

Students' quick guide for Eikon DFO (Datastream for Office)

Thomson Reuters' Eikon DFO provides access to a large range of financial data of companies and stock markets, among others mergers and acquisitions, pricing for equities, bonds, futures and options, I/B/E/S consensus and history.


Eikon runs on all cloudbooks available in the library. The librarian at the information desk will give you access to the program.

General recommendations:

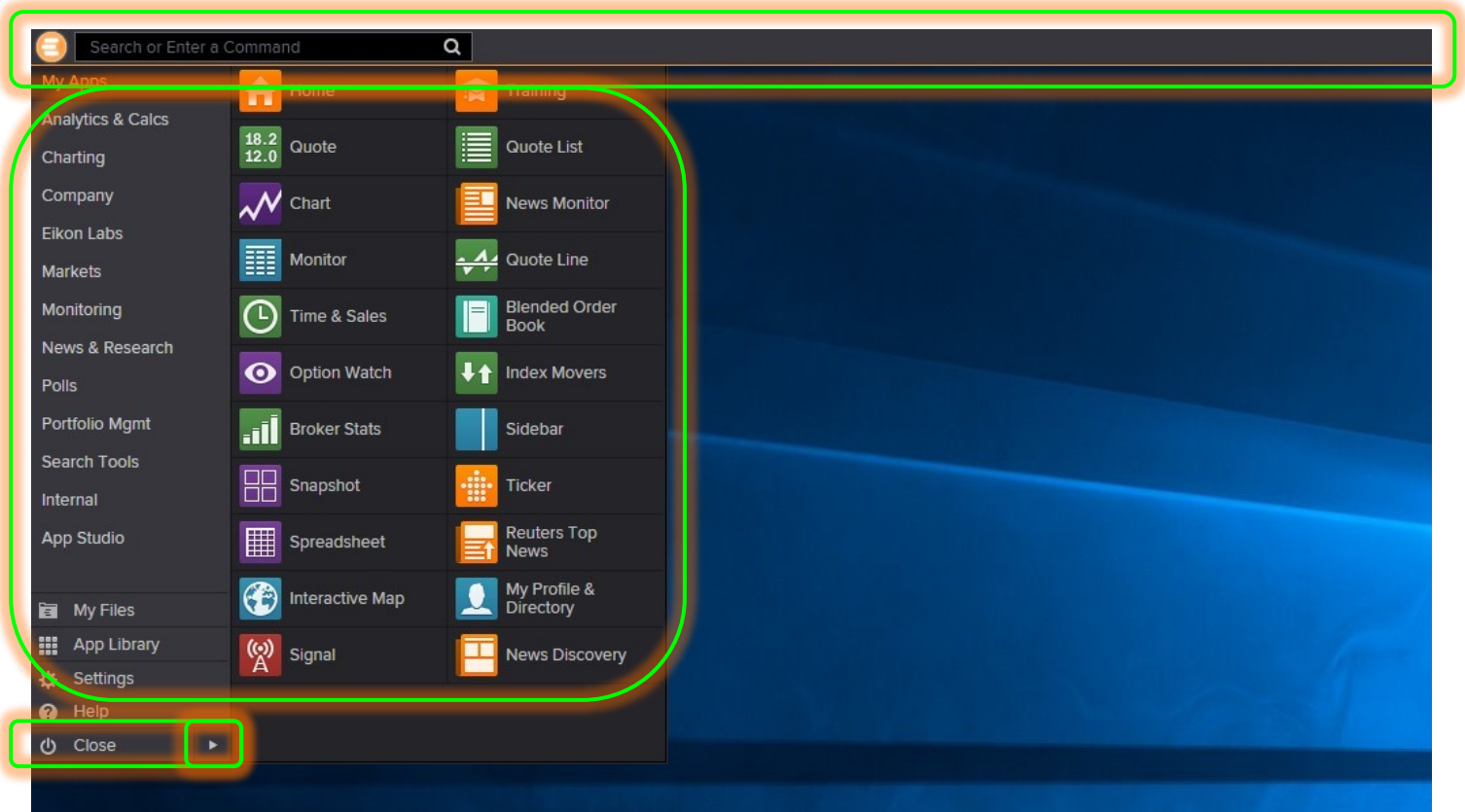
- Eikon requires a great part of the cloudbook's memory. Therefore, we recommend using the program alone and not simultaneously with other demanding programs or online services (e.g. SPSS, music/video streaming, etc.).
- In order not to block the access/license to other potential users, please close/shut down the program as soon as you have finished your search and data retrieval.

Get started! You can use Eikon DFO in two ways: via the stand-alone program or via the Excel Add-ins.

1) The stand-alone program

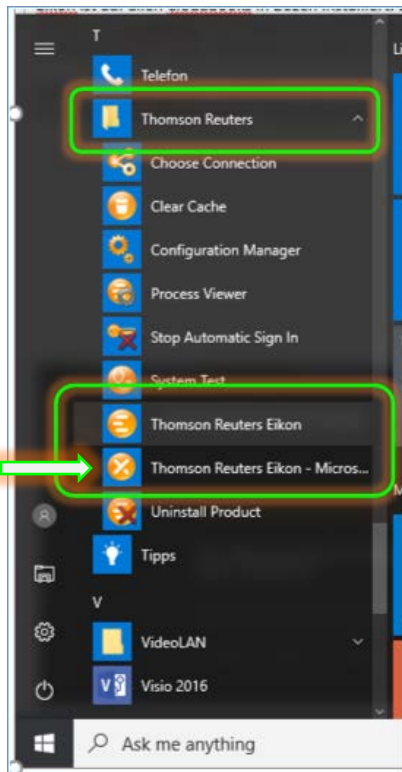
After logging in, a menu bar appears at the top of the screen. You may either enter a keyword or app name in the search field or you click on the menu button  in the upper left corner. Subcategories will open up from which you may select the app you need. A list of selected apps is shown as well (see below).

Once you open an app, it is added to your current workspace. Go to the upper right corner if you want to add more workspaces (not in the picture).

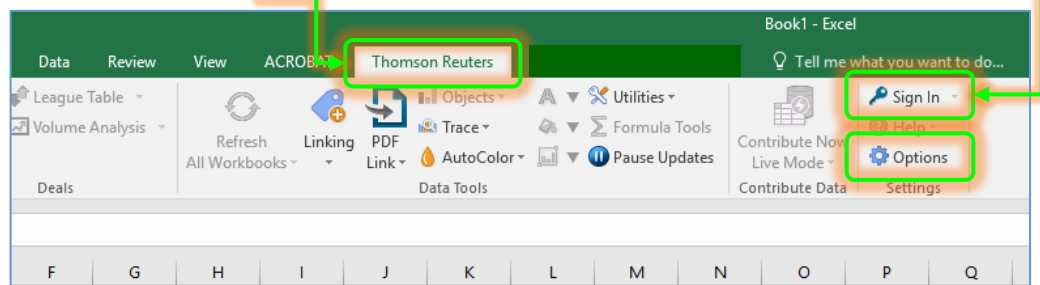


2) The Excel Add-ins

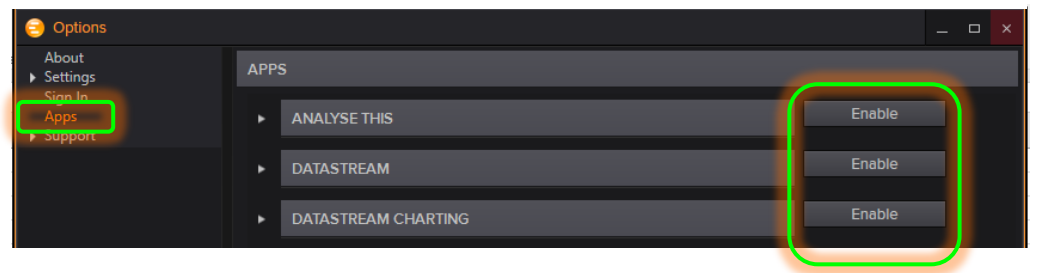
First, you have to log in to the stand-alone program. Then select from the start menu > Thomson Reuters > **Thomson Reuters Eikon – Microsoft Excel.**



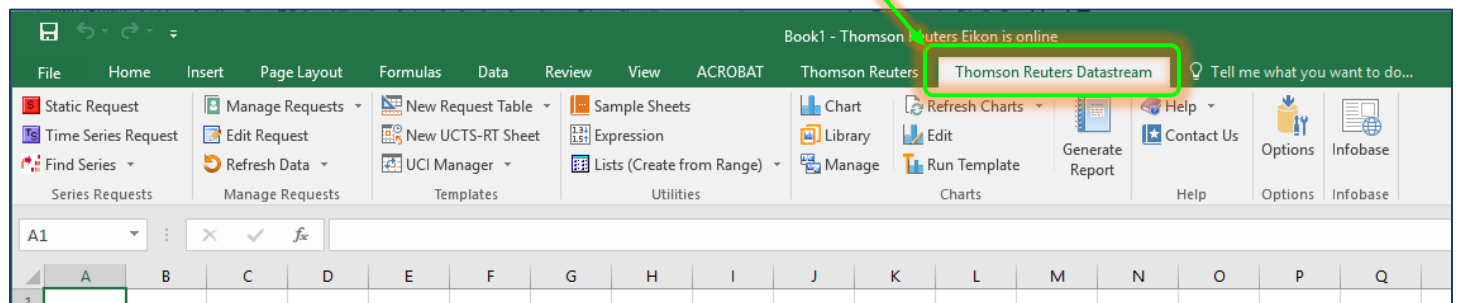
Excel will open. Among the ribbons you find one called “Thomson Reuter”. This ribbon is the main Eikon add-in. In order to activate its functions, click on *Sign In*.



In order to use the Datastream functions, an additional ribbon has to be added. Click on *Options*, then *Apps*, and then *Enable* the 8 apps in the list. Wait until it displays “Restart required” for all apps, then close and restart Excel (not the PC).

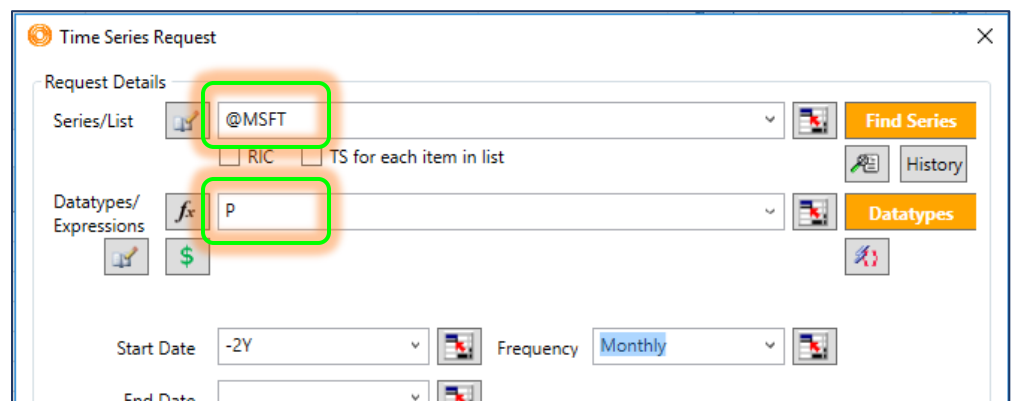


After restarting Excel, you find an additional ribbon called “Thomson Reuters Datastream”. To activate its functions, please click again *Sign In* the Thomson Reuters ribbon/add-in.



You can now start using the add-in functions, e.g. for a *Time Series Request* on Microsoft’s monthly stock price of the last two years.

	A	B
1	Name	MICROSOFT
2	06.04.15	41,545
3	06.05.15	46,28
4	06.06.15	46,14
5	06.07.15	44,39
6	06.08.15	46,62
7	06.09.15	42,61



Key Functions of the Thomson Reuters ribbon

(The following two images are taken from thomsonreuters.com)

The image shows the Thomson Reuters ribbon in an Excel application window titled "Book1 - Thomson Reuters Eikon is online". The ribbon is divided into several tabs: Home, Insert, Page Layout, Formulas, Data, Review, View, Acrobat, Thomson Reuters, and Thomson Reuters Datastream. The Thomson Reuters tab is currently selected, showing various tool groups. Callout boxes with orange lines point to specific features and provide descriptions of their functions.

Use the **Formula Builder** to create complex data requests with speed and ease.

Screen companies.

Dig deeper into rich asset-specific content, news, research, estimates, prices, and more.

Enable the **Linking app** to link Excel data and charts to PowerPoint or Word documents. This is an entitlement-based additional app.

Work with **Datastream** data and charts. These are entitlement-based additional apps.

Work with **lists and portfolios**, even those created in the Desktop.

Use handy asset-specific **templates**.

Monitor **deal flow**, identify trends and gain insight into your competitive positioning with **Deal Analytics**. This is an entitlement-based additional app.

Increase productivity with handy tools like **Auto Color**, **Presentation Tools**, **Formula Tools**, **Shortcuts**, and more...

Contribute data locally or to a network.

View product information, set sign-in preferences, define settings, and enable additional apps.

AUTOSUGGEST powers the entire application. Add input, make selections, and build data requests with ease and speed.

 Search	<p>Rapidly find instruments using the general search, or the advanced asset-specific searches. Help Topic. Training video: browser.</p>		<p>Contribute data locally within Excel, or to server. Help Topic. Training video: browser.</p>
 Lists	<p>Work with lists, indices, and portfolios created in Eikon Desktop and Excel. Help Topic.</p>		<p>Deal Analytics – an entitlement-based app Monitor deal flow; identify trends, gain insight and spot opportunities. Audit fundamental and estimates data. Help Topic. Training video: browser.</p>
 Templates	<p>Reuse asset-specific templates; access, create and share data sheets in a few mouse-clicks. Help Topic.</p>		<p>Linking – an entitlement-based app Link Excel data and charts to PowerPoint and Word documents. Help Topic.</p>
 Screener	<p>Screen companies by universe, filter by qualitative and quantitative data items, and monitor companies in Excel. Help Topic. Training video: browser.</p>		<p>Datastream & Datastream Charting – entitlement-based apps Comprehensive source for cross-asset analysis for IM professionals. Help Topic.</p>
 Charts	<p>Chart data in Excel. Help Topic.</p>		<p>Presentation Tools – an entitlement-based app Tools to facilitate brand compliant presentations. Help Topic.</p>
 Home	<p>Explore the data further. View rich asset-specific content, news, research, estimates, prices, and more. Help Topic.</p>		<p>Options View product information, install apps, define data retrieval settings and set sign-in preferences. Help Topic.</p>
 Refresh All Workbooks	<p>Choose which data to refresh data: all workbooks, workbook, worksheet, selection, or calculator links.</p>		<p>Trace Trace formula precedents and dependents in a grid or tree view. Help Topic.</p>
 Auto Color	<p>Instantly identify different types of content. Spot delayed real-time data, linked text, formulas with references, etc. Help Topic.</p>		<p>Utilities Access tools like <i>Shortcuts</i>, Adfin settings and conversion tools for legacy content. Help Topic.</p>
 Formula Tools	<p>Modify data display and the update frequency with the handy contextual <i>Formula Tools</i>. Help Topic.</p>		