Getting Started with Bloomberg

A user guide compiled for University of North Florida students and faculty.

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If you intend to download data into Excel you will need to install the Add-In. Here are guidelines for doing so.

If the Bloomberg ribbon or menu does not automatically appear in Microsoft® Excel, you can install the Bloomberg Add-In using the Bloomberg API Diagnostics tool.
Steps:

- Close all Microsoft® Office applications.
- From the Start menu of your PC, select All Programs > Bloomberg > API Environment Diagnostics.

  Note: If the Bloomberg folder or the API Environment Diagnostics application does not appear, try downloading the Add-In. For more: Downloading the Add-In.

  The Bloomberg API Diagnostics window appears.

- In the upper left corner of the Bloomberg API Diagnostics window, click the Start button.

  The diagnostic tool checks your system, displaying a progress bar at the top of the window. The process can take up to a minute to complete. When the process completes, a confirmation window appears.

- Click the OK button.

  The results of the diagnostics tool appear in the System Attributes section, displaying each category of system attributes. Warnings appear in yellow and errors appear in red.

- In the upper left corner of the window, if the Repair button is active, click the Repair button.

  The diagnostics tool attempts to install the software. A confirmation window appears.

- Click the OK button, then once the repair is completed, close the window.

The Bloomberg ribbon appears in Excel.

Return to Top

Downloading the Add-In
If the Bloomberg API Diagnostics tool fails to install the Add-In ribbon or menu, you can download the Add-In software from Bloomberg and install it.
For more: Installing the Add-In.
To download and install the Add-In software manually:

- Close all Microsoft® Office applications.
- In your web browser, go to http://www.bloomberg.com/professional/downloads/.

  The Client Downloads web page appears.

- Under Office Tools, click the download icon.

  The Bloomberg Office Tools Installation file is downloaded to your PC.

- In your PC's downloads folder, double-click the installer file, then follow the instructions in the installer.

  The Bloomberg Office Tools window appears.

The Bloomberg ribbon appears in Excel.
Note: If the installation was not successful, you can attempt to run the Bloomberg API Diagnostics tool again to add the ribbon or menu to Excel by following the steps in Installing the Add-In. If the ribbon or menu again fails to appear, contact the Bloomberg Help Desk within the Bloomberg Terminal® by pressing the <Help> key twice.

Getting started with Bloomberg Terminal

1. Open the Bloomberg terminal icon [icon] on the desktop or from the start menu.

2. Select the preferred language and press enter as shown below.
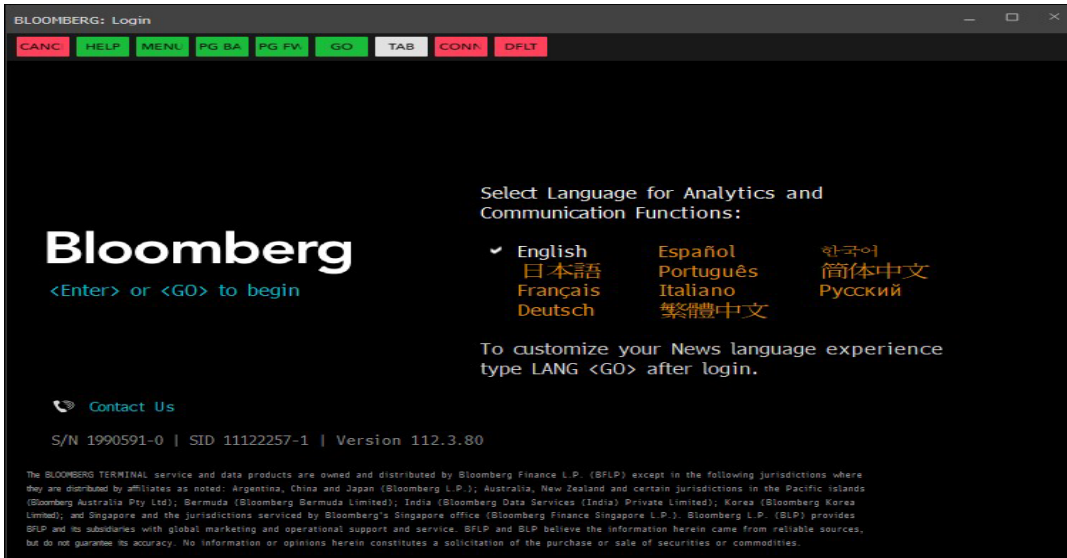
Sign in or create an account.

1. Enter your login details. In the text field that appears, type in your user account and password. If you don't have an account, jump to step 3.

2. Click Login. It's below the text box.
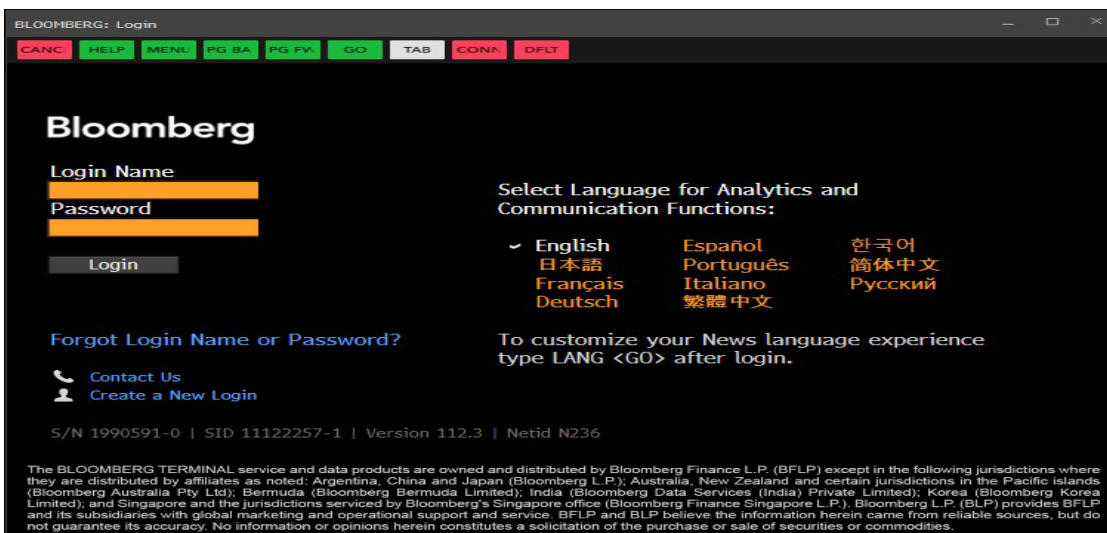
3. Click on "Create a New Login" to create an account (you will need an email and a phone number).

4. Follow the prompts.

How to logout

1. Click on options from the search engine bar.

2. Select "log off & Exit"

3. Follow the prompts to sign out.

Command Line

The Bloomberg terminal is discoverable from the command line, which appears at every Bloomberg panel's top.
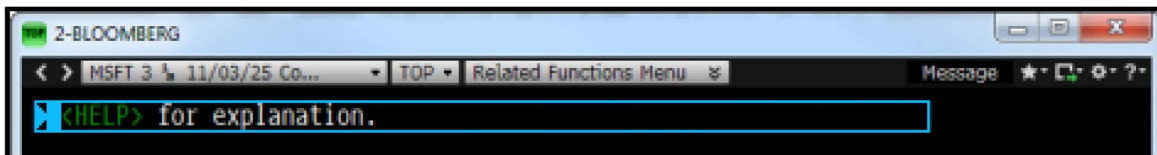
Uses of Command Line:

To search for a function by keyword:

1. Start typing the first few letters of a keyword in the command line at the top of the screen without hitting <GO>. For example, if you want Mergers & Acquisitions start typing… MERG.

2. Select the function you want from the list of matches.
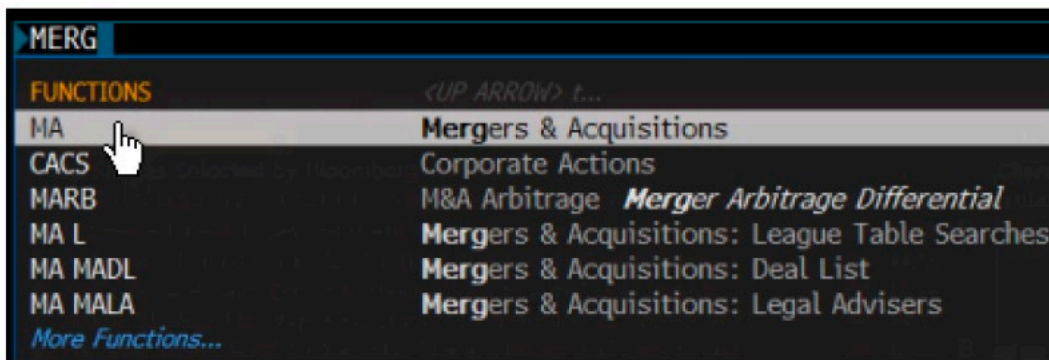
You can further refine the list of function matches by continuing to enter the keyword or by entering additional keywords. For example, you could enter MERGER ACQ.

To search for a function by Command:

If you already know the mnemonic for the function you want to run or the ticker for the security you want to load, type it in the command line, then hit the green <GO> key on the keyboard.

For example, if you already know that WEI is the mnemonic for the World Equity Indices function and you want to go directly to that function, in the command line, enter WEI, then hit <GO>.
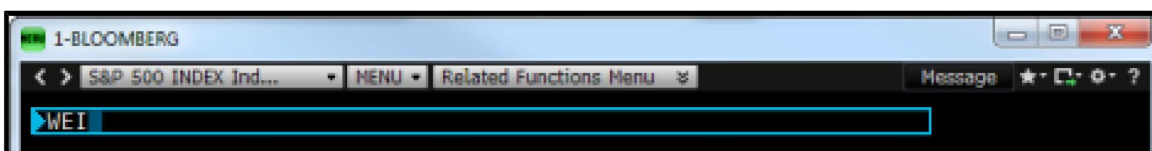
Alternatively, without hitting <GO>, the matching function is automatically highlighted on a list of the potential functions, securities, and searches. To run the function, you can click it from the list or just hit <GO> to complete the command.

Bloomberg Panels

The terminal delivers Bloomberg's news, data, and analytics through a series of up to four (4) desktop panels (windows). Each panel works independently, so you can access multiple analyses and workflows simultaneously.
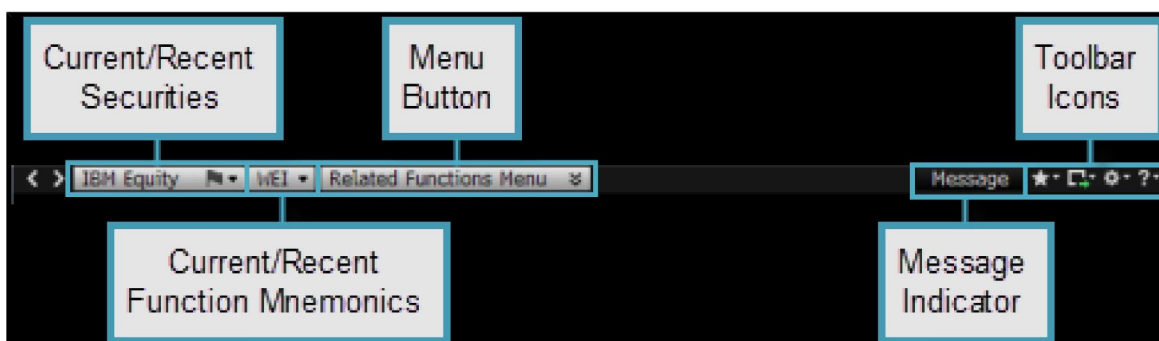
Panel frame (window)

The left side of the panel frame(window) displays the mnemonic for the function currently running on the window along with the current panel's number (1 through 4), so you can distinguish between your workspaces. The right side of the panel frame provides the traditional minimize and maximize panel options. Clicking "X" close icon logs you completely out of the current Bloomberg session.
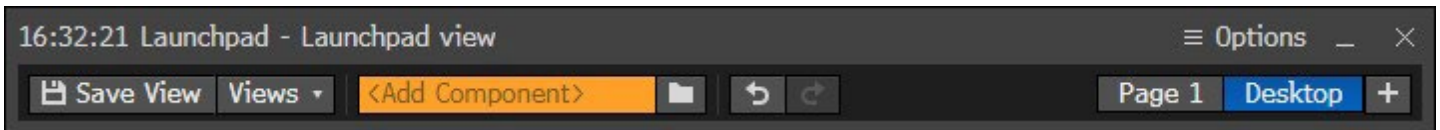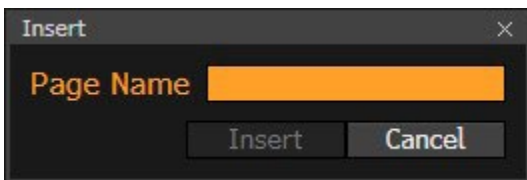
How to create customized panel frames for your launchpad view page?

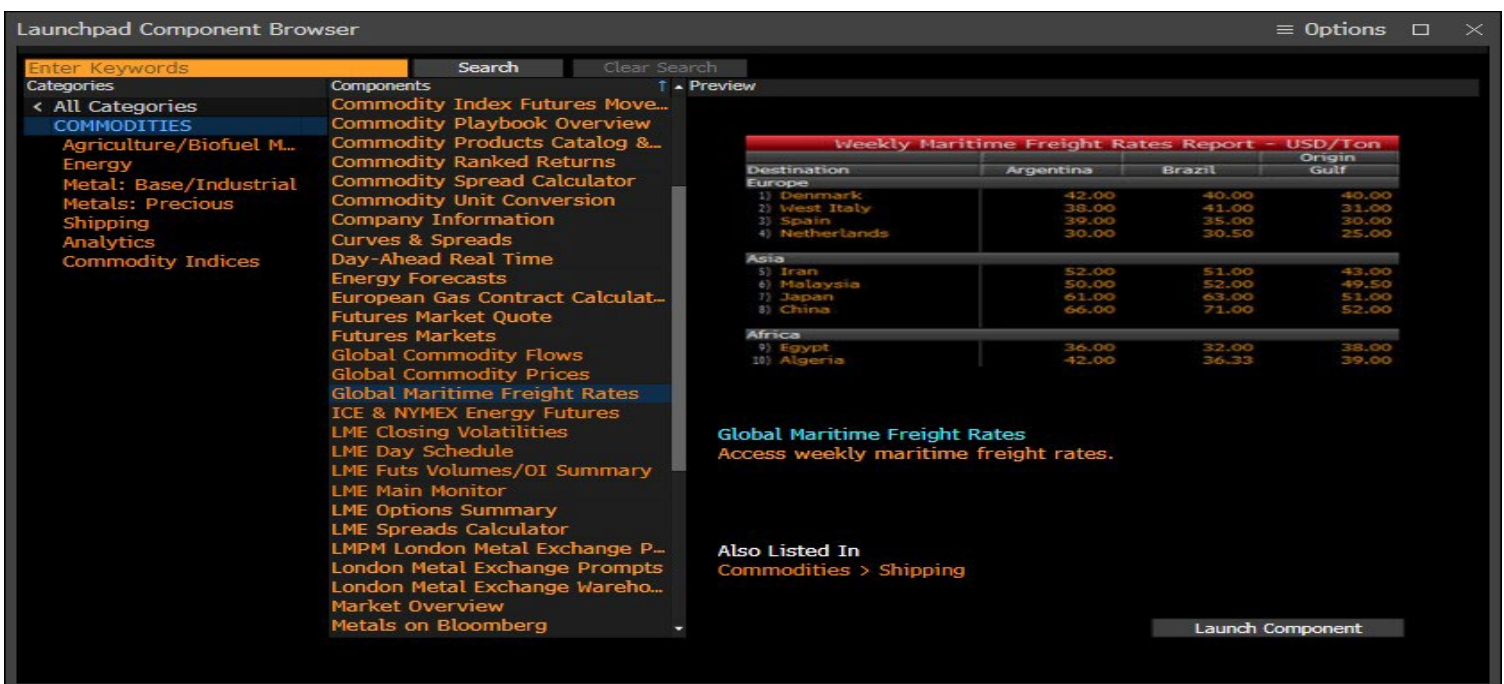1. Click on the plus sign (Add page to your view)

2. Name the panel frame based on your preference and click "insert" to confirm.

3. From the launchpad bar click on the "Open launchpad component browser icon or enter keywords in the "Add Component" space.

4. Select the category, and the corresponding component, then click "launch component" to create the panel frame (window).

For example, to create a panel frame in the launchpad view with news pertaining to "Global Freight Rates", follow the steps above to arrive at the below output.

	Ticker	Last Px	Last Px (1 Year)	Change 1 Qu	Dt Last Updt	Ssnlty & Trans	Q
▾ GDP Annual USD (229)							
World	WGDPWRLD	96527.426			12/31/2021	Value Annual	B
US	WGDPUS	23315.081			12/31/2021	Value Annual	B
China	WGDPCHIN	17734.063			12/31/2021		B
Euro Area	WGDPEURO	14563.283			12/31/2021		B
Japan	WGDPJAPA	4940.878			12/31/2021		B
Germany	WGDPGERM	4259.935			12/31/2021		B
United Kingdom	WGDPUK	3131.378			12/31/2021		B
France	WGDPFRAN	2957.880			12/31/2021		B
India	WGDPINDI	3176.295			12/31/2021		B
Italy	WGDPITAL	2107.703			12/31/2021	Value Annual	B
Canada	WGDPCANA	1988.336			12/31/2021	Value Annual	B
Korea	WGDPKORE	1810.956			12/31/2021		B
Russian Federatio	WGDPRUSS	1778.783			12/31/2021		B
Brazil	WGDPBRAZ	1608.981			12/31/2021		B

Bloomberg Keyboard

The Bloomberg keyboard is designed to help your work more efficiently, with color-coded keys that make it easy to follow the logic of the system.

Use	To
	Exit the current function and return to a home page that displays important contact information, so you can easily reach your Bloomberg representative, the Help Desk, or the Tech Support Team.
	Execute a typed command. For example, to access the Top News function, type **TOP**, then press **<GO>.** For more information, see *Functions* and *Securities*.
	• Navigate from any function back to a menu of related functions, then back through the menu hierarchy to the Home menu. • Navigate back to the previous screen. Note: The function of the <Menu> key on the old Bloomberg keyboard has transferred to the < End/Back> key on the new Bloomberg keyboard. For more information, see *Accessing Menus*.
	Navigate back to the previous screen. Note: This key provides the same functionality as the <Menu> key on the old Bloomberg keyboard.
	Connect to function Help Pages and to the Bloomberg Help Desk. To access a Help Page, press the **<Help>** key once; to open a chat with a Help Desk representative, press the **<Help>** key twice. For more information, see *Help Resources*.
	Load securities and access market sector menus. For more information, see *Accessing Menus* and *Securities*.
	Switch between windows.

For a complete view of the Bloomberg keyboard, hold down the <Alt> key and press K. To dismiss the keyboard image, press the K key again.

PART 2
BLOOMBERG – LOGISTICS AND SUPPLY CHAIN

1.1 SPLC – Supply Chain Analyses

1.2. AHOY- Global Commodities Flow

1.3. ESG- Environment, Social, and Governance

1.1. SPLC <GO>
   Supply Chain Analysis

SPLC <GO> provides a comprehensive supply chain breakdown for a selected company, so you can analyze revenue exposure for the central company, its suppliers, and its customers, as well as track a company's performance against its peers.

Note: Supply chain relationship values are based on company disclosures and other publicly available information. Bloomberg does not guarantee that customer/supplier rankings are accurate or complete, and they should not be relied on as such.

Quick Start

1. Enter a Security to display the company's Supply Chain Data.

2. To find suppliers or customers that meet your criteria, in the *Filter By* field, enter the criteria. For example, to see companies with greater than $10 billion market cap, start typing *Market Cap*, then select *Large*.

3. For more targeted analysis, select the *Table* view, then select a tab:
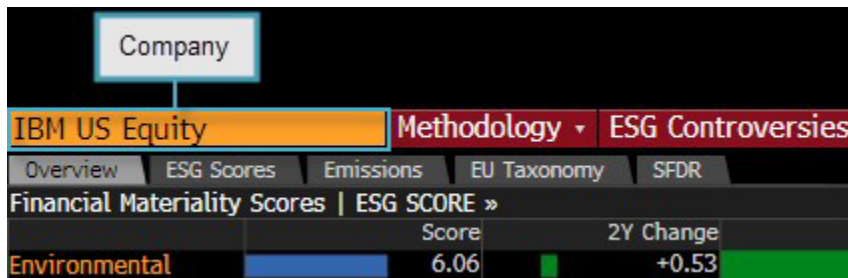

- Overview: See all suppliers or customers along with the amount of business they represent
- Geo-Exposure: Break down companies by the geographic location of their management or factories.
- ESG: Review companies' environmental, social, and governance scores.

1.2. ESG <GO>
ESG Analysis

Quick Start

1. Specify the company you want to analyze.

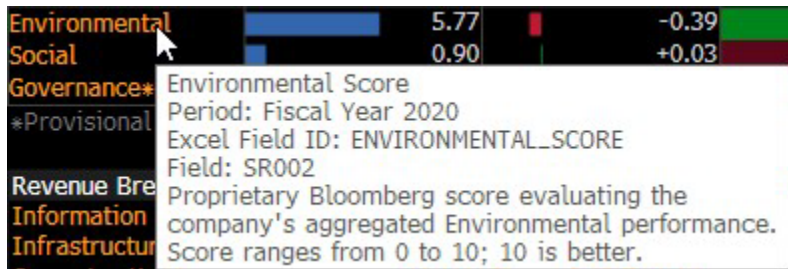2. Select a tab to begin your analysis:

- Overview: See key ESG measures for a company including scores from Bloomberg and third parties, as well as regulatory data, climate-related data, sustainable debt and ESG funds exposure. You can click links on a dataset to access functions for additional insights and transparency. For more: Overview Tab.
- ESG Scores: See how a company's emissions have changed over time and review Bloomberg's temperature scores. For more: ESG Scores Tab.
- Emissions: Drill into Bloomberg's materiality framework for ESG scores. For more: Emissions Tab.
- EU Taxonomy: Analyze a company's estimated eligibility for screening under the EU Taxonomy and the component pieces of Taxonomy alignment. The EU Taxonomy provides a framework to classify environmentally sustainable economic activities. For more: EU Taxonomy Tab, BESG Help Page > European Regulation.
- SFDR: Review disclosure requirements for funds and across different principle adverse impacts (PAIs) to compare a company's improvements over the year against their peers. For more: SFDR Tab.

Getting Hints as You Go

On any Bloomberg function, you can mouse over key items for more information:

1.3. AHOY <GO>
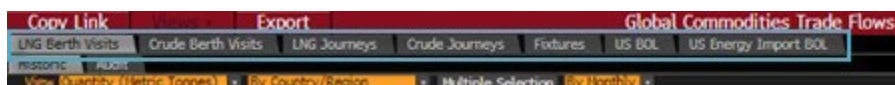## Global Commodities Trade
Flows

AHOY <GO> allows you to track global commodity imports and exports, so you can make investment decisions based on trade flow activity between countries. You can also see berth visit data to monitor estimated LNG imports and exports, and fixtures data to assess when commodities may arrive at a specific port of destination.

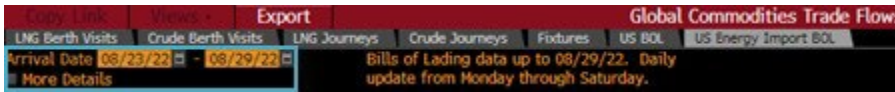## Quick Start

1. Select a tab to begin your import/export analysis.

For descriptions of each tab: <u>Tab Descriptions</u>.

2. Customize the commodity flow data to focus on the imports and exports you want to track.

Note: The image above shows the *US Energy Import BOL* tab. Depending on the tab you select, the customization options and data are different.

Getting Hints as You Go

On any Bloomberg function, you can mouse over key items for more information:
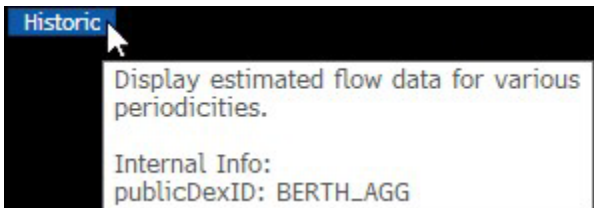
Tab Descriptions

- LNG Berth Visits: Search for berth visit data by location or vessel to calculate the estimated amount of product being moved between global regions.
- Crude Berth Visits: Track daily or historical crude berth visits to crude flow locations.
- LNG Journeys: Search global LNG trade flows to understand the LNG supply and demand status.
- Crude Journeys: Search global crude berth trade flows to understand the crude supply and demand status.
- Fixtures: Track shipping fixtures by specific criteria, such as fixture and loading date, cargo, type, and region.
- US BOL: Search U.S. customs bills of lading (BOL) to track the movement of shippable goods entering and exiting the United States.
- US Energy Import BOL: Search U.S. customs bills of lading (BOL) to find shipping vessels entering the country with oil cargo.