months.

Datastream’s expression builder enables one to create and edit one’s own expressions, which one can keep and access through the expression picker for future use.

Online help: Select Help >Contents >Using Datastream >Expressions and functions, OR Click the Help button on the expression picker, or expression builder dialog boxes.
FLEXIBLE CHARTS

Flexible chart gives one the freedom and flexibility to create one’s own tailor-made chart layouts. Datastream provides for comprehensive customisation of all aspects of one’s graphs.

Flexible Chart is particularly good for creating multiple chart layouts with multiple series using a variety of different chart types and styles.

Online help: Select Help >Contents >Using Datastream >Flexible Chart

PROJECTS

Datastream Projects enable one to save one’s analysis and automate printing and exporting charts.

One can schedule projects to update at a future time and to print or export the updated requests in a range of graphics or spreadsheet formats.

Online help: Select Help >Contents >Using Datastream > Projects
SCHEDULE NIGHT SHIFT

Datastream scheduling enables you to refresh your projects at a future time and on a regular basis. For example, you can refresh your projects overnight giving you access to updated charts, reports, and data the following morning.

Online help: Select Help > Contents > Using Datastream > Schedule Night Shift

EQUITY SCREENING

Equity screening enables you to search the entire global equities database of over 60,000 stocks, or across a region, such as the euro zone, or a single market. You can store your search to edit and re-run at a later date. You can save the results in a list for analysis in Datastream or AFO. For a worked example, see page 67.

Online help: Select Help > Contents > Using Datastream > Equity Screening
CUSTOMISING CHARTS AND REPORTS

You can customise your charts and reports using properties and annotations. You can change the text, line, and fill styles, and save your styles in a template for future use.

Online help: Select Help >Contents >Using Datastream >Annotating charts and reports

WEB BROWSER

The embedded browser links you directly to user support through the Datastream Research Extranet.

Online help: Select Help >Contents > Using Datastream >Web Browser
FAVOURITES

Favourites enables you to store your chart or report request with its settings, for example, dates, datatype, currency, etc. You can save them with unique names and select them from a drop down list.

Online help: Select Help >Contents >Using Datastream >Favourites

AFO REQUEST TABLE

The request table enables you to manage groups of refreshable requests. You can view the details of all your requests together. You can schedule the table to be updated at a future time or overnight. You can select which requests you want to update.

Online help: Select Help >Help Contents >Datastream Advance for Office > Using Request Table
USER CREATED INDICES

The UCI Manager enables you to create and maintain your own indices. Each index is based on a list of constituent series, which you specify as the first step of creating an index. Once created, an index can be automatically maintained for you, with new values calculated daily.

Online help: Select Help >Contents >Using Datastream >User Created Indices

USER CREATED TIME SERIES

A user time series is a series of values (data) for different points in time created by you and uploaded for storage on Datastream. The values can be daily, weekly, monthly, quarterly, or yearly and you can save the series in management groups to help you organise them. You can use these series in Datastream and AFO charts and reports. You can combine them with Datastream maintained series and use functions and expressions to manipulate them. An Excel template is used to create and edit your time series. You can download an existing series to form the basis of a new one.

Online help: Select Help >Contents >Using Datastream >Favourites
RIBBON BASED UI FOR AFO (IN MS-OFFICE 2007 AND ABOVE)

When you install AdvanceOffice.xlam and the Charting Addin component, Datastream is available as an Add-In tab. Datastream provides following facilities in the form of seven separate groups.

- **Static Request**
  Create a one off or embedded request for a series or list at one point in time.

- **Time Series Request**
  Create a one off or embedded request for a series or list at one point over time.

- **Manage Requests**
  Create requests for fundamentals information and view, update and edit your embedded requests.

- **New Request Table**
  Open a new Request Table to create manage and update spreadsheets.

- **Sample Sheets**
  Access a library of spreadsheets.

- **Conversion Wizard**
  Upgrade spreadsheets to the latest version.

- **Find Series**
  Find the series you require.

- **UCI Manager**
  Create, calculate and select User Created Indices.

- **Expression Builder**
  View and create saved expressions.

- **Create List (From Range)**
  Create a local central system or UCI.

- **List Wizard**
  Create local lists using series from navigator.

- **New UCTS sheet**
  Open a new User Created Time Sheet.

- **Chart**
  Open new chart window.

- **Library**
  Open new library window.

- **Chart Manager**
  Open Chart Manager to refresh, edit, apply style, remove links, delete and upload charts.

- **Run Template**
  Get the latest charts associated to particular Templates in your current spreadsheet.

- **Schedule for Refresh**
  Schedule Charts or Chart Templates for Refresh.

- **Refresh Charts**
  Refresh selected / all charts with the latest data.

- **More**
  Open more chart pages (Key Indicators, Overview, Reports) in a new window.

- **Help**
  Access Online help contents, Definitions, Contact Us link and Version details.

- **Options**
  Configure a range of settings and defaults.

- **Extranet**
  Access the Extranet.
FURTHER SUPPORT

Datastream has a comprehensive documentation set to support you. This comprises a complete set of manuals, online help, and interactive options to get you started.

MANUALS

A set of Datastream 5.1 help is available from the Help menu, select online manuals. These are provided as fully bookmarked Adobe Acrobat PDF files. You can browse, select, read, and print the sections you are interested in.

- **Getting started** - A brief guide to getting started with the basics of Datastream.
A set of AFO 5.1 user guides is available from the AFO menu in Excel, Word, and PowerPoint: select Online Manuals.

- **User guide Excel** - A comprehensive guide to using AFO with Excel.
- **User guide Word** - A comprehensive guide to using AFO with Word.
- **User guide PowerPoint** - A comprehensive guide to using AFO with PowerPoint.
SOFTWARE HELP

A comprehensive online help system is available from the Help menu: select Contents. You can also access context sensitive Help from most of the dialog boxes within Datastream.

Select Contents from the Help menu. The Online Help opening screen is displayed.

Welcome to Datastream Online Help

Click on the following tabs to get required information in the online help:

- **Table of Contents Tab**
  To list and select topics by their book titles. For example, Error Messages can be found under the book Reference.

- **Index Tab**
  To list all topics in alphabetical order. Some topics can also be found under general index entries, for example, Company Accounts Data can also be found under Settings.

- **Search Tab**
  To compile a database of topics for using the search engine. You can create a minimum, maximum or customized database.

- **Favorites Tab**
  To create a list of topics which are used frequently by the user. Favorite topics can be added and removed from the list.
AFO SAMPLES

Datastream Advance for Office samples illustrate how the different Datastream content sets can be used in a range of different workflows. You can access AFO sample from Word, Excel or PowerPoint.

Select AFO Samples from the Help menu. The AFO Sample opening screen is displayed.
SUPPORT

Thomson Reuters provides fully resourced Help desks for queries on Datastream, data, and communications problems. For more information see Contact Us links in the Desktop and add-ins.

ACCOUNT MANAGEMENT

In addition to the service provided by the Help desk, full advice and support is available from your Account Manager.

DATASTREAM RESEARCH EXTRANET SUPPORT SITE

The Extranet contains information on new content and functionality, series code updates and an increasing range of spreadsheets, documents, and presentations showing how Datastream charts and data can be used in Excel, Word, and PowerPoint.

TRAINING

Thomson Reuters provides a range of hands on training options designed to give you the knowledge, practice, and confidence to make full use of Datastream. Contact your Account Manager for complete and up to date information.

CONTACT DETAILS

For current numbers and addresses, see the Extranet:

http://product.datastream.com/extranet