# HELP PAGE
# GETTING STARTED WITH THE BLOOMBERG

**Enter HELP<Go>**

**Bloomberg**

## CONTENTS

# WELCOME TO THE TERMINAL

The Bloomberg Professional® service is built to work the way you do: fast and smart. Our integrated platform is designed to deliver rich data across market sectors and workflows through one unified system. The following topics provide a guide to the logic that connects you to the data, news, analytics, and people that help you make fast, effective decisions. Mastering this logic empowers you to find whatever you need, wherever you are on the terminal.

To watch an introductory video on the terminal's most need-to-know features and navigation tools, *click here*.

## OVERVIEW

The Bloomberg terminal is built on functions and securities, organized by asset class and common workflows of financial professionals. Understanding functions, securities, and how to find and interact with them is the key to getting the most from the depth and breadth of Bloomberg's offerings.

- **Functions** are applications designed to provide targeted information and analysis on either the broad financial markets or on a specific security. Functions are grouped together by workflow and are discoverable through a hierarchy of menus. Each function has a mnemonic (short name) used to identify and access the function quickly. Want to learn more? See *Functions*.

- **Securities** are the financial instruments you can analyze. You can load a security to the system then run a series of functions to find information about the security or perform deeper analysis. The millions of securities in Bloomberg's databases are organized by market sector and ticker. Want to learn more? See *Securities*.

Bloomberg provides two main ways to find and interact with functions and securities:

- **Command Line** is at the top of every Bloomberg screen. The entire system is discoverable from the command line. As the name suggests, the command line is where you enter commands to drive the system, but is also a search bar to find exactly what you need. Want to learn more? See *Command Line*.

- **Menus** provide a way to browse the full breadth and depth of Bloomberg's offerings to find what you need. All Bloomberg functions are organized onto menus, which start with overall market analysis and allow you to drill down to security-specific analysis. Want to learn more? See *Menu System*.

To help you navigate through the terminal, Bloomberg also provides a unique setup: four desktop Bloomberg panels (windows) that allow you to multi-task and switch between functions, and the Bloomberg keyboard, featuring unique color-coded keys that makes following the logic of the terminal simple. Want to learn more? See *Bloomberg Panels* and *Bloomberg Keyboard*.

## COMMAND LINE

The Bloomberg terminal is entirely discoverable from the command line, which appears across the top of every Bloomberg panel.



If you know exactly what you need on the system, you can use the command line to enter direct commands, such as a function mnemonic or security ticker. If you know what you want but don't know how to find it, you can use the command line to search by keyword.

The following topics explain how to use the command line to find a function by keyword, find a security by keyword, directly enter commands, and get an answer to a question.

### FIND A FUNCTION BY KEYWORD

You can find a function that provides a specific type of information or analysis by entering a keyword in the command line.

To search for a function by keyword:

1. In the command line at the top of the screen, start typing the first few letters of a keyword without hitting <GO>.

   For example, if you want a function analyzing mergers and acquisitions, start typing **MER**.



   *As you type in the command line*, a list of suggested matches appears.

2. Select the function you want from the list of matches.

*[Hint] 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**.*

**FIND A SECURITY BY KEYWORD**

You can find and load the security you want to analyze by entering a keyword in the command line.

To search for a security by keyword:

**1**. In the command line at the top of the screen, start typing the first few letters an issuer name, or ticker without hitting <GO>.

For example, if you're looking for a Disney bond with a 7% coupon, start typing **DIS 7**.



*As you type in the command line, a list of suggested matches appears.*

**2**. Select the security you want to load for analysis from the list of matches.

*[Hint]* *You can further refine the list of security matches by continuing to enter the keyword or by entering additional keywords or by pressing the relevant yellow market sector key. For example, you could enter* **DIS 7 <Corp>**.

## FIND 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>**.



For more information on the function mnemonics and security tickers that can be entered in the command line, see *Mnemonics* and *Securities*.

## FIND A QUICK ANSWER

You can use the command line in combination with the green <Help> key on the Bloomberg keyboard to search the entire Bloomberg system by keyword.

To find answers to common questions from the command line:

**1**. Type the question into the command line.

For example, enter **IBM Q3 2013 revenue**.



**2**.  Hit the green <Help> key on the keyboard.
*The answer to your question is highlighted in the Help Search (HL) screen.*



*For more information on using the command line to search for answers in the Help Search (HL) function, see Bloomberg Search.*

## MENU SYSTEM

All the functions on the terminal are organized onto a hierarchy of menus, based on market sector and common workflows of financial professionals. To discover the full range of analysis that Bloomberg offers, you can browse menus that include high-level market overview functions down to categories of security-specific and topic-specific functions.

For example, to discover functions that allow you to monitor current rates in the foreign exchange markets, start by hitting the yellow **<Curncy>** market sector key on the keyboard, then hit  **<GO>**.



The top-level *Currency Markets* menu appears. From this menu, you can drill down into the *Price Discovery* category to display a more specialized menu of functions. From the category, you can select a function, such as **WCR World Currency Rates**, to start your analysis.

For information on alternative ways to access menus, see *Accessing Menus*.
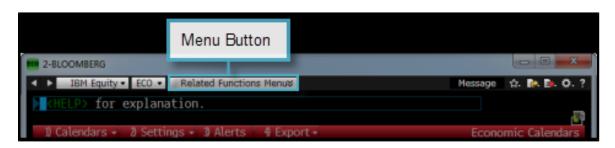
## ACCESSING MENUS

There are three ways to access menus:

- **Yellow Key**: To access the menu of functions related to a market sector, hit the market sector's yellow key on the keyboard, then hit the green <GO> key.

  For example, to browse the *Currency Markets* menu, hit the yellow **<Curncy>** key, then hit **<GO>**. A categorized menu of top-level currency market analysis functions appears.
- **Loading a Security**: To access the menu of functions to analyze a specific security, simply load the security. For example, to access the menu of functions that can be used to analyze IBM US, enter **IBM US <Equity> <GO>**.
- **Menu Button and Menu Key**: To access a menu of functions related to the function you are currently using, click the **Menu Button** on the grey toolbar or hit the green **<Menu>** key on the keyboard.



## FUNCTION SHORTCUTS

For some functions, you can enter a shortcut command to directly access a specific view or version of the function.

On menus, functions with shortcuts are identified by a shortcut icon ↗ (white arrow).

To display a list of all shortcuts for a function, click the corresponding shortcut icon.



## FUNCTIONS

Functions are applications designed to provide targeted information and analysis on either the broad financial markets or on a specific security, so you can make better, faster decisions.



There are two types of functions:

• **Non-security functions**: Provide information on an entire market sector or on news, and do not require a loaded security.

• **Security-specific functions**: Allow you to analyze a loaded security.

To find a function, type a keyword or the function name (if you know it) into the command line.



As you type in the command line, a list of suggested matches appears, listed by function mnemonic and function title. To run a function, select it from the list.

## MNEMONICS

Every function has its own mnemonic, which is a short name used to identify and access the function. Mnemonics are designed to make Bloomberg fast and provide the most direct way to access a function.

To access a function directly, just type its mnemonic in the command line, then hit <GO>. For example, to run the *World Equity Indices* (WEI) function, just type **WEI** then hit  **<GO>**.



The mnemonic for the function that is currently running appears in the grey toolbar at the top of the screen.



Other examples:

- **WB <GO>** to run the *World Bond Markets* function
- **TOP <GO>** to run the *Top News* function
- **ECO <GO>** to run the *Economics Calendar* function

For information on finding a function when you don't already know its mnemonic, see *Find a Function by Keyword*.

**SCREEN INTERACTION**

Bloomberg functions include common elements to let you know where and how you can interact with a screen to input data or access additional functionality through mouse clicks and keyboard actions. Once you learn about these elements, you can use any function.



- **Menu Bar**: The red bar at the top of each function includes the function's title at the right and provides drop-down lists and buttons to help you perform key tasks. The menu bar may also include a page count indicator.
- **Amber Fields**: Amber fields indicate areas on the screen that you can change. For example, these areas are used for editable form elements, text and data input, and drop-down lists.
- **Clickable Navigation**: Areas of a function screen may highlight when you move your mouse over them to indicate that the item is clickable.
- **Number <GO>s**: Number <GO>s appear next to some clickable list items and allow you to quickly navigate a function with your keyboard by entering the number, then hitting <GO>.
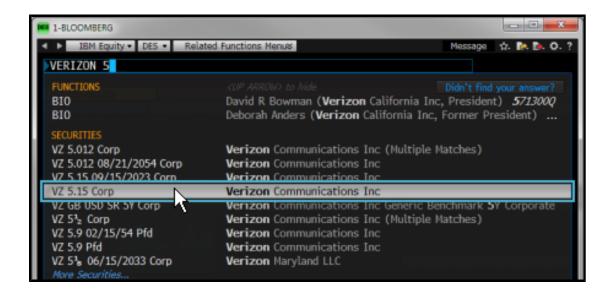
## SECURITIES

Securities are the financial instruments you can analyze on the Bloomberg. Once you load a security, you can run a series of functions to conduct your analysis. You can load a security from the command line.

- **If you know the ticker**, in the command line, enter the ticker, hit the yellow market sector key, then hit <GO>. For example, to load the Euro spot rate, enter **EUR <Curncy> <GO>**.



- **If you don't know the ticker**, in the command line, start typing a keyword or the company name. A list of matches appears. You can refine this list by pressing a yellow market key. To access the full list of matching securities, click *More Securities*.

Once you load a security, you can select a function from the menu that appears. Or, if you already know the mnemonic for the function you want to run, enter the mnemonic in the command line, then hit <GO>.

For more information on using menus to run functions, see *Accessing Menus*. For more information on using mnemonics to run functions, see *Mnemonics*.

For information on finding and loading securities for specific market sectors and security types, click *here* .

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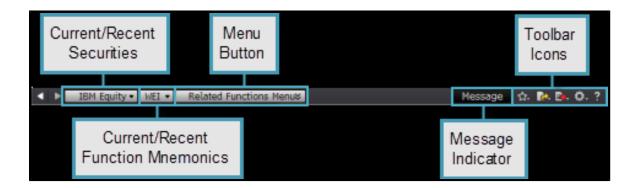
The terminal delivers Bloomberg's news, data, and analytics through a series of up to four desktop panels (windows). Each panel works independently, so you can access multiple analyses and workflows simultaneously.

- **Panel Frame**: The left side of the panel frame 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 the X "Close" icon logs you completely out of your current Bloomberg session.



- **Toolbar**: The left side of the toolbar includes the menu button and drop-down lists of recently loaded securities and function mnemonics, with the current loaded security and currently function mnemonic visible. The right side provides icons to help you perform key tasks, including exporting to Microsoft® Excel, accessing Help, and adjusting your defaults and display.

- **Command Line** Allows you to search for and access functions and securities. The Bloomberg is entirely discoverable from the command line.



For more information on using the command line, see *Command Line*.

- **Function Area**: Shows you the function content.

- **Information Panel**: Shows you new or enhanced Bloomberg functionality.

## BLOOMBERG KEYBOARD

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

| Use | To |
|-----|-----|
| Esc<br>Cancel | 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. |
| Enter<br>GO | Execute a typed command. For example, to access the *Top News* function, type **TOP**, then press **<GO>**.<br><br>For more information, see *Functions* and *Securities*. |
| Menu | • Navigate from any function back to a menu of related functions, then back through the menu hierarchy to the Home menu.<br>• Navigate back to the previous screen.<br><br>**Note**: The function of the <Menu> key on the old Bloomberg keyboard has transferred to the <End/Back> key on the new Bloomberg keyboard.<br><br>For more information, see *Accessing Menus*. |
| End<br>Back | Navigate back to the previous screen.<br><br>**Note**: This key provides the same functionality as the <Menu> key on the old Bloomberg keyboard. |
| F1<br>Help | 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*. |
| F3<br>Corp | Load securities and access market sector menus.<br><br>For more information, see *Accessing Menus* and *Securities*. |
| Panel | 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.

## HELP RESOURCES

The green <Help> key on the Bloomberg keyboard connects you with fast answers and 24-hour comprehensive support, so you can find, interpret, and act upon the information and analysis you need.

- To learn more about a function from the function's Help Page, press the <Help> key once from that function.

- To start a chat with Bloomberg's live 24-hour Help Desk, press the <Help> key twice.

- To find targeted answers using the *Help Search* (HL) function, enter a keyword in the command line, then press the <Help> key.

### HELP PAGES

Help Pages are online user guides designed to help you find fast answers, discover new business solutions, and get more from the Bloomberg. A Function Help Page provides information specific to one function. This includes an explanation of the business solution the function provides along with how-to instructions, definitions, calculations, and links to related documents and videos.

To access a function's Help Page, from the function, press the green <Help> key once.



### PRINTING HELP PAGES

To generate a printable Adobe® PDF version of a Help Page, click **Print**, then choose one of the following options from the drop-down menu:

- **Print Full Help Page**: Includes all sections and topics from the Help Page in the printable PDF.
- **Select Sections to Print**: Allows you select individual sections from the Help Page's left sidebar to include in the printable PDF. For more information on using this option, click *here* .

## HELP DESK

The Bloomberg Help Desk is available 24 hours a day, 7 days a week to answer your questions and address your concerns.

To start a live chat, hit the green <Help> key twice.
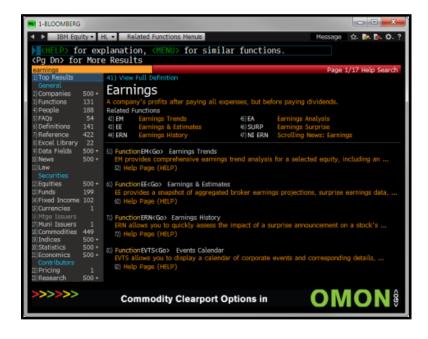


## BLOOMBERG SEARCH

Bloomberg's *Help Search* (HL) allows you to search by keyword across all categories of information, including functions, securities, companies, and people. HL groups search results by category and relevancy.

To start a search from the command line, just start typing a keyword. As you type, a short list of suggested matches appears. If you see what you're looking for on the list, click it.

To expand the search, finish typing your keyword(s) in the command line, then hit the green <Help> key once. The full set of search results appears in the *Help Search* (HL) screen.



For complete information on *Help Search*, see *HL <Help>*.

# LEARN MORE

The Bloomberg terminal is complemented by flexible, highly customizable platforms to accommodate your individual information gathering, analysis, and execution workflow.

**BLOOMBERG LAUNCHPAD**®: Launchpad is a custom desktop environment that allows you to create a workspace of active, analytical tools to meet the needs of your workflow. For more information, see *BLP <Help>*.

**Bloomberg Microsoft**® **Office Integration**: The Bloomberg Add-In is a powerful suite of tools bundled with the Bloomberg that allows you to deliver market data, historical data, reference data, and analytics into a Microsoft® Office document, such as Excel, PowerPoint, or Word. For more information, see *DAPI <Help>*.

**Communications** & **Community**: The BLOOMBERG PROFESSIONAL® service includes a multi-platform communication and collaboration solution that allows you to easily share news, information, insight, and actionable ideas with clients and

colleagues, instantly and seamlessly. For more information on Bloomberg Communication & Community tools, click *here* .

**News** & **Research**: Bloomberg's suite of news and research functionality allows you to leverage the BLOOMBERG PROFESSIONAL® service to find the most important market-moving news and research from every region, topic, source, and language, so you can make faster decisions and perform more accurate and in-depth analysis. For more information on

Bloomberg News & Research tools, click *here* .

**Alerts**: Forefront the critical information you need to take action by setting alerts for specific types of market activity. For example, know instantly when a security's performance meets your custom conditions, when a company's ratings change, or when an important economic indicator is released, so you can execute on your investment strategies. For more information, see *ALRT <Help>*.

**Portfolio Management** (**PORT**): PORT empowers you to gain deeper insight into your portfolios by providing the tools to understand the structure of your portfolios, analyze your positions and active bets, and explain the drivers of historical performance and potential sources of future risk. For more information, see *PORT <Help>*.

**Markets and Platforms**: Bloomberg provides distinct self-contained workflows along with customizable platforms to support your individual information gathering, analysis, and execution. For more information on Bloomberg's offerings and products,

click *here* .

**Tips** & **Tricks**: In addition to the Bloomberg logic and navigation basics covered in this guide, there are tips and tricks you can use to customize and enhance your Bloomberg experience. For information on these Bloomberg settings, shortcuts, and ease

of use tools, click *here* .

# Bloomberg

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**BEIJING**
+86 10 6649 7500

**FRANKFURT**
+49 69 9204 1210

**LONDON**
+44 20 7330 7500

**NEW YORK**
+1 212 318 2000

**SÃO PAULO**
+55 11 2395 9000

**SYDNEY**
+61 2 9777 8600

**DUBAI**
+971 4 364 1000

**HONG KONG**
+852 2977 6000

**MUMBAI**
+91 22 6120 3600

**SAN FRANCISCO**
+1 415 912 2960

**SINGAPORE**
+65 6212 1000

**TOKYO**
+81 3 3201 8900

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