

DATASTREAM FOR OFFICE (DFO) - REFINITIV WORKSPACE

QUICK REFERENCE CARD

REFINITIV WORKSPACE 1.16 AND LATER

Find the series or datatypes and return to sheet

Create a list from series in your sheet or edit a list

View and create saved expressions

Create a DSCHART formula to display a chart

View and create new Users Created Indices

Access Datastream knowledgebase on MyRefinitiv

Refresh Data - Workbook, Worksheet or Selection

Create or edit formula request for a series or list at one point in time or for a time period

Manage (edit, refresh & delete) requests

Switch the Refinitiv ribbon on and off-line

Open a new combined Request Table and User Created Time Series workbook

Convert Request Tables from earlier DFO and AFO versions

Find Series

Find Datatypes

Create Lists

Expressions

DFO Charts

UCI Manager

Infobase

Refresh All Workbooks

Pause Updates

Datastream Formula

New Request Table

Online

Help

Settings

Options

Request Table - create and manage Datastream content in your sheets

Configure a range of settings and defaults

New Request Table

New UCTS_RT Sheet

Conversion Wizard

DATASTREAM FORMULA BUILDER

Type series name or description to display the series or select previous selections from dropdown

Datatypes are displayed as you type or select previously used from dropdown

Select **Start-End** to display time series or **As Of** for values at a single date

Dropdowns display the available date and frequency parameters such as Start of Month

Set column and row headings, transpose options and more

The DSGRID formula changes as options selected

Select to indicate list mnemonic entered

Select to use Datastream or RIC codes

Select the data category to use for series and datatype searches in Navigator

Select series or lists using Datastream Navigator

Reference a datatype /expression or several datatypes

Find datatype using Navigator

Click to convert the datatype to a different currency

Reference a series or several series

Editors to facilitate creating/editing requests with multiple series/datatypes

Display and select from recent requests to use for similar requests

Set if the request should be refreshed on open

Display the datatypes related to selected series

Click to select saved expressions

Select a Datastream function to use

Add links to display metadata for series in Navigator

Relative dates enable relative periods to be selected

Select to display the series name and the expression description

Series/Lists: Search Series/Lists

Time Series for each item in list

Symbology: Datastream

Category: Equities

Series Editor

Datatype Editor

History

Start-End: From -4Y To Frequency Daily

Options: Display Custom Header Display Row Titles Display Column Titles Display Headings Transpose Data Display Code Display Currency Display Latest Value First Hyperlink To Series Metadata Hyperlink To Datatype Definition Auto Refresh

Display Expression: 1st Series 1st Series & Description

Date Format: Yearly-Date Quarterly-Date

Cancel Insert

=DSGRID("","","",-4Y,"",Daily,"",RowHeader=true,ColHeader=true,Code=true,DispSeriesDescription=true,YearlyTSFormat=false,QuarterlyTSFormat=false)

USING THE DATASTREAM REQUEST TABLE

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

The screenshot shows the Refinitiv Datastream Request Table interface. The top part is a configuration panel with various options like 'Process Table', 'Add to Index', 'Find Series', 'On Open', 'Pre-Request Macro', 'On Completion Macro', 'Process Table', 'Display Details', 'Compatible options with AFO', 'Enable Sequencing', 'Support R1C1 Reference Style', 'Display Destination as an Excel form', 'Suppress Comments', and 'Use as "not available" string'. The bottom part is a table with columns for 'Update', 'Request Type', 'Format', 'Series Lookup', 'Datatype/Expressions', 'Start Date', 'End Date', and 'Frequency'. The table contains several rows of data, including series names like 'MKS', 'FTALLSH', and 'LRTAILUK', and their corresponding datatypes and start/end dates.

Callouts and their descriptions:

- Schedule tables to update using the DFO Index** (points to 'Add to Index')
- Set column and row headings, transpose options and more** (points to 'Process Table')
- The editors facilitate the creation and editing of requests with multiple series (or datatypes & expressions)** (points to 'Find Series')
- Run macros before and after update** (points to 'On Open', 'Pre-Request Macro', 'On Completion Macro')
- Process the Request Table when it is opened** (points to 'Process Table')
- Process the requests in sequential order** (points to 'Enable Sequencing')
- This includes the code with a time series request where Transpose turned off** (points to 'Support R1C1 Reference Style')
- Enables data destination references to be auto-filed for columns** (points to 'Display Destination as an Excel form')
- Update the table** (points to 'Process Table')
- Select if request should update** (points to 'Update' column)
- Choose static, time-series, time series for list request.** (points to 'Request Type' column)
- Update central system list (L#) with series in your sheet.** (points to 'Series Lookup' column)
- Use Data sheet for manipulating downloaded data. Note: this sheet can then be hidden.** (points to 'Data' column)
- Select series or constituent lists using Navigator** (points to 'Series Lookup' column)
- Create or update user list** (points to 'Series Lookup' column)
- Select datatypes from Navigator** (points to 'Datatype/Expressions' column)
- Select different functions with parameters** (points to 'Datatype/Expressions' column)
- Select the start date, end date and frequency** (points to 'Start Date', 'End Date', 'Frequency' columns)
- Select user lists for requests** (points to 'Series Lookup' column)
- Select saved expression** (points to 'Datatype/Expressions' column)
- Tick this to maintain the destination references when cells are inserted and deleted in the destination sheet.** (points to 'Support R1C1 Reference Style')
- Specify the text to use for the 'not available' string** (points to 'Use as "not available" string')
- Select the destination for the data** (points to 'Display Destination as an Excel form')