

A decorative graphic consisting of a solid blue square on the left, with a horizontal blue line extending to the right and a vertical blue line extending downwards from the square's bottom edge.

Getting Started

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Introduction

Overview	2
Datastream's data coverage	2
Data selection	3
Starting Advance and AFO	4

Using Advance

The Advance interface	8
The tool bar	10
Making a request	12
Selecting a data category	14
Selecting a data series	15
Using Navigator - quick search	16
Using Navigator - power search	18
Selecting types of request	22
Refining your request	24
Dates	24
Datatypes	26
Currency	28
Making your request	29

Using your results

Printing reports, charts, and data	33
Copying reports, charts and data	34
Transferring charts to MS Office	36
Exporting charts, reports, and data	37

Using Advance for Office

The Advance for Office (AFO) interface	40
Making a static request	42
Making a time series request	46
Making a company accounts request	50
Using the Request Manager	54

Worked examples

Creating Advance lists	58
Creating a flexible chart	62
Creating an index	70
Creating an equity search	74

More...

Advance lists	82
Expressions and functions	82
Flexible charts	83
Projects	83
Schedule Night Shift	84
Equity search	84
Customising charts and reports	85
Web browser	85
Favourites	86
AFO request table	86
User created indices	87
User created time series	87

Support...

Manuals	90
Tutorials	92
Online help	93
Telephone support	94
Account management	94
Research Extranet support site	94
Training	94



Introduction



Overview
Datastream's data coverage
Data selection
Starting Advance and AFO

Overview

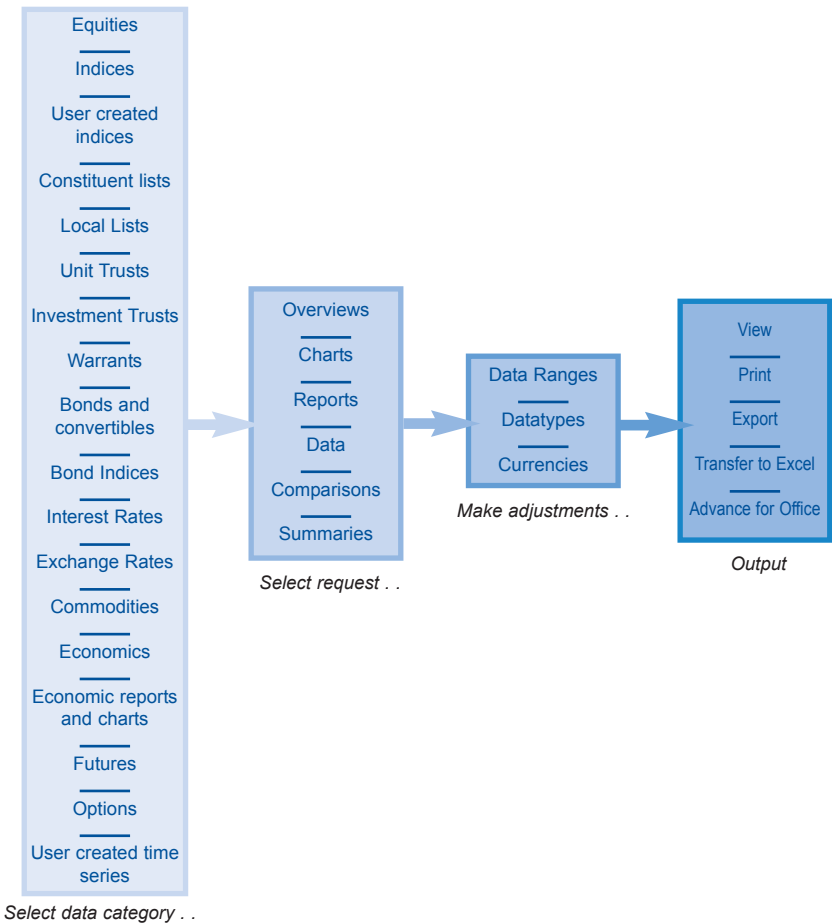
Datastream Advance gives you access to the world's largest and most respected historical financial numerical database. Advance provides a range of charting and reporting tools that enable you to manipulate and display, or simply download that data in the way that you want. With Datastream Advance you 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 I/B/E/S and added value data sets from respected sources such as MSCI and FTSE All World. And all data is quality checked and actively maintained by dedicated staff.

Data selection

Datastream Advance 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:



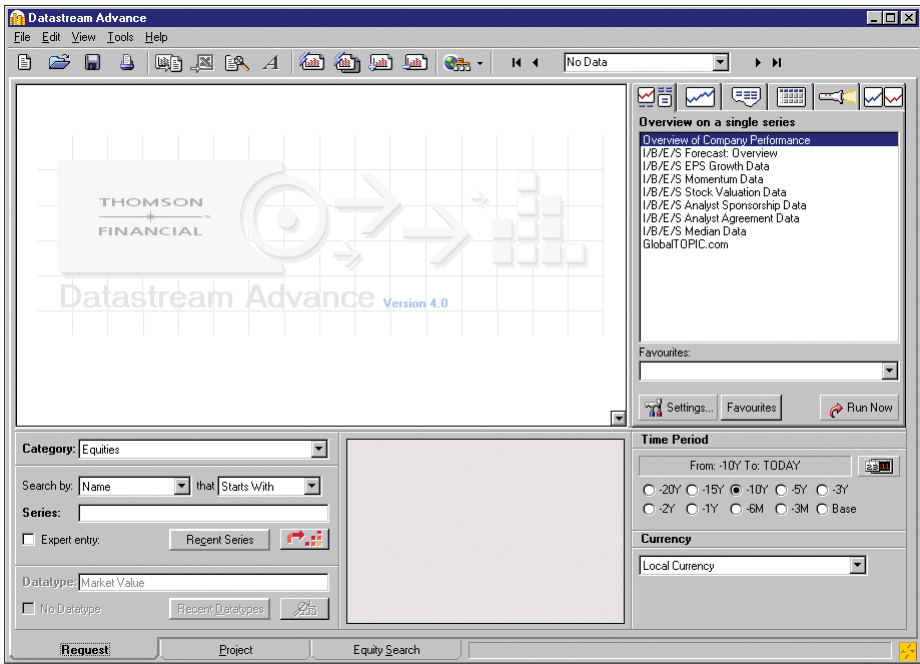
Starting Advance and Advance for Office (AFO)

Before you use Advance, 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, Advance Installation guide*.

Starting Advance

- Double click on the Advance icon. 

When Advance has loaded successfully, the **Request** screen is displayed.



Closing Advance

From the **Request**, **Project**, or **Equity Search** screens, 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 Advance.

Starting AFO

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

Closing AFO

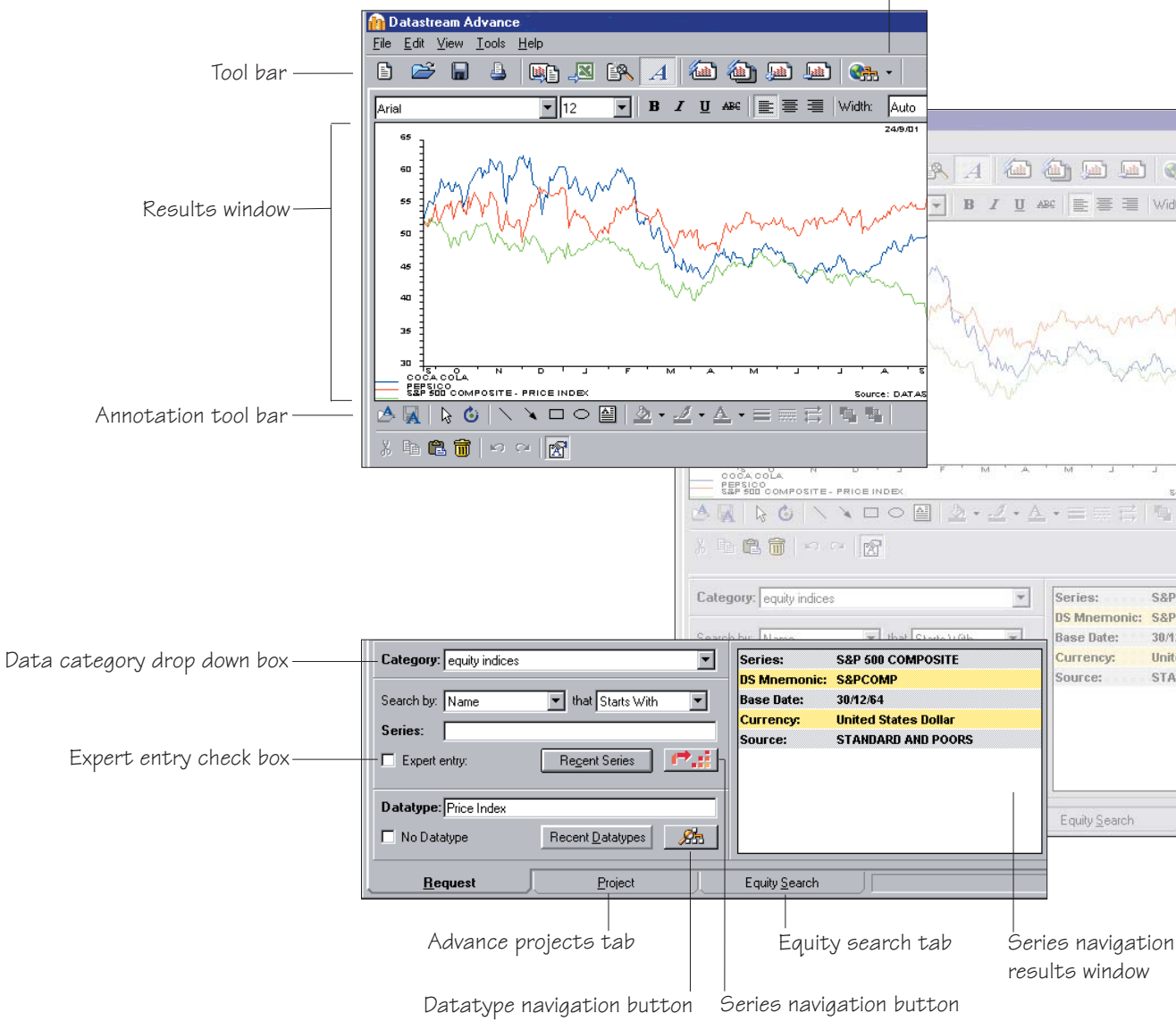
Advance for Office closes when you close your Office application.

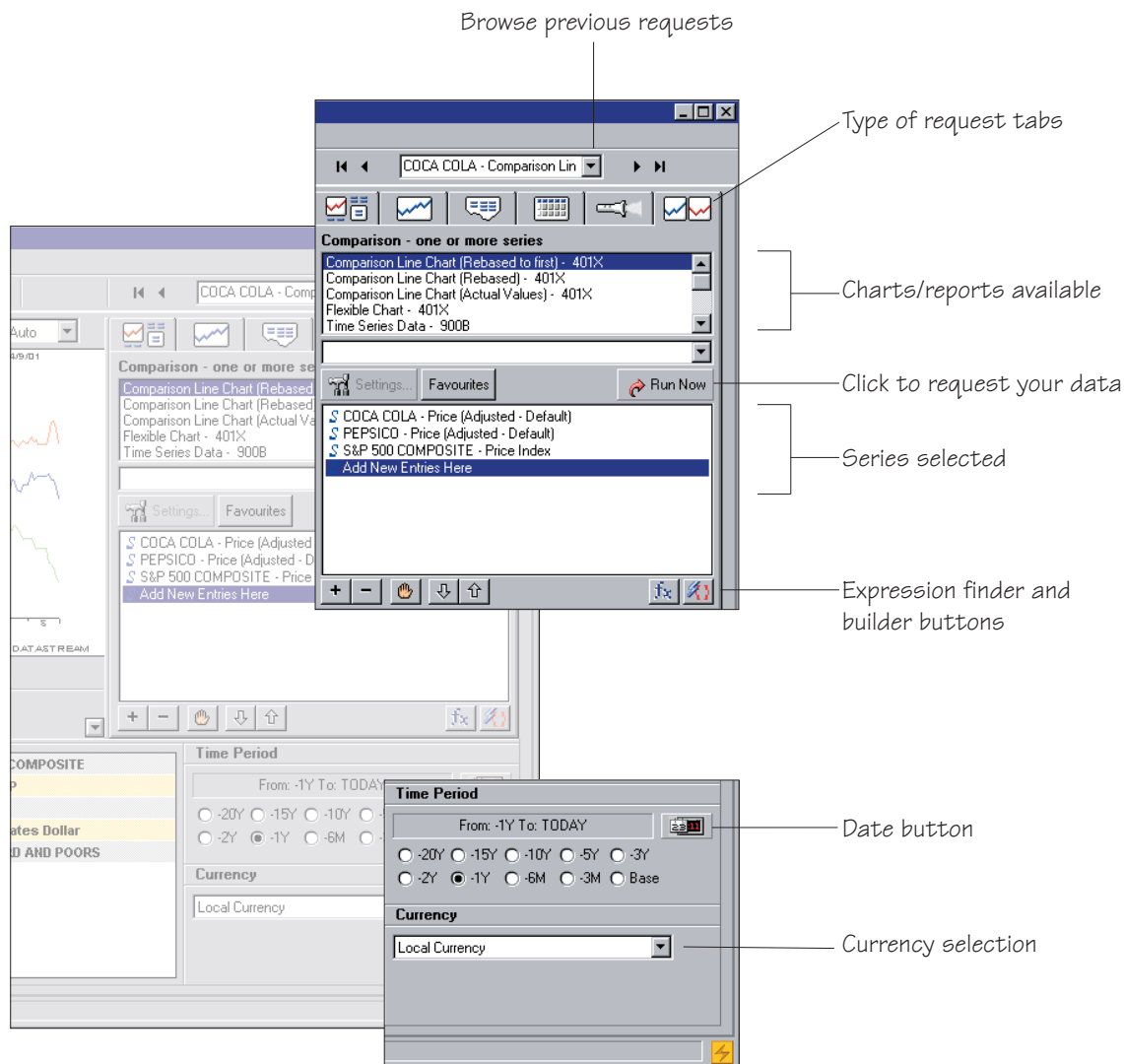
Using Advance

- The Advance interface
 - The tool bar
 - Making a request
 - Selecting a data category
 - Selecting a data series
- Using Navigator - quick search
- Using Navigator - power search
- Selecting types of request
- Refining your request
 - Dates
 - Datatypes
 - Currency
- Making your request


The Advance interface


Link to Thomson Financial sites via browser, including Research Extranet access








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.
- 

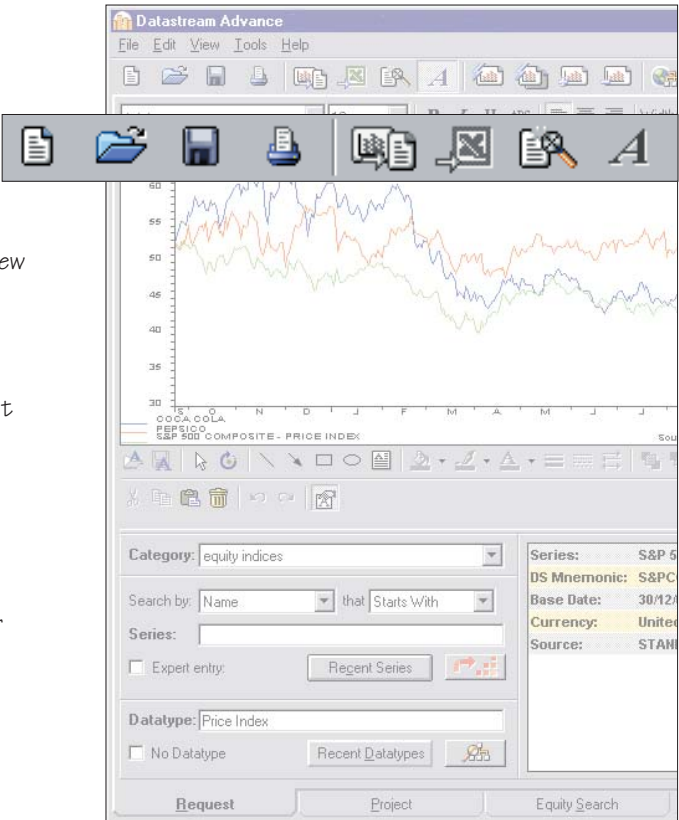
Print the displayed request to the default Windows printer. If you want to specify another printer or change the printer settings, select File>Print to display the Windows Print dialog.
- 

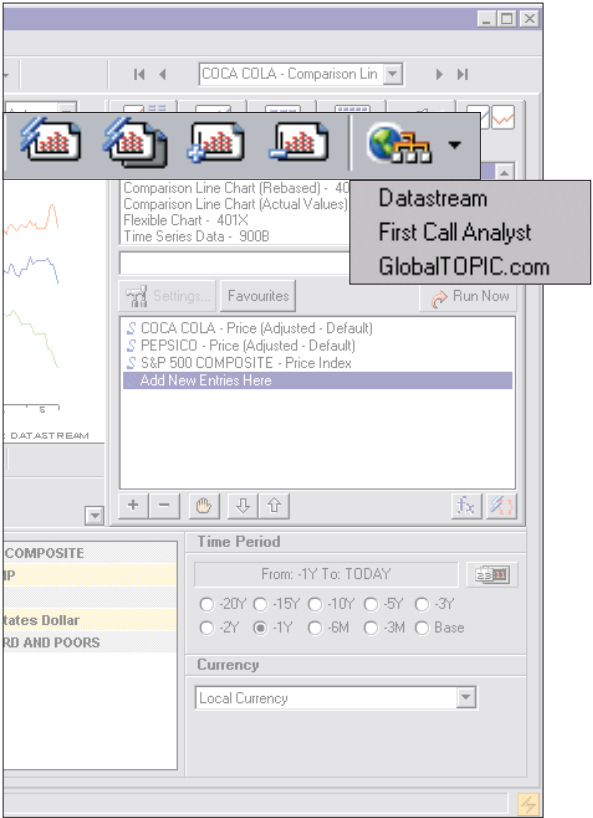
Export a chart, or a selected area of data, or a report in a format suitable for use with spreadsheets, word processors, etc.
- 

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.





Launch Datastream Research Extranet, First Call Analyst browser, or Global Topic browser in the display window.

To use First Call Analyst or Global Topic, you need a license.



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:

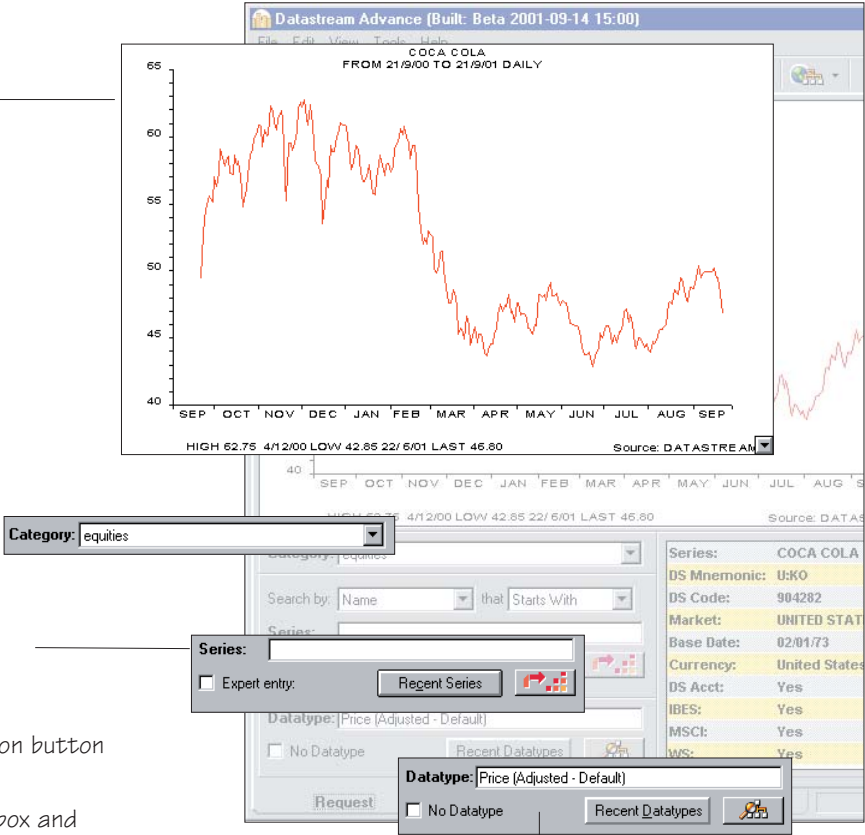
View your results.
You can Print, Export, or Copy the results of your request, and for a data request, transfer the data to your spreadsheet for future refreshing within Excel.

Select the type of series you want from the Category drop down box.
See [Selecting a data category](#), page 14.

Find and select your series.

- You can:
- Click the Series navigation button to open Navigator.
 - Check the Expert entry box and type the exact mnemonic or code in the Series field.
 - Click the Recent Series button to select from the last 12 series used.
- See [Selecting a data series](#), page 15.

- Select a datatype (optional).
- You can:
- Click the Datatype Navigation button to open Navigator.
 - Click the recent datatypes button to select from the last 12 datatypes used.
- See [Datatypes](#), page 26.



For interactive step by step instruction, see the Advance 4.0 tutorial: select **Advance Tutorial** from the **Help** menu.

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 22.

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 29.

Refine your request.

Change the display period, select a relative date option or click the **Date** button.
See *Dates*, page 24.

Change the currency, click the **Currency** drop down box.
See *Currency*, page 28.

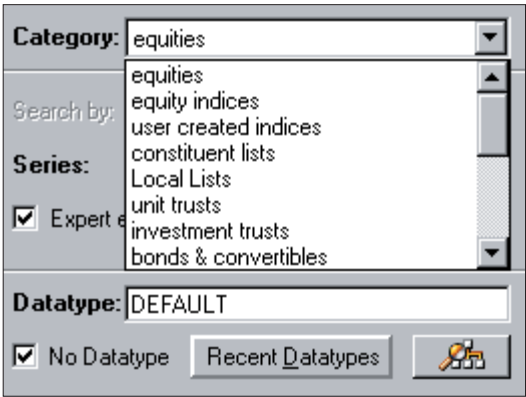
You can also make additional graph layout and data settings for some requests using the **Settings** button.
See *Settings*, *Advance User Guide*, page 130.

Selecting a data category

Datastream series codes are stored in a database and are accessed using Datastream Navigator. The series are grouped into 18 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.



You can select:



Equities
Indices
User created indices
Constituent lists
Local lists
Unit Trusts
Investment Trusts
Bonds and convertibles
Bond indices
Warrants
Economics
Economic reports and charts
Exchange Rate
Interest Rate
Futures
Options
Commodities
User created time series

To select a data category:

- Click the **Category** drop down box and select a category from the list displayed.

Selecting a data series

Use Datastream Navigator to find and select the series you want, or if you know the exact Datastream mnemonic or code, or 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.

Expert entry:
Check the **Expert entry** box and type the exact mnemonic or code directly in the **Series** field.

The screenshot shows a dialog box with the following elements:

- Category:** A dropdown menu currently showing 'equities'.
- Search by:** Two dropdown menus, the first showing 'Name' and the second showing 'Starts With'.
- Series:** A text input field.
- Expert entry:** A checkbox that is currently unchecked.
- Recent Series:** A button with the text 'Recent Series'.
- Series navigation button:** A button with a red arrow icon pointing to the right.

Click the **Series navigation** button to open the **Datastream Navigator**.

Click the **Recent Series** button to display a list of recent series.

To select a data series

- Click the **Series navigation** button to find and select your series from Datastream Navigator.
- Click the **Recent Series** button 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, see the *Advance User Guide*, pages 7-8.

Using Datastream Navigator - quick search

Quick search is the most basic search. Use this to search by the name, DS mnemonic, DS code, SEDOL, ISIN, local code, or I/B/E/S ticker of the series you are looking for.

To find and select a series using quick search:

Click the **Series navigation** button to open **Datastream Navigator**.

Click the **quick search** button, if it is not already selected.

Select name, DS mnemonic, DS code, SEDOL, ISIN, local code, or IBES ticker from the **find** drop down box.

Name	DS Mnemonic	DS Code	Market
COCA COLA	U:KO	9042	
COCA COLA (FRA)		430871	United States
COCA COLA (FRA)	D:CCC3	951259	United States
COCA COLA (IRS)	CCA	140862	United States
COCA COLA (LIM)	PE:CCO	274630	United States
COCA COLA BEVERAGES	SL:PBG	316777	Sri Lanka
COCA COLA BOTTLING (FRA)	D:CC5	14477R	United States
COCA COLA BOTTLING CONS.	@COKE	906847	United States
COCA COLA CERT. (ZRH)	S:KO	982123	United States
COCA COLA ENTS.	U:CCE	741521	United States
COCA COLA HELLENIC	A:HBCX	263855	Australia

4 Select **Starts with** or **Contains** from the drop down box.

5 Type the first few characters of the name, mnemonic, or code in the **Search** field.

The screenshot shows the Datastream Advance search interface. At the top, there is a search bar with a dropdown menu set to "Starts With" and a text field containing "coca cola". Below this, there is a "SEARCH" button. The search results are displayed in a table with columns: DS Mnemonic, DS Code, Market, Base Date, Currency, DS Acct, IBES, MSCI, WS, Status, and More. The first row is highlighted in yellow and shows "32 United States 02/01/73 United States Dollar Yes Yes Yes Active More".

DS Mnemonic	DS Code	Market	Base Date	Currency	DS Acct	IBES	MSCI	WS	Status	More
32		United States	02/01/73	United States Dollar	Yes	Yes	Yes	Yes	Active	More
-	430871	United States	26/09/88	German Mark	Yes	No	No	No	Active	More
D:CCC3	951259	United States	26/09/88	Euro	Yes	No	No	No	Active	More
CCA	140862	United States	11/06/01	Pounds	Yes	No	No	No	Active	More
PE:CCO	274630	United States	10/08/99	Peruvian Nuevo Sol	Yes	No	No	No	Active	More
SL:PBG	316777	Sri Lanka	01/06/87	Sri Lankan Rupee	No	Yes	No	No	Active	More
D:CC5	14477R	United States	31/08/01	Euro	Yes	No	No	No	Active	More
@COKE	906847	United States	02/01/73	United States Dollar	Yes	Yes	No	Yes	Active	More
S:KO	982123	United States	16/07/90	Swiss Franc	Yes	No	No	No	Active	More
U:CCE	741521	United States	21/11/86	United States Dollar	Yes	Yes	Yes	Yes	Active	More
A:HBCX	263855	Australia	01/09/00	Australian Dollar	No	No	No	No	Active	More

6 Click the **Search** button.

7 Select your series from the list displayed.

8 The series is displayed in Advance.

Using Datastream Navigator - power search

Power search helps you speed up the search for your series by using your own search criteria.

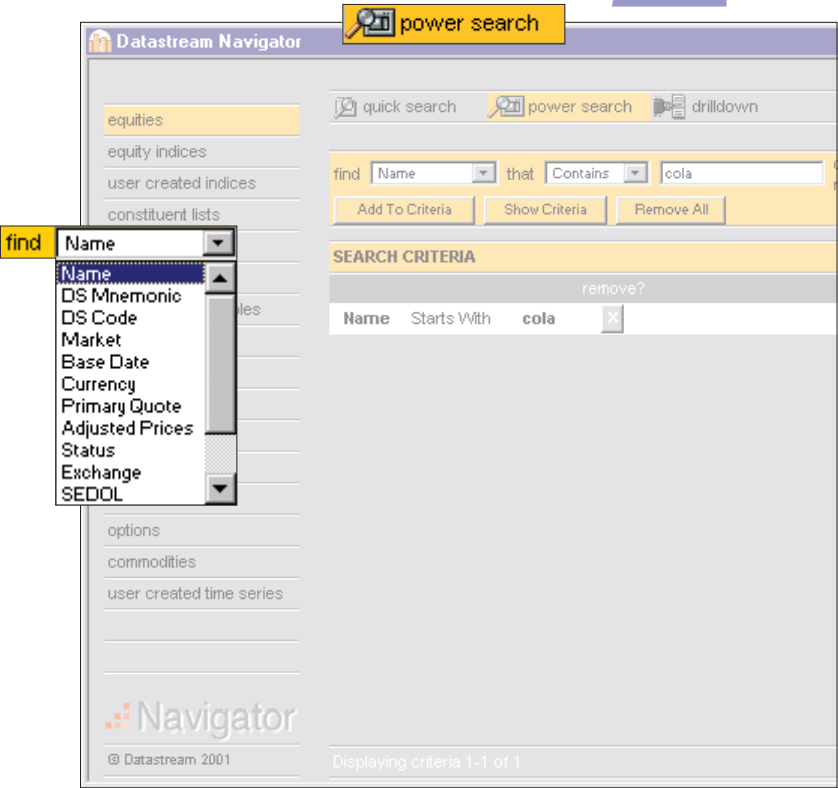
To find and select a series using power search 1:

For criteria: name, DS mnemonic, DS code, SEDOL, base date, exercise date, and management mnemonic.

Click the **Series navigation** button to open **Datastream Navigator**.

Click the **power search** button, if it not already selected.

Select **name, mnemonic, code, SEDOL, base date, exercise date, or management mnemonic** from the **find** drop down box.



4
Select **Equals**, **Starts With** or **Contains** from the drop down box.

5
Type the criteria, eg **cola**, in the **Search** field.

The screenshot shows the Datastream Advance search interface. At the top, there is a search bar with a dropdown menu set to 'that' and a text input field containing 'cola'. Below this, there is a section titled 'SEARCH CRITERIA' with a table listing the criteria. The table has columns for 'Name' and 'Starts With'. The first row shows 'Name' as 'cola' and 'Starts With' as 'cola'. There is a 'remove?' button next to the row. Below the table, there is a status bar that says 'Displaying criteria 1-1 of 1'.

Name	Starts With
cola	cola

6
Click the **Add to Criteria** button.

7
The criteria are listed.

Using Datastream Navigator - power search

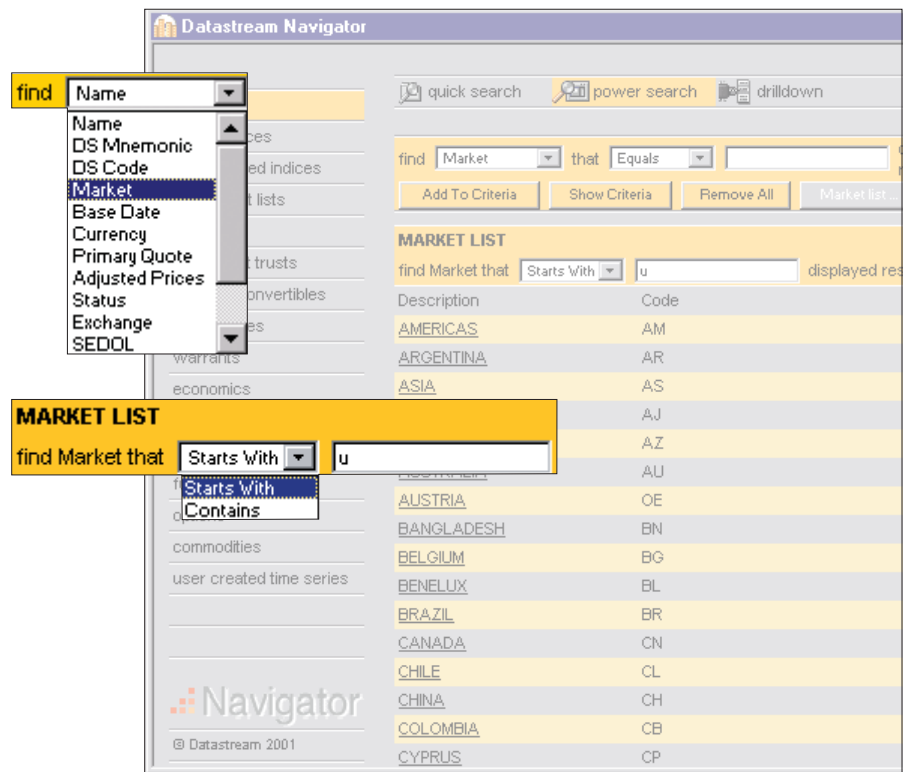
To find and select a series using power search 2:

For criteria: market, currency, source, class, frequency, unit, type, key indicator, adjustment, borrower, call/put, from currency, to currency, country, exchange, adjusted prices, and primary quote.

Select one of the above criteria from the **find** drop down box, eg Market. The **Market List** is displayed.

Select **Starts With** or **Contains** from the drop down box.

Type the criteria, eg U for markets starting with U.



quick search

power search

drilldown

help

find

Market

that

Equals

displayed results

fit page

SEARCH

Add To Criteria

Show Criteria

Remove All

Market list ...

MARKET LIST

find Market that

Starts With

u

displayed results

fit page

SEARCH

Description	Code
AMERICAS	AM
ARGENTINA	AR
ASIA	AS
ASIA EX JAPAN	AJ
AUSTRALASIA	AZ
AUSTRALIA	AU
AUSTRIA	OE
BANGLADESH	BN
BELGIUM	BG
BENELUX	BL
BRAZIL	BR
CANADA	CN
CHILE	CL
CHINA	CH
COLOMBIA	CB
CYPRUS	CP

SEARCH

4

Click the Search button.

5

Select the market you want to add to the criteria, eg United States.

6

Click the Search button to run the search.

MARKET LIST

find Market that

Starts With

Description	Code
UNITED KINGDOM	UK
UNITED STATES	US

SEARCH CRITERIA

remove?

NameContains colaX

And Market EqualsUNITED STATESX

The search criteria are displayed.

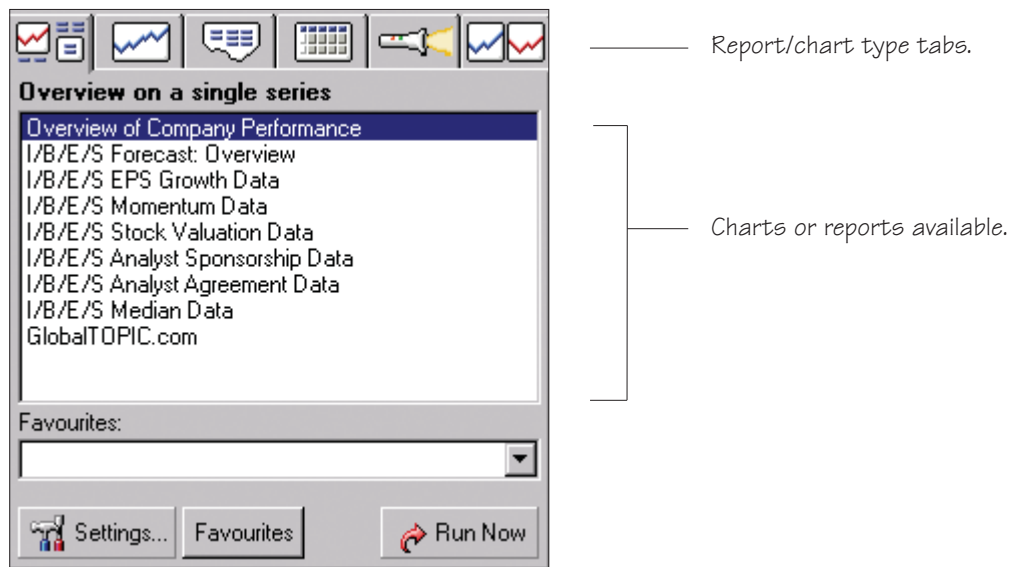
DATASTREAM ADVANCE VERSION 4.0, ISSUE 1 DATASTREAM ADVANCE VERSION 4.0, ISSUE 1 DATASTREAM ADVANCE VERSION 4.0, ISSUE 1 DATASTREAM ADVANCE VERSION 4.0, ISSUE 1 DATASTREAM ADVANCE VER

21

Selecting types of request

Advance 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 Advance’s database. You can access these by selecting a report/chart type tab on the **Request** screen.



To select a request:

- 1 Click a request type tab.
- 2 Select a request from the list displayed.

Request types:



Overviews - You can request Datastream company, commodity, warrant, trust, and bond performance overviews, and a range of fixed format I/B/E/S forecast overviews.



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



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



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



Summaries - These are used for data requests for a list of series. For example, performance, geographical, and industrial summaries for a Datastream constituent list. Values for all constituents are displayed in one summary report, chart, or data format.



Datastream Mnemonic Search - Two tools are available to search the Datastream database for company mnemonics. The searches can be for 'live' or 'dead' stocks.



Comparisons - You can request information on multiple series, enabling you to create comparisons across different data category types, and use flexible charts to create 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.

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.

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

To select a date period:

Click the **Date** button.
The **Configure Dates** dialog is displayed.

Time Period

From: -9M To: 0D

-20Y

-15Y

-10Y

-5Y

-3Y

-2Y

-1Y

-6M

-3M

Base

Date button.

Relative dates.

Configure Dates

Start Date

Fixed

02/03/1997

Show as Year

Relative

1

Year

Before Today

After Today

Year Ends:
(Company Account Reports Only)

-4

Datastream Base Date

End Date

Fixed

02/03/1998

Show as Year

Relative

-1

Day

Before Today

After Today

Year Ends:
(Company Account Reports Only)

0

Today

OK

Cancel

Help

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)

DATASTREAM ADVANCE VERSION 4.0, ISSUE 1 DATASTREAM ADVANCE VERSION 4.0, ISSUE 1 DATASTREAM ADVANCE VERSION 4.0, ISSUE 1 DATASTREAM ADVANCE VERSION 4.0, ISSUE 1 DATASTREAM ADVANCE VERSION 4.0, ISSUE 1

24

2

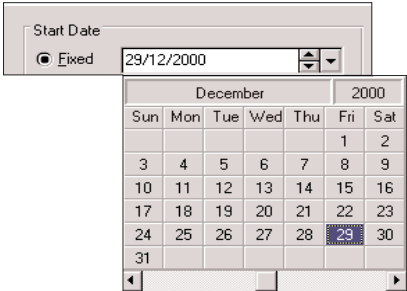
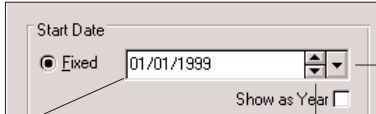
Select the date options.

Fixed date option

Type a date.

Use the spin buttons to select a date.

Click the **Calendar** button to display an interactive calendar.



December 2000						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Relative date option

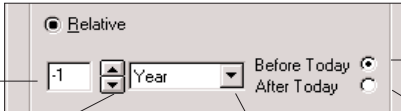
Type a relative date, for example, -4.

Use the spin buttons to select a date.

Select day, week, month, quarter or year.

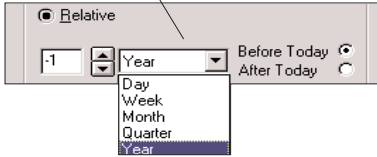
To select both start and end periods before today.

To select both start and end dates after today, for projected series.



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 Price - Opening.


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 time series, static, company accounts, I/B/E/S datatypes, MSCI datatypes, and Worldscope data items.

To select a datatype:

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

Datatype: PRICE (ADJUSTED - DEFAULT)


☐ No Datatype Recent Datatypes 


Datatype navigation button.

Check this box if default datatype is required.

Select **Starts With** or **Contains** from the drop down box.


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

that Starts With 

find Name 

Name
Mnemonic

Datastream Navigator

equities  datatype search help

find Name that Starts With displayed results 20 SEARCH

type Time Series group Key Datatypes Definitions

EQUITIES	
Name	Mnemonic
Default	DEFT
Dividend Yield	DY

5 Select the type of datatype, **Static** or **Time Series**.

4 Type the search criteria.

7 Click the **Search** button.

The screenshot shows the 'datatype search' window in Datastream Advance. The 'type' dropdown is set to 'Time Series'. The 'group' dropdown is set to 'Key Datatypes'. The search criteria field is empty. The 'SEARCH' button is visible. The results table shows various equity datatypes.

Name	Mnemonic	Definition
Dividends Per Share	DPS	Definition
Dividends Per Share	DPS	Definition
Earnings Per Share	EPS	Definition
Local Market Index	LI	Definition
Market Value	MV	Definition
Price (Adjusted - Default)	P	Definition
Price - Intraday High	PH	Definition
Price - Intraday High (Padded)	PHP	Definition
	PL	Definition
	PLP	Definition
	PQ	Definition
	PI	Definition
	PE1	Definition
	PE2	Definition
	PE	Definition
	RI	Definition
	104	Definition

6 Select the group of datatypes to select from.

Select the datatype from the list displayed. The datatype is displayed in Advance.

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.

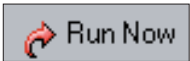
Note:
The parameters that you can change are dependent on the data category and chart, report, or data format chosen. For example, you can change the date, datatype, and currency for an Equity - Line Chart request, but only the date for a Constituent - Bar Chart request. If you cannot change the currency,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

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, Advance user guide*, pages 92-95.

Using your results

Printing reports, charts, and data
Copying reports, charts, and data
Transferring charts to MS Office
Exporting charts, reports, and data

■ Using your results

ADVANCE GETTING STARTED GUIDE ADVANCE GETTING STARTED GUIDE ADVANCE GETTING STARTED GUIDE ADVANCE GETTING STARTED GUIDE ADVANCE GETTING STARTED GUIDE

When you request reports, charts, and data formats from Datastream, they are displayed within Advance and are automatically added to the current open Project. You can:

- Print your charts and selected pages of reports to any Windows printer.
- Copy reports, charts, and data formats to the Windows clipboard for pasting into Windows compatible 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 your spreadsheet for regular updating.
- Transfer charts to Microsoft Office applications, 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 within the applications.




Price, Dividend & Earnings for FTSE ALL GEN RETAILERS								
Name	Price	—Price	Range	—Div	Earn	Div	Per	Cover
		—12	Months—					
ALLIEDS	161.50	163.00	91.50	8.40	16.60	5.78	9.7	
ARCADIA GROUP	278.00	289.00	38.00	0.00	0.00	0.00		
ASHLEY (LAURA)	25.50	27.25	17.00	0.00	0.74	0.00	34.4	3.0
BLACK'S LEISURE	182.00	132.00	317.00	6.65	26.00	4.06	7.0	3.0
BOOTS	584.00	649.00	479.00	25.50	45.81	4.06	12.7	1.1
BROWN & JACKSON	41.00	166.50	39.00	3.50	9.87	9.37	4.2	2.0
BROWN (W) GROUP	291.50	354.00	62.50	13.14	19.80	22.21	2.2	2.0
CARPENTHRY	60.00	181.00	431.50	24.50	36.73	4.54	16.8	1.1
CARPHONE WARE SHG	140.00	223.00	119.00	0.00	0.00	0.00		
CLINTON CARDS	135.00	135.00	5.00	5.88	17.15	4.84	7.9	2.0
COURTS	325.00	414.00	272.50	5.60	26.70	19.11	11.3	5.0
DEEENHAMS	461.00	478.00	169.00	11.10	25.70	2.68	17.9	2.0
DEEENHAMS (F) ENTURE CO	489.00	489.00	269.00	19.20	31.70	4.36	4.4	2.0
DIXONS GP	249.25	250.00	183.00	4.80	9.84	2.14		
FNIEL	272.50	286.50	203.00	10.65	14.26	3.44		
FRENCH CONNECT	857.87	867.50	645.00	6.50	54.00	18.84		
GRAMPAN HDG	73.00	84.50	55.50	8.00	9.08	12.2		
ST LANE STORES	601.00	601.00	270.00	20.00	26.61	3.81		
HARVEY NICHOLS	231.00	241.00	124.00	7.70	19.48	3.61		
HOMESTYLE GROUP	460.50	483.50	261.50	19.80	32.00	4.54		



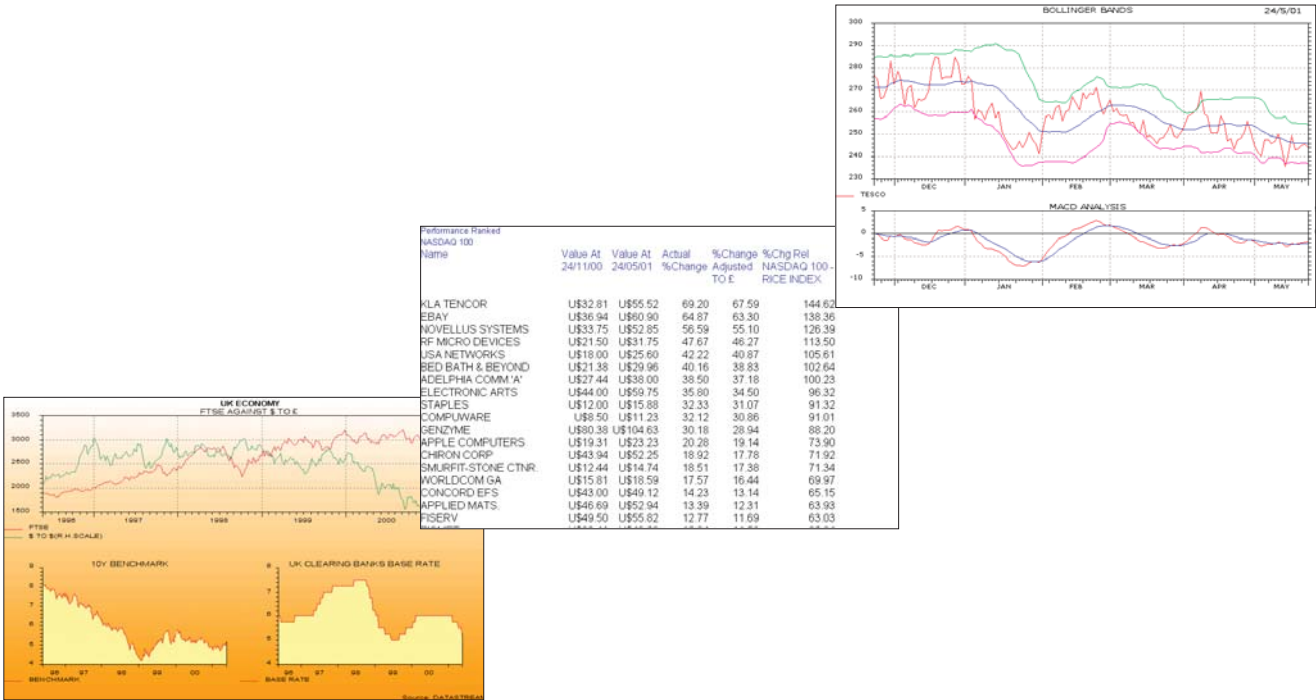
Printing reports, charts, and data

You can print any displayed report, chart, or data format to the default Windows printer.

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.

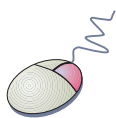
To change the printer or printer settings, select **Print Setup** for either Report or Chart from the **File** menu.



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.

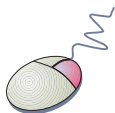
To copy a chart:

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

Note:

The chart will be held on the clipboard as a Windows Meta File.

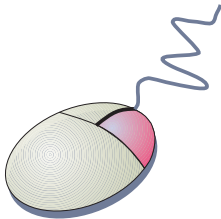
To copy data:



- 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.

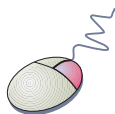


You can use the right click menu to copy.

Transferring charts to MS Office

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

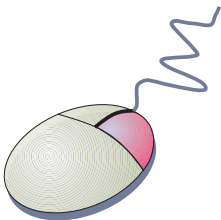
To transfer a chart request to MS Office:



- 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.



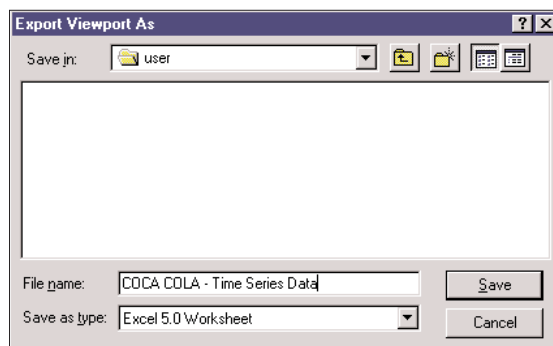
You can use the right click menu to transfer and export.

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**.



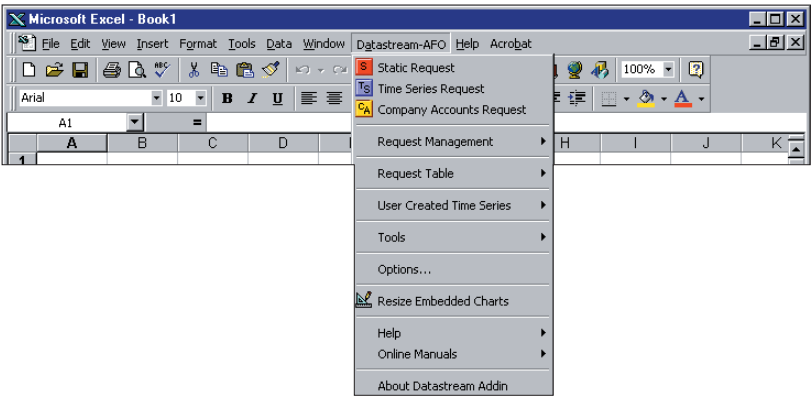
Using Advance for Office



- The Advance for Office (AFO) interface
 - Making a static request
 - Making a time series request
 - Making a company accounts request
 - Using the Request Manager

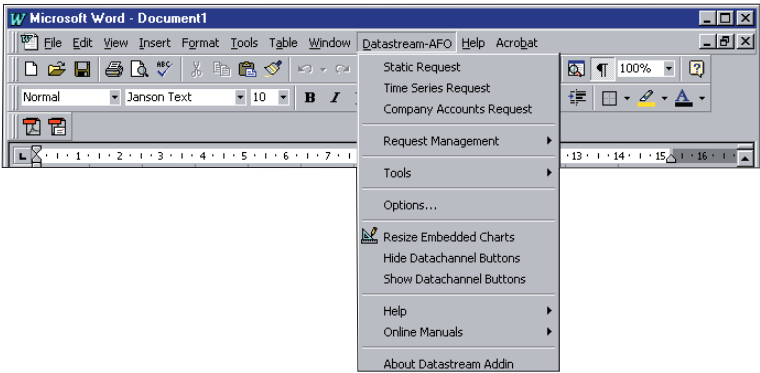
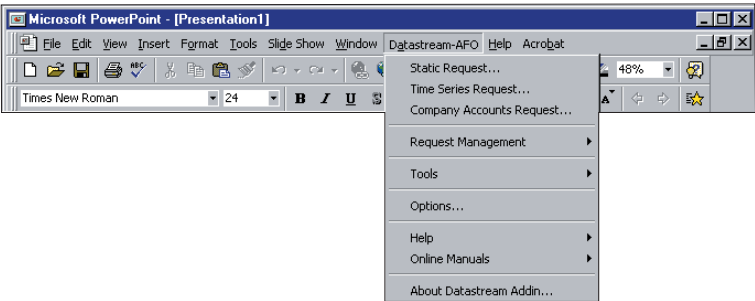
The Advance for Office (AFO) Interface

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



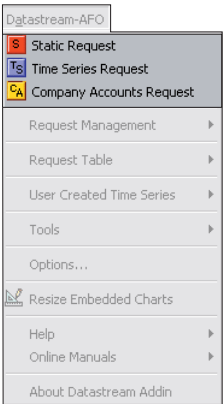
AFO menu in Excel.

AFO menu in PowerPoint.



AFO menu in Word.

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



Static requests

To request data for a specific date or dates.

	A	B	C	D	E	F
1	Date	01/01/01				
2	Type	NAME	P	PE	DY	CURRENCY
3	U:KO	COCA COLA	60.94	80.2	1.18	U\$
4	U:PEP	PEPSICO	49.66	34.7	1.13	U\$

For example, the price of Coca-Cola on 01/01/00 and 01/06/00.

Time series requests

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

	A	B	C	D	E	F	G
1	Start	01/06/00					
2	End	01/06/01					
3	Frequency	D					
4	Name	CURRENCY	01/06/00	02/06/00	05/06/00	06/06/00	07/06/00
5	PEPSICO	U\$	1.44	1.44	1.44	1.44	1.4
6							

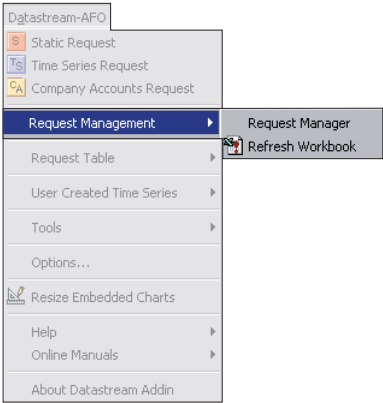
For example, the daily prices of Pepsi between 01/01/00 and 01/06/00.

Company account requests

To request accounts data on the company itself.

For example, industrial company accounts for Coca-Cola over the last four years.

	A	B	C	D	E	F
1	U:KO	COCA-COLA COMPANY				
2	TYPE	DESCRIPTION	31/12/96	31/12/97	31/12/98	31/12/99
3	104	TOTAL SALES	18546000	18868000	18812992	19804992
4	136	DEPRECIATION	479000	626000	645000	792000
5	696	DEPN AND OPERATING PROVISIONS	479000	626000	645000	792000
6	993	OPERATING PROFIT	4299500	5061000	5040000	4795000
7	2408	NET INTEREST CHARGES	48000	47000	58000	77000
8	D011	EXTRAORD./SPECIAL ITEMS	-384500	448000	118000	-813000
9	154	PRE-TAX PROFIT	4385000	5900000	5166000	4003000
10	623	PUBLISHED AFTER TAX PROFIT	3492000	4129000	3533000	2431000



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

1
Select **Static Request**
from the **AFO** menu.

2
Select the series.
Click the **Series navigation**
button to display
Datastream Navigator.

Datastream Static Request

Request Details

Series/Lists: U:KO,U:PEP

☐ Display Data As MSChart

Datatypes / Expressions: NAME,PPE,DY

Date: 01/01/01

Options

☒ Display Row Titles ☒ Display Currency ☒ Embed

☒ Display Column Titles ☐ Display Expression

☒ Display Headings ☐ Description ☐ Auto Refresh

☐ Transpose Data ☐ Number ☐ Visible button

Help Default Options Submit Cancel

The series
chosen is
displayed in the
Series field.

You can also select
lists of series, and
expressions.

Select the series you want
from the list. See
Selecting a data series,
page 15.

Datastream Navigator

equities equity indices user created indices constituent lists unit trusts investment trusts bonds & convertibles bond indices warrants

quick search power search drilldown

find Name that Starts With coca cola

EQUITIES

Name	DS Mnemonic	DS Code	Market
COCA COLA	U:KO	904282	UNITED STATES
COCA COLA (FRA)	D:CCC3	951259	GERMANY
COCA COLA (IRS)	CCA	140862	PERU

3
Select the datatype.
Click the **Datatype** navigation
button to display **Datastream
Navigator**.

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

4
Select the datatype
you want from the list.
See **Datatypes**, page
26.

Datastream Static Request

Request Details

Series/Lists: U:KQ,U:PEP

☐ Display Data As MSChart

Datatypes / Expressions: NAME,P,PE,DY

Date: 01/01/01

Options

☒ Display Row Titles ☒ Display Column Titles ☒ Display Headings ☐ Transpose Data

☒ Display Currency

Display Expression: ☒ Description ☐ Number

☒ Embed ☐ Auto Refresh ☐ Visible button

Buttons: Help, Default Options, Submit, Cancel

Datastream Navigator

datatype search

find Name that Starts With displayed results 20 SEARCH

type Time Series group Key Datatypes Definitions

EQUITIES

Name	Mnemonic
Default	DEFT
Dividend Yield	DY
Dividends Per Share	DPS

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, -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.

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 54.

Datastream Static Request

Request Details

Series/Lists: U:KO,U:PEP

☐ Display Data As MSChart

Datatypes / Expressions: NAME,P,PE,DY

Date: 01/01/01

Options

☒ Display Row Titles ☒ Display Column Titles ☒ Display Headings ☐ Transpose Data

☒ Display Currency ☐ Description ☐ Number

☒ Embed ☐ Auto Refresh ☐ Visible button

Help

Help Default Options **Submit** Cancel

Click the **Submit** button to make the request.

The values for the datatypes selected are displayed for the date selected.

Microsoft Excel - Book1

	A	B	C	D	E	F
1	Date	01/01/01				
2	Type	NAME	P	PE	DY	CURRENCY
3	U:KO	COCA COLA	60.94	80.2	1.18	U\$
4	U:PEP	PEPSICO	49.56	34.7	1.13	U\$

To refresh the request, either:
Right click in the top left cell of the request (the one with the red triangle) and select **Refresh**,
OR
Use the **Request Manager**, see page 54.

Making a time series request

1
Select **Time Series Request** from the **AFO** menu.

2
Select the series.
Click the **Series** navigation button to display **Datastream Navigator**.

Time Series Request

Request Details

Series/Lists: U:PEP

☐ Display Data As MSChart

Datatypes: EPS

Start Date: 01/06/00 Freq: Daily

End Date: 01/06/01 ☐ TS for each item in list

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

Select the series you want from the list. See *Selecting a data series*, page 15.

MSChart

Start Date: 01/06/00 Freq: Daily

End Date: 01/06/01 ☐ TS for each item in list

Options

☒ Display Row Titles ☒ Display Currency ☒ Embed

☒ Display Column Titles ☒ Auto Refresh

☒ Display Headings ☒ Visible Button

☒ Transpose Data

Display Expression

☒ 1st Series ☐ Description

Help Default Options Submit Cancel

Series navigation buttons:

You can also select lists of series and expressions.

Datastream Navigator

 quick search  power search  drilldown

find that Starts With

EQUITIES

Name	DS Mnemonic	DS Code	Market	Base Date
PEPSICO	U:PEP	905677	UNITED STATES	02/01/70
PEPSICO (AMS)	H:PEP	993313	UNITED STATES	09/03/70
PEPSICO (FRA)	D:PEP	775271	GERMANY	26/09/70

2
Select the datatype.
Click the **Datatype** navigation button
to display **Datastream Navigator**.

The datatype
chosen is displayed
in the **Datatype**
field.

4
Select the datatype
you want from the list.
See **Datatypes**, page
26.

Time Series Request

Request Details

Series/Lists: U:PEP

☐ Display Data As MSChart

Datatypes: EPS

Start Date: 01/06/00 Freq: Daily

End Date: 01/06/01 ☐ TS for each item in list

Options

☒ Display Row Titles ☒ Display Currency ☒ Embed

☒ Display Column Titles ☐ Display Expression ☒ Auto Refresh

☒ Display Headings ☐ 1st Series ☒ Visible Button

☒ Transpose Data ☐ Description

Help Default Options Submit Cancel

Datastream Navigator

equities equity indices user created indices unit trusts investment trusts bonds & convertibles bond indices warrants economics

datatype search help

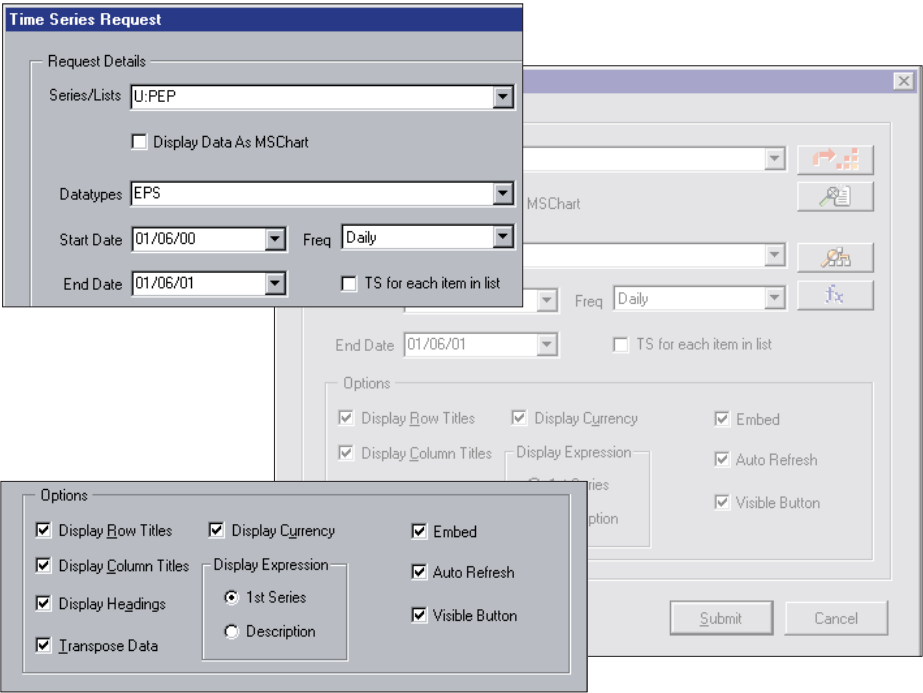
find Name that Starts With displayed results 20 SEARCH

type Time Series group Key Datatypes Definitions

EQUITIES

Name	Mnemonic
Default	DEFT
Dividend Yield	DY
Dividends Per Share	DPS
Earnings Per Share	EPS

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, -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 first series mnemonic or description.

Transpose

Displays the series data in rows instead of columns.

Embed

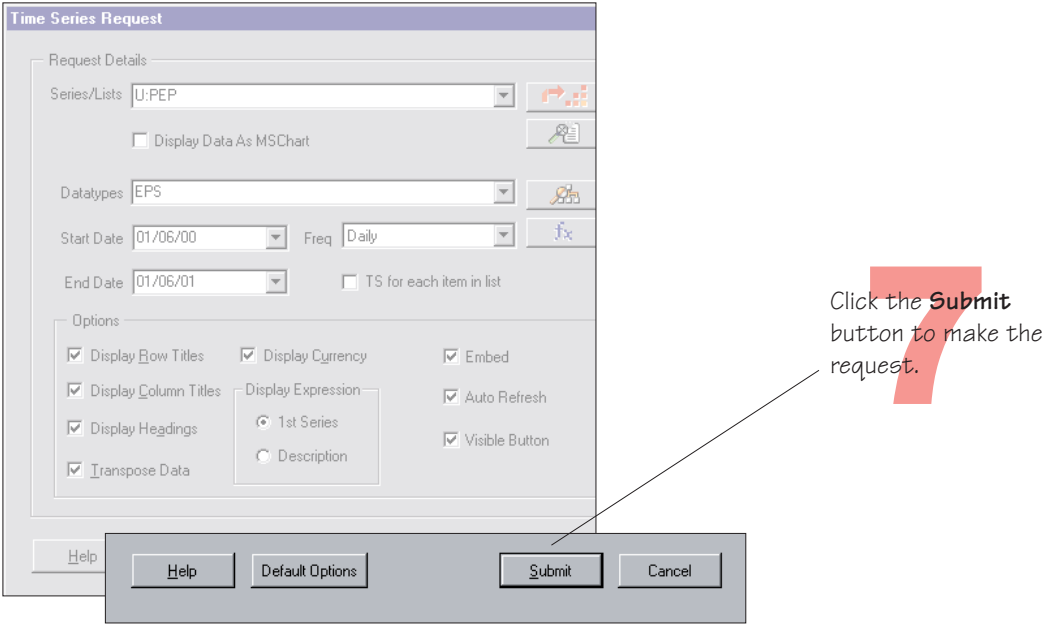
The request is embedded as a dynamic, refreshable object when saved. If this is not selected, the results cannot be refreshed.

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 54.



The values for the datatypes selected are displayed for the date selected.

The screenshot shows a Microsoft Excel spreadsheet titled 'Microsoft Excel - Book2'. The data is organized in a table with columns A through J and rows 1 through 5. The data represents time series information for PEPSCO.

	A	B	C	D	E	F	G	H	I	J
1	Start	01/06/00								
2	End	01/06/01								
3	Frequency	D								
4	Name	CURRENCY	01/06/00	02/06/00	05/06/00	06/06/00	07/06/00	08/06/00	09/06/00	12/06/00
5	PEPSICO	U\$	1.44	1.44	1.44	1.44	1.44	1.44	1.44	1.44

To refresh the request, either:
Right click in the top left cell of the request (the one with the red triangle) and select **Refresh**,
OR
Use the **Request Manager**, see page 54.

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

Select the series you want from the list. See *Selecting a data series*, page 15.

Select the format of company accounts.
Click the **CA** button to display the **Format Code Picker**.

The format of accounts chosen is displayed in the **Format** field.

Select the format of company accounts you want from the list displayed.

Datastream Company Accounts Request

Request Details

Series/Lists: U:K0

Format: 014F/Z

Start Date: -4YE

End Date:

☐ Annualise

Options

☒ Display Row Titles ☐ Display Column Titles ☐ Display Headings ☐ Transpose Data

☐ Display Currency ☐ Display Expression

☒ Embed ☐ Auto Refresh ☐ Visible Button

☐ Description ☐ Number

Buttons: Help, Default Options, Submit, Cancel

Company Accounts Format Code Picker

Global Company Accounts Formats | User Created Company Accounts Formats

Description	Code
Industrial Company Accounts	014F/Z
Industrial Company Financial Ratios	015F
Insurance Company Accounts	242F/Z
Insurance Company Financial Ratios	243F
Property Company Accounts	244F/Z
Property Company Financial Ratios	245F
Banking Company Accounts	246F/Z
Banking Company Financial Ratios	247F
Other Financial Company Accounts	248F/Z
Other Financial Company Financial Ratios	249F
Tandoku Accounts & Ratios	016F
North American Industrial Company Accounts	250F/Z
North American Industrial Company Financial Ratios	251F
Emerging Markets - Industrial Company Accounts	252F/Z

Buttons: OK, Cancel, Help

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, -4YE for the last four financial years.

The screenshot shows the 'Datastream Company Accounts Request' dialog box. The 'Request Details' section includes a 'Series/Lists' dropdown set to 'U:KO', a 'Format' dropdown set to '014F/2', a 'Start Date' dropdown set to '-4YE', and an 'End Date' dropdown. There is an 'Annualise' checkbox which is unchecked. The 'Options' section includes several checkboxes: 'Display Row Titles' (checked), 'Display Column Titles' (unchecked), 'Display Headings' (unchecked), 'Transpose Data' (unchecked), 'Display Currency' (unchecked), 'Display Expression' (set to 'Description'), 'Embed' (checked), 'Auto Refresh' (unchecked), and 'Visible Button' (unchecked). The 'Request' dialog box is also visible in the background.

Select the display options.

Row Titles

Displays the series code at the left of each series.

Embed

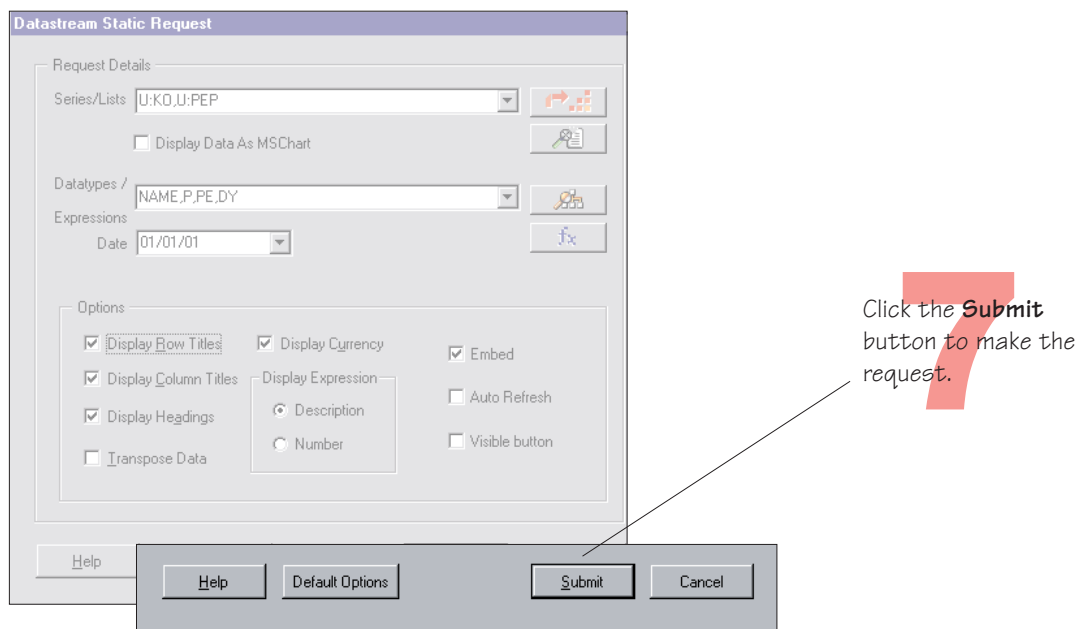
The request is embedded as a dynamic, refreshable object when saved. If this is not selected, the results cannot be refreshed.

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 54.



The company accounts are displayed for the date selected.

Microsoft Excel - Book3							
File Edit View Insert Format Tools Data Window Datastream-AFO Help Acrobat							
Arial 10 B I U % , .00 .00							
J27 =							
	A	B	C	D	E	F	G
1	U:KO	COCA-COLA COMPANY					
2	TYPE	DESCRIPTION	31/12/96	31/12/97	31/12/98	31/12/99	31/12/00
3	104	TOTAL SALES	18546000	18668000	18812992	19804992	20458000
4	136	DEPRECIATION	479000	626000	645000	792000	773000
5	696	DEPN AND OPERATING PROVISIONS	479000	626000	645000	792000	773000
6	993	OPERATING PROFIT	4299500	5061000	5040000	4795000	5134000
7	2408	NET INTEREST CHARGES	48000	47000	58000	77000	102000
8	D011	EXTRAORD./SPECIAL ITEMS	-384500	448000	118000	-813000	-1325000
9	154	PRE-TAX PROFIT	4385000	5900000	5166000	4003000	3688000
10	623	PUBLISHED AFTER TAX PROFIT	3492000	4129000	3533000	2431000	2177000
11	176	MINORITY INTERESTS	0	0	0	0	0
12	625	EARNED FOR ORDINARY	3492000	4129000	3533000	2431000	2177000
13	193	EXTRAORD. ITEMS AFTER TAX	0	0	0	0	0
14	D012	ORDINARY DIVIDENDS	1247000	1387000	1480000	1580000	1685000
15	1300	EBIT	4671000	6158000	5443000	4340000	4135000

To refresh the request, either:
Right click in the top left cell of the request (the one with the red triangle) and select **Refresh**,
OR
Use the **Request Manager**, see page 54.

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.

1

Select **Request Manager** from the **AFO** menu.

Select either data or chart requests.

2

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

Request Manager

DS Data

DS Charts

Request	Location	Type	Autorefresh
U:KO,U:PEP;NAME,P,PE,D...	Sheet1!\$A\$1	Static	Off
U:PEP;EPS;01/06/00;01/0...	Sheet2!\$A\$1	Time Series	Off
U:KO;014F/Z;-4YE;	Sheet3!\$A\$1	Company Accounts	Off

Action

Goto

Edit

Delete

Refresh

Select All

Help

Close

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

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

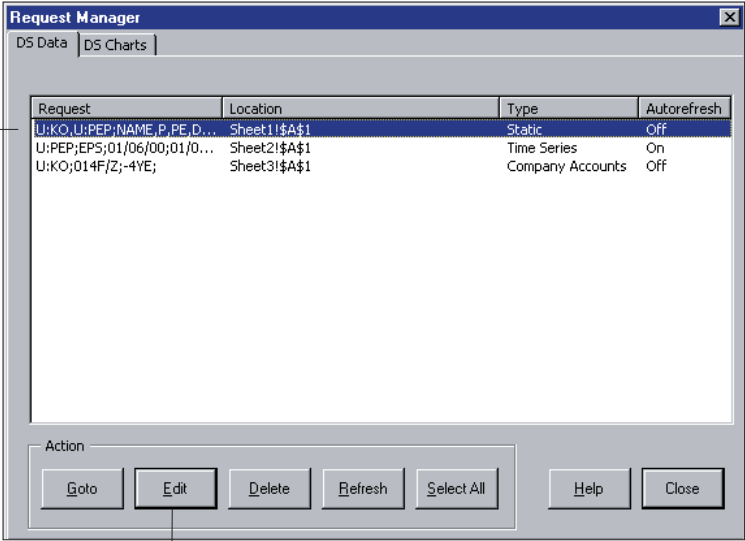
Click to display the **Request Details** dialog for editing.

Click to refresh the data in the selected requests.

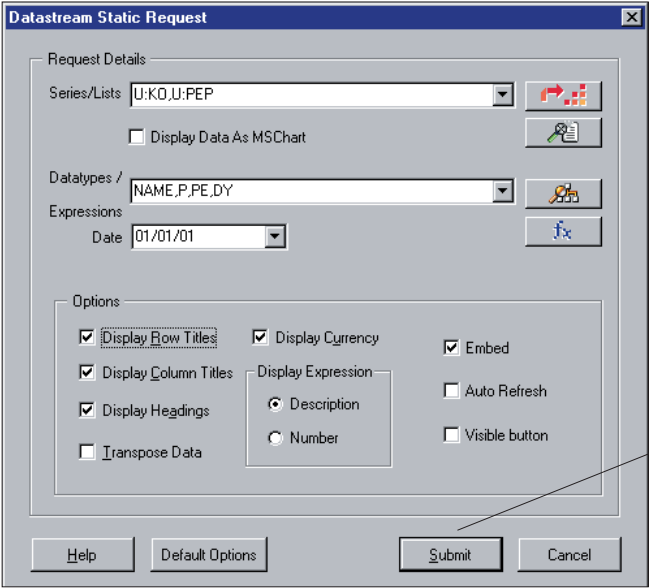
Click to delete the selected request.

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

To edit a request, for example, select the request you want to edit.



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 Advance lists
- Creating a flexible chart
- Creating an index
- Creating an equity search

Creating Advance lists

Lists are a good way to make report, chart, and data requests for groups of series that you use frequently. Instead of making individual requests, you can make one request to get results on 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 Advance, 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 *Advance User Guide*, pages 21 - 33.

Creating a list of beverage companies

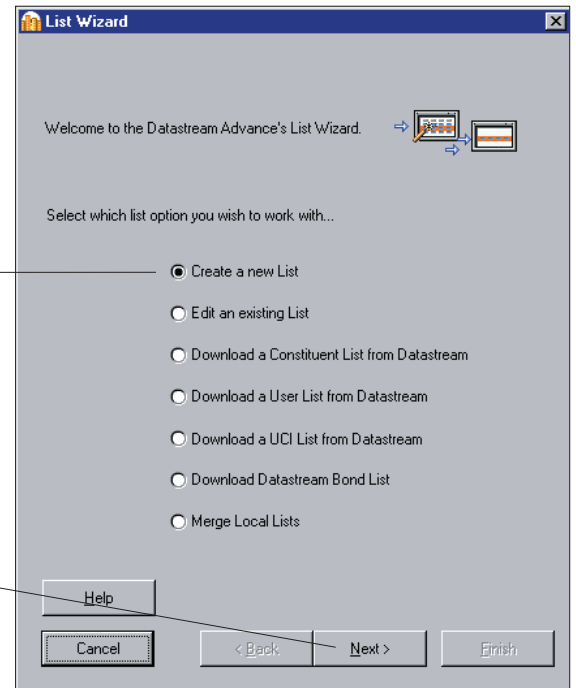
1 Select the **Local Lists** data category.

The screenshot shows the 'Advance' software interface. On the left, a list of categories is displayed: 'French automotive industry', 'Beverages', and 'Vendors of Information'. The 'Category' dropdown is set to 'Local Lists'. Below this, the 'Datatype' is set to 'Price (Adjusted - Default)'. There is a checkbox for 'No Datatype' and a button for 'Recent Datatypes'. On the right, a table lists series names and mnemonics: 'All', 'REUTERS GP.', 'THOMSON', and 'PEARSON'. At the bottom, there are buttons for 'Request', 'Project', and 'Equity Search'. A large orange number '2' is overlaid on the bottom right, with a line pointing to the 'List Wizard' button.

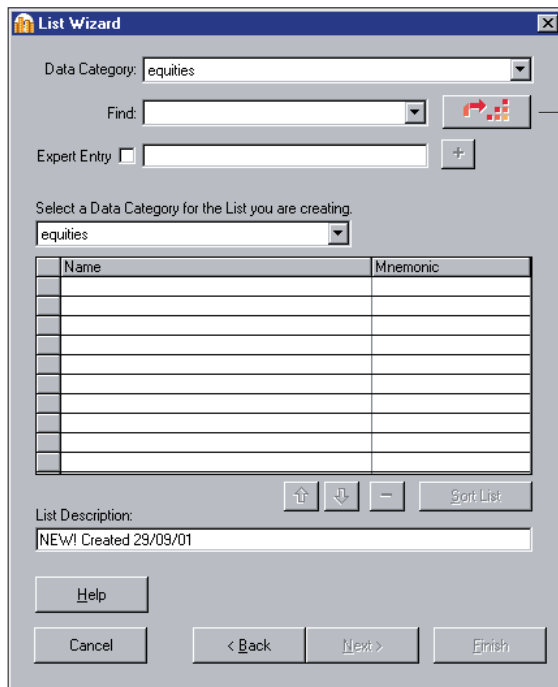
2 Click the **List Wizard** button.

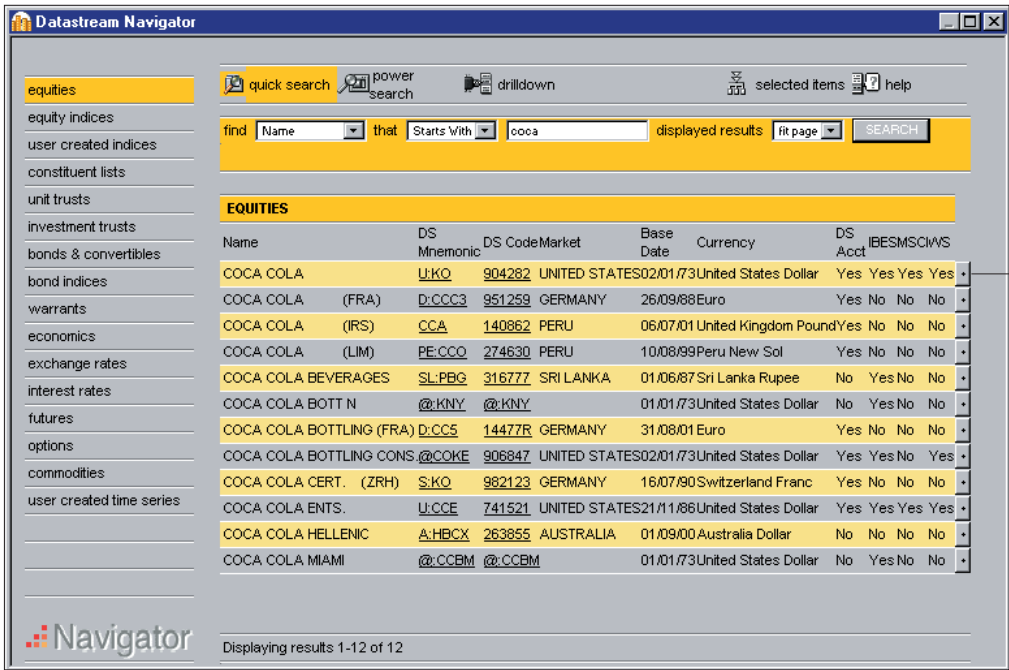
3
Select **Create a**
new list.

4
Click the **Next**
button.



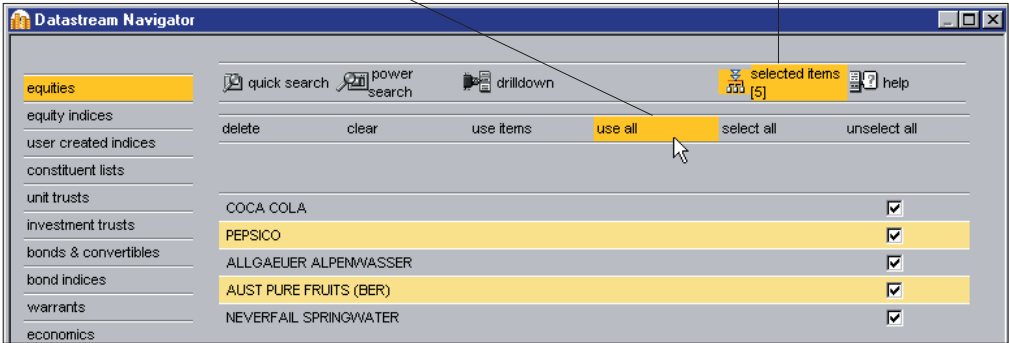
5
Click the **Series** navigation
button to display
Datastream Navigator.





Click the **use all** button to add the series to your list.

When you **have selected** all your series, click the **selected items** button to view your series. You can amend your selection.



To remove a series from the list, select the series to remove and click the **Remove** button.

9
Click **Next**.

List Wizard

Data Category: equities

Find: [] [] []

Expert Entry [] [] []

Select a Data Category for the List you are creating.
equities

Name	Mnemonic
COCA COLA	U:KO
PEPSICO	U:PEP
ALLGAEUER ALPENWASSER	D:AAW
AUST PURE FRUITS (BER)	D:USZ
NEVERFAIL SPRINGWATER	A:NEVX

List Description: Non alcoholic beverages

Help Cancel < Back **Next >** Finish

Remove button.

10
Type the description and name for your list.

List Wizard

Enter a description for this List.

List Description: Non alcoholic beverages

List File: Bev_0002.LLT

The list will be stored in your lists directory. The file name must end with .LLT

Save Options

Select the save option for the list and click the Finish button.

☒ Save as Local List only

☐ Save as Local List and upload to Datastream as a User List

Validate list on upload ☒

☐ Save as Local List and upload to Datastream as a UCI List called: X# []

Help Cancel < Back **Next >** Finish

Type the description and name for your list.

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.

11
Click the **Finish** button.

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.

3

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

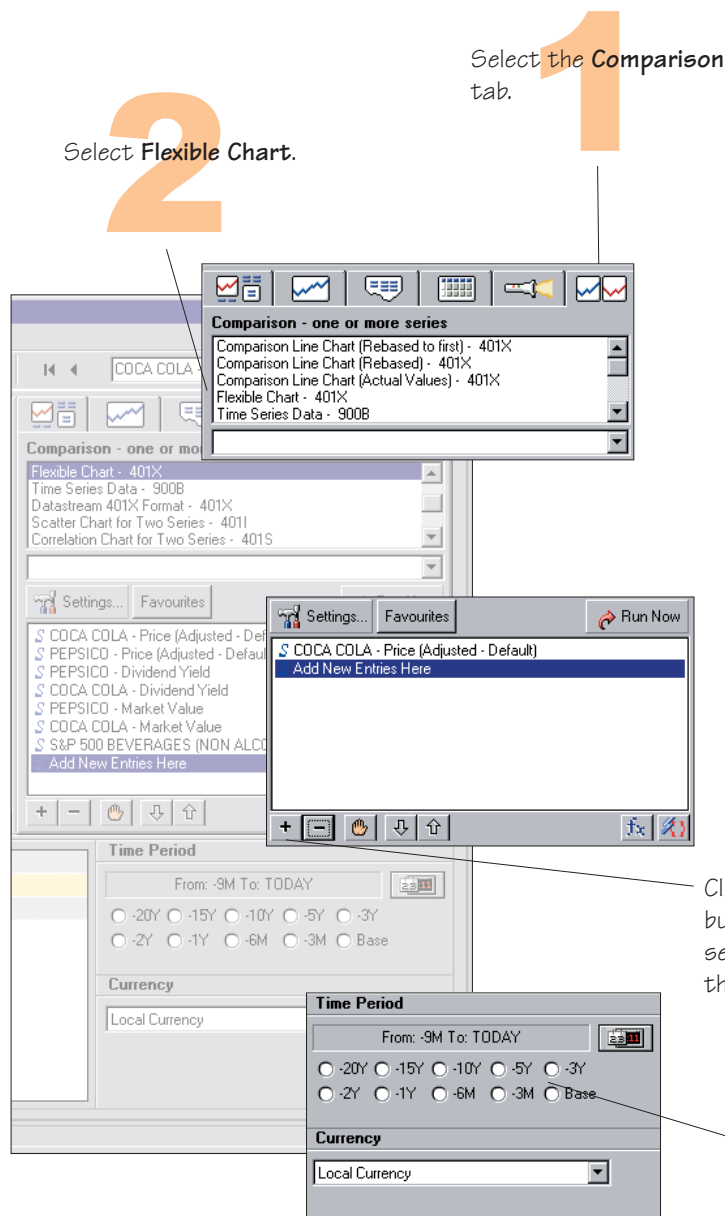
4

Select the series.
See *Selecting a data series*, page 15.

5

Select the datatype.
See *Datatypes*, page 26.

The screenshot shows the Datastream Advance FLEX CHART 4.0.ADV interface. The main window displays three charts: 'Performance of Coca Cola and Pepsi cola Market Value' (a stacked bar chart), 'Price against Index' (a line chart), and 'Dividend Yield' (a line chart). The 'Price against Index' chart shows the performance of Coca-Cola, Pepsi, and the S&P 500 index. The 'Dividend Yield' chart shows the dividend yield for Coca-Cola and Pepsi. The 'Performance of Coca Cola and Pepsi cola Market Value' chart shows the market value for Coca-Cola and Pepsi. The interface includes a menu bar (File, Edit, View, Tools, Help) and a toolbar with various icons. A series selection dialog box is open, showing the 'Category' dropdown set to 'equities', the 'Search by' dropdown set to 'Name', and the 'Series' list. The 'Datatype' dropdown is set to 'Price (Adjusted - Default)'. The 'Request' button is highlighted.

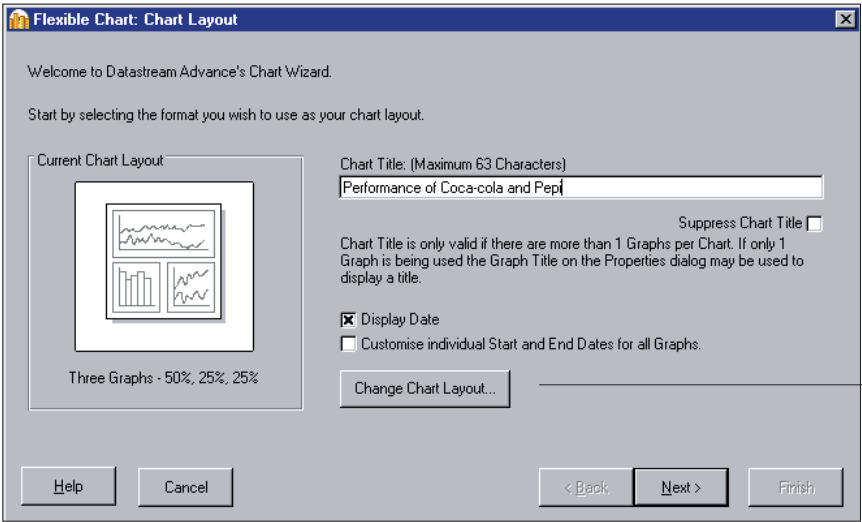
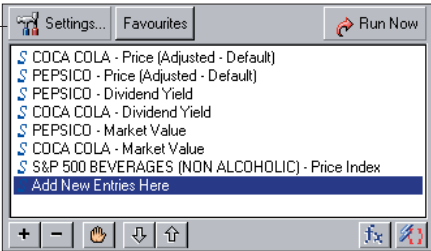


Repeat steps 3-5 for each series, you should have:

Coca-Cola - Price
Pepsi - Price
Coca-Cola - Dividend Yield
Pepsi - Dividend Yield
Coca-Cola - Market value
Pepsi - Market value
S&P 500 Beverages - Price Index

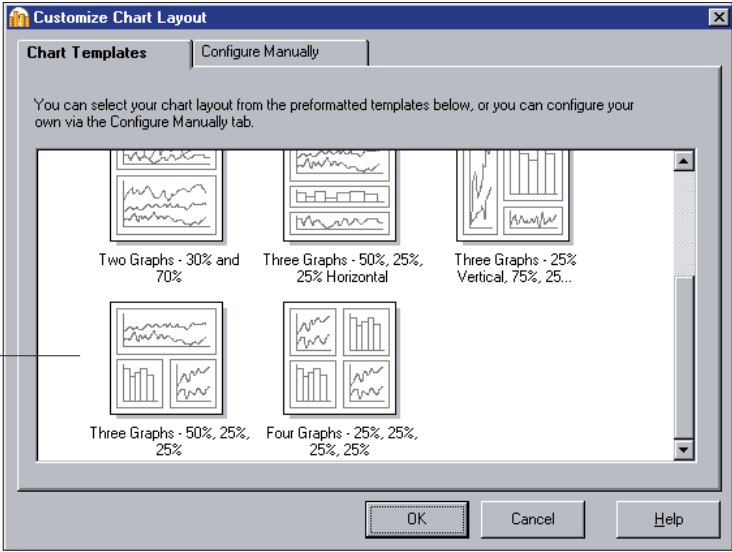


Click the **Settings** button.
The **Flexible Chart Wizard** is displayed.



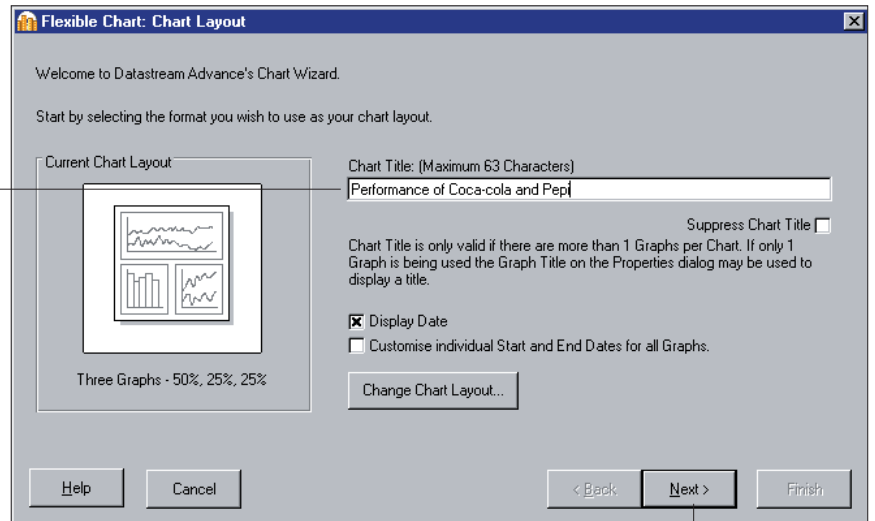
Click the **Change Chart Layout** button.
The **Customise Chart Layout** dialog is displayed.

Select three graphs and click **OK**.



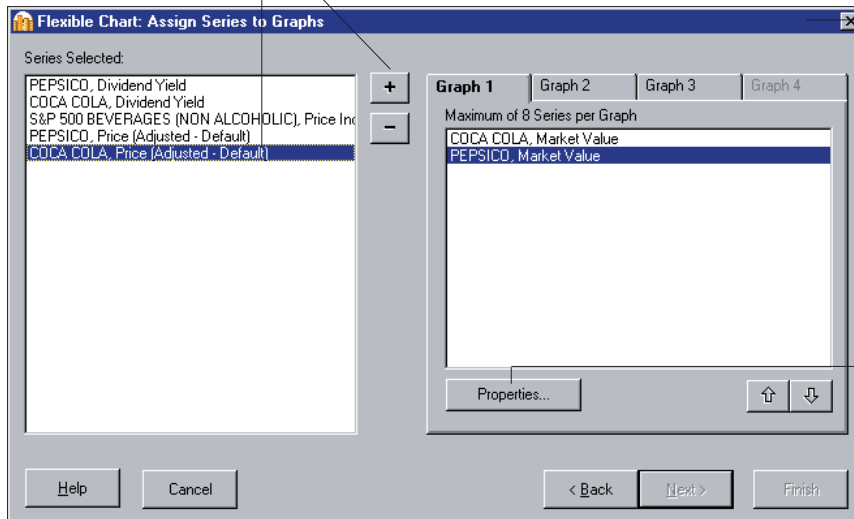
12

Type the Chart Title.



14

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

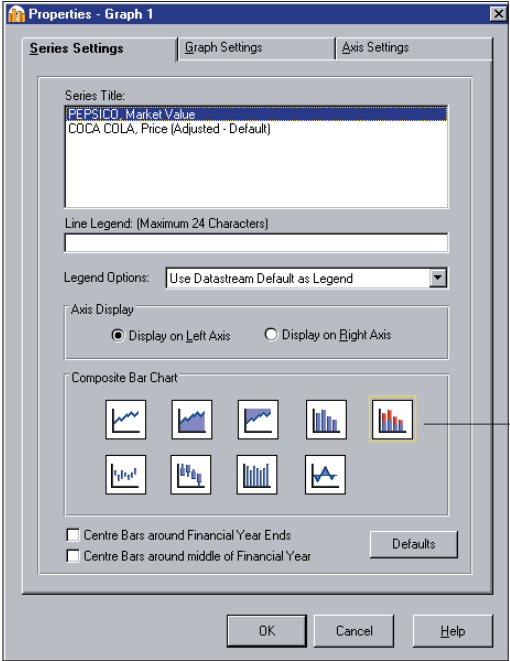


13

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

15

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



16
Select the Series and Graph Settings for Graph 1.

Series Settings

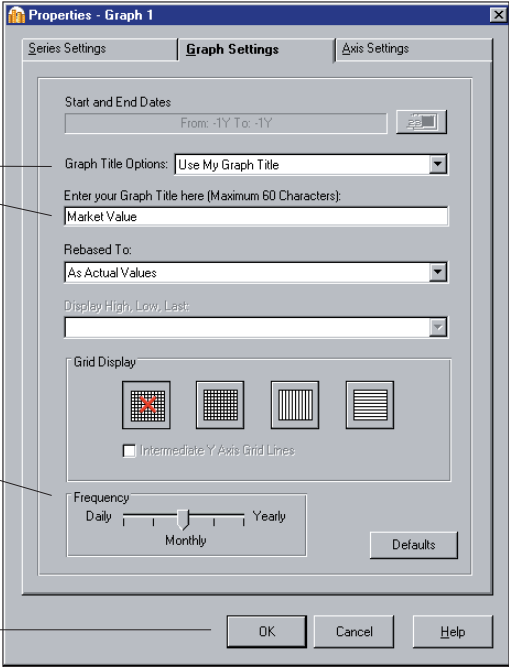
17
Select the type of chart for each series: Composite bar chart.

Graph Settings

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

19
Select the data Frequency.

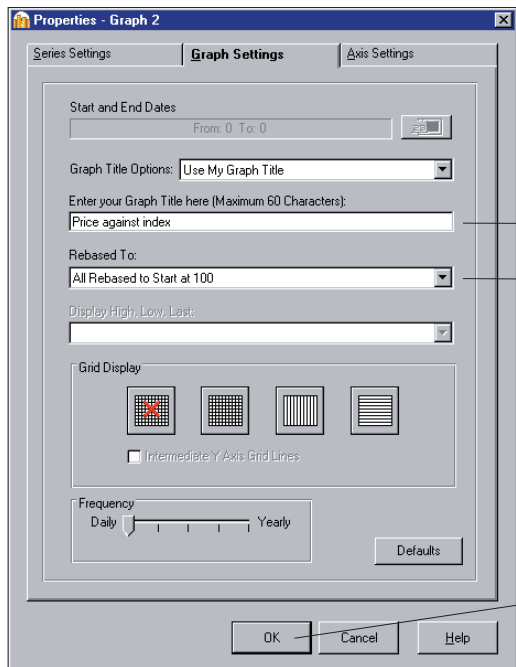
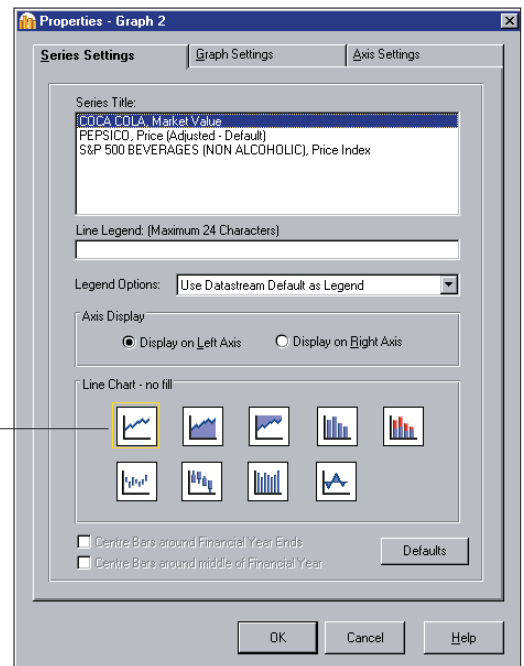
20
Click OK.



21

Select the Series and Graph settings for graphs 2 and 3.

Line Chart.

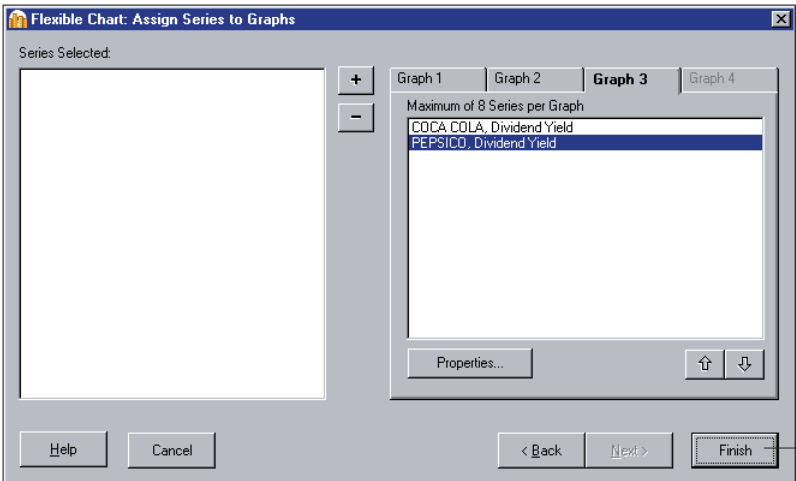


Select Use my graph title and type the Title.

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

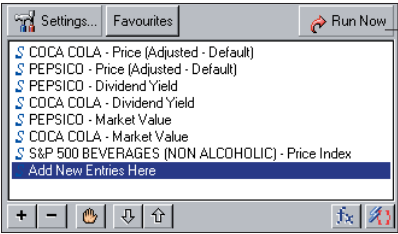
Click OK.

22



23

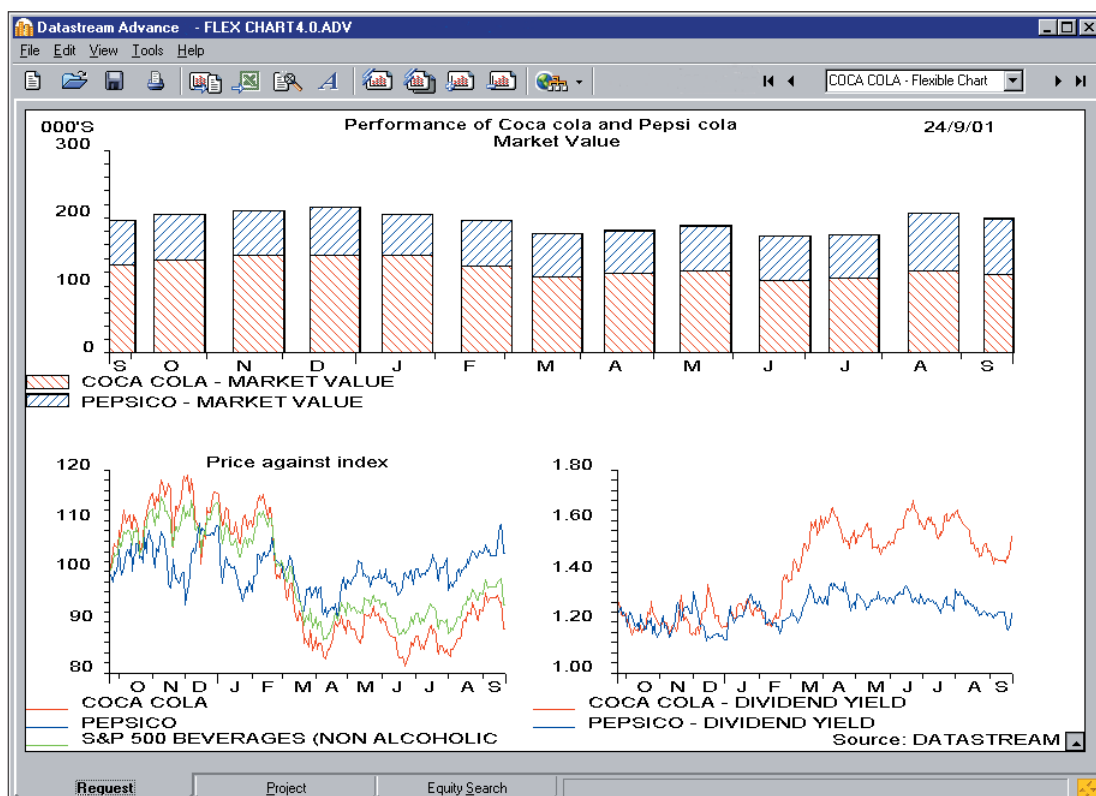
Click **Finish**.



24

Click **Run Now**.

The results are displayed.



You can:

- Edit the chart settings; click the **Settings** button
- Edit the chart using Annotations; select **Tools>Display Annotation 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 Advance User Guide, pages 71 - 91.

Creating an index

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.

This worked example shows you how to create an index list and how to calculate it as a trial index. For more information about user created indices and what you can do with them, see the *Advance User Guide*, pages 34 - 41.

Creating an index list of beverage companies

1 Select **UCI Manager** from the **Tools** menu.

2 Select **Create new list**. The **List editor** is displayed.

List mnemonic.

List description.

The screenshot shows the 'UCI Manager' application window. At the top, there are three tabs: 'Master List', 'Create New List' (which is selected), and 'Usage Report'. Below the tabs, there is a search section with a 'find' dropdown set to 'Description', a 'that' dropdown set to 'Starts With', and a text input field. To the right of the search section are 'SEARCH' and 'REFRESH' buttons. Below the search section is a 'LIST EDITOR' section. It contains a 'List Mnemonic' field with the text 'X#drinks' and a 'List Description' field with the text 'non alcoholic beverages'. Below these fields is a table with the following structure:

Name	DS Mnemonic	DS Code
Items: 0 Selected: 0		

At the bottom of the window, there are four buttons: 'Remove', 'Clear Sel', 'Invert Sel', and 'Save'. In the bottom right corner, there is a 'Series navigation' button, which is a small icon with a red arrow pointing to the right.

You can also select a local or user list: click the **List picker** button.

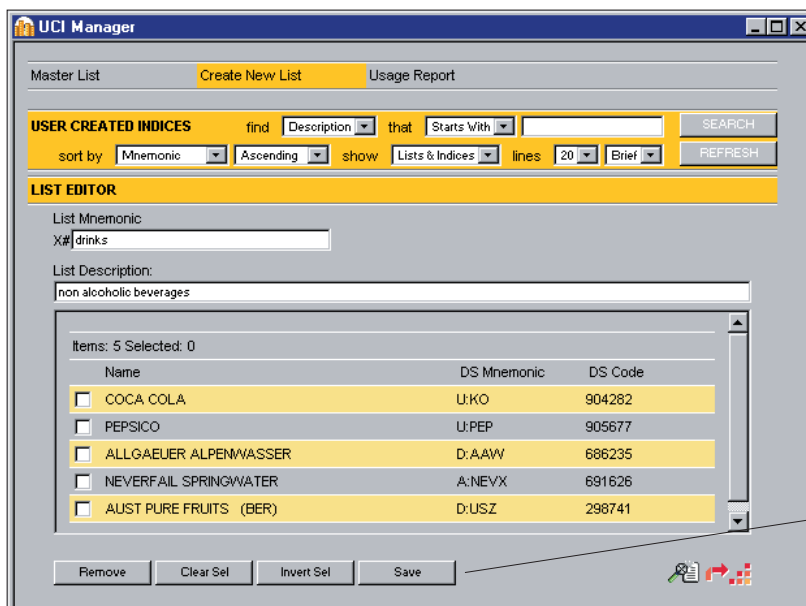
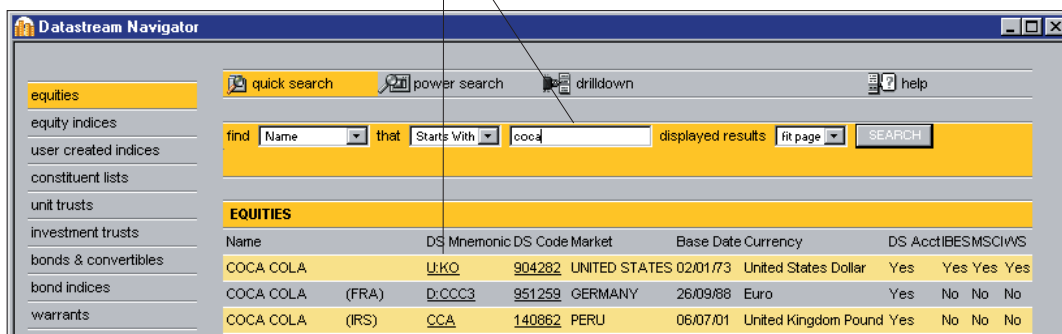
3 Click the **Series navigation** button to display **Datastream Navigator**.

Search for your series, see
Selecting a data series, page
15.

Click on the mnemonic to select

Repeat step 4 until
you have selected all
your series.

Close Navigator.



You can use the
Remove, **Clear**
selection, and **Invert**
selection buttons to
amend your list.

Click the **Save**
button to save
your list. The
Details for your
list are displayed.

Calculating a trial index of beverage companies

This example calculates a Trial index. A trial index is an experimental or one off calculation. This is usually calculated within an hour and is not updated by Datastream. An auto index is calculated automatically, by Datastream, every 24 hours. This is first calculated the day following your initial request and then every 24 hours.

Click the **Request calculation** button.

The **Calculation request** screen is displayed.

Type or select the **Base date** and the **Base value**.
The **Base date** is the date for the starting value of the index.
The **Base value** is the starting value for the index, typically 100 or

Type or select the **End date** (optional) for trial indices.
For auto indices calculations are made to the latest date for which data is available.

Click the **Submit request** button.
Your index is sent for calculation.

Select the **Currency** for the index.

Select the type of Calculation: Trial or Auto. In this case select Trial.

UCI Manager

Master List Create New List Usage Report

USER CREATED INDICES find Description that Starts With SEARCH

sort by Mnemonic Ascending show Lists & Indices lines 20 Brief REFRESH

DETAILS FOR X#X06718

List: X#DRINKS Index:

Description: non alcoholic beverages Status: vWeighting:

Items: 5 Created: September 29, 2001 Base Date: Base Value:

Type: PRIV Modified: September 29, 2001 Date Requested: Currency:

Request Calculation Show/Edit Constituents Delete List/Index Refresh Details

CALCULATION REQUEST

Reference: X#X06718 Calculation Type: Trial

Base Date: January 1, 1981 Base Value: 100

End Date (optional): Currency: United States Dollar

vWeighting: Default by Market Value

Submit Request

While your index is being calculated, the status is shown as **Trial Pend**. Click the **Refresh** button on the details screen to check on the status.

UCI Manager

Master List

Create New List

Usage Report

USER CREATED INDICES

find

Description

that

Starts With

SEARCH

sort by

Mnemonic

Ascending

show

Lists & Indices

lines

20

Brief

REFRESH

DETAILS FOR X#X06718

List: X#DRINKS

Index: X%DRINKS

Description: non alcoholic beverages

Status: TRIAL PEND

Weighting: Default by Market Value

Items: 5

Created: September 29, 2001

Base Date: January 1, 1981

Base Value: 100

Type: PRIV

Modified: September 29, 2001

Date Requested: September 29, 2001

Currency: United States Dollar

Show Constituents

Refresh Details

CALCULATION REQUEST RESULTS

Calculation Request Accepted

UCI Manager

Master List

Create New List

Usage Report

USER CREATED INDICES

find

Description

that

Starts With

SEARCH

sort by

Mnemonic

Ascending

show

Lists & Indices

lines

20

Brief

REFRESH

List refreshed 29/09/01 16:09:20

Description	List Mnemonic	Index Mnemonic	List Size	Status	Currency	Base Date	Base Value	
TOP TEN OIL COMPANIES	X#A00010		27					Modify Index
TOP TEN UTILITY COMPANIES	X#A00020		27					Modify Index
SOUTH AMERICA MINERAL CO'S	X#A00060		27					Modify Index
TOP EUROPEAN CAR COMPONENTS CO'S	X#A00070		27					Modify Index
CENTRAL EUROPEAN PORTFOLIO 'S	X#A00080		27					Modify Index
HOLIDAY COMPANIES GERMANY	X#A00090		27					Modify Index
PRECIOUS METALS LIST	X#A00100		27					Modify Index
non alcoholic beverages	X#DRINKS	X%DRINKS	5	TRIAL	U\$	January 1, 1981	100	Modify Index
	X#FRED2		1					Modify Index
test list	X#FTEST	X%FTEST	5	TRIAL	U\$	September 3, 1995	100	Modify Index
test 2	X#FTEST2		5					Modify Index
Beverages	X#FTEST3		5					Modify Index

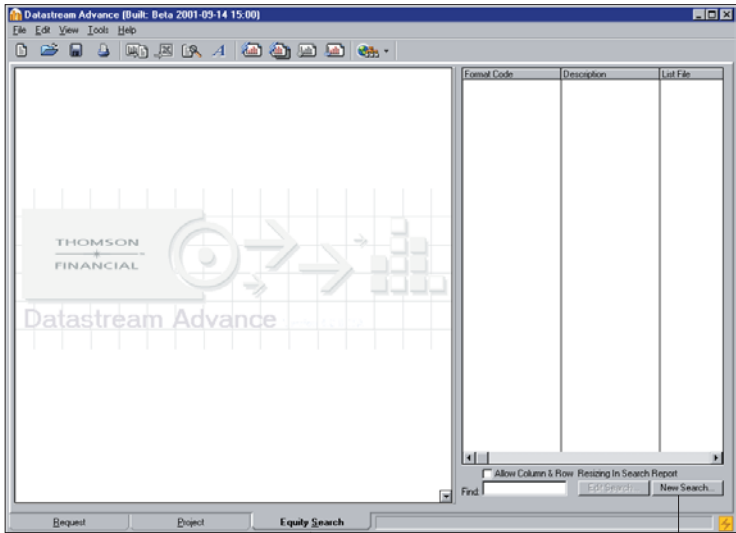
When your index is calculated, the status is shown as **Trial**. When you are happy with your index, you can calculate an auto index.

Creating an equity search

Equity search 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 Advance or AFO.

For more information about equity search and what you can do with them, see the *Advance User Guide*, pages 102 - 121.

Creating an equity search



1
Select the
Equity Search
tab.

2
Click the New
Search tab.

Select France
from the
Country tab.

Datastream Search Wizard

Search By

Country | Constituent | Lists

Build a Country based search by selecting either Country Codes or Composite Codes, or by typing in a simple expression.

☒ Country Codes:

- BRAZIL
- COLOMBIA
- CHINA
- CHILE
- CANADA
- SRI LANKA
- CZECH REPUBLIC
- DENMARK
- ECUADOR
- SPAIN
- FINLAND
- FRANCE**
- GREECE
- HONG KONG
- HUNGARY
- INDONESIA

☐ Composite Code:

AFRICA

☐ Expert Expression (Eg: EEC - UK - FR):

Universe to search (Maximum of 10):

FRANCE

+ -

Select the Search By All option if you wish to search the entire Universe.

Search By ALL ☐

☐ Historical Search

This date can be relative or absolute.

Help Cancel < Back **Next >** Finish

Click the Add
button.

Click the Next
button.

13
Click the **Sort**
Order & Currency
tab.

12
Click the **Add**
button

Datastream Search Wizard

Search Criteria (Maximum of 10): eg: Find Equities that match Criteria 1 AND Criteria 2 AND Criteria 3 etc...

No.	Data Type	Limitation	Unit
1	Market Value	OVER1000	Default

+ -

Datatypes & Limitations | **Industry & Sector Mnemonics** | **Sort Order & Currency**

A maximum of Two Mnemonics may be used. ☒ Display Industry Mnemonics ☐ Display Sector Mnemonics

Find Equities in 1st Industry OR...

- NONE
- AEROSPACE
- AIRLINES & AIRPORTS
- ASSET MANAGERS
- AUTO PARTS
- AUTOMOBILES**
- BANKS, RETAIL
- BUILDING & CONSTRUCTION MATERIALS
- BUILDERS MERCHANTS
- BROADCASTING CONTRACTORS

in 2nd Industry.

- NONE
- AEROSPACE
- AIRLINES & AIRPORTS
- ASSET MANAGERS
- AUTO PARTS**
- AUTOMOBILES
- BANKS, RETAIL
- BUILDING & CONSTRUCTION MATERIALS
- BUILDERS MERCHANTS
- BROADCASTING CONTRACTORS

Help Cancel < Back Search Now! Finish

10
Select automobiles
from the **Find equities**
in 1st industry box.

11
Select auto
parts from the
2nd industry
box.

14
Select euro from the
Currency box.

Datastream Search Wizard

Search Criteria (Maximum of 10): eg: Find Equities that match Criteria 1 AND Criteria 2 AND Criteria 3 etc...

No.	Data Type	Limitation	Unit
1	Market Value	OVER1000	Default
2	Mnemonic - Industry	AUTOS, AUPRT	

Datatypes & Limitations | Industry & Sector Mnemonics | **Sort Order & Currency**

Sort Order

☐ No Sort Order

☒ **Ascending**

☐ Descending

☐ Alphabetical

Market Value

...and sort by Industry Group ☐

...and sort by Sector ☐

Currency (Max. 1 per search):

East Caribbean Dollar

ECU Rate

Ecuador Sucre

Egypt Pound

Estonia Kroon

Euro

Euro - Datastream Synthetic

Euro - FTSE Synthetic

Euro - Warburg Dillon Read Synthetic

Euro via Austrian Schilling

Euro via Belgian Franc

Help Cancel < Back Search Now! Finish

15
Select
Ascending and
Market value.

16
Click the
Search Now
button.

17

Click the **Save as list** button.

Datastream Search Wizard

Results:

TOTAL MATCHES = 18
Currency = Euro

Data Type	Limitation	Unit	No. of Matches
Market Value	OVER1000	Default	1096
Mnemonic - Industry	AUTOS, AUPRT	Default	18

Name	Market Value	Industry Classification
AUTOMOBILES CHATENET	489999.80	AUTOS
EUROPE AUTO IND.	668250.10	AUPRT
MOTOCYCLE ARDOIN AMAND A	901789.70	AUTOS
STREIT INDUSTRIES	2228.56K	AUPRT
FLIP TECHNOLOGY	4200.00K	AUPRT
DYNAFOND	11690.55K	AUPRT
CORA INDUSTRIES	14291.55K	AUPRT
SAIRP COMPOSITES	17989.98K	AUPRT
HBS TECHNOLOGIE	20740.72K	AUPRT
DELMON INDUSTRIE	40260.02K	AUPRT
MGI COUTIER	51073.49K	AUPRT
LE BELIER	53054.93K	AUPRT
MONTUPET	104152.10K	AUPRT
SOMMER-ALLIBERT	1266.15M	AUPRT
FAURECIA	1481.23M	AUPRT
VALEO	3607.20M	AUPRT
RENAULT	9402.50M	AUTOS
PEUGEOT SA	13901.87M	AUTOS

Search Status: SUCCESSFUL

Help Cancel Refine Search **Save As List** Finish

Datastream Search Wizard

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:

List Description:

Click Upload to store this List on the Datastream service

Upload

Help Cancel < Back **Save As List** Finish

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

Type the file name and description for your search and click the **Finish** button.

More...

- Advance lists
- Expressions and functions
- Flexible charts
- Projects
- Schedule Night Shift
- Equity search
- Customising charts and reports
- Web browser
- Favourites
- AFO request table
- User created indices
- User created time series

Advance lists

Advance provides flexibility for creating lists of series, such as a portfolio, a watch list, or a set of related indicators. You can analyse the series as a set or individually. Lists are a convenient way to make report, chart, and data requests using multiple series. You 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 steps you through the process effortlessly. For a worked example, see page 58.

- User guide: Advance User Guide, pages 21 - 33.
 - Online help: Select **Help>Contents>Advance facilities>Lists**,
OR
Click the **Help** button on the list wizard dialog box.
 - Tutorial: Select **Help>Tutorials>How to use Advance lists**
-

Expressions and functions

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

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

- User guide: Advance User Guide, pages, 46 - 58.
- Online help: Select **Help>Contents>Advance facilities> using expressions and functions**,
OR
Click the **Help** button on the expression picker, or expression builder dialog boxes.

Flexible charts

Flexible chart gives you the freedom and flexibility to create your own tailor-made chart layouts. Advance provides for comprehensive customisation of all aspects of your graphs.

Flexible Chart is particularly good for creating multiple chart layouts with multiple series using a variety of different chart types and styles. For a worked example, see page 62.

User guide:	Advance User Guide, pages 71 - 91.
Online help:	Select Help>Contents>Flexible Chart
Tutorial:	Select Help>Tutorials>How to use flexible charts

Projects

Advance Projects enable you to save your analysis and automate printing and exporting charts.

You 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.

User guide:	Advance User Guide, pages 92 - 95.
Online help:	Select Help>Contents>Advance facilities> Projects
Tutorial:	Select Help>Tutorials>How to use Projects

Schedule Night Shift

Advance 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.

- User guide: Advance User Guide, pages 98 - 101.
- Online help: Select **Help>Contents>Advance facilities>Schedule Night Shift**
- Tutorial: Select **Help>Tutorials>How to use Night Shift**

Equity search

Equity search 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 Advance or AFO. For a worked example, see page 74.

- User guide: Advance User Guide, pages 102 - 121.
- Online help: Select **Help>Contents>Equity search**
- Tutorial: Select **Help>Tutorials>How to use equity search**

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.

- User guide: Advance User Guide, pages 59 -70.
- Online help: Select **Help>Contents>Advance facilities>Annotating charts and reports**

Web browser

The embedded browser links you directly to user support through the Datastream Research Extranet. It also provides direct integration with internet products and third party providers: First Call Analyst, and Global Topic.

- User guide: Advance User Guide, pages 122 - 131.
- Online help: Select **Help>Contents>Web browser**

Favourites

Favourites enable 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.

User guide: Advance User Guide, page 97.

Online help: Select **Help>Contents>Advance facilities>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.

User guide: Advance for Office - Excel User Guide, pages 30 - 38.

Online help: Select **Help>Contents>AFO 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. For a worked example, see page 70.

- User guide: Advance User Guide, page 34 - 41.
- Online help: Select **Help>Contents>Advance facilities>Favourites**
- Tutorial: Select **Help>Tutorials>How to use 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 Advance 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.

- User guide: Advance User Guide, page 42 - 45.
- Online help: Select **Help>Contents>Advance facilities>Favourites**



Support



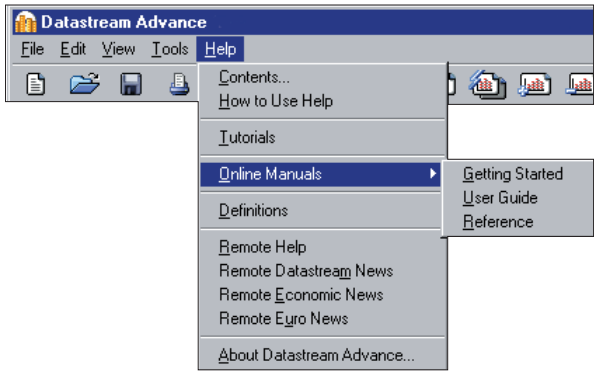
- Manuals
- Tutorials
- Online Help
- Telephone support
- Account management
- Research Extranet support site
- Training

Further support

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

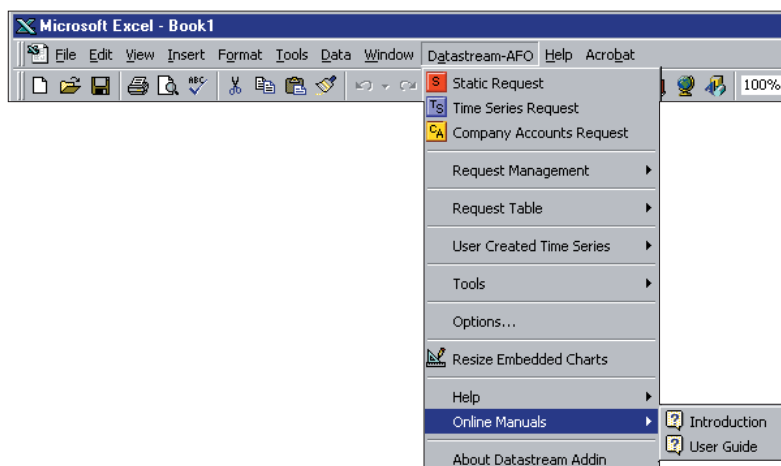
Manuals

A complete set of Advance 4.0 user guides 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 Advance
- User guide - A comprehensive guide to Advance and how to use it
- Reference - A reference guide to the menus, options, and tools

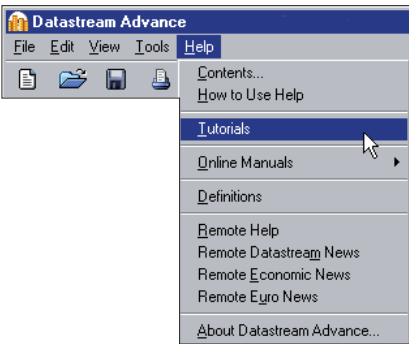
A complete set of AFO 4.0 user guides is available from the AFO menu in Excel, Word, and PowerPoint: select Online Manuals.



- Introduction - An overview of Advance for Office (AFO)
- 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

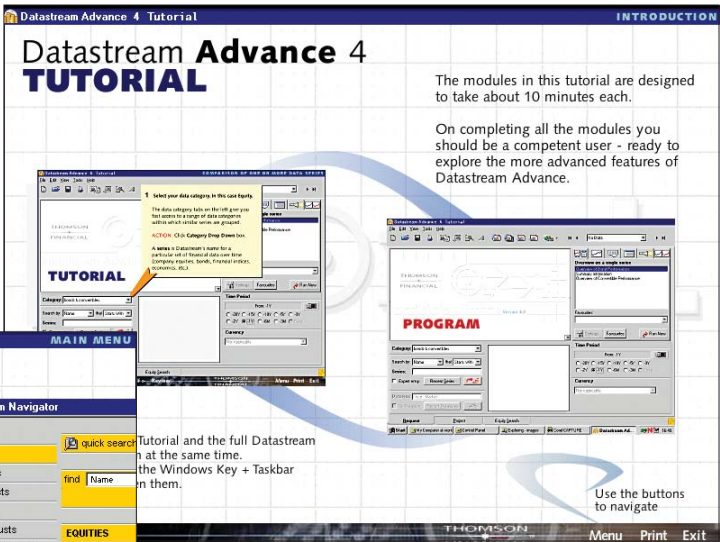
Tutorials

Advance has a set of interactive tutorials taking you step by step through the basics of Advance. Select Tutorials from the Help menu.

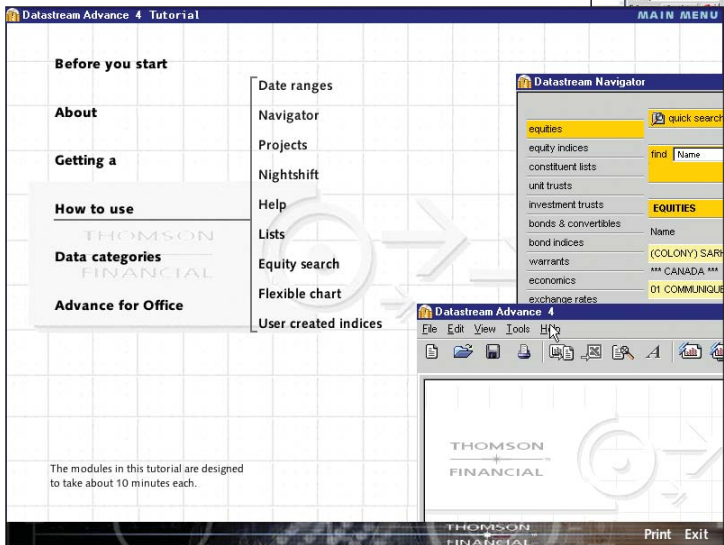


Select **Tutorials** from the **Help** menu.

The **Tutorial** screen is displayed.



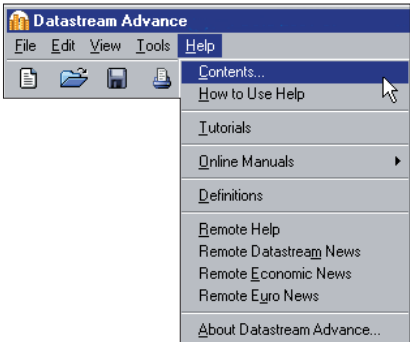
Click on **Menu**.
The **Menu** is displayed.



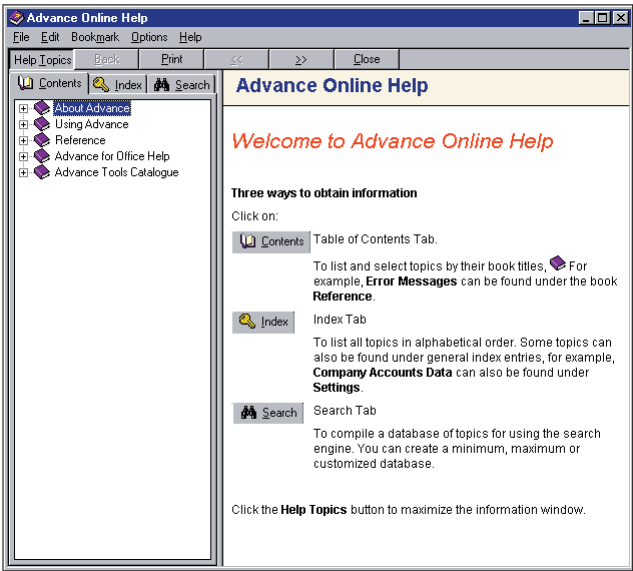
Select a tutorial.

Online 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 Advance.



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



Telephone support

Datastream provides fully resourced Help desks for queries on Advance, data, and communications problems.

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

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

Contact details

For current numbers and addresses, see the Extranet:

<http://www.datastream.com/support>

Notes

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