

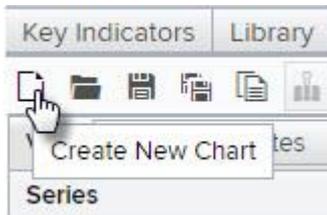
Datastream Chart Studio (DSCHART)

Quick Start Guide

The Datastream Chart Studio provides an intuitive interface to display any indicator available in Datastream and leverage Datastream's powerful library of analytical functions. The add-in for Microsoft Office (DFO) allows charts to be transferred as refreshable objects to Excel, Word and PowerPoint. This short guide covers the basic functionality and will help you get started.



Start a new chart



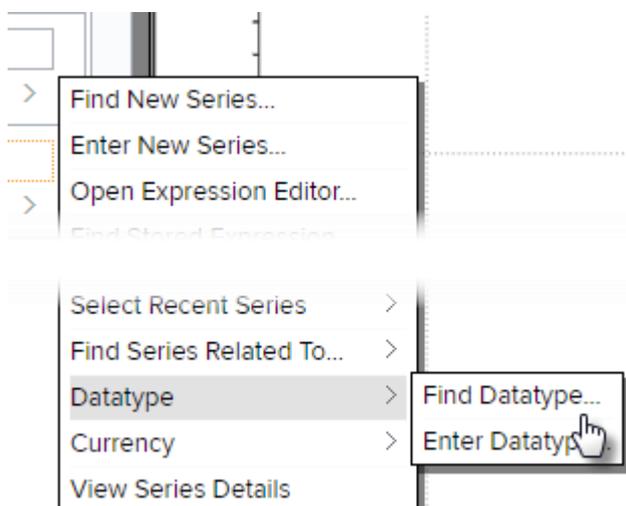
Add series

Start typing the name and see if it appears in the top 5 suggestions, or hover over the arrow to **Find New Series** in the code lookup tool Navigator.



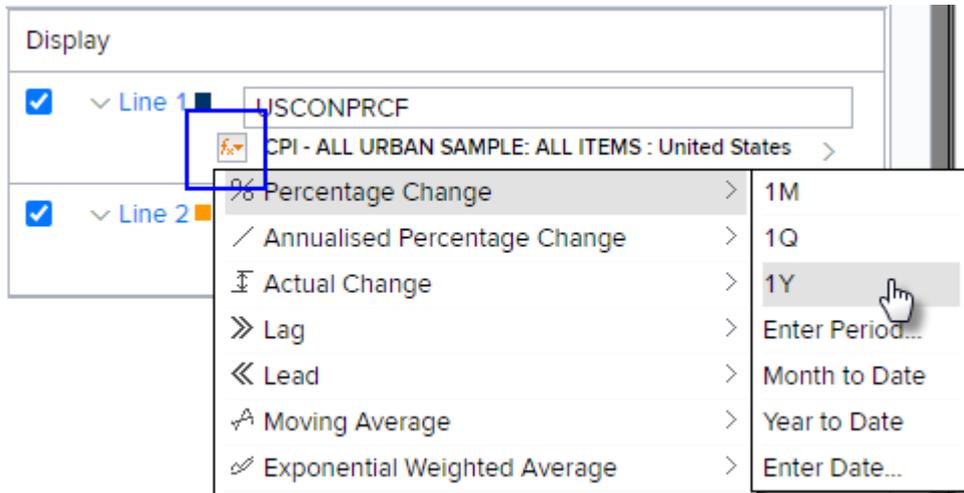
Add datatypes

Hover over the arrow and select **Datatype** to look up data fields such as volume, sales or market cap.



Apply functions

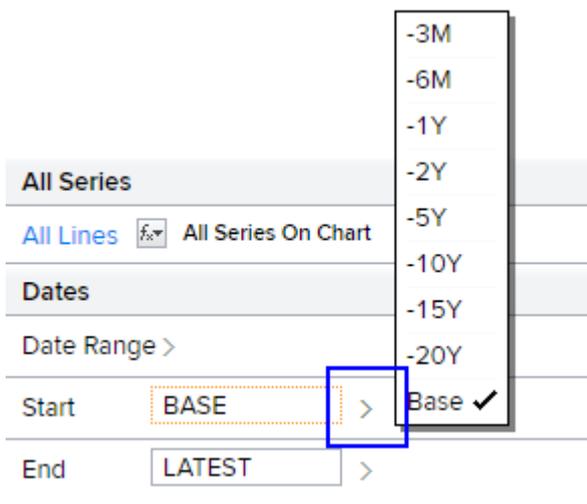
Hover over the function menu to see commonly used functions such as percentage change. Click on the required function and parameter to apply the function to your series. You can apply further functions, for example a moving average can be applied to a percentage change.



The most frequently used functions are listed on the menu. For further choices click **Functions Help...** and type the function directly into the text box.

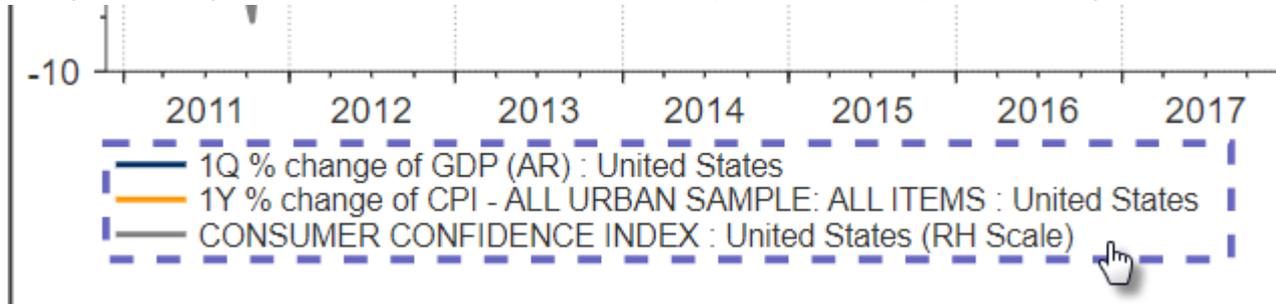
Set the date range

Hover over the arrows in the **Dates** section to select from the menus or type in the required date as a relative date (e.g. -25Y) or absolute date (e.g. 01/03/08).



Edit the chart

Click on any element in the chart to open an editor for the settings. For example, click on a line to change its color, or click on the legend to change its position. The dotted line border will show you which element you are selecting:



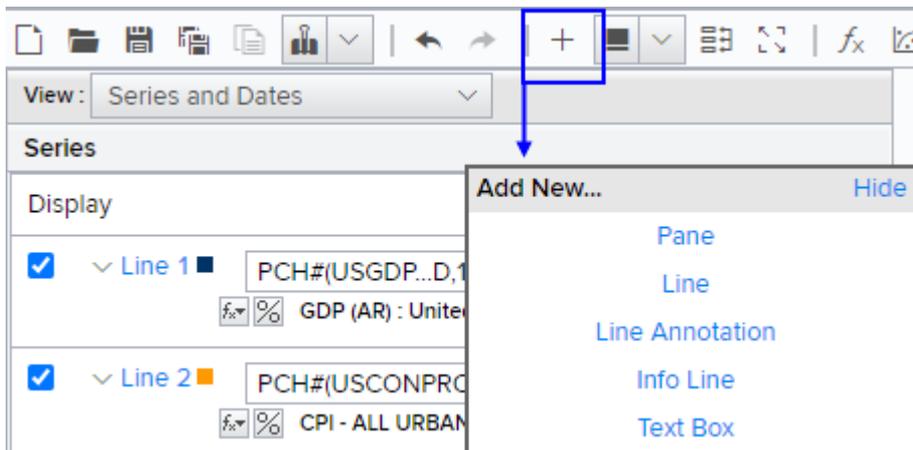
Use the **all** links to change settings for multiple elements at once.

To save your preferred style settings such as colors and fonts, click the **Edit and Save as a Style** option on the toolbar.

When you want to use the same style for another chart, click the **Apply Style** icon on the toolbar and select the style from the picker.

Annotate the chart

Click the + button on the toolbar to add annotations such as lines, notes, text boxes or recession bands. Some types of annotation are linked to specific dates/values on the chart and will move accordingly when the chart is updated, while others are fixed in a specific position on the screen.

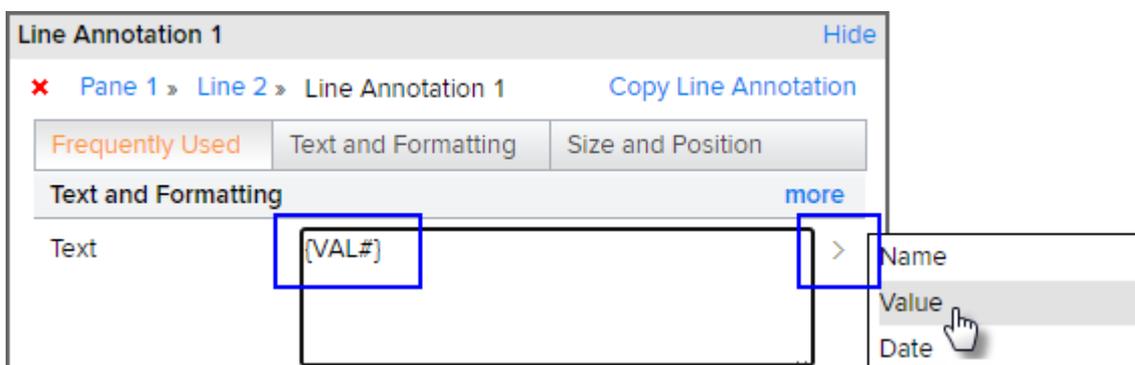


Add substitutable text

Use datatypes, functions or keywords inside curly brackets { } to generate automatic text in any text field on your chart such as the chart title, legend or annotations.

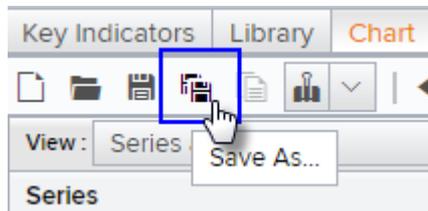
For example, to add the latest value to an annotation, use the substitutable text {VAL#}.

Hover the arrow to see a menu of the most commonly used substitutions, or for more options select **Substitutions Help..** from the menu.



Save the chart

Click the **Save As** icon on the toolbar to save your chart in the Chart Library.

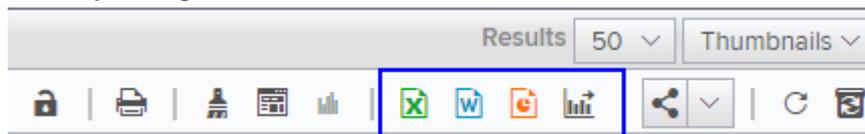


Select a destination folder from the Shared or Private section and specify the chart name. Charts saved in Private folders are visible only to you, while charts saved in Shared folders are accessible to your colleagues. To make shared charts read only for other Library users, click the **Locked** checkbox.

Export a chart to Microsoft Office

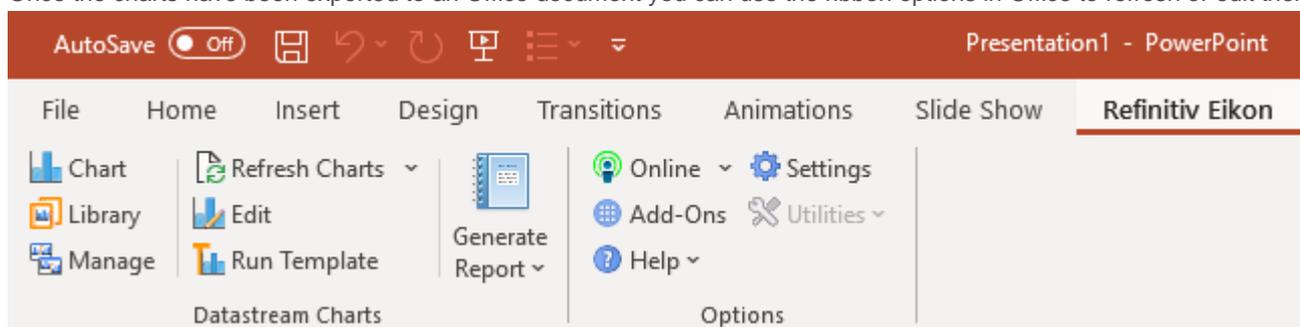
Saved charts can be exported to Microsoft Excel, Word or PowerPoint as refreshable objects. Charts can also be exported as image files (e.g. jpg) to a Windows folder on a local or shared drive.

In the Library hover your cursor over the arrow next to the chart name and select one of the Export options, or select multiple charts by clicking the check boxes and the icons on the toolbar.



The export dialogs will offer a number of options such as the layout and format of the exported charts and the destination.

Once the charts have been exported to an Office document you can use the ribbon options in Office to refresh or edit them:

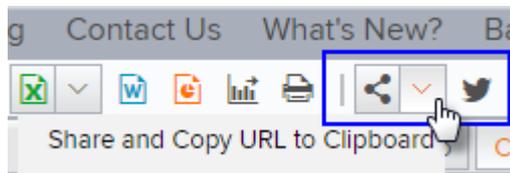


Select the **Manage** option to open the Chart Manager for further options such as Edit or Apply Style.

Share the url of a chart

You can copy a URL of your chart to the clipboard and share it (via email, document, instant message, Twitter and so on) with your audience or embed it in a blog or other html page. The URL maintains a live link to your chart and reflects any updates to the data or edits you make, until you decide to stop sharing and disable the URL.

To copy the chart URL to the clipboard, click the icon on the toolbar then paste the URL as required.



You can also use the preferences to copy an Edit URL which allows any Datastream user to open your chart on their Datastream ID, edit it as required and save it in their own chart library.

Find and organise charts

Saved charts are stored in the Library.



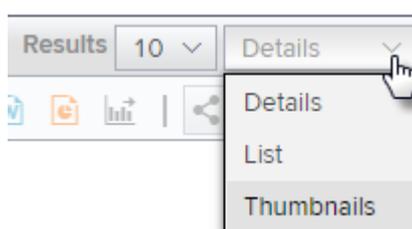
Find charts using the Search options. Click the help icon for details of advanced search terms.



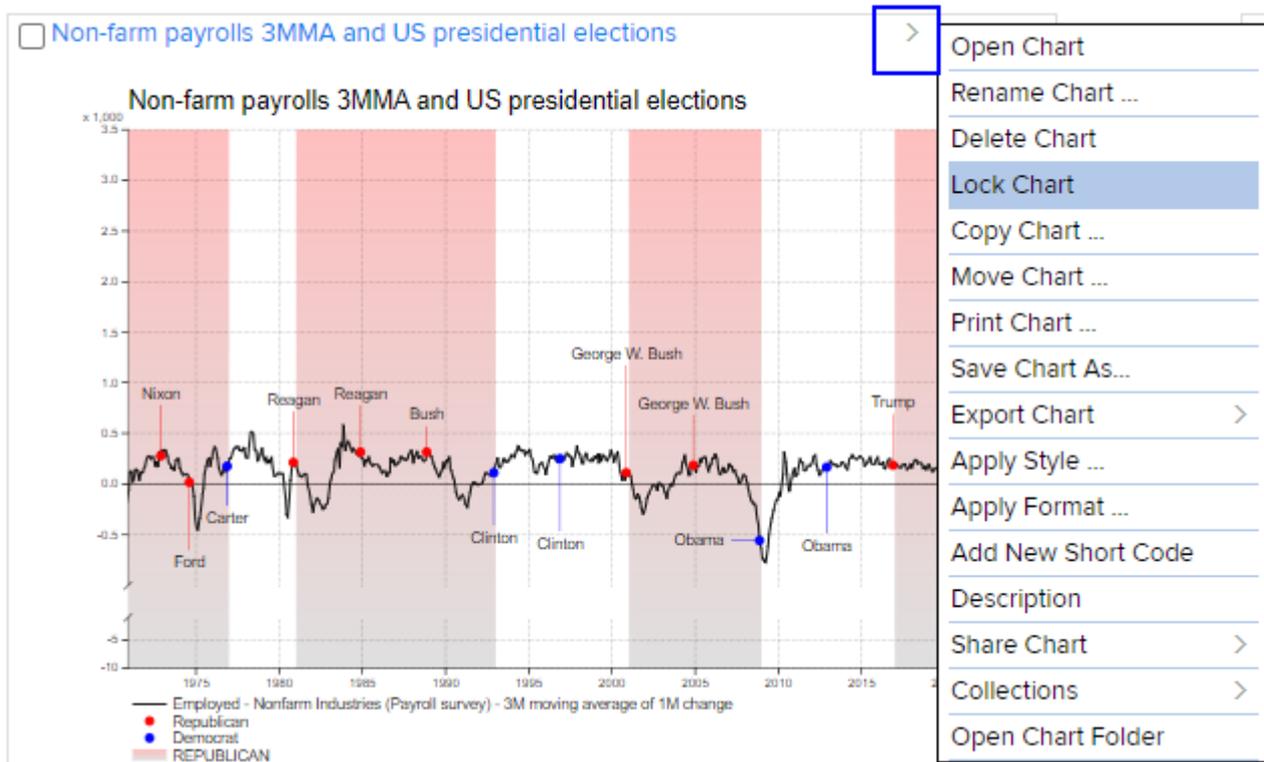
If you delete a chart, it will be moved to the Recycle Bin and can be restored from there.



Select the number of results per page and display your charts as thumbnail images or as a list of chart names.

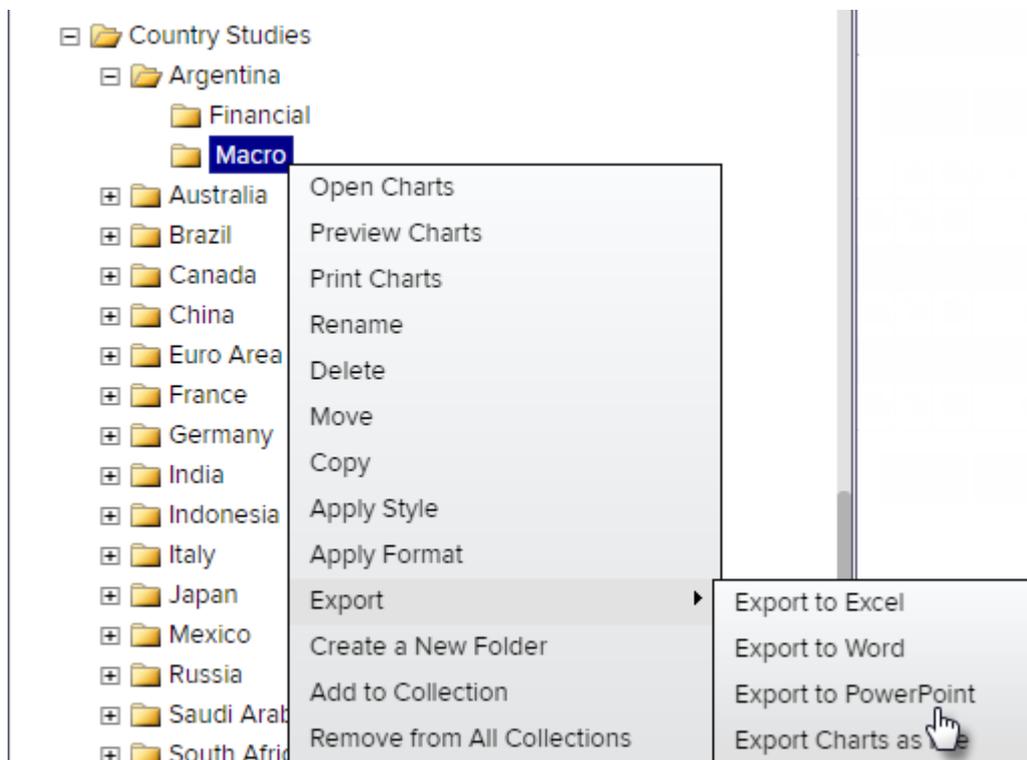


Hover over the arrow next to each chart name for a menu of options:



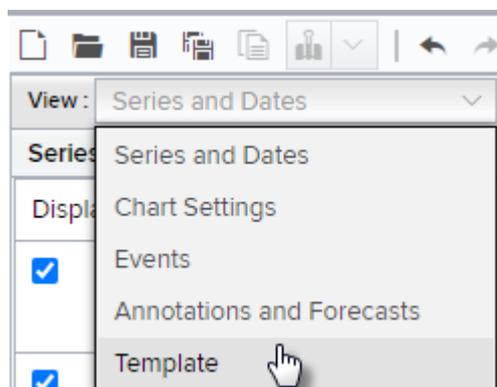
To perform actions on multiple charts, use the check boxes in conjunction with the toolbar.

You can also right click on the folder names to manage the folders or export all charts in a folder to Office.

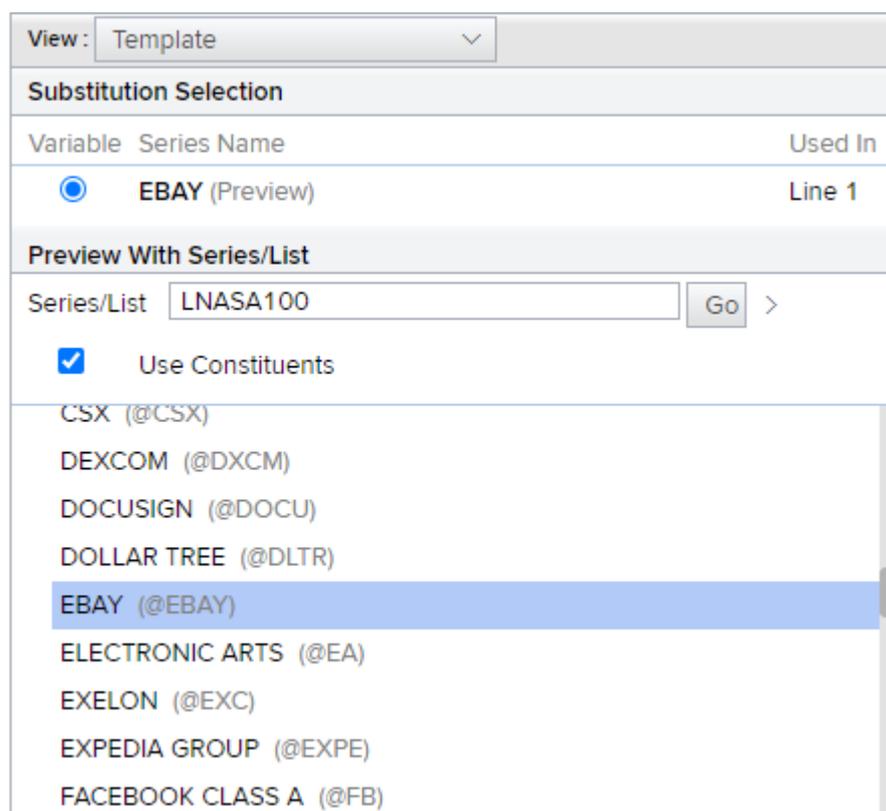


Use a chart with a list

The same chart can be used with a list of series by converting it to a Template. Create a model of the chart you require using an example series and any functions, currencies or datatypes. Set the date range and format the chart, then select the **Template** option to convert the chart.



Check the **Variable** radio button for the series you want to replace with the constituents of your list and select the required list either by typing in the list mnemonic or clicking the arrow to open Navigator. You can use Datastream constituent lists, UCI lists, or user created lists.

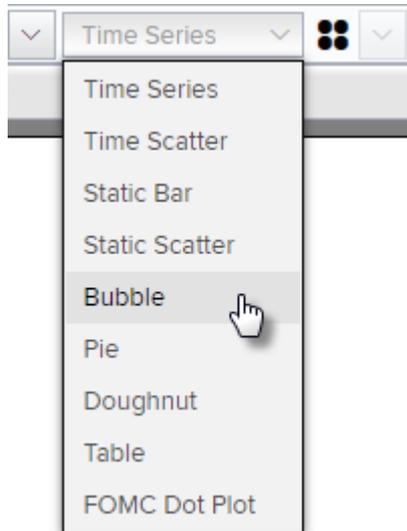


Click through the list constituents to see each chart on screen or save the template using the **Save** button on the toolbar, then click the export buttons on the toolbar to export the charts to Microsoft Office.

Saved templates are stored in the Library and can be organized, managed and retrieved in the same way as charts.

Other chart types

Use the dropdown on the toolbar to select static bar charts, scatter charts, bubble charts, pie and doughnut charts, tables and the FOMC Dot Plot.



The Datastream folder in the Library has examples of these various chart types in the Chart Types folder and the help files contain details of the features available.

The screenshot shows the Datastream Chart Studio interface with the 'Library' tab selected. The 'CHARTS' panel displays a tree view of folders, including 'Datastream', '- New Features', 'Chart Functionality Examples', 'Analytics', 'Annotations, Bands and Forecasts', 'Chart Types', 'Area Charts', 'Bar Charts', 'Bubble Charts', 'Candlestick Charts', 'Curves', and 'Doughnut Charts'. A search window is open over the 'Bubble Charts' folder, showing the search results for 'bubble' in the 'Refinitiv Eikon - Microsoft Office | Datastream Charting Online Help' files. The search results include a link to 'Creating a bubble chart' and a section titled 'About bubble charts'.

Creating a bubble chart

About bubble charts

A bubble chart displays three dimensions for entities (sectors, companies, markets and so point in time.

The first two dimensions for each entity are u bubbles in a coordinate (X,Y) system created (X) and vertical (Y) axes, for example risk on return on the Y axis. The third dimension (Z) size (the area) of the bubble, for example the

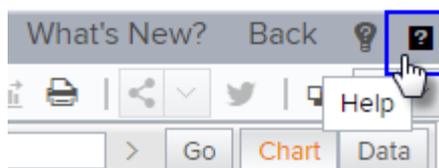
The Chartbook

The Chartbook contains a comprehensive library of charts from Fathom Consulting covering economic and financial market indicators for a broad range of markets, forecasts and comment, as well as weekly topics of interest in the 'Hot Topics' folders.

The screenshot shows the Datastream Chart Studio interface. The top navigation bar includes 'Key Indicators', 'Library', 'Chart', 'Chartbook', and 'News In Charts'. The 'Chartbook' section is active, displaying a tree view of folders. The '02. Virus update' folder is selected and highlighted. The main content area shows a search bar and a list of charts. The chart titled ''R' and mortality across countries*' is displayed, showing a scatter plot of 'R' proxy (Y-axis, 0 to 5) versus Deaths per million inhabitants (X-axis, 0 to 600) for various countries including UK, India, Sweden, NZ, US, Germany, and Brazil. The chart is dated *14/01/2020 to 14/09/2020. The source is cited as Refinitiv Datastream / Fathom Consulting.

Getting help

Click the help icon at the top of the page and browse or search for the topic you need.



Alternatively, use the **Contact Us** link to submit a query.

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