

# Introduction to the Data Room

SAFE Research Datacenter\*

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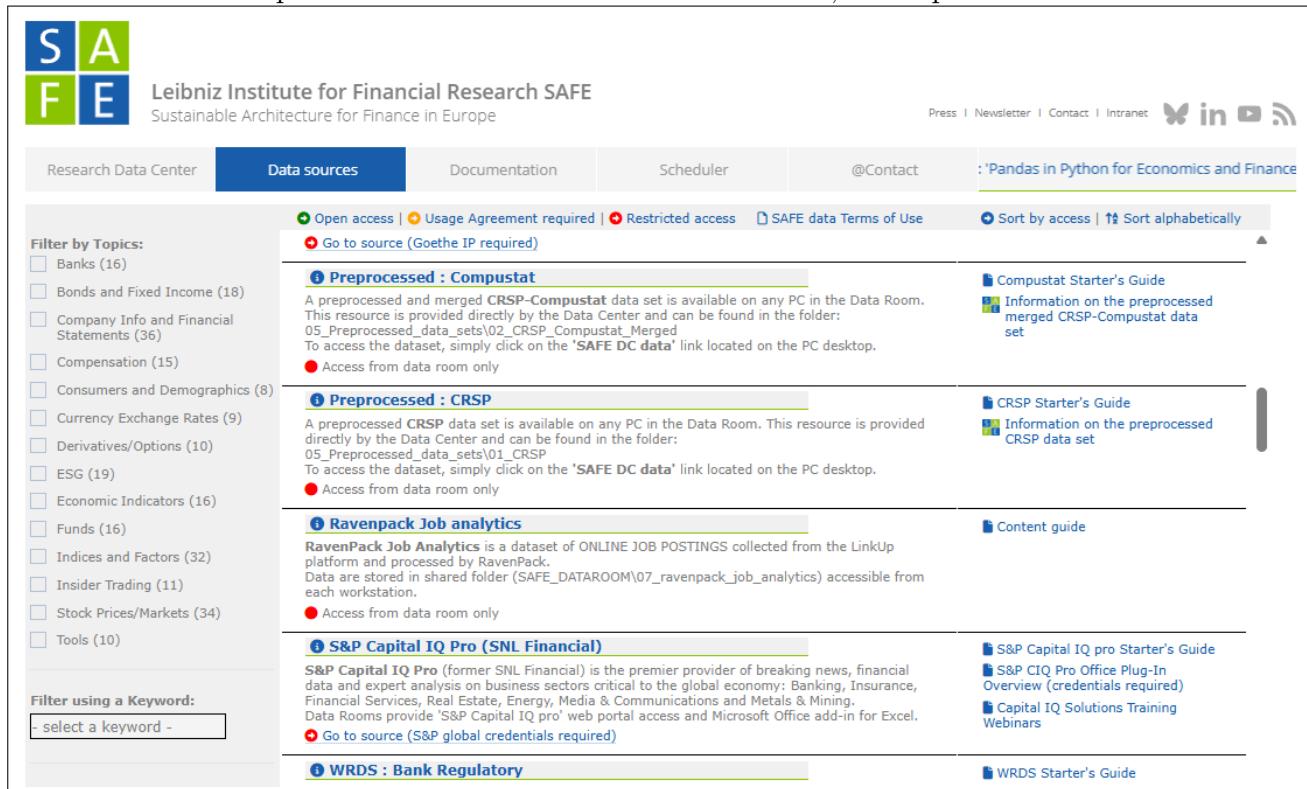
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# 1 SAFE Data room overview

## 1.1 Data sources

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



Leibniz Institute for Financial Research SAFE  
Sustainable Architecture for Finance in Europe

Press | Newsletter | Contact | Intranet

Research Data Center **Data sources** Documentation Scheduler @Contact : 'Pandas in Python for Economics and Finance'

**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)
- Economic Indicators (16)
- Funds (16)
- Indices and Factors (32)
- Insider Trading (11)
- Stock Prices/Markets (34)
- Tools (10)

**Filter using a Keyword:**  
select a keyword -

**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

**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

**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

**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)

**WRDS : Bank Regulatory**  
WRDS Starter's Guide

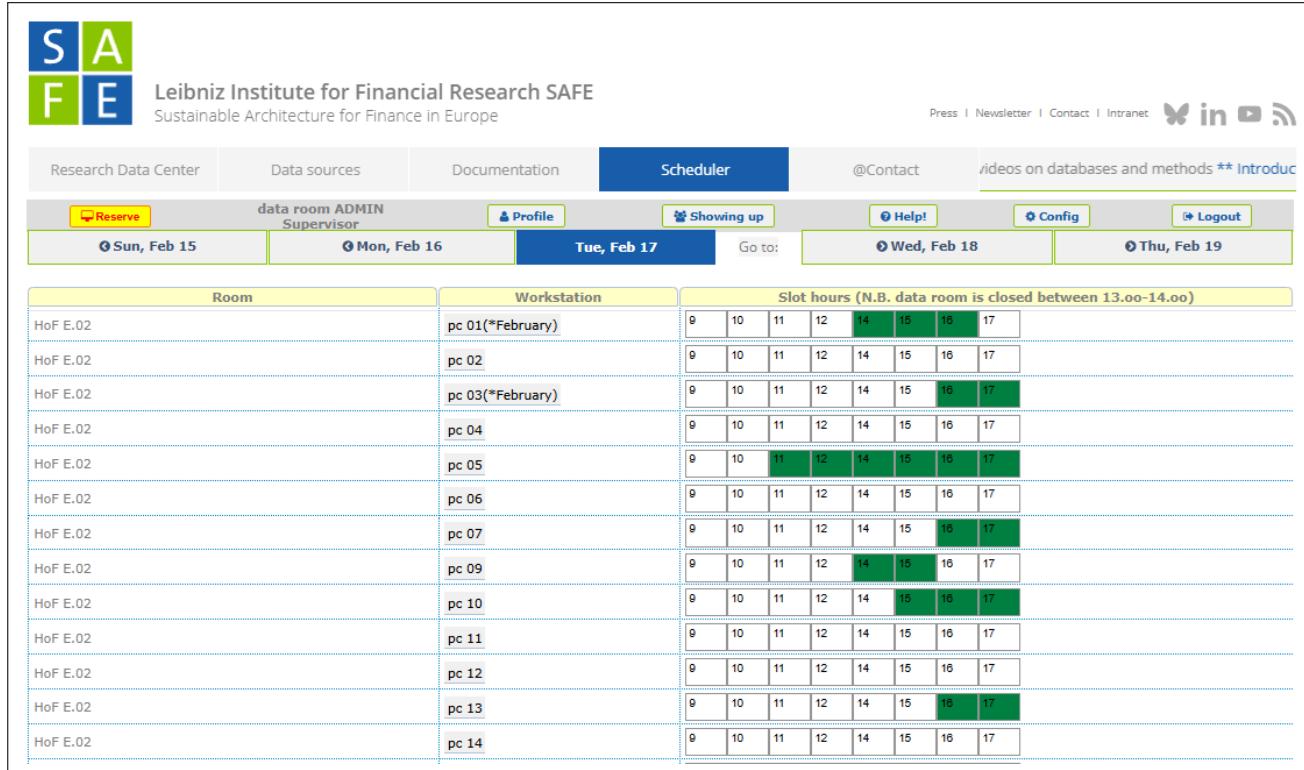
## 1.2 SAFE Data room access

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

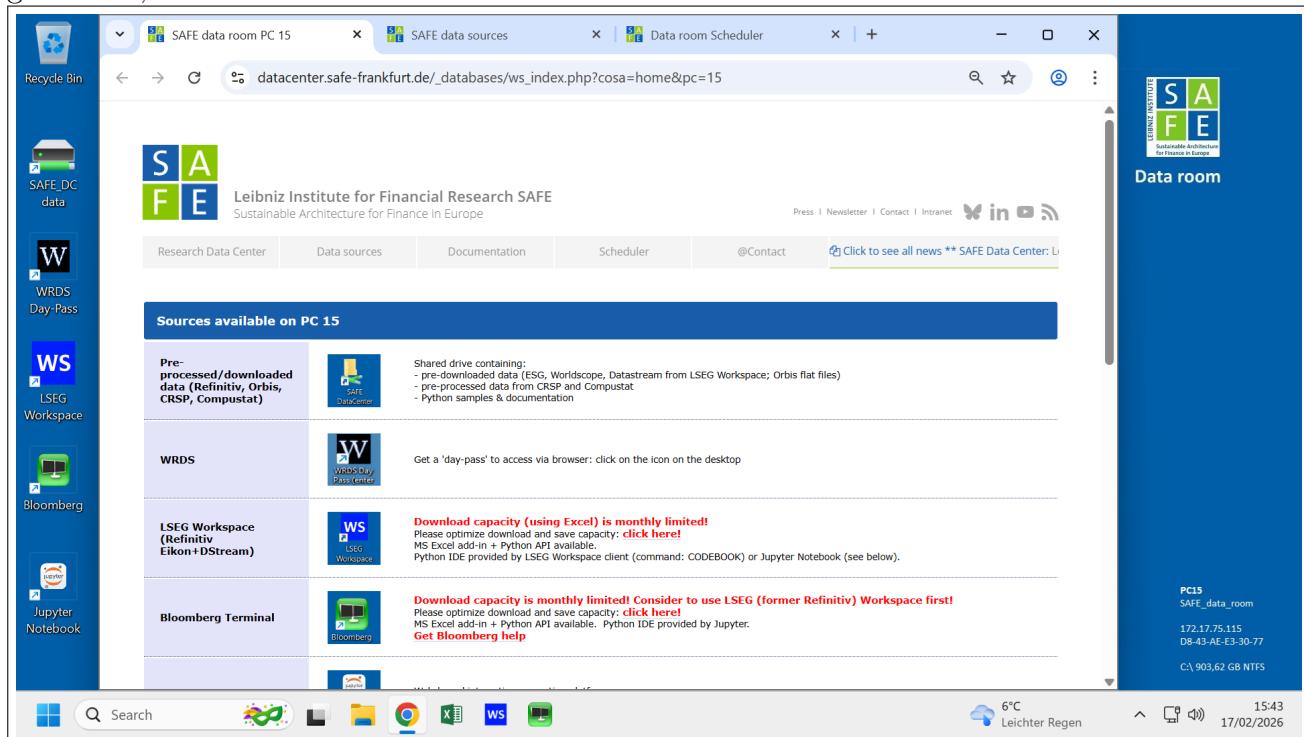
Register and reserve slots using the [Scheduler](#):



The Scheduler interface displays a grid of workstations (pc 01 to pc 14) across different rooms (HoF E.02) on a specific date (Tue, Feb 17). The grid highlights available slot hours (9-10, 11-12, 14-15, 16-17). A yellow 'Reserve' button is visible at the top left.

## 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:



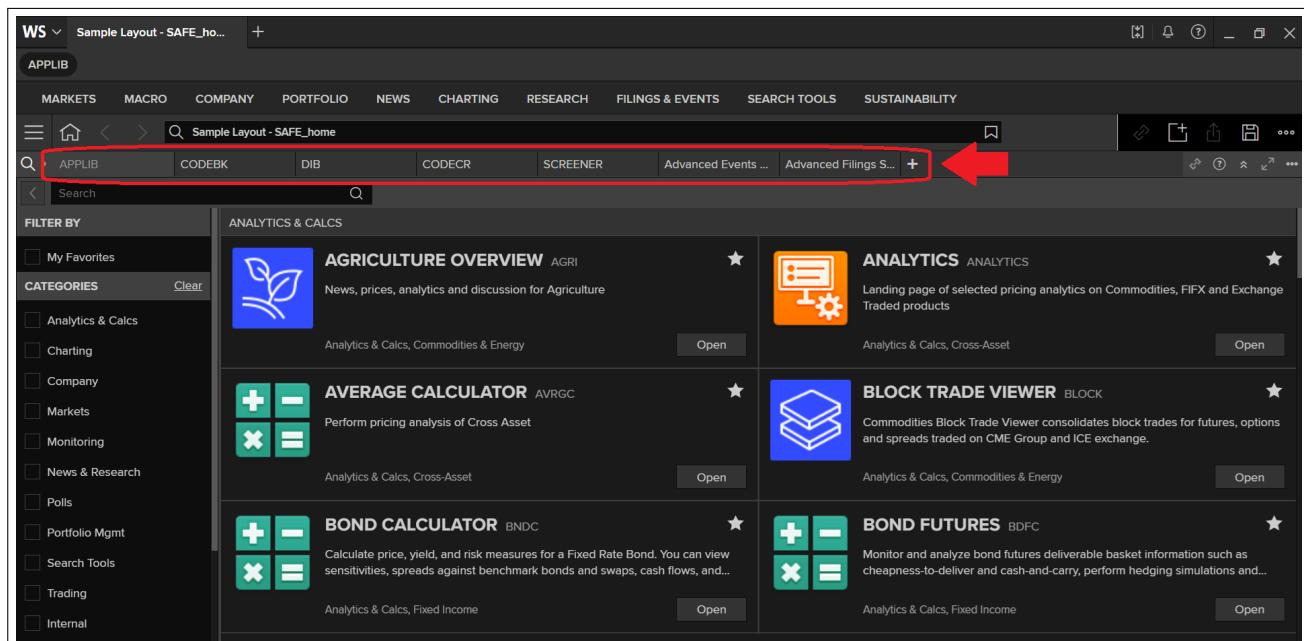
The desktop environment for a Data Room PC includes icons for various data sources (Recycle Bin, SAFE\_DC data, WRDS Day-Pass, LSEG Workspace, Bloomberg, Jupyter Notebook) and a browser window showing the 'Sources available on PC 15' page. The browser page lists available sources like SAFE Data Center, LSEG Workspace, and Bloomberg Terminal, along with their respective icons and descriptions. A vertical sidebar on the right shows the 'Data room' logo and PC15 details.

## 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 (ADVFLG), criteria based search for company filings



### 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).

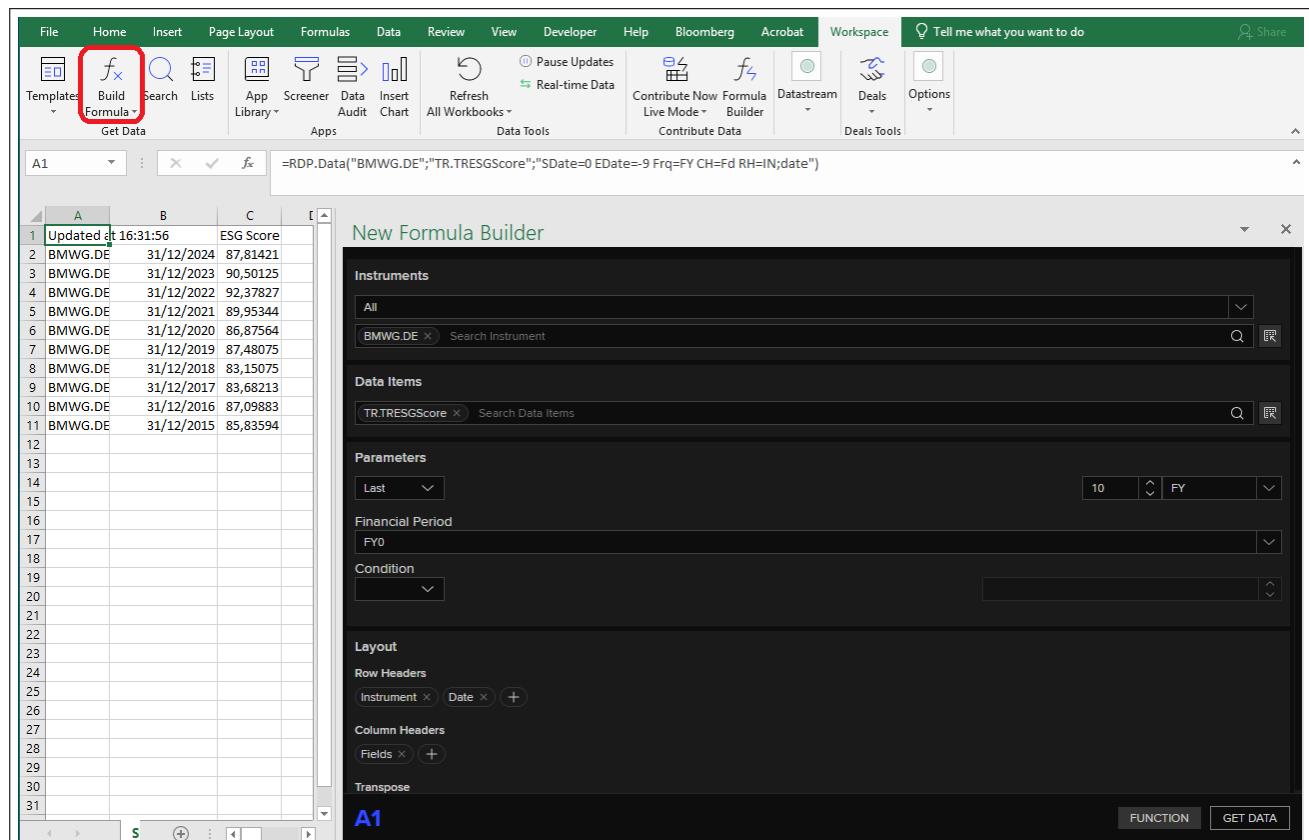
This can be an advantage because ISINs do not usually contain information about the exchange (usually they implicitly give the data points of the primary exchange, i.e. where the security is primarily traded or where the IPO took place).

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.



	A	B	C
1	Updated at 16:31:56	ESG Score	
2	BMW.G.DE	31/12/2024	87,81421
3	BMW.G.DE	31/12/2023	90,50125
4	BMW.G.DE	31/12/2022	92,37827
5	BMW.G.DE	31/12/2021	89,95344
6	BMW.G.DE	31/12/2020	86,87564
7	BMW.G.DE	31/12/2019	87,48075
8	BMW.G.DE	31/12/2018	83,15075
9	BMW.G.DE	31/12/2017	83,68213
10	BMW.G.DE	31/12/2016	87,09883
11	BMW.G.DE	31/12/2015	85,83594
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## 2.3 Monthly Downloading Limit

**Excel:**

10 million data points per month in Datastream/Workspace

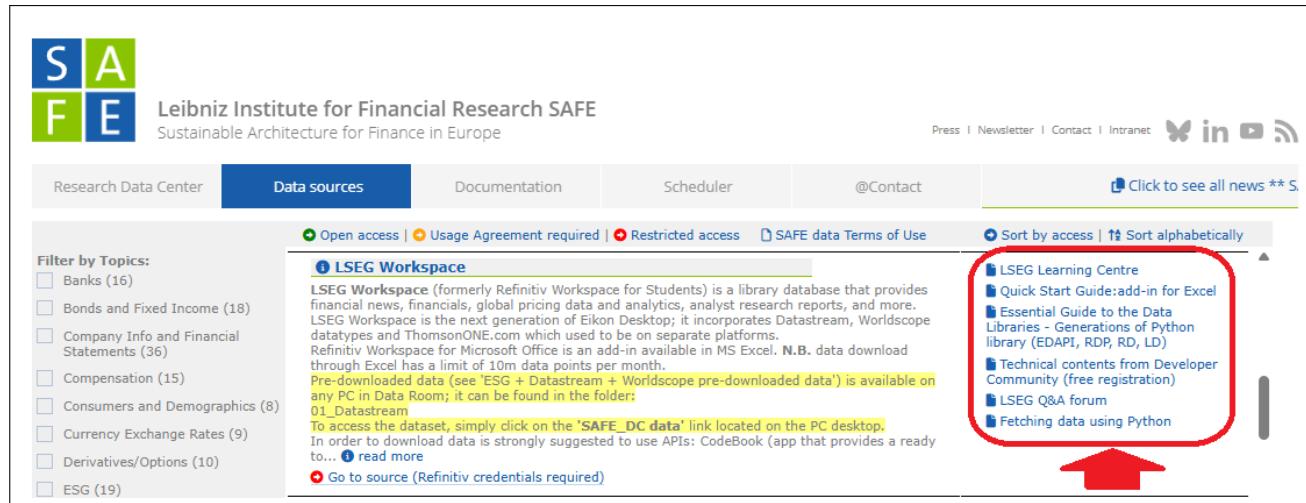
Datapoints = Universe · Fields · time points

**(Python) API:**

(nearly) unrestricted

## 2.4 Useful links and documentation

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



Leibniz Institute for Financial Research SAFE  
Sustainable Architecture for Finance in Europe

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

Press | Newsletter | Contact | Intranet    

**Filter by Topics:**

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- 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)

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

**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 \(Refinitiv credentials required\)](#)

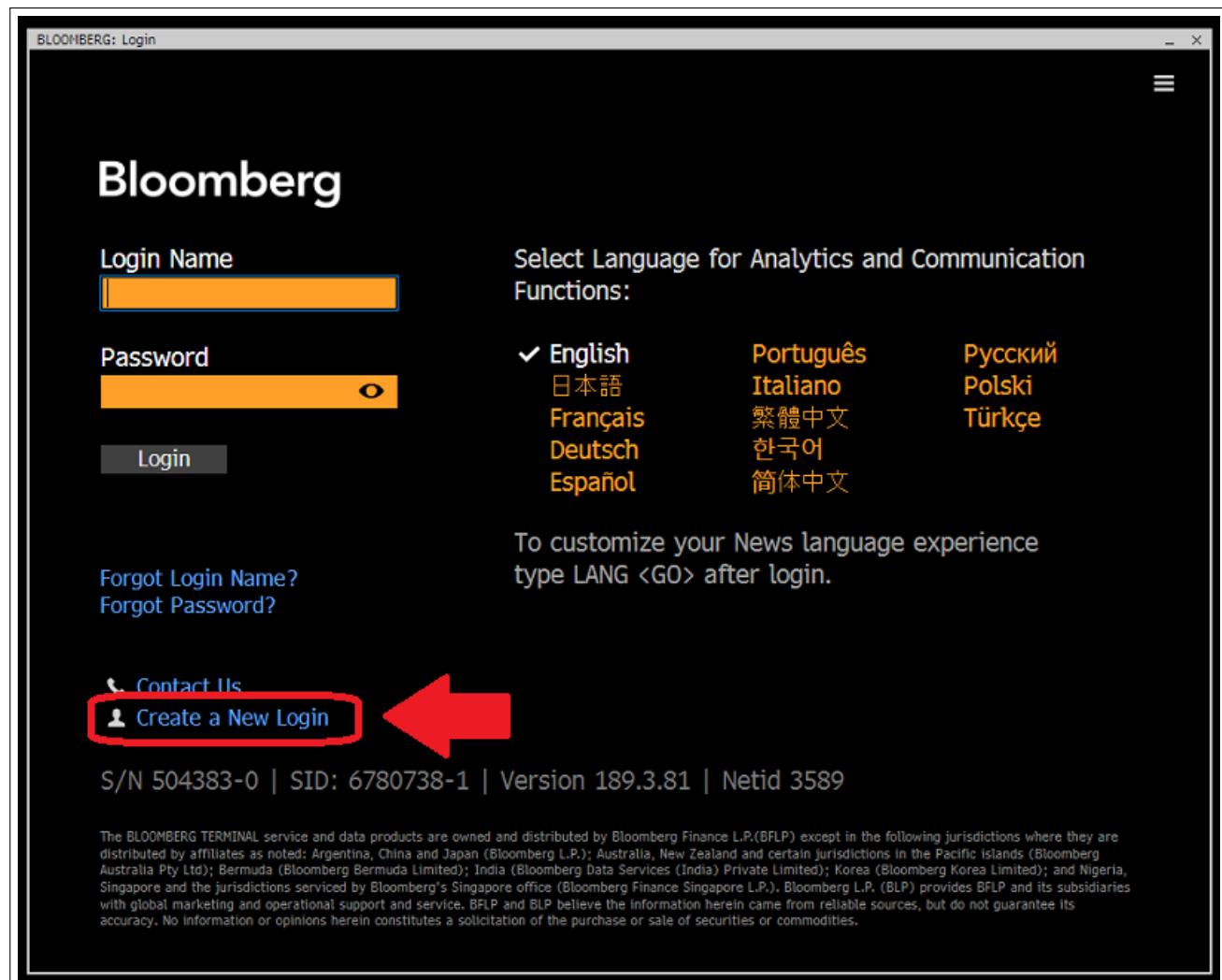
**LSEG Learning Centre**

- [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.



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

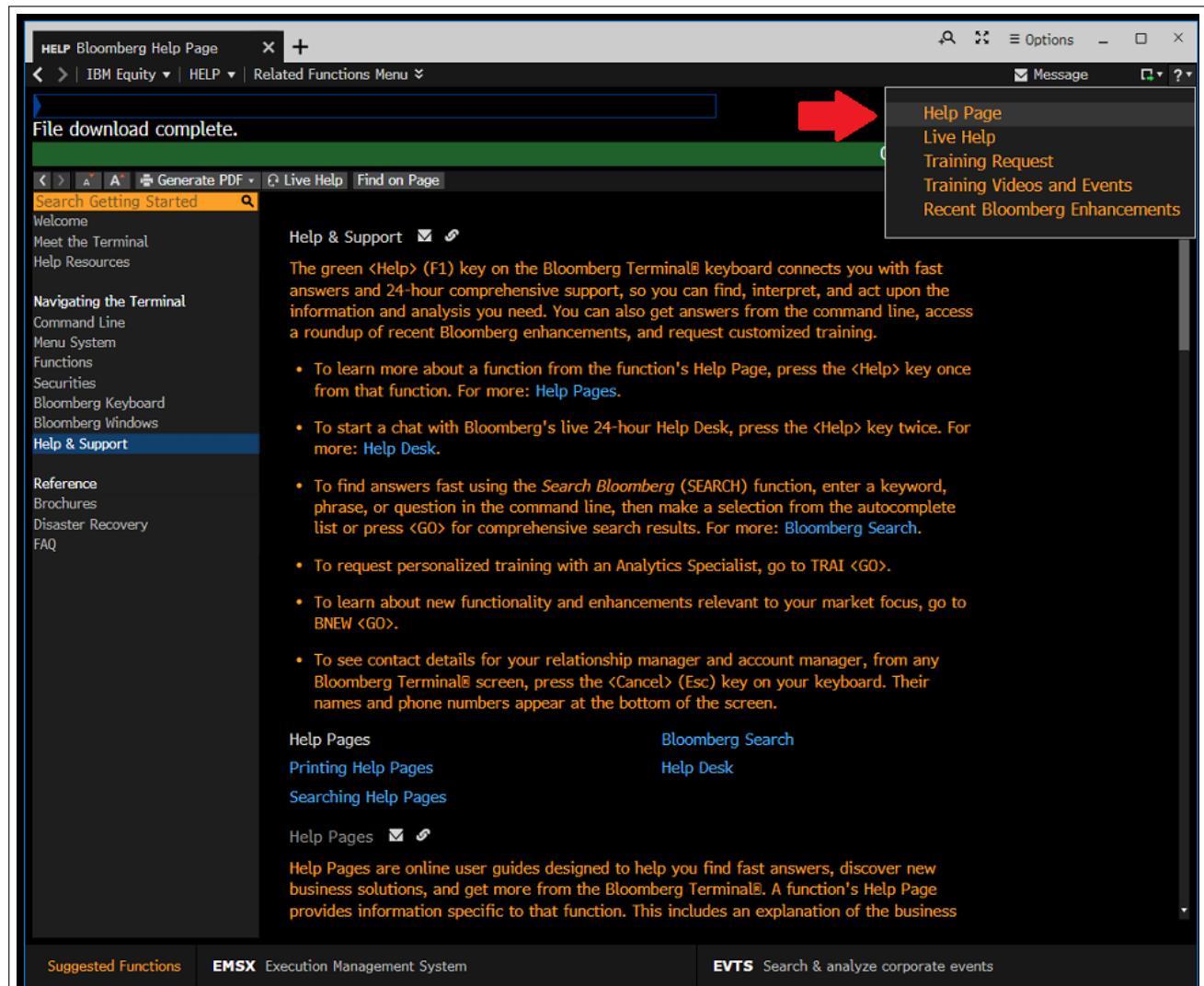
The screenshot shows the Bloomberg Terminal's 'Welcome' page. At the top, there is a navigation bar with 'New Tab', a search bar, and various menu options like 'Options', 'Message', and '?'. Below the navigation bar is a grid of five rows of functions:

HDSK	TOP	DOCS	FRNT	HELP
Help Desk	Top News	Bloomberg Documents	Front Page	Bloomberg Help Page
LANG	DES	MSG	GP	GIP
Language Preferences	Security Description	Message	Line Chart	Intraday Price Chart
>> Tips				
<b>Cycle Through Your Windows</b> Cycle through all of your Bloomberg windows.				
<b>Open a Link in a New Tab or Window</b> Right-click a link to open it in a new tab or window.				
<b>Find an Answer Fast</b> Search all of Bloomberg by typing your query in the command line.				

Below the grid, there are three sections labeled 'Tips' with corresponding descriptions and screenshots:

- Cycle Through Your Windows**: Describes how to cycle through Bloomberg windows using keyboard shortcuts (Ctrl [ and Ctrl ]). It includes a screenshot of the Bloomberg interface showing multiple windows.
- Open a Link in a New Tab or Window**: Describes how to right-click a link to open it in a new tab or window. It includes a screenshot of a context menu with options like 'Open in New Tab' and 'Copy Link'.
- Find an Answer Fast**: Describes how to search all of Bloomberg by typing a query in the command line. It includes a screenshot of a search results page for 'MICROSOFT ESG'.

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



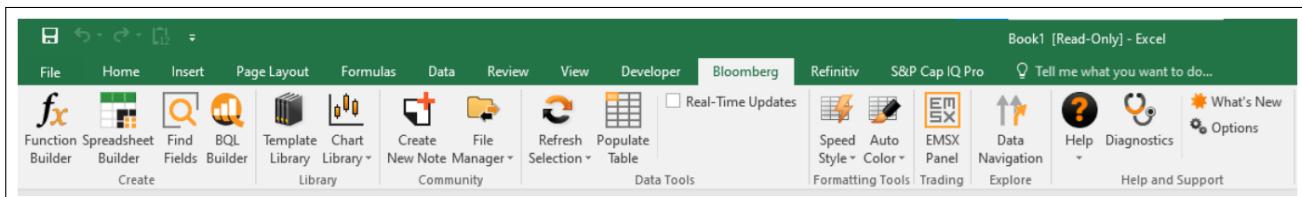
Bloomberg provides different types of support resources to help you quickly find the answer to your questions.

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:

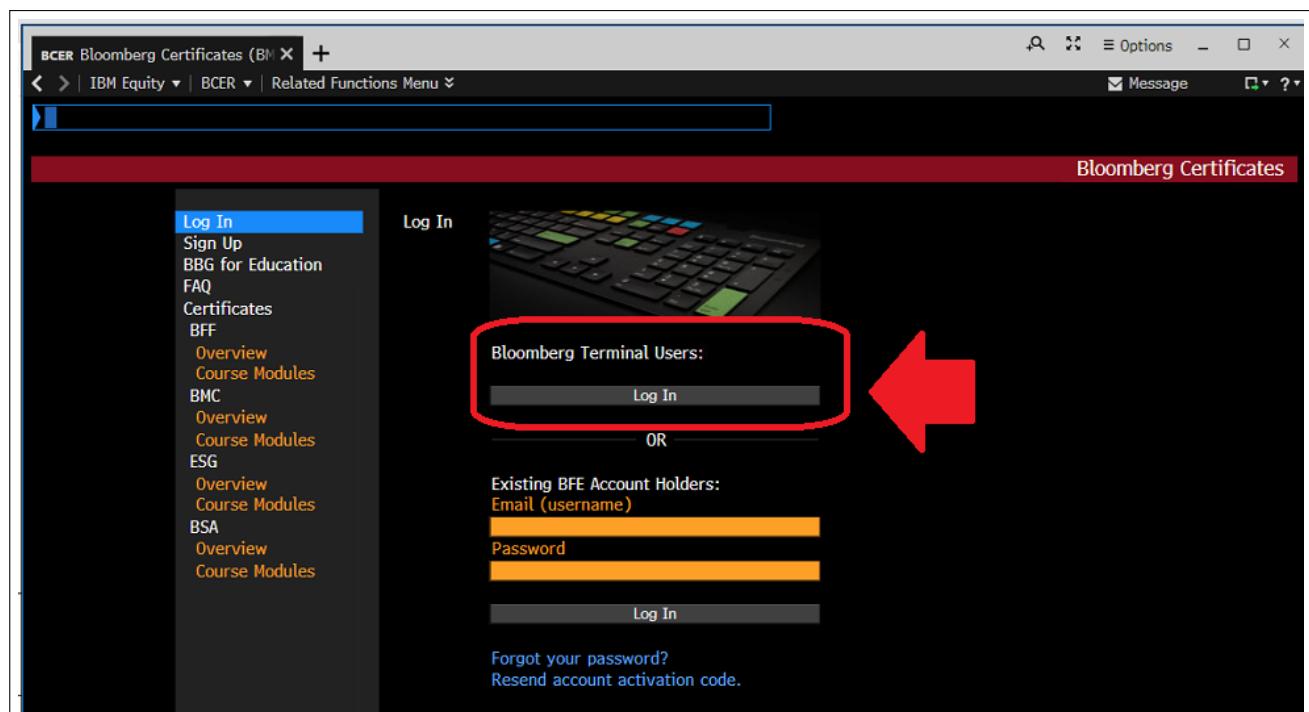
- Optimize queries to reuse the same securities rather than repeatedly introducing new ones.
- Use BDH (historical download) rather than repeated BDP cells in Excel to reduce usage.
- Consider batching and copying data instead of refreshing repeatedly.

### 3.4 E-learning courses, seminars and events

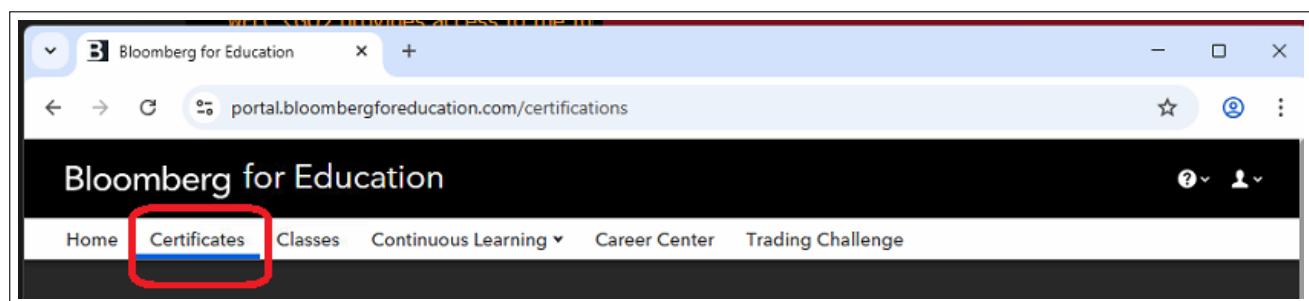
Bloomberg provides access to courses at no extra cost. Upon finishing each program, a certificate of completion is issued. Available courses are :

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

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



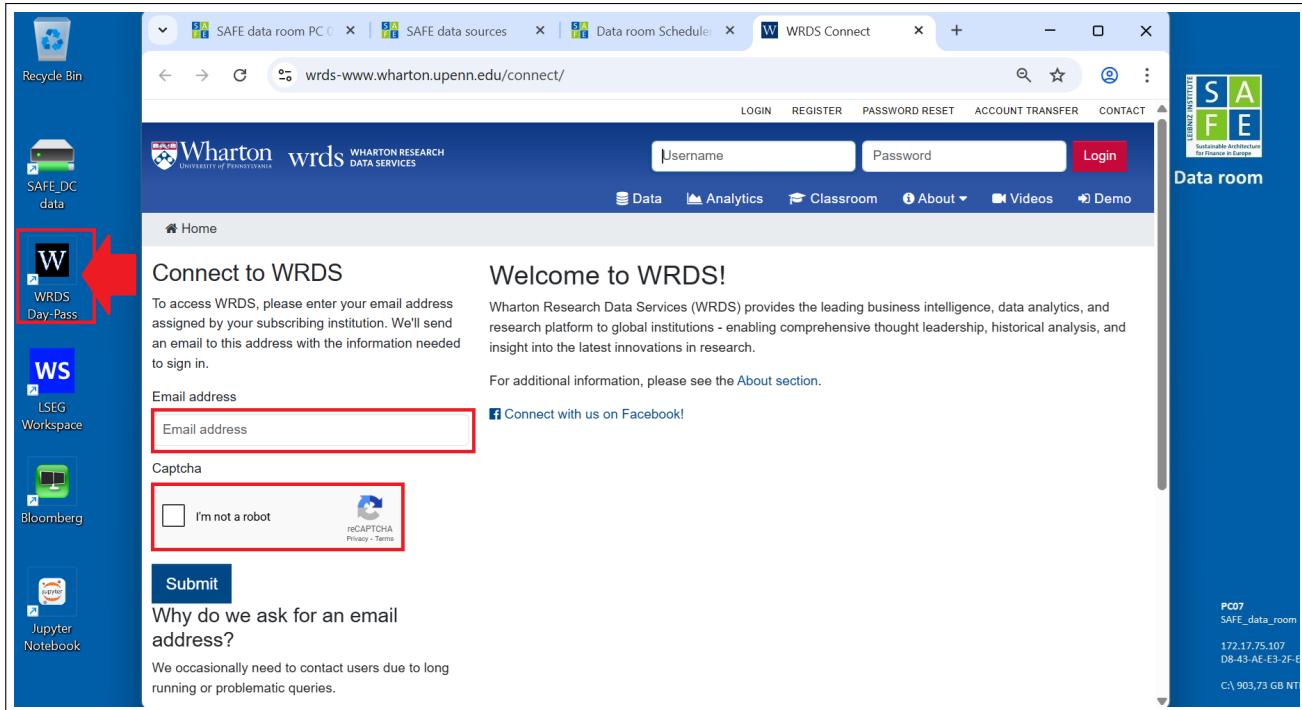
A web-session will be opened in the browser; be sure to select "Certificates" to access the courses



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".

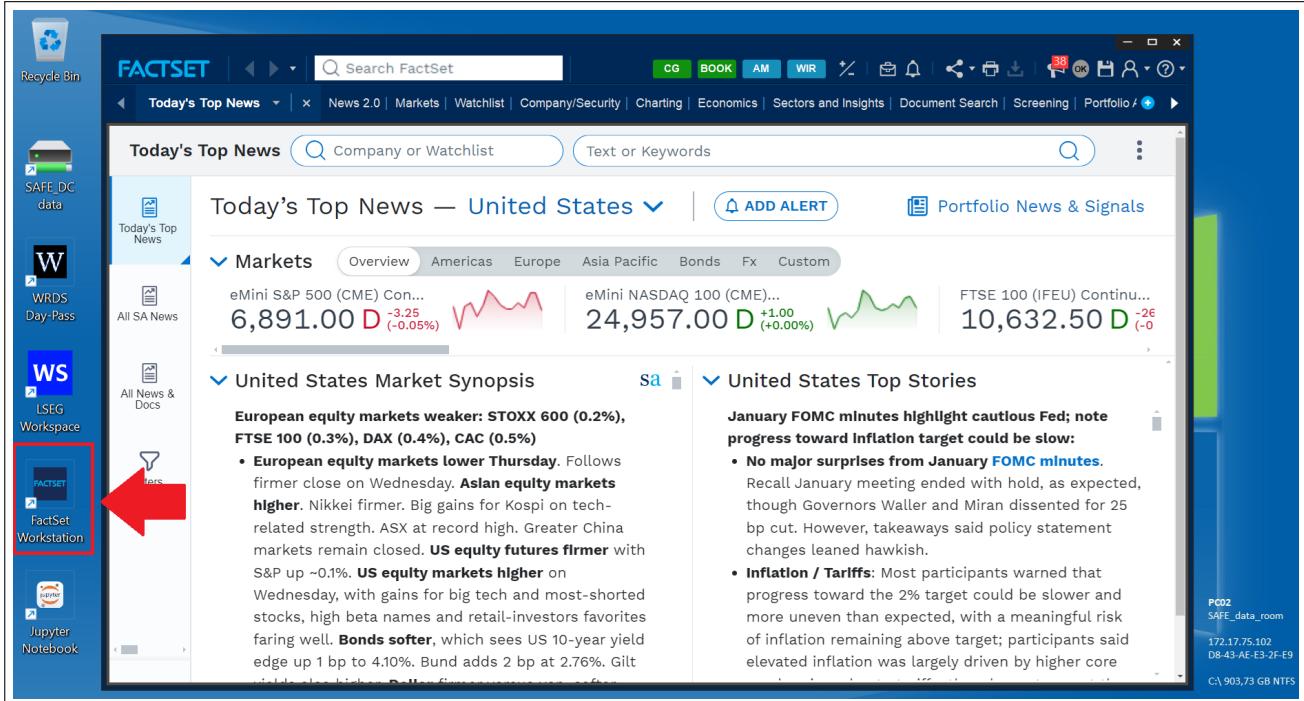


See details in [Accessing Wharton Researcher Data Services platform](#).

# 5 Other databases and tools

## 5.1 Factset

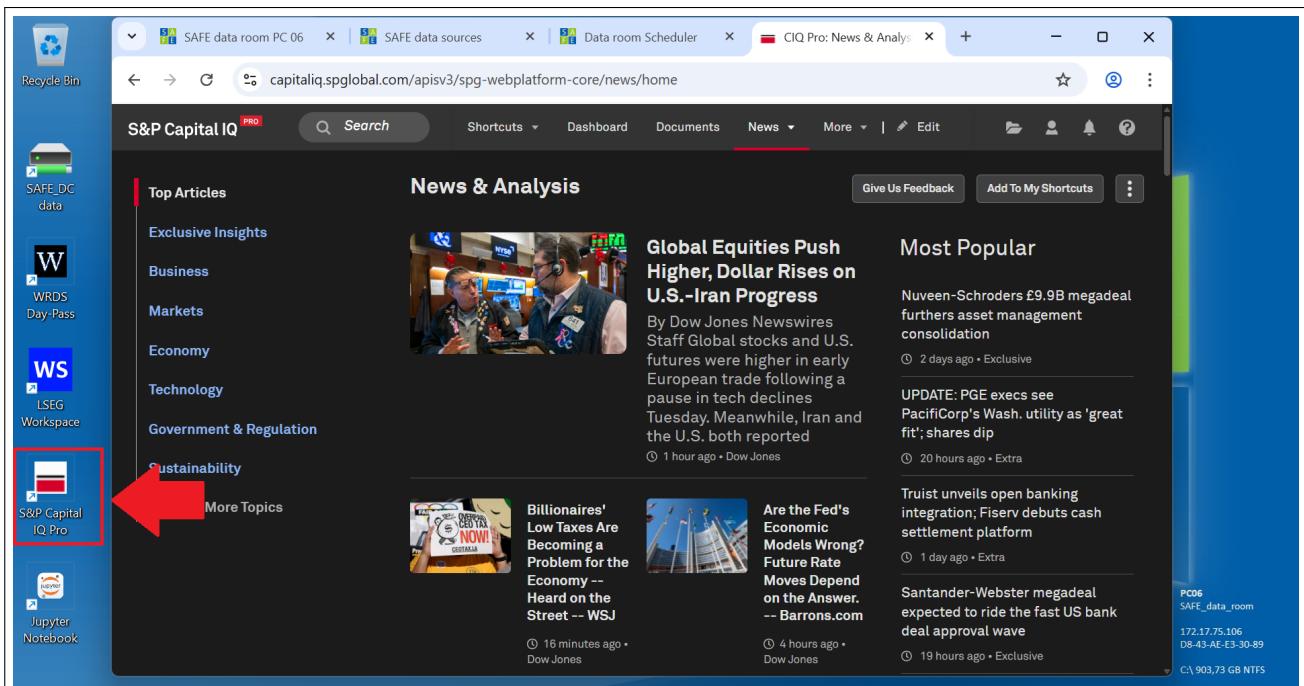
FactSet client is accessible from data room's workplace desktop; login occurs automatically



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



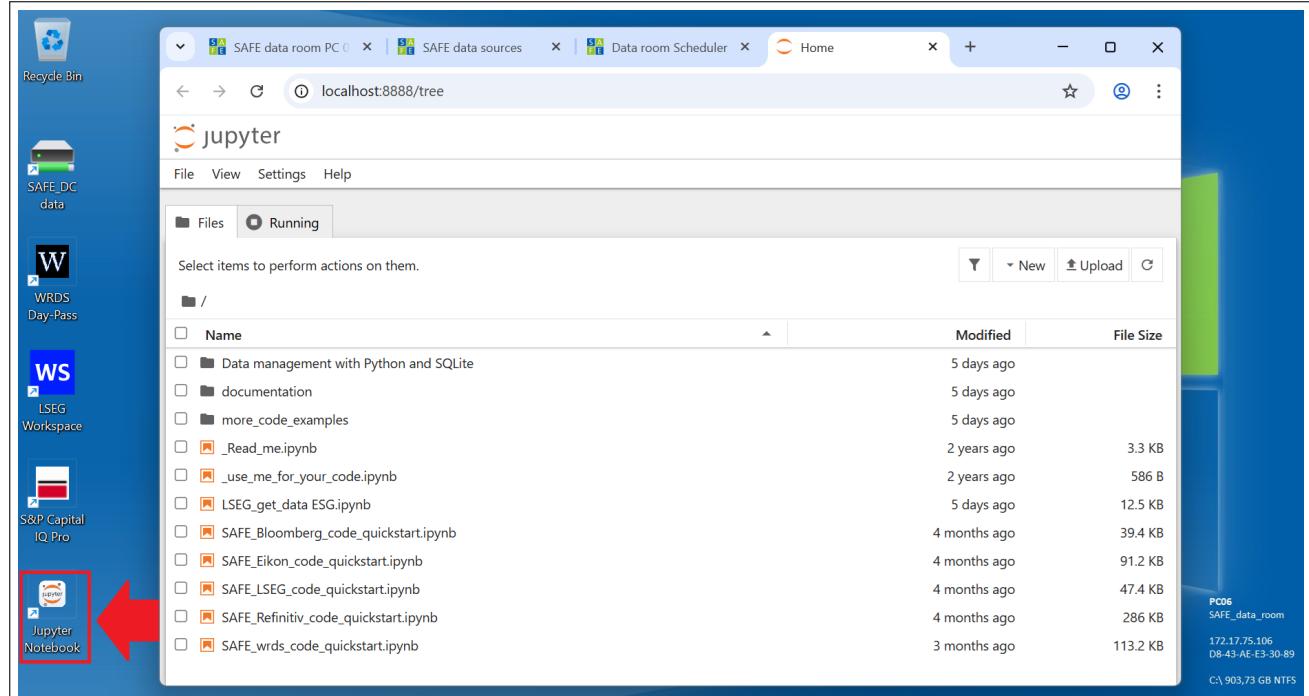
[S&P Capital IQ Pro - User Guide](#) is freely accessible.

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](mailto:datacenter@safe-frankfurt.de)

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

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