This step-by-step guide will take you through the process of exporting data from within Bloomberg for use and analysis away from the terminal

To follow these steps, you will first need to log-in to Bloomberg on one of the dedicated terminals available in the Information Centre.

As you go through this guide you will see that the menu structures within Bloomberg change from screen to screen and the locations of the exporting options vary.

To illustrate these different options within this guide we have focused on exporting data from a particular security, however the steps here can be applied to many other areas within Bloomberg. Remember: just because the menu options do not appear to be the same as previous screens you may have looked at does not mean that the data cannot be exported.

Exporting Data into Excel: Output

It is possible to export and save the raw data that is used to populate the tables and graphs of information that you can find within Bloomberg into an Excel worksheet.

The table in Figure 1 shows the key financial statistics for a particular security.

This data can be exported into Excel for comparison or use outside of the Bloomberg terminals by selecting menu '97) Output' and following the path listed here:

- 97) Output > Excel > 73) Current Template

Selecting Current Template will cause Excel to open in the background and the data to appear in a blank worksheet.

Note: If an error message pops up asking you to verify the file is not corrupted click yes.

Figure 1: Output

Exporting Data into Excel: Copy Data to Clipboard

Figure 2 shows a graph, created using the GP function, comparing the performance of two equities against an index. In Bloomberg it is possible to switch between the graph view and the underlying table of data on the screen but what do you do if you need to take that data away for analysis and use outside the terminal?

You can see that in this screen there is no menu titled 'Output' like we saw in Figure 1. There are several exporting options from different menus in this screen, including the option to export as JPEG or PDF (see below), however none of these mention Excel directly.

While there is no specific option in this case to export directly to Excel following menu '97) Edit' the option to 'Copy Data to Clipboard' is present which can be used to the same effect.

To export the data in this case you need to click on 'Copy data to Clipboard' then open a blank Excel worksheet and manually paste the data using the icon in the menu bar or the 'CTRL + V' keyboard shortcut.

Figure 2. Edit

Figure 3 shows an alternative method of locating the 'Copy Data to Clipboard' function.

In this case right click over the graph or table that you wish to export and look for 'Copy/Export Options' from the resulting menu.

Follow this path to locate the option to 'Copy Data to Clipboard' and then paste into Excel as above.

Note: As you have seen the menu options and location can vary from screen to screen within Bloomberg. If you are looking to export data and can't see the menu's shown above, don't be disheartened – try looking at all of the menu options within the screen to look for the 'Copy Data to Clipboard' function.
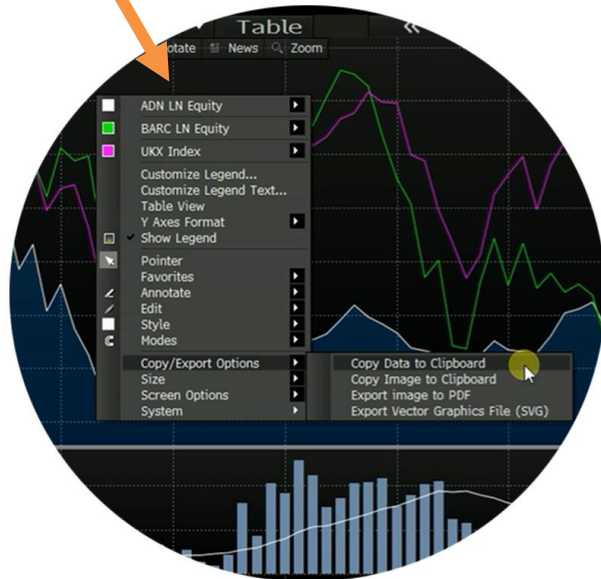
Figure 3. Right click

Exporting Data as an Image

It is also often possible to export graphs and tables of data as JPEG or PDF image files.

Again the options for this change their location depending on the screen you are looking at. In Figure 1 you can see the option to export the table as a PDF file in the same menu as the option to export the data to Excel. In Figure 2 this option is not present in the menu shown.

Figure 4 shows that, in this case, the option to export an image of the graph is found by following the menu path:

- 96) Actions > Export

Note: Excel is not included in the list of export options here as you may reasonably expect – it is necessary to follow the 'Copy Data to Clipboard' instructions mentioned above.

Figure 4. PDF & JPEG

This guide shows that the locations and options for exporting data from within Bloomberg vary from screen to screen depending on the exact function you are looking at. If none of the options listed here are available for the data you are looking to export, remember to look in all of the menus on the page you are looking at.

Also, remember that you can export data directly using the plug-in available in Excel. See the guide: 'Exporting Data From Bloomberg Using Excel' for details.