

How to use DataStream Advance for Office (AFO) to do a Multiple Equities time series query, resulting in a single spreadsheet

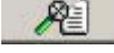
Example: Query the closing prices for 5 Food and Drug retailers (CVS, Caseys General Stores, Pantry, Rite AID and Walgreen) in the United States for the last 2 months

I. Create a Local List:

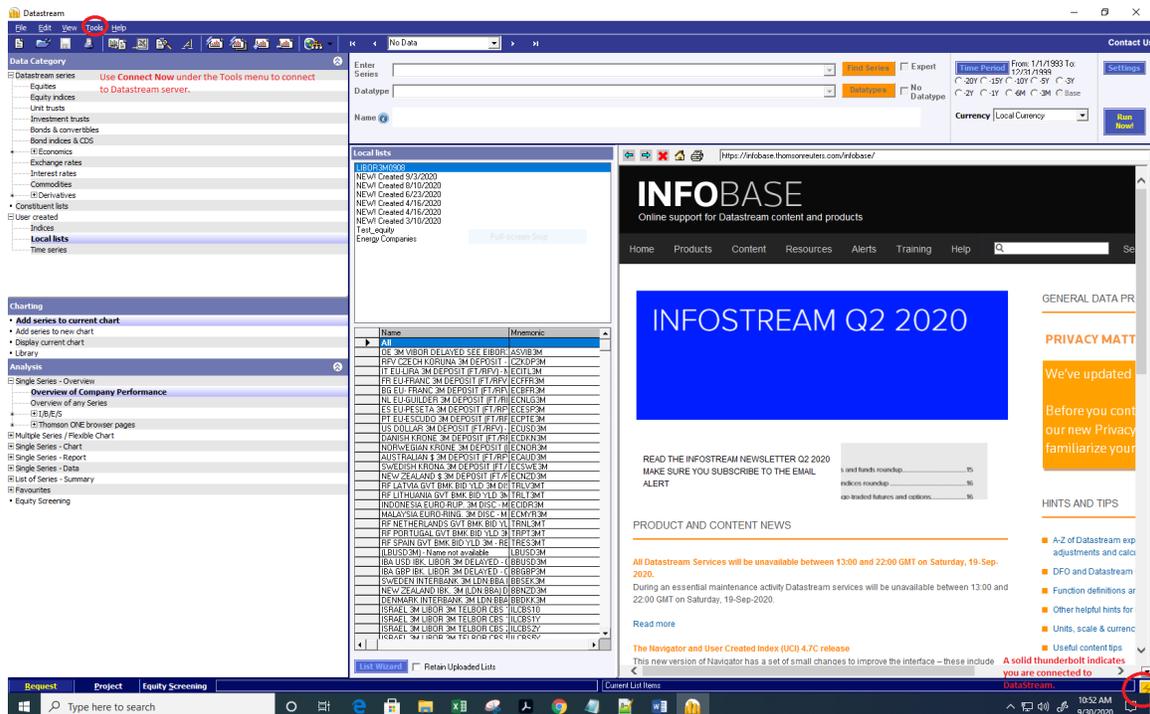
1. Open DataStream Advance 5.1 from Desktop. In the **Data Category** pane (upper left corner), expand **User created** and select **Local lists**. A pane with the heading “Local lists” will open.
2. Click on the blue **List Wizard** button at the bottom of the Local lists pane. A List Wizard window will open; select **Create a new list** from the options, and then click on the **Next** button.
3. Click on the orange **Find Series** button to get to the DataStream Navigator page.
4. Click on the word **Explore** below the search box to browse subject categories, and then click on the **Equities** category in the window that appears.
5. Equities are organized by Market (Country) and then Sector (Industries). Select **United States** and then **Food & Drug Retailers**. A list of equities will appear in the right pane.
6. Click the checkboxes next to the five food and drug retailers in the example to select them. Then scroll to the top of the list and click the word **Use**.
7. The five selected retailers will be displayed in the **List Wizard** window. You can sort your list using the **Sort List** button if you wish.
8. In the List Description box, give your list a descriptive title and then click the **Next** button. In the next window, you can give your list a file name of your choosing or let the program name your file. Accept the default “Save as Local List only,” and then click on the **Finish** button to save your list locally.

II. Put the equities time series from your list into a single spreadsheet, using DataStream-AFO in Microsoft Excel 2016:

1. From the Start menu, select **Programs, Microsoft Office** and then **Microsoft Excel 2016**.

2. Click on **Add-ins** on the Excel 2007 menu bar, and then click **DataStream-AFO**.
3. Select the purple **Time Series Request** box from the menu that appears.
4. In the **Time Series Request** window click on the **List Picker** button  (to the right under the orange Find Series button) to locate the Food and Drug Retailers list created in Advance 5.0. Click the name of your list to highlight, then click the **OK** button.
5. If you leave the **Datatype** box blank, it will default to the closing price of the previous day. If you would prefer a different datatype, click on Datatype to view other available datatypes for equities.
6. For **Start Date** type -2M (2 months prior to today), for **Frequency** use daily. Other available frequencies are weekly, monthly, quarterly and yearly.
7. Check any **Options** you need on the display option list.
8. Click on the **Submit** button to request the data.
9. The daily closing prices for these five food and drug retailers in the United States from the last two months will be displayed in Excel. You can save it to C:\Temp for your analysis later.

You need to connect to DataStream Server in Advance 5.1 before you run any time series request. **Connect Now** is listed under **Tools** in the menu.



The screenshot shows the Datastream software interface. The 'Tools' menu is open, and 'Connect Now' is highlighted. The 'Local Lists' window is also open, showing a list of financial instruments with columns for Name and Mnemonic. The 'INFOBASE' website is visible in the background, displaying 'INFOSTREAM Q2 2020' and a newsletter alert.