

## Datastream Advance 4.0 Search Guide

**Content:** Datastream is an extensive, historical time series database from Thomson Financial which provides financial and economic data for over 140 countries and 60 markets. Data categories include equities, equity indices, unit and investment trusts, bonds, bond indices, warrants, economics, foreign exchange rates, interest rates, futures, options, and commodities. The database can be accessed by using the Datastream Advance software or from the Datastream-AFO (Advance for Office) add-in for Excel. Both are available on the **Library's Multimedia Workstation**.

### Method 1: Accessing Datastream via Datastream Advance 4.0

1. Double click on the **Datastream Advance** icon. It should automatically open to the Request view. If not, just pull down the **View** menu and choose **Request View**.
2. You must select a **Data Category** (e.g. Equities) from the Data Category drop down list. Click on the plus sign (e.g. +Economics) to expand the list and view additional categories. Select a category by clicking on it.
3. Find and select your **Series**. Enter the name (e.g. WestJet) in the Series field and click Search. You will then be taken to the Datastream Navigator to view your search results. To select a series from the search results, simply click on its DS mnemonic. If you already know the DS mnemonic, you can check the Expert entry box and type the mnemonic directly in the Series field.
4. Select the **Analysis** (request type) to be run from the **Analysis List** located in the lower right hand corner of the screen. The most popular request types are:
  - 1) **Single series – overview** (note: - I/B/E/S and Thomson ONE are not available)
  - 2) **Multiple series/Flexible chart** (display information on multiple series or create comparisons across different data categories)
  - 3) **Single Series - Chart** (e.g. line, moving average, high-low-close)
  - 4) **Single Series – Report** (e.g. Profit & Loss, Key Accounts Ratios, Company Profiles)
  - 5) **Single Series – Data** (for time series, static data, or company accounts)
5. For certain types of Analysis (e.g. time series), you must select a **Datatype**. Click on the **Search** button located beside the Datatype box to search for available datatypes. Select the appropriate datatype by clicking on its DS mnemonic.
6. Depending on which request type you choose, you may also need to select the **Time Period** and **Currency** (the default is local currency). You may use one of the preset **Time Periods** or click on the **Date** button to configure your own date options. Options include fixed start and end dates, relative start and end dates, and the Datastream base date (earliest available data).
7. Click on **Settings** to verify the frequency (e.g. daily, weekly, monthly) and format options. Click **Run Now** to complete the request. Datastream will connect to the mainframe and the data will appear in the display area in the upper left hand corner of the screen. Click on the maximize button in the lower right hand corner of the display area to increase the viewing area.

### Printing / Downloading

To print a chart, graph or data, use the **File-Print** command. To save a chart, graph or data, use the **File-Save As** command. To export a chart, graph or data to another software package such as Powerpoint, Excel or Word, use the **Tools-Transfer** command.

### Getting Help

For further assistance, click on the **Help** button within any Datastream window or dialog box. Use the **Help** menu in Datastream Advance to access the help documentation including a tutorial, online manuals (Getting Started, User Guide and Reference) and definitions.

## Error Codes

Error codes are usually generated when a datatype is selected that is not available for a particular data category. Explanations of error codes are available in Datastream Advance's online help (choose **Help - Contents – Reference – Error Messages**). If you are unable to **Run** your request, it could be that someone else is using Datastream from another computer (the Library shares access to Datastream with the Faculty of Business). In that case, wait a few moments and try again.

## Disconnecting / Exiting

Please remember to Exit when you are finished so that others may have access to this database. To disconnect from the Datastream mainframe and exit the program, choose the **File- Exit and Shut Down Comms Server** command.

## Method 2: Accessing Datastream-AFO via Excel

1. Start **Excel** by double clicking on the **Excel** icon.
2. Look for the **Datastream-AFO** menu at the top of the screen.
3. Select a **Request Type** (Static, Time Series or Company Accounts) from the list.

## Creating Static or Time Series Requests in Excel

1. Select **Static Requests** or **Time Series Requests** from the Datastream-AFO menu.
2. Click on the **Series Selection** (Series Search) button to search for the name of the series. The default Data Category is Equities. To search for a series in a different Data Category, simply click on the arrow to view the dropdown Data Category list. Enter the series name (e.g. Royal Bank) in the search box and click **Search**. Select the correct series from the list of search results by clicking on its DS Mnemonic (e.g. C:RY).
3. Click on the **Datatype Mnemonic Picker** (Datatype Search) button to view a list of all available datatypes for that Category. For Static Requests, make sure the Type is Static and the Group is Datastream Static. Select the datatype by clicking its DS Mnemonic (e.g. Beta). Select multiple datatypes by clicking in the checkbox next to the Mnemonic and then clicking on **Use Selected**.
4. For Static Requests, select the **Date** and click **Submit**. For Time Series Requests, select the appropriate **Start Date** and **End Date**, **Frequency** and format **Options**.
5. Click on **Submit** to run the request. Datastream-AFO will connect to the Datastream mainframe to run the request and the data will be pasted into the open Excel worksheet.

## Creating Company Accounts Requests

1. Select **Company Accounts Request** from the Datastream-AFO menu.
2. Click on the **Series Selection** (Series Search) button to view a list of available series. Make sure the Equities Category is highlighted. Enter the series name (e.g. Royal Bank) in the search box and click **Search**. Select the correct series from the list of search results by clicking on its Ds Mnemonic (e.g. C:RY).
3. Click on the **Company Accounts Format Code Picker** button to select a format (i.e. Industrials Income Statement or Industrials Key Account Ratios).
4. Select a **Start Date** and **End Date**. Typing -4YE in the **Start Date** will give you the most recent 4 years. You can also enter specific start and end dates (e.g. 2000 to 2004).
5. Click on **Submit** to run the request. Datastream-AFO will connect to the Datastream mainframe to run the request and the data will be pasted into the open Excel worksheet.

## Printing / Saving

Use the **File-Print** command to print the worksheet. Remember to verify the settings and click **OK**. Then, on the Print Job Monitoring screen, identify your print job with a User Name and click **Print**. Use the **File-Save As** command to save the worksheet. Remember to name your file and click **Save**.

## **Datastream Search Examples**

The following are examples of some of the most frequently requested types of data. Please note that the steps listed below are abridged and meant only to guide you toward the location of the data you are seeking.

### **Q. How can I find the Beta for a company?**

- A. Betas are available as static data, so you must retrieve the data for a specific date.
1. Category: Equities
  2. Series: Research In Motion
  3. Request Type: Single Series - Data: Static Data
  4. Click on Settings, then click on the Datatype Search button.
  5. Change the Datatype to Static and Datastream Static. Click on Beta
  6. Select a Date (e.g. 2005)
  7. Click on Run Now.

### **Q. How can I find the Price Index for the S&P/TSX Composite Index?**

- A.
1. Category: Equity Indices
  2. Series: S&P/TSX Composite Index
  3. Request Type: Single Series – Data - Time Series Data
  4. Datatype: Price Index
  5. Click on Settings and choose a frequency (e.g. annually)
  6. Click on Time Period and select range of dates (e.g. 2000 to 2006).
  7. Click on Run Now.

### **Q. How can I find 5 years of financial ratios for West Jet?**

- A.
1. Category: Equities
  2. Series: West Jet
  3. Request Type: Single Series – Data : Company Accounts
  4. Click on Settings. Select Industrial Key Account Ratios
  5. Click on Time Period: Company Account Dates (e.g. -5yr).
  6. Click on Run Now.

### **Q. How can I find bond credit ratings for the Royal Bank?**

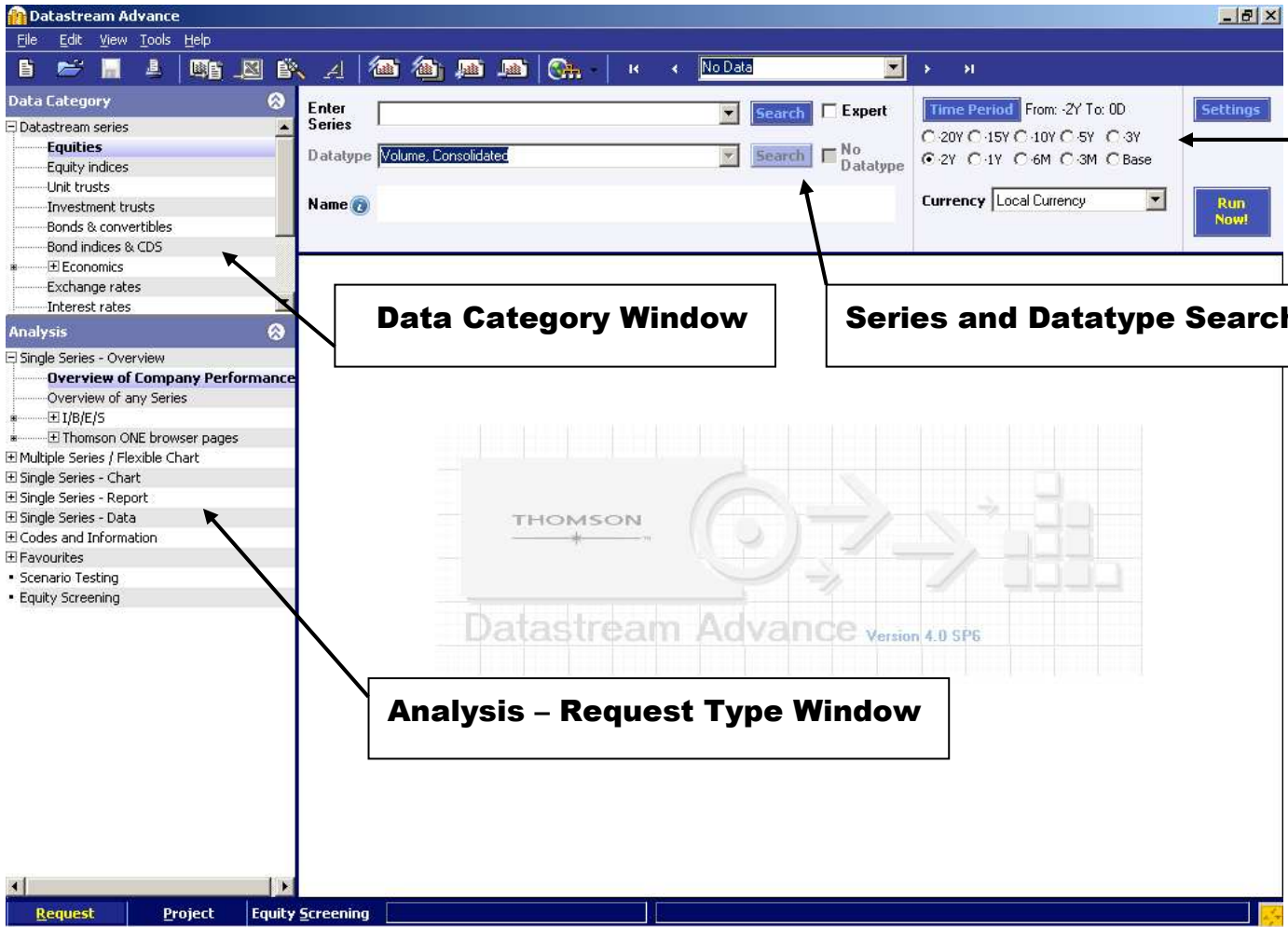
- A.
1. Category: Bonds & Convertibles
  2. Series: Royal Bank Canada .
  3. Select a specific series (e.g. Royal Bank Canada 2004 5%)
  4. Request Type: Report on a Single Series: Bond Credit Ratings
  5. Click on Run Now

### **Q. How can I find the price of crude oil?**

- A. There are several kinds of crude oil benchmarks including West Texas, Brent Crude, Dubai (Arab Gulf), etc.
1. Category: Commodities
  2. Series: to limit to the most relevant series, use the Series Search. Find Type Equals Crude Oil. This will produce over 150 series. Narrow these results by adding a Name (e.g. Brent).
  3. Request Type: Single Series - Data: Time Series Data
  4. Datatype: Price
  5. Select Time Period and Settings (for frequency).
  6. Click on Run Now.

Prepared by: Linda Lowry, Business and Economics Librarian, James A. Gibson Library, Brock University  
August 2007 Tel: 905-688-5550 ext. 4650 Email: [Linda.Lowry@Brocku.ca](mailto:Linda.Lowry@Brocku.ca)

# Datastream Advance Request View



**Data Category Window**

**Series and Datatype Search**

**Time Period, Settings & Currency**

**Analysis - Request Type Window**

**Datastream Navigator**

**HOMSON DATASTREAM NAVIGATOR** [Series Search](#) [UCI](#) [UCTS](#) [Drilldown](#) [Help Browse](#)

**Data Category: Equities**

**Criteria** | [Retrieve Results](#) | [News](#) | **Search**

NAME   [+](#) [-](#)

DS MNEMONIC   [+](#) [-](#)

DS CODE   [+](#) [-](#)

MARKET  [+](#) [-](#) [...](#)

BASE DATE   [+](#) [-](#)

CURRENCY  [+](#) [-](#) [...](#)

PRIMARY QUOTE  All  No  Yes

ADJUSTED PRICES  All  No  Yes

STATUS  All  Active  Dead  Suspended

EXCHANGE  [+](#) [-](#) [...](#)

### Using the Series Search

Enter the Name of the series you wish to find into the Name text box and press Search. You may add additional criteria (i.e. Market, Exchange) to narrow your search. Review the results and click on the DS Mnemonic (e.g. C:NT) to select that series.

**Datastream Navigator**

**HOMSON DATASTREAM NAVIGATOR** [Series Search](#) [UCI](#) [UCTS](#) [Drilldown](#) [Help Bro](#)

**Data Category: Equities**

**Criteria** | **Retrieve Results** | [News](#) | **Name starts with nort**

Name	DS Mnemonic	DS Code	Market	Base Date
NORTEL NETWORKS <a href="#">+</a>	<a href="#">C:NT</a>	<a href="#">930952</a>	Canada	02/01/1976
NORTEL NETWORKS (FRA) <a href="#">+</a>	<a href="#">D:NNT</a>	<a href="#">775901</a>	Canada	16/01/1992
NORTEL NETWORKS (IRS) <a href="#">+</a>	<a href="#">NNC</a>	<a href="#">14309K</a>	Canada	18/06/2001
NORTEL NETWORKS (NYS) <a href="#">+</a>	<a href="#">U:NT</a>	<a href="#">938801</a>	Canada	09/04/1974
NORTEL NETWORKS (XET) <a href="#">+</a>	<a href="#">D:NNTX</a>	<a href="#">273057</a>	Canada	05/10/1999
NORTEL NETWORKS PF.'A' <a href="#">+</a>	<a href="#">C:NTLPG</a>	<a href="#">670290</a>	Canada	28/11/1997
NORTEL NETWORKS PF.'A' <a href="#">+</a>	<a href="#">C:NTLPG</a>	<a href="#">884842</a>	Canada	26/11/1996

**Data Category: Equities**

Type  Group

Find     Di:

Name	Mnemonic
Accounting Standards Followed (Key Item)	<a href="#">WC07536</a>
Adjustment Factor (WC05575 or WC05576)	<a href="#">ADJ</a>
Adjustment Factor ( accumulated)	<a href="#">AF</a>
Adjustment Factor ( not accumulated)	<a href="#">AX</a>
Default	<a href="#">DEFT</a>
Dividend Yield	<a href="#">DY</a>
Dividend Yield (MSCI)	<a href="#">MSDY</a>
Dividends Per Share	<a href="#">DPS</a>
Earnings Per Share	<a href="#">EPS</a>
Free Float Number Of Shares	<a href="#">NOSHFF</a>
Local Market Index	<a href="#">LI</a>
Market Value	<a href="#">MV</a>
Market Value (MSCI)	<a href="#">MSMV</a>
Number Of Shares	<a href="#">NOSH</a>
Price (Adjusted - Default)	<a href="#">P</a>
Price - Intraday High	<a href="#">PH</a>
Price - Intraday High (Adjusted)	<a href="#">PH</a>

**Datatype Definition:**

To view the definition for Datatype simply select th the definition will be disp

**Using the Datatype Search**  
 Type the name of the datatype you wish to find (e.g. Price) into the textbox and press Search. The default Type is Time Series. You may need to select Static to locate some datatypes (e.g.BETA).Click on the DS Mnemonic of the correct datatype to select it.