

DATASTREAM FOR OFFICE (DFO) ADD-IN

QUICK REFERENCE CARD

DATASTREAM FOR OFFICE (DFO) ADD-IN RIBBON FOR OFFICE 2007 AND LATER

Callouts for the ribbon groups:

- Static Request / Time Series Request / Find Series:** Create a one off or embedded request for a series or list at one point in time. Find the series or datatypes you require.
- Edit Request / Refresh Data:** Edit request. Refresh Data and set Calculation mode.
- New Request Table / New UCTS-RT Sheet / UCI Manager:** Request Table - create and manage Datastream content in your sheets. Create your own index or download index template.
- Expression / Lists (Create from Range):** Access a library of spread sheets. Open a new combined Request Table and User Created Time Series workbook.
- Sample Sheets / Utilities:** View and create saved expressions. Create a list from series in your sheet or edit a list.
- Chart / Library / Manage:** Create a chart book based on a list. Select to edit a chart.
- Refresh Charts / Edit / Run Template:** Select to re-generate the charts. Refresh selected or all charts with the latest data.
- Generate Report:** Select chart to edit. Schedule Charts or Chart Templates for Refresh.
- Help / Contact Us / Options / Extranet:** Access Online Help. Configure a range of settings and defaults. Access the Extranet.

STATIC DATA REQUEST

Use to request data for a series or a list of series at a single date.

Callouts for the Static Request dialog:

- Series/List:** Type series directly or select previous series from dropdown.
- Datatypes/Expressions:** Select to use RIC codes.
- Date:** Select series from Navigator.
- Options:** Functions and available parameters are displayed as you type, with links to the help. Type the date, or request latest values for fundamentals and economics, or intra-day values for equities. Set column and row headings, transpose options and more. Add link to the series code to display the classifications and metadata pages from Navigator.
- Display Expression:** See the previous requests. Select datatype.
- Display Datatype:** Select to display the expression description or number.
- Embed Formula:** Select to display the datatype description or mnemonic.
- Default Option:** Add links to the datatype to display the definition from Navigator. Check to create an DFO formula that can be refreshed or edited.

TIME-SERIES REQUEST

Use to request data for series or list of series over a period of time.

Callouts for the Time Series Request dialog:

- Series/List:** Click to convert the datatype to a different currency. Reference a series or several series. Select list from the list picker.
- Datatypes/Expressions:** Click to select saved expressions.
- Start Date / End Date / Frequency:** Enter the start date, end date and frequency.
- Options:** Check to display Custom Header. Check to display series code. Check to display most recent value first.
- Display Expression:** Select to display the Time Series format.

USING THE DATASTREAM REQUEST TABLE

The Request Table enables you to define the detail of each request – series, lists, expressions, datatypes, dates and the format, and control the updating of the requests, to facilitate the creation and modification of complex models.

The screenshot shows the Thomson Reuters Datastream software interface. The main window displays a 'REQUEST TABLE' with columns for 'Y', 'Y/N', 'N', 'S', 'TS', 'TSL', 'L', 'CH', 'Format', 'Series Lookup', 'Datatype/Expressions', 'Start Date', 'End Date', and 'Freq'. The 'REQUEST TABLE' contains several rows of data, including series names like 'BARC', 'LBankUK', and '7634_0_500_850_EMF'. The interface also includes a 'Process Table' button, a 'Find Series' button, and a 'Series Navigator' pane. The 'Series Navigator' pane shows a list of series and their datatypes. The 'Datatype/Expressions' pane shows the selected datatype and expression for the current series. The 'Start Date', 'End Date', and 'Freq' columns allow users to specify the date range and frequency of the requests.

Update table.

Select if request should update.

Choose static, time-series, list, chart requests.

Update central system list (L#) with series in your sheet.

Update Datastream Charts with different series based on charting template.

Use Data sheet for manipulating downloaded data. Note: this sheet can then be hidden.

Use the Time Series template to upload series to Datastream.

Select series (or lists) using Navigator.

Create user list for requests.

Create or select user list for requests.

Create chart requests.

Select datatypes and expressions from Navigator.

Select different functions and expressions

Select the start date, end date and frequency.

Schedule tables to update using the DFO Index.

Set column and row headings, transpose options and more.

The editors facilitate the creation and editing of requests with multiple series (or datatypes & expressions).

Run macros before and after update.

Select to refresh template based Datastream Charts after update (taking account of series changes in list).

Process the request in sequence order.

This allows you to include display code option if it is a time series request with Transpose turned off.

Enables data destination references to be auto-filed for columns.

Switch to maintain the destination references when cells are inserted and deleted in the destination sheet.

Specify the text to use for the not available string.

Select to update all user time series after update.

Select the destination for the data.

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