

Introduction to the Data Room

SAFE Research Datacenter*

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1 SAFE Data room overview

1.1 Data sources

Check out the comprehensive list of available [data sources](#), description and documentation.

The screenshot displays the 'Data sources' page of the Leibniz Institute for Financial Research SAFE. The page features a navigation bar with tabs for 'Research Data Center', 'Data sources' (selected), 'Documentation', 'Scheduler', '@Contact', and a link to 'Pandas in Python for Economics and Finance'. Below the navigation bar, there are filters for 'Filter by Topics' (listing categories like Banks, Bonds and Fixed Income, etc.) and 'Filter using a Keyword'. The main content area lists several data sources with their descriptions and access instructions. The sources listed are: Preprocessed : Compustat, Preprocessed : CRSP, Ravenpack Job analytics, S&P Capital IQ Pro (SNL Financial), and WRDS : Bank Regulatory. Each source entry includes a brief description, access instructions, and a link to a starter's guide or content guide.

Source	Description	Access	Guide/Link
Preprocessed : Compustat	A preprocessed and merged CRSP-Compustat data set is available on any PC in the Data Room. This resource is provided directly by the Data Center and can be found in the folder: 05_Preprocessed_data_sets\02_CRSP_Compustat_Merged. To access the dataset, simply click on the 'SAFE DC data' link located on the PC desktop.	Access from data room only	Compustat Starter's Guide Information on the preprocessed merged CRSP-Compustat data set
Preprocessed : CRSP	A preprocessed CRSP data set is available on any PC in the Data Room. This resource is provided directly by the Data Center and can be found in the folder: 05_Preprocessed_data_sets\01_CRSP. To access the dataset, simply click on the 'SAFE DC data' link located on the PC desktop.	Access from data room only	CRSP Starter's Guide Information on the preprocessed CRSP data set
Ravenpack Job analytics	RavenPack Job Analytics is a dataset of ONLINE JOB POSTINGS collected from the LinkUp platform and processed by RavenPack. Data are stored in shared folder (SAFE_DATAROOM\07_ravenpack_job_analytics) accessible from each workstation.	Access from data room only	Content guide
S&P Capital IQ Pro (SNL Financial)	S&P Capital IQ Pro (former SNL Financial) is the premier provider of breaking news, financial data and expert analysis on business sectors critical to the global economy: Banking, Insurance, Financial Services, Real Estate, Energy, Media & Communications and Metals & Mining. Data Rooms provide 'S&P Capital IQ pro' web portal access and Microsoft Office add-in for Excel.	Go to source (S&P global credentials required)	S&P Capital IQ pro Starter's Guide S&P CIQ Pro Office Plug-In Overview (credentials required) Capital IQ Solutions Training Webinars
WRDS : Bank Regulatory			WRDS Starter's Guide

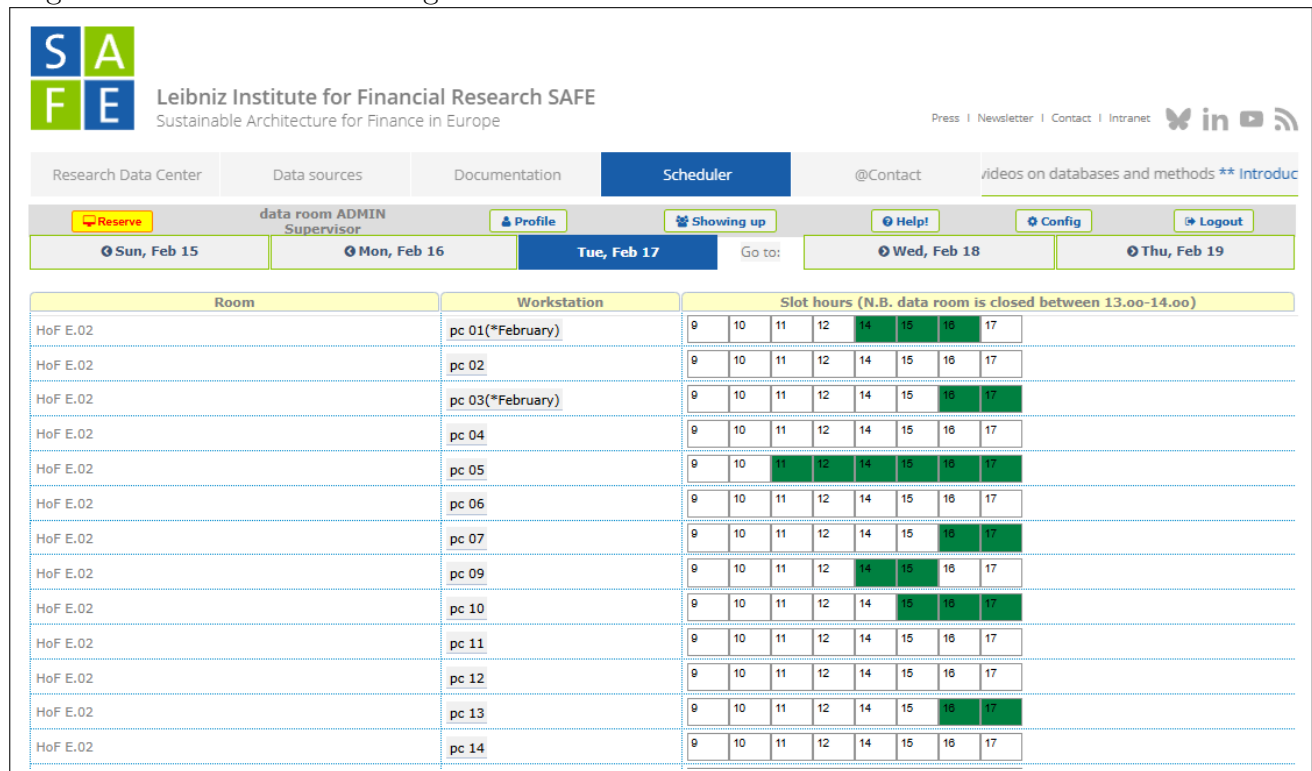
1.2 SAFE Data room access

All listed data sources are available via the SAFE Data room.

Please find detailed information regarding opening hours, registration and reservation [here](#).

1.3 Making an Appointment

Register and reserve slots using the [Scheduler](#):



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Sustainable Architecture for Finance in Europe

Press | Newsletter | Contact | Intranet

Research Data Center | Data sources | Documentation | **Scheduler** | @Contact | Videos on databases and methods ** Introduc

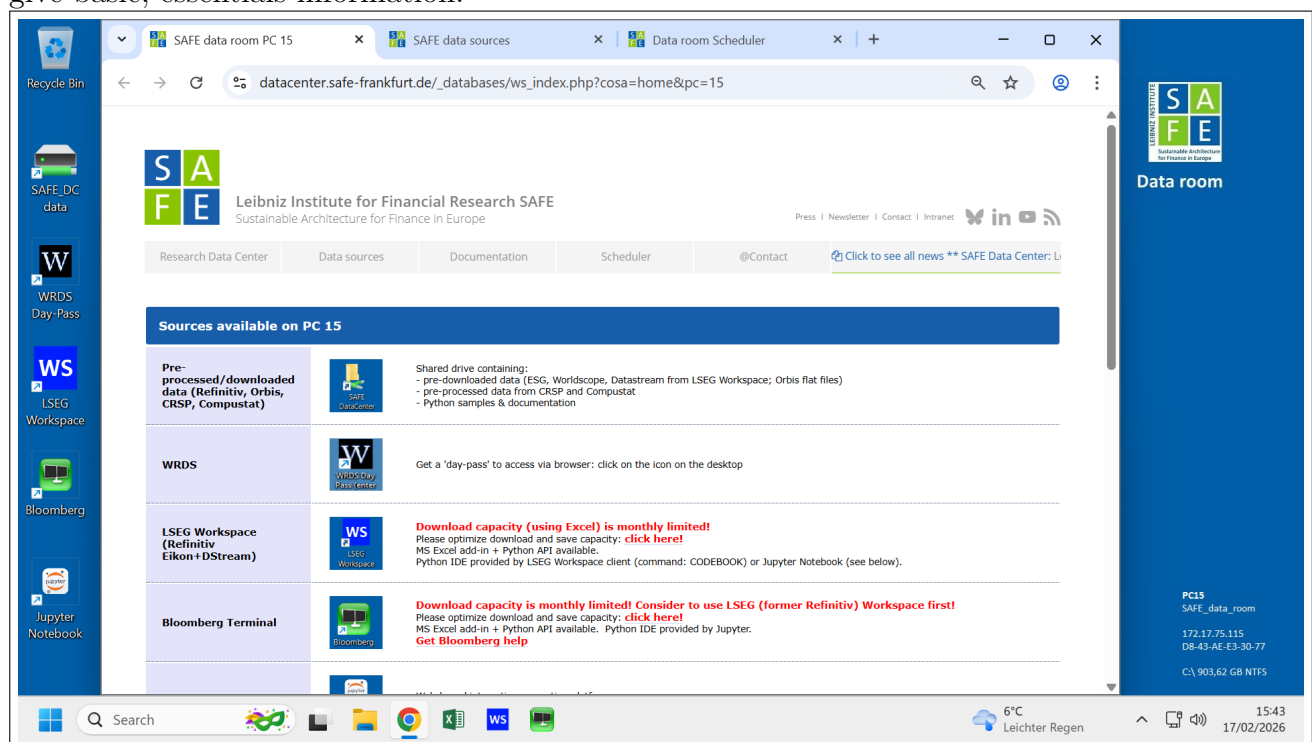
Reserve data room ADMIN Supervisor Profile Showing up Help! Config Logout

Sun, Feb 15 Mon, Feb 16 **Tue, Feb 17** Go to: Wed, Feb 18 Thu, Feb 19

Room	Workstation	Slot hours (N.B. data room is closed between 13.00-14.00)
HoF E.02	pc 01(*February)	9 10 11 12 14 15 16 17
HoF E.02	pc 02	9 10 11 12 14 15 16 17
HoF E.02	pc 03(*February)	9 10 11 12 14 15 16 17
HoF E.02	pc 04	9 10 11 12 14 15 16 17
HoF E.02	pc 05	9 10 11 12 14 15 16 17
HoF E.02	pc 06	9 10 11 12 14 15 16 17
HoF E.02	pc 07	9 10 11 12 14 15 16 17
HoF E.02	pc 09	9 10 11 12 14 15 16 17
HoF E.02	pc 10	9 10 11 12 14 15 16 17
HoF E.02	pc 11	9 10 11 12 14 15 16 17
HoF E.02	pc 12	9 10 11 12 14 15 16 17
HoF E.02	pc 13	9 10 11 12 14 15 16 17
HoF E.02	pc 14	9 10 11 12 14 15 16 17

1.4 Access the source

The Home Desktop of Data Room PCs is organized to facilitate the access of the sources and give basic, essentials information:



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Research Data Center | Data sources | Documentation | Scheduler | @Contact | Click to see all news ** SAFE Data Center: L

Sources available on PC 15

Pre-processed/downloaded data (Refinitiv, Orbis, CRSP, Compustat)		Shared drive containing: - pre-downloaded data (ESG, Worldscope, Datastream from LSEG Workspace; Orbis flat files) - pre-processed data from CRSP and Compustat - Python samples & documentation
WRDS		Get a 'day-pass' to access via browser: click on the icon on the desktop
LSEG Workspace (Refinitiv Eikon+DStream)		Download capacity (using Excel) is monthly limited! Please optimize download and save capacity: click here! MS Excel add-in + Python API available. Python IDE provided by LSEG Workspace client (command: CODEBOOK) or Jupyter Notebook (see below).
Bloomberg Terminal		Download capacity is monthly limited! Consider to use LSEG (former Refinitiv) Workspace first! Please optimize download and save capacity: click here! MS Excel add-in + Python API available. Python IDE provided by Jupyter. Get Bloomberg help

PC15
SAFE_data_room
172.17.75.115
D8-43-AE-E3-30-77
C:\ 903.62 GB NTFS

6°C Leichter Regen 15:43 17/02/2026

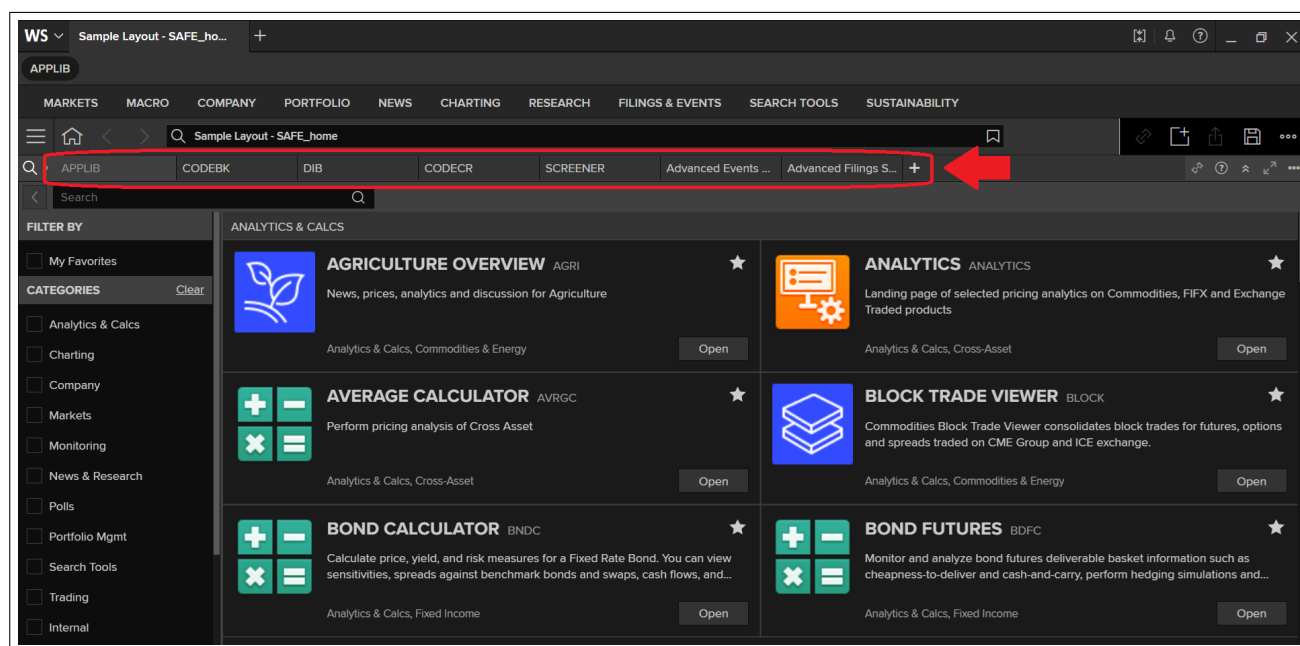
2 LSEG Workspace

LSEG Workspace (formerly Refinitiv Workspace or Eikon) Home page shows the list of the App Library.

Among them, some are pre-loaded:

- Codebook (CODEBK), a Python IDE to retrieve data in programmatic way; many code examples provided
- Data Item Browser (DIB), a content discovery tool
- Code creator (CODECR), a tool to create Python code by indicating instruments and fields
- Screener (SCREENER), to screen public and private companies using a variety of criteria
- Advanced Events Search (ADVEV), to search events by multiple contexts
- Advanced Filings Search (ADVFIL), criteria based search for company filings

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2.1 RICs (Reuters Identifier Codes)

When searching for securities (e.g. shares, bonds, derivatives), Workspace offers the possibility to search for all known identifiers such as ISIN, CUSIP, WKN, ...

Most commonly used in LSEG Workspace are internal identifiers called **RICs** (for example "AAPL.O").

In general, RIC Format (not always) is TICKER.EXCHANGE

e.g. "AAPL" is the ticker and "O" stands for NASDAQ (check exchange abbreviations via *EXCHID01* command).

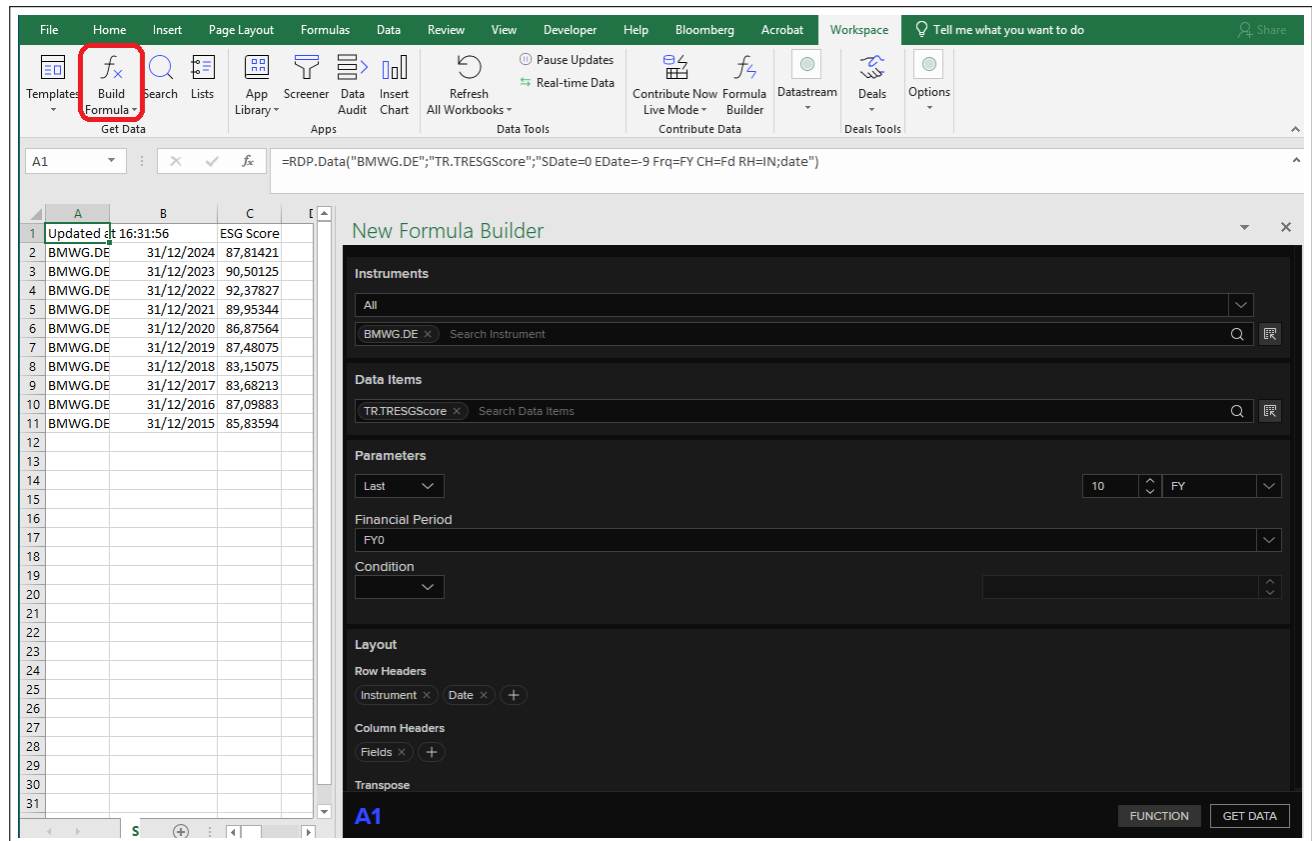
This can be an advantage because ISINs do not usually contain information about the exchange (usually they implicitly give the data points of the primary exchange, i.e. where the security is primarily traded or where the IPO took place).

Since RICs (like ISINs, etc.) can change, LSEG also provides permanent identifiers (for Workspace) called **PermID**, see [here](#).

2.2 LSEG Workspace Excel add-in

LSEG Workspace include an Excel add-in to retrieve data.

The "Build Formula" button helps to set up functions, which can later be made more sophisticated.



The screenshot displays the LSEG Workspace Excel add-in interface. The Excel ribbon at the top includes tabs for File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Help, Bloomberg, Acrobat, and Workspace. The 'Build Formula' button is highlighted with a red box. The 'New Formula Builder' pane is open on the right, showing the following configuration:

- Instruments:** All (dropdown), BMWG.DE (selected), Search Instrument (input field).
- Data Items:** TR.TRESGScore (selected), Search Data Items (input field).
- Parameters:** Last (dropdown), 10 (input field), FY (dropdown).
- Financial Period:** FY0 (dropdown).
- Condition:** (dropdown).
- Layout:**
 - Row Headers:** Instrument x, Date x, + (button).
 - Column Headers:** Fields x, + (button).
 - Transpose:** (checkbox).

The Excel spreadsheet shows a table with columns A, B, and C, containing data for BMWG.DE ESG Score from 2015 to 2024. The formula bar shows the formula: `=RDP.Data("BMWG.DE";"TR.TRESGScore";"SDate=0 EDate=-9 Frq=FY CH=Fd RH=IN;date")`.

2.3 Monthly Downloading Limit

Excel:

10 million data points per month in Datastream/Workspace

Datapoints = Universe · Fields · time points

(Python) API:

(nearly) unrestricted

2.4 Useful links and documentation

See links in the right column in [Data sources](#) page :

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Research Data Center **Data sources** Documentation Scheduler @Contact [Click to see all news ** S](#)

[Open access](#) | [Usage Agreement required](#) | [Restricted access](#) | [SAFE data Terms of Use](#) | [Sort by access](#) | [Sort alphabetically](#)

Filter by Topics:

- ☐ Banks (16)
- ☐ Bonds and Fixed Income (18)
- ☐ Company Info and Financial Statements (36)
- ☐ Compensation (15)
- ☐ Consumers and Demographics (8)
- ☐ Currency Exchange Rates (9)
- ☐ Derivatives/Options (10)
- ☐ ESG (19)

LSEG Workspace

LSEG Workspace (formerly Refinitiv Workspace for Students) is a library database that provides financial news, financials, global pricing data and analytics, analyst research reports, and more. LSEG Workspace is the next generation of Eikon Desktop; it incorporates Datastream, Worldscope datatypes and ThomsonONE.com which used to be on separate platforms. Refinitiv Workspace for Microsoft Office is an add-in available in MS Excel. **N.B.** data download through Excel has a limit of 10m data points per month.

Pre-downloaded data (see 'ESG + Datastream + Worldscope pre-downloaded data') is available on any PC in Data Room; it can be found in the folder: 01_Datastream

To access the dataset, simply click on the 'SAFE_DC data' link located on the PC desktop. In order to download data is strongly suggested to use APIs: CodeBook (app that provides a ready to... [read more](#))

[Go to source \(Refinitiv credentials required\)](#)

Useful links:

- [LSEG Learning Centre](#)
- [Quick Start Guide:add-in for Excel](#)
- [Essential Guide to the Data Libraries - Generations of Python library \(EDAPI, RDP, RD, LD\)](#)
- [Technical contents from Developer Community \(free registration\)](#)
- [LSEG Q&A forum](#)
- [Fetching data using Python](#)

3 Bloomberg Terminal

3.1 How to login

A Bloomberg registration is required to access terminal contents.
The process is easy, self explanatory and takes just few moments.

>>

Bloomberg

Login Name
[Input Field]

Password
[Input Field] [Eye Icon]

Login

Select Language for Analytics and Communication Functions:

- ✓ English 日本語 Français Deutsch Español
- Português Italiano 繁體中文 한국어 简体中文
- Русский Polski Türkçe

Forgot Login Name?
Forgot Password?

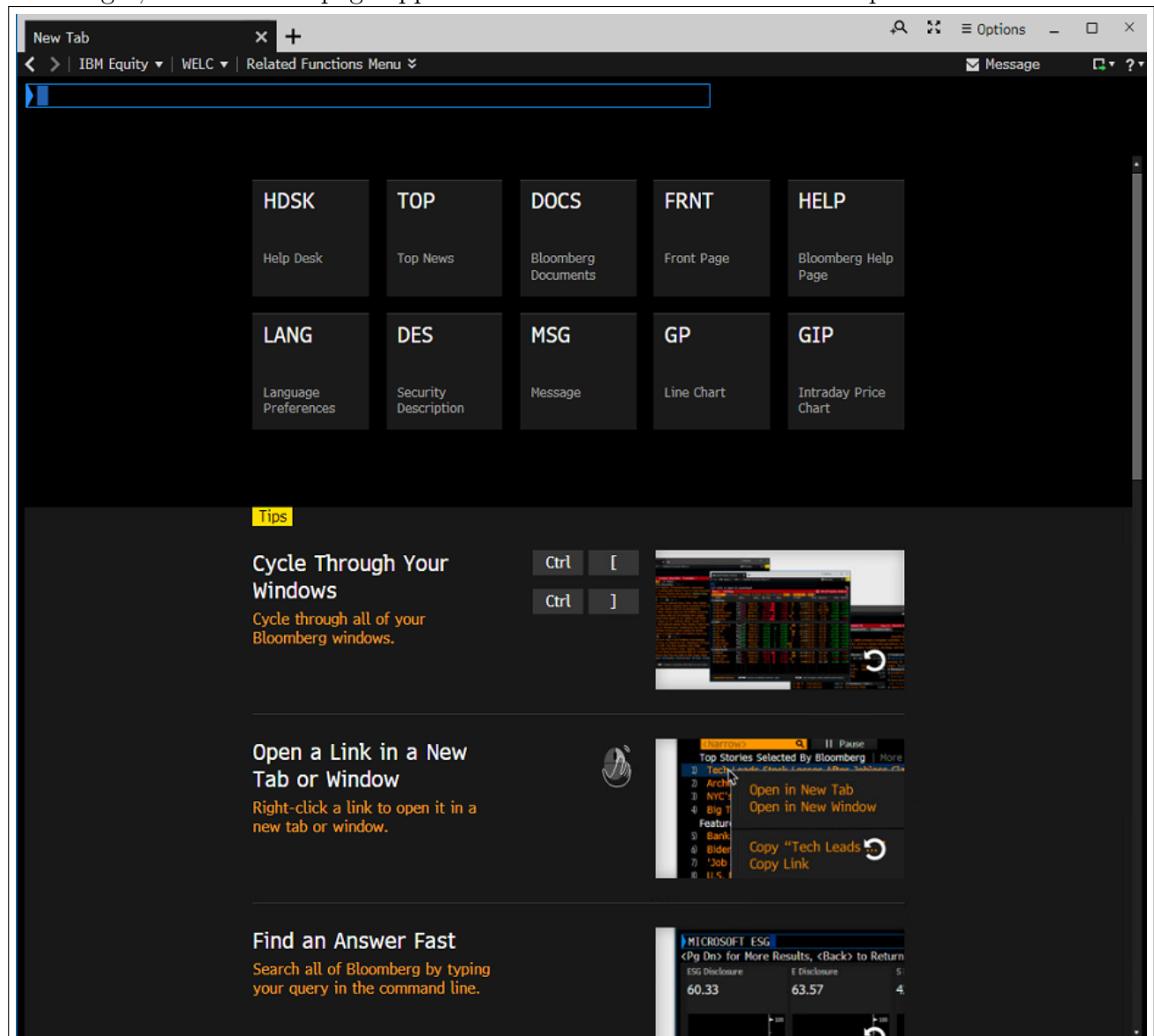
Contact Us
Create a New Login

To customize your News language experience
type LANG <GO> after login.

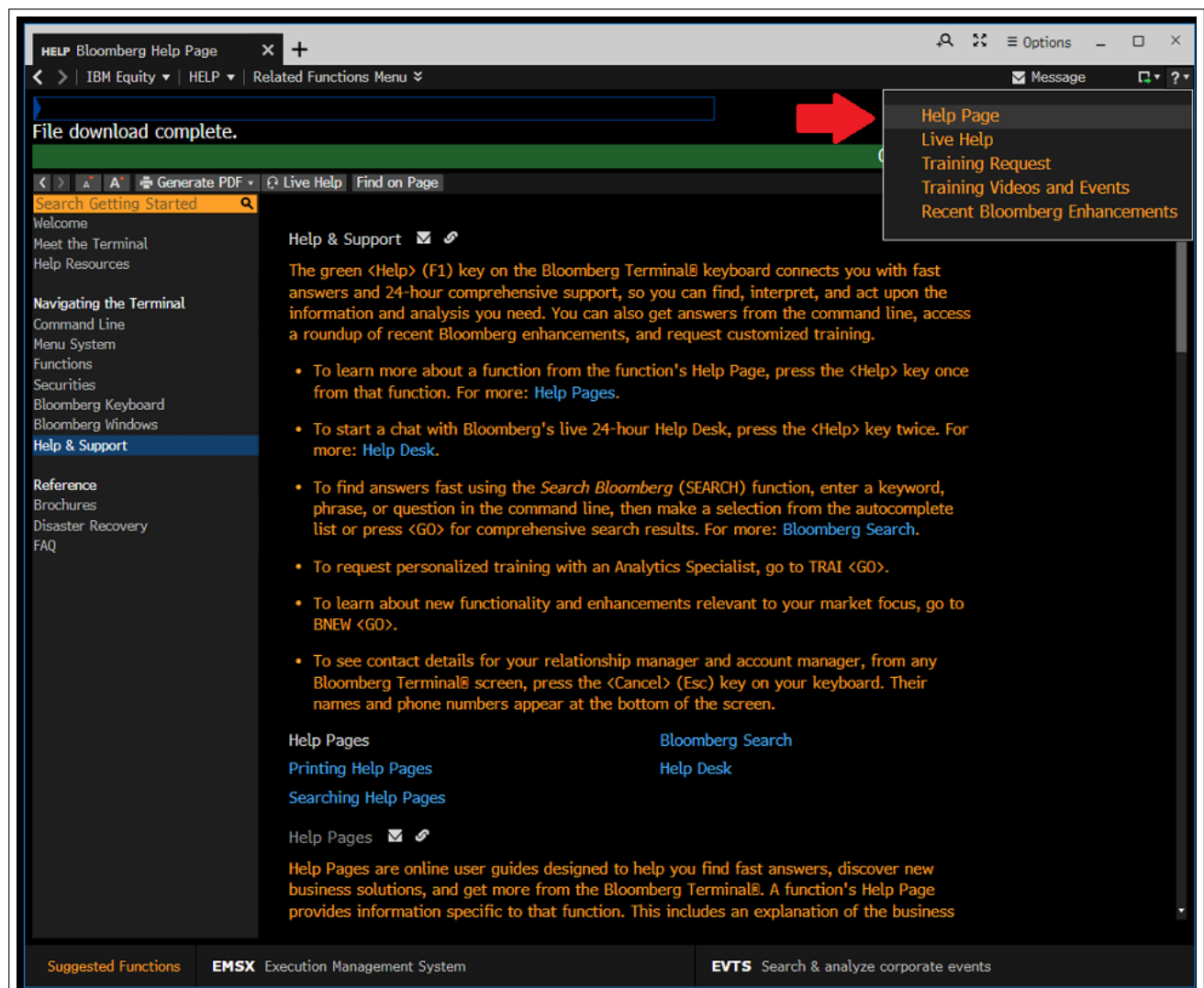
S/N 504383-0 | SID: 6780738-1 | Version 189.3.81 | Netid 3589

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After login, a "Welcome" page appears with most used functions and tips:

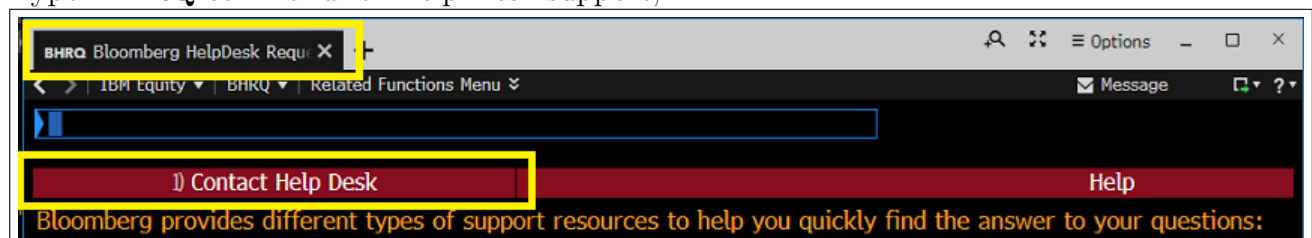


Especially for beginners, it is recommended to select "Help page" to get the [Welcome to the Bloomberg Terminal® Help Page](#)



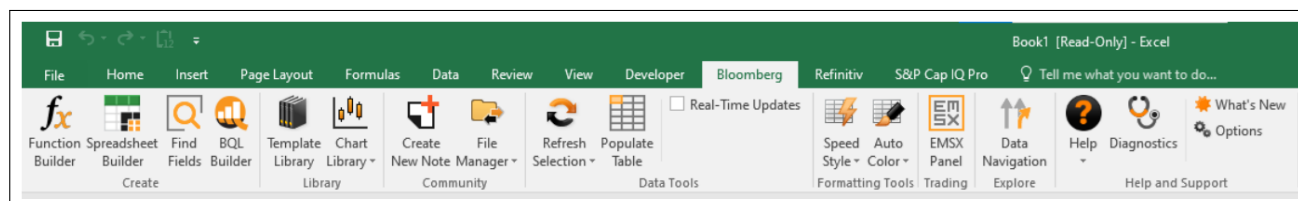
Bloomberg provides different types of support resources to help you quickly find the answer to your questions.

Type **BHRQ** command for Help Desk support;



and select "1) Contact Help Desk" to submit questions and get an answer in one business day.

3.2 Bloomberg Excel add-in



Bloomberg Excel functions

- **BDH**: Bloomberg Data History retrieves historical values (end-of-day or intra-day)
= BDH(Security, Field, StartDate, EndDate, [option])
- **BDP**: Bloomberg Data Point retrieves current or real-time values.
= BDP(Security, Field, [option])
- **BDS**: Bloomberg Data Set populates multiple cells with descriptive data for a security
= BDS(Security, Field, [option])
- **BQL**: Bloomberg Query Language is a separate approach that enables more-robust, SQL-like queries.
= BQL(Instrument, Function, Range)

3.3 Monthly Downloading Limit

Bloomberg has a **monthly downloading limit** on each terminal that applies to data downloaded via Excel functions or API calls.

Once reached, you'll see errors (e.g., #N/A Limit) and can't download more until the next calendar month.

Monthly limit comes from a **proprietary model** based on unique securities and depends on the type of data being downloaded.

The limit is tied to unique securities/data types, not simply raw datapoint counts.

Bloomberg does not advertise / disclose an explicit cap in terms of "number of datapoints" for this monthly limit, and there is no official way to query your remaining budget programmatically.

Practical guidance

If you're approaching heavy downloads:

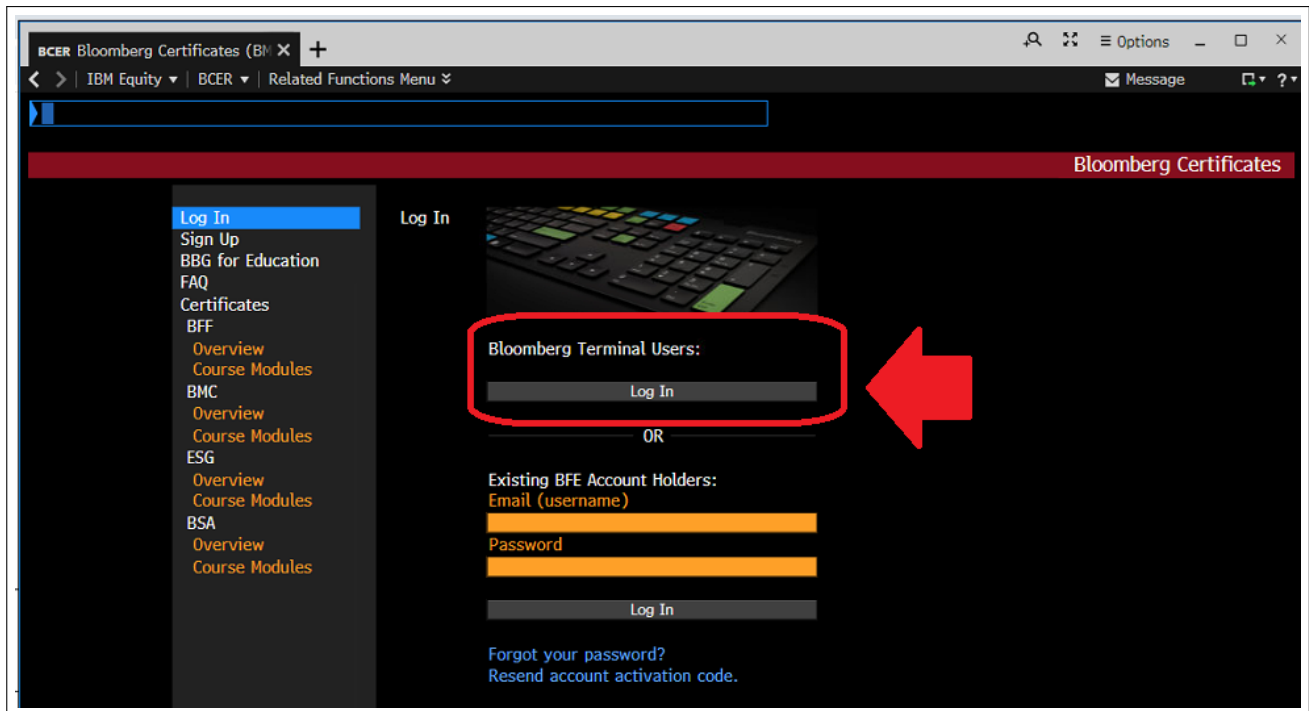
- Optimize queries to reuse the same securities rather than repeatedly introducing new ones.
- Use BDH (historical download) rather than repeated BDP cells in Excel to reduce usage.
- Consider batching and copying data instead of refreshing repeatedly.

3.4 E-learning courses, seminars and events

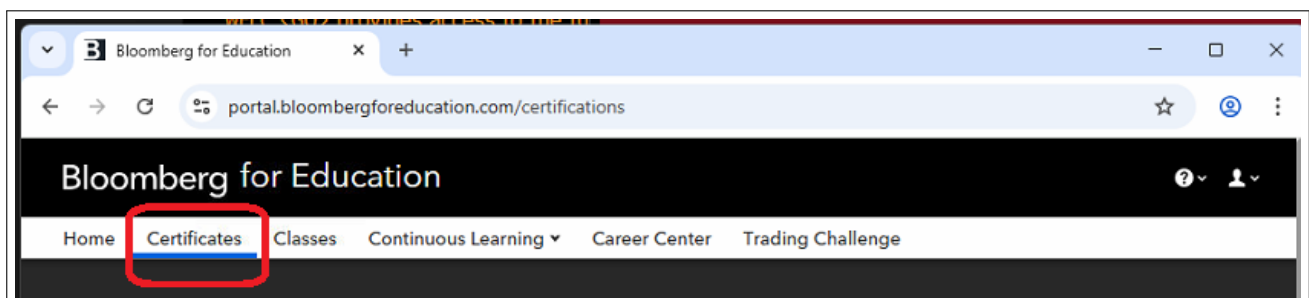
Bloomberg provides access to courses at no extra cost. Upon finishing each program, a certificate of completion is issued. Available courses are :

- Bloomberg Finance Fundamentals (BFF)
- Bloomberg Market Concepts (BMC)
- Bloomberg Social Governance (ESG)

Type **BCER** command and Log in as Bloomberg Terminal User



A web-session will be opened in the browser; be sure to select "Certificates" to access the courses



Seminars and events, virtual or in person, can be searched using **SMNR** command.

4 WRDS

WRDS web-portal is accessible from SAFE data room by getting a "day pass".

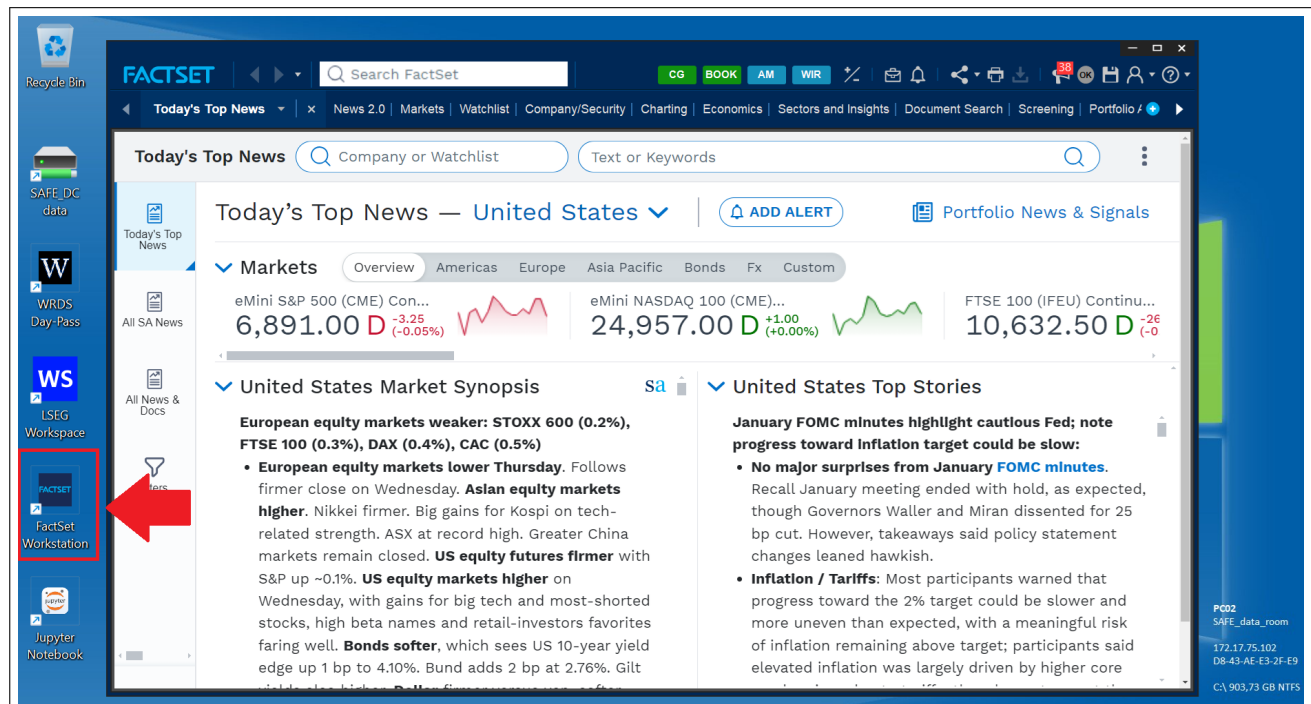
The screenshot displays the WRDS Connect web portal. On the left, a blue sidebar contains icons for 'Recycle Bin', 'SAFE_DC data', 'WRDS Day-Pass' (highlighted with a red box and arrow), 'WS LSEG Workspace', 'Bloomberg', and 'Jupyter Notebook'. The main content area has a header with the Wharton logo and 'wrds WHARTON RESEARCH DATA SERVICES'. Below the header, there are login fields for 'Username' and 'Password' with a 'Login' button. A navigation bar includes links for 'Data', 'Analytics', 'Classroom', 'About', 'Videos', and 'Demo'. The main section is titled 'Connect to WRDS' and 'Welcome to WRDS!'. It contains a form with an 'Email address' field (highlighted with a red box), a 'Captcha' section with an 'I'm not a robot' checkbox and a reCAPTCHA image (also highlighted with a red box), and a 'Submit' button. Text explains that an email address is required for contact. The right sidebar shows the 'SAFE' logo and 'Data room' information, including IP address, date, and time.

See details in [Accessing Wharton Researcher Data Services platform](#).

5 Other databases and tools

5.1 Factset

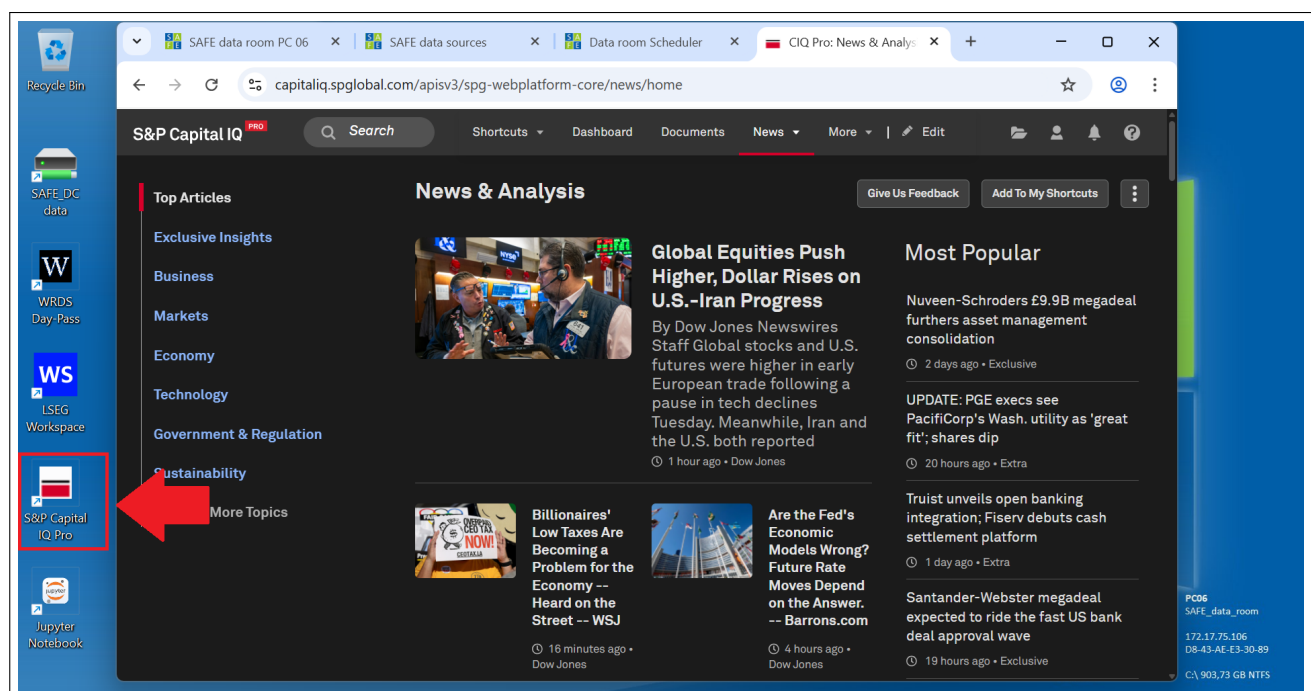
FactSet client is accessible from data room's workplace desktop; login occurs automatically



An Excel add-in is provided to download data and access templates, utilities, help and documentation.

5.2 Capital IQ Pro

'S&P Capital IQ pro' home page is accessible from data room's workplace desktop; login occurs automatically



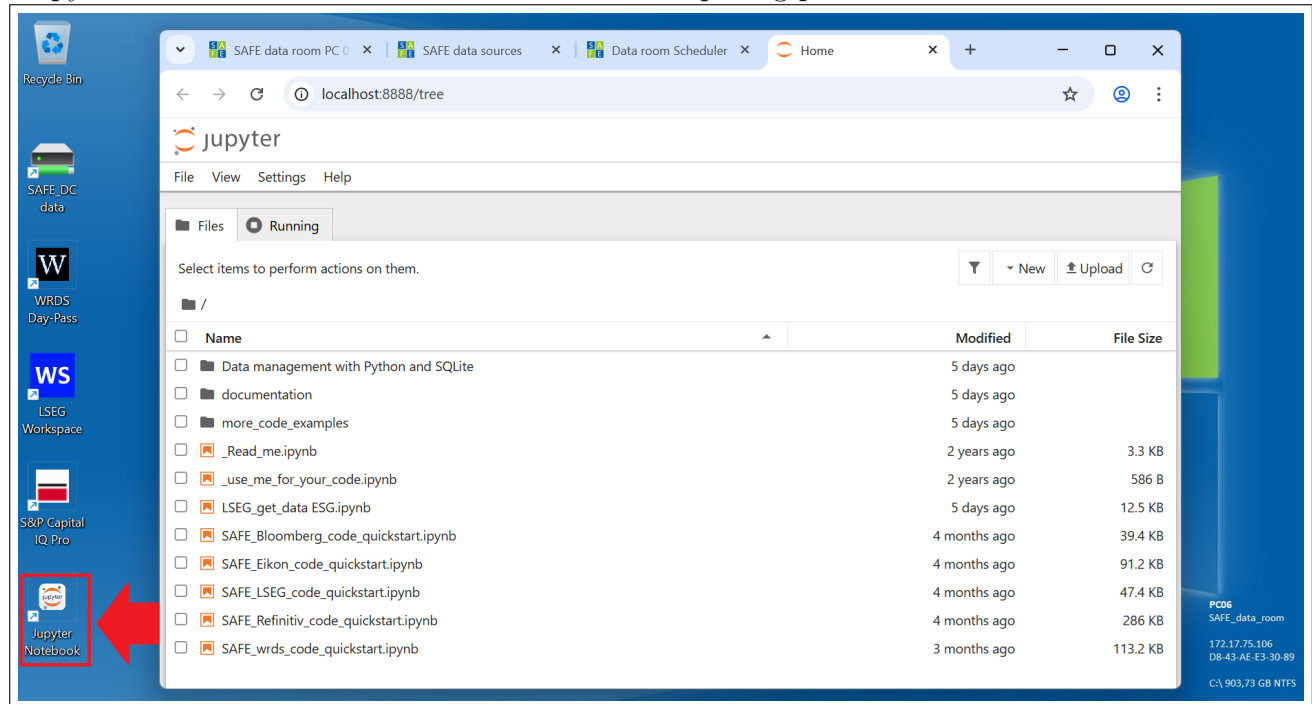
S&P Capital IQ Pro - User Guide is freely accessible.

New user training, excel training and webinars can be found in [Help Center](#) (login required) and [Platform Training Webinars](#) (registration required).

An Excel add-in is provided to download data.

5.3 Jupyter Notebook

'Jupyter Notebook' is a web-based interactive computing platform.



Here you can find documentation and Python sample code to get and manage data using Bloomberg, LSEG (Refinitiv) Workspace, WRDS, SQLite.

6 Contact

If you encounter any difficulties or just want general information, do not hesitate to contact us.

SAFE Research Datacenter: datacenter@safe-frankfurt.de

More information about the SAFE Research Datacenter can be found [here](#).

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