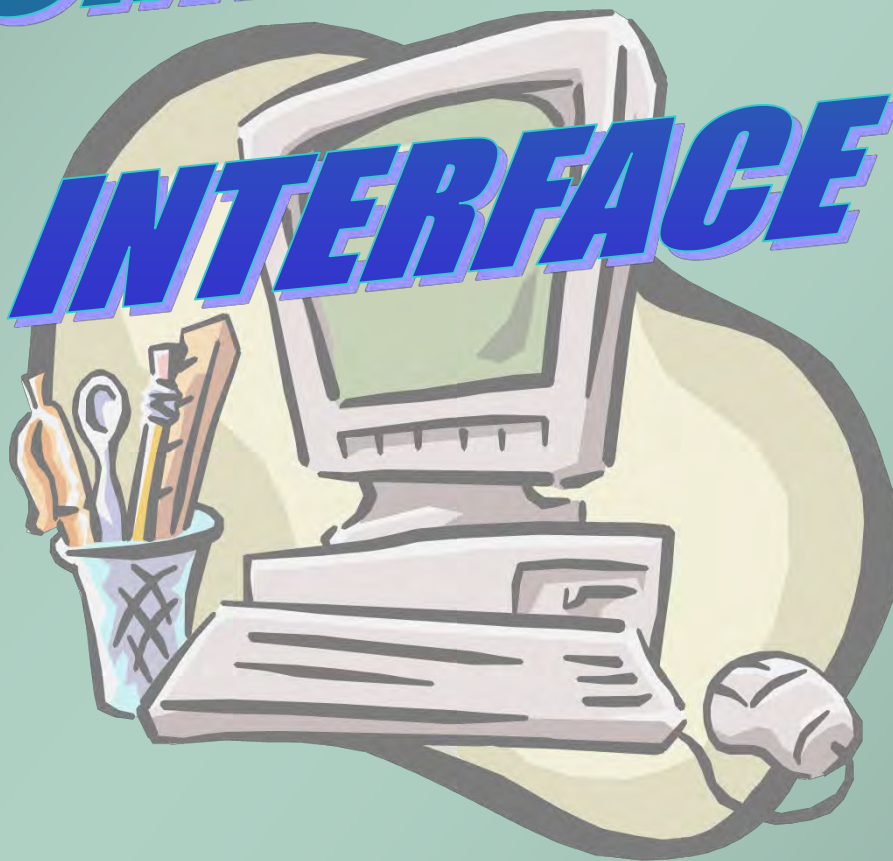


COMMENTARY



INTERFACE

Author: Jaime Szumski

COMMENTARY INTERFACE

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PART 1

What You Need to Know

In this section, you will learn:

- An Overview of Commentary
- An Overview of the Commentary Interface Program
- What You Need to Work in the Program
- How to Open the Program
- The Program Work Environment



AN OVERVIEW



■ WHAT IS COMMENTARY?

- Commentary is an interpretive markup language used to design and create screens exclusively for the Bloomberg.
- The commentary language is based on a 23 row x 80 column grid and uses various commands that all begin with a tilde (~).
- Commentary commands, or codes, are saved in a commentary file and uploaded on the Bloomberg.
- A commentary screen is the Bloomberg's interpretation of the text and codes saved in the file.

■ WHAT IS THE COMMENTARY INTERFACE?

- The Commentary Interface is a tool for creating and maintaining commentary-based screens on the Bloomberg.
- The Commentary Interface conforms to commentary standards and generates reliable commentary code.
- While the commentary codes are generated behind the scenes, you can quickly create and format text, work with the background color and borders, add links, images or multimedia, and much more.

■ SOFTWARE APPLICATIONS

- Microsoft Excel
- The Bloomberg
- Comtzapn (upload software) – to request, submit an <ISHD>.

Commentary Interface Contacts :

Jaime Szumski : (803) 3494

Tim Mazzella : (803) 5427



GETTING STARTED



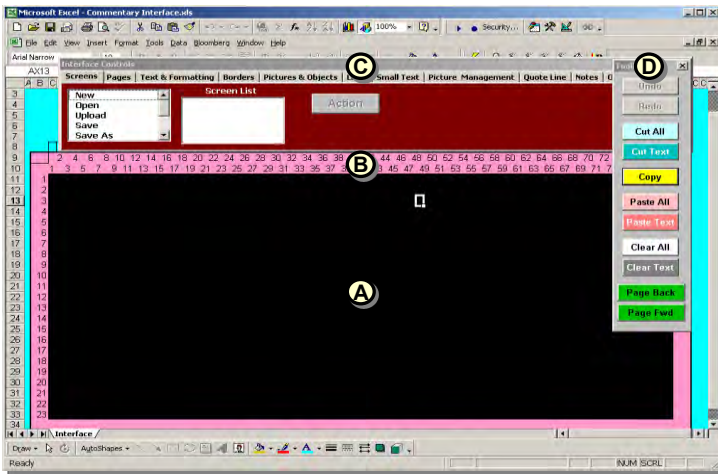
OPENING THE COMMENTARY INTERFACE

- 1) Open **MS Excel**.
- 2) From the **File** menu, select **Open**.
- 3) At the **Open dialog**, browse to the location where "*Commentary Interface.xls*" is saved and double-click to open it.
- 4) If the **Security Warning** dialog opens, click **Enable Macros**.
- 5) Right-click on the spreadsheet and select **Launch Control Panel**, then right-click again and select **Launch Toolbar**.



Note: If "**Launch Control Panel**" or "**Launch Toolbar**" is not listed in the right-click menu, check the Security level setting in Excel (see instructions below) :

The Commentary Interface program opens and looks something like this:



Check Security Instructions:

- 1) Close *Commentary Interface.xls*.
- 2) In Excel, from the **Tools** menu, go to **Macros**, then select **Security**.
- 3) At the **Security** dialog, select either **Low** (to always enable macros), or **Medium** (to choose whether or not to run macros).
- 4) Click **Ok**.
- 5) Open *Commentary Interface.xls*.



Note: You do not need to save "*Commentary Interface.xls*" when you close it. All settings in the Control Panel are automatically saved, so they can be restored the next time you open the program.

GETTING TO KNOW THE COMMENTARY INTERFACE

- Ⓐ Template Screen – displays the active screen currently open in the program. You will not be able to type or make changes to your screen directly on the template itself, rather, you must go through the control panel to make any changes.
- Ⓑ Screen grid – displays a 23 row x 80 commentary screen grid.
- Ⓒ Control panel – almost all aspects of working with a screen is done through the control panel. The control panel provides access to the various options and controls available in the program, and organizes them by tabs based on their purpose.
- Ⓓ Toolbar – provides quick and easy access to some of the most commonly-used commands.

PART 2

Working With Screens and Pages

In this section, you will learn:

- How to Create, Open and Close Screens
- How to Save and Upload Screens
- How to Copy and Rename Screens
- How to View the Commentary Code for Screen
- How to Add and Copy Pages to Your Screen
- How to Reorder Pages
- How to Exclude and Delete Pages
- How to Rename Pages



SCREENS TAB

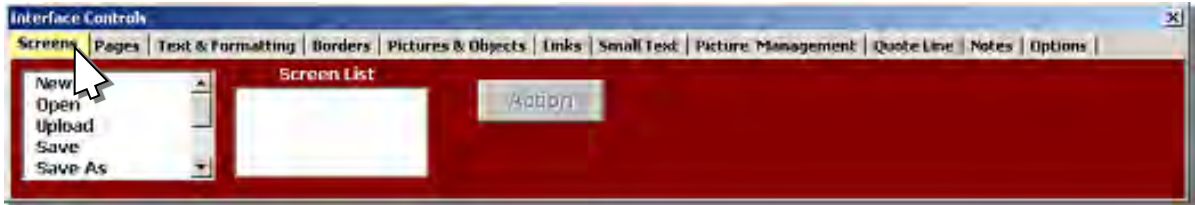


ABOUT THE SCREENS TAB

Use the **Screens** tab to access and manage commentary screens in the Commentary Interface.

To access the Screens tab:

- Click the **Screens** tab at the top of the control panel.



- Take a moment to study the features at this tab:

Screens menu: Provides options to create, open, upload, save, close, copy, rename, or view the code for a commentary screen.

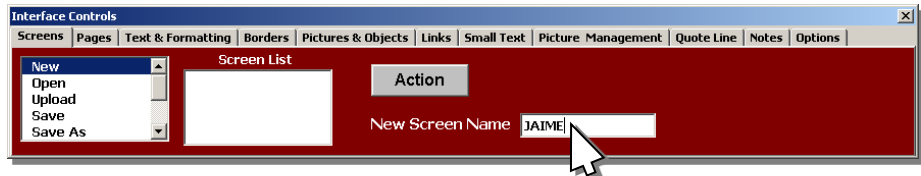
Screen List: Displays the screens currently open in the Commentary Interface program. To select a screen, click the screen name in the list.

CREATING A NEW SCREEN

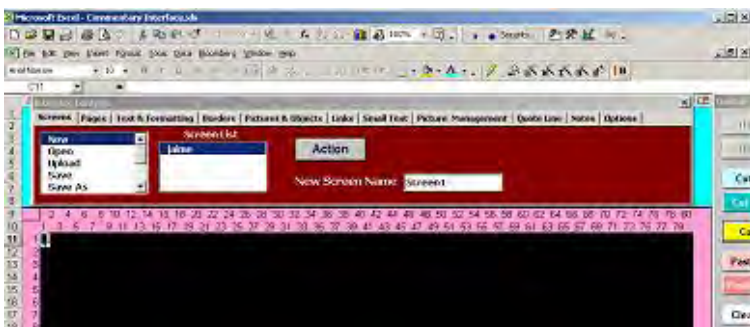
Before you begin work on your screen, you must either open an existing screen, or create a new screen. Creating a new screen opens a blank screen in the template.

To create a new screen:

- From the **Screens** tab, select **New** on the menu.
- In the **New Screen Name** box, type the new screen name (8 characters or less).
- Click **Action**.



The new screen is opened on the template and added to the **Screen List**.



OPENING A SCREEN

In general, each commentary screen is its own commentary file (.BCM/.BMM). When you open a commentary file, the commentary codes in the file are decrypted and the resulting screen opens on the template.

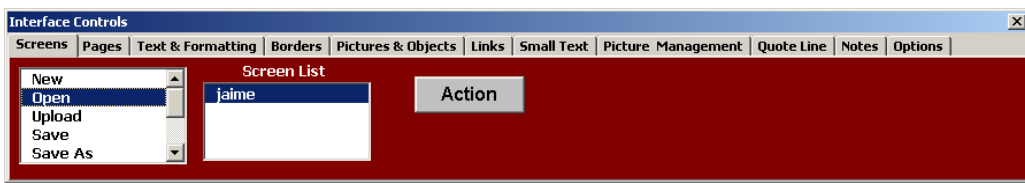
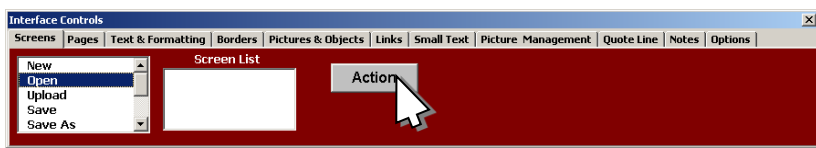
To open an existing screen:

- 1) From the **Screens** tab, select **Open** on the menu.
- 2) Click **Action**.

The **Open Commentary File** dialog opens.

- 3) Browse to the drive/folder where the commentary file is located and double-click to open it.

The screen is opened on the template and added to the **Screen List**.



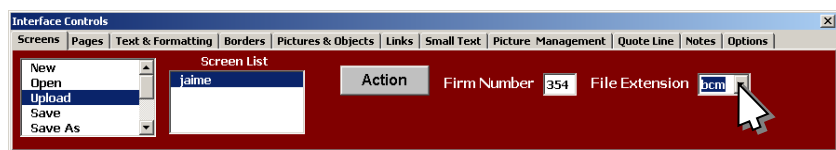
UPLOADING A SCREEN

After you complete work on your screen, you need to upload it to view it on the Bloomberg. Uploading a screen compiles a commentary file, then uses comtzapn software to upload the file to the Bloomberg.

To upload a screen:

- 1) From the **Screens** tab, select **Upload** on the menu.
- 2) Enter the following information:

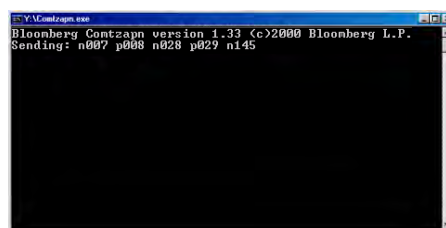
- In the **Firm Number** field, type the firm number.
- In the **File Extension** field, select a file extension from the dropdown (if necessary).



- 3) Click **Action**. (Notice the compile status is shown in the bottom-left toolbar of MS Excel.)

Once the file is compiled, an MS-DOS window opens and uploads the file...

The screen is uploaded to the Bloomberg.



Note: You do not need to save your screen before you upload it. Upload files are saved in a special folder, called "UploadFiles", which is found in the folder where the Commentary Interface is saved.

SAVING A SCREEN

You can save any screen currently open in the Commentary Interface. Saving a screen compiles and saves a commentary file (.BCM or .BMM). The name of the compiled commentary file is based on the current name of your screen.

To save a screen:

1) From the **Screens** tab, select **Save** on the menu.

2) Click **Action**.

If the screen has not been saved yet, the **Save As Commentary File** dialog opens, otherwise the screen is saved.



To save a screen using a different name, file extension, or PC location:

1) From the **Screens** tab, select **Save As** on the menu.

2) Click **Action**.

The **Save As Commentary File** dialog opens.

3) Change any of the following fields:

- **Save in:** Browse to the new drive/folder location.
- **File name:** Type the new file name, without the extension.
- **Save as type:** Select the file extension from the drop-down list.

4) Click **Save**.

The screen is saved.



CLOSING A SCREEN

Once you are done work on your screen, you can close it. When you close a screen, the screen name is removed in the **Screen List**.

To close a screen:

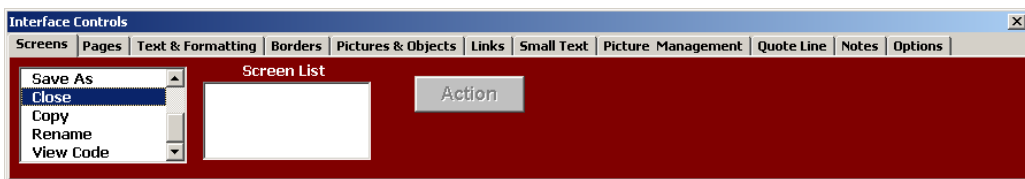
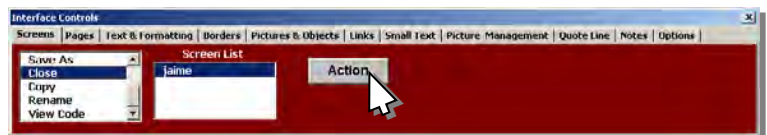
1) From the **Screens** tab, select **Close** on the menu.

2) Click **Action**.

The **Close Screen** dialog opens.

3) Click **Yes** to save and close the file.

The screen is closed on the template and removed from the **Screen List**.



COPYING A SCREEN

You can copy existing screens using a different name and then modify the new one to make it unique. This is a helpful technique for setting up numerous screens under a single Bloomberg function.

To copy a screen:

- 1) From the **Screens** tab, select **Copy** on the menu.
- 2) In the **New Name** box, type the screen name.



- 3) Click **Action**.

The copied screen is opened on the template and added to the **Screen List**.

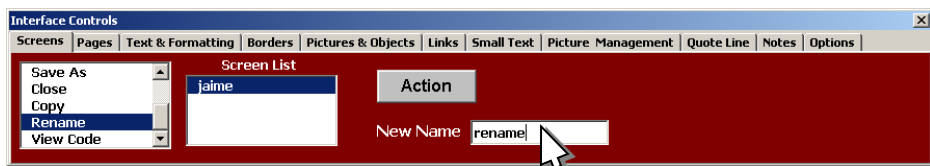


RENAMING A SCREEN

You can change the name of a screen by renaming it. When you rename a screen, you also change the name of the compiled commentary file if you save or upload the screen.

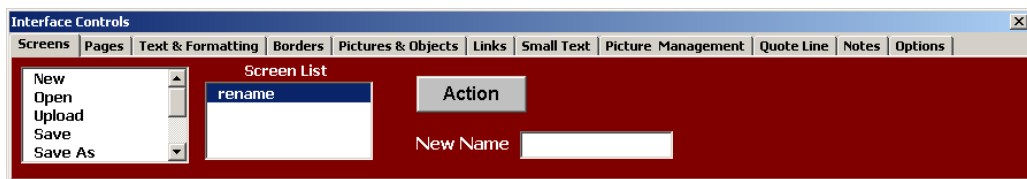
To rename a screen:

- 1) From the **Screens** tab, select **Rename** on the menu.
- 2) In the **New Name** box, type the new screen name.



- 3) Click **Action**.

The screen is renamed in the **Screen List**.

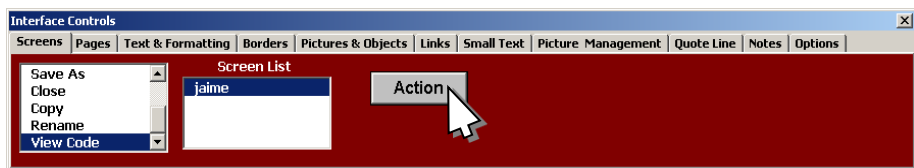


VIEWING CODE FOR A SCREEN

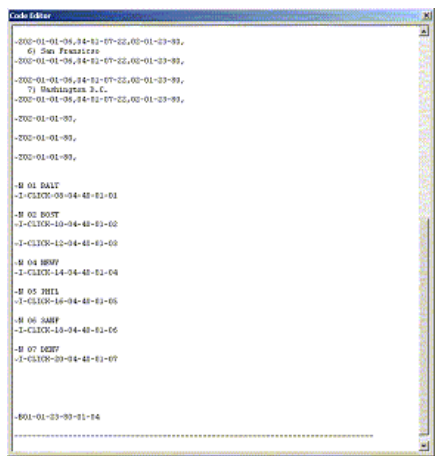
You can view and modify the contents of your commentary file in the Code Editor. The Code Editor works like a simple text editor, allowing you to enter, delete, copy, and paste codes or text.

To view the code for a screen:

- 1) From the **Screens** tab, select **View Code** on the menu.
- 2) Click **Action**.



The commentary file opens in the **Code Editor**.



- 3) Edit the commentary codes or text as needed. You can also use the copy (CTRL+C) and paste (CTRL+V) keyboard commands to copy text.
- 4) Once your work is done, click **Close**  (top-right corner of window).

The **Save Changes** dialog opens.

- 5) Click **Yes** to apply your changes.



PAGES TAB



ABOUT THE PAGES TAB

Use the **Pages** tab to access and manage individual pages for your screen.

To access the Pages tab:

- Click the **Pages** tab at the top of the control panel.



- Take a moment to study the features at this tab:

Pages menu: Provides options to add, copy, order, delete, or rename a page in your screen.

Screen List: Displays the screens currently open in the Commentary Interface program.

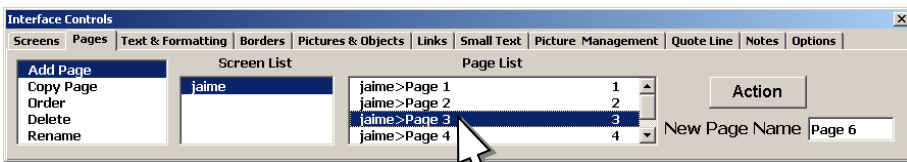
Page List: Displays the individual pages for the selected screen. Pages are organized in the list according to their order of appearance on the Bloomberg system (also indicated by the sequence number shown in the right-hand column). By default, pages are named by their respective page number in this viewing order.

VIEWING PAGES

You can access a specific page in your screen, or page through each page in the same order viewed on the Bloomberg.

To view a specific page in screen:

- From the **Pages** tab, click the page name in the **Page List** to select it.



To <Page Fwd> or <Page Back> in screen:

- From the **toolbar**, hit the **Page Forward** button to page down in the screen, or hit the **Page Back** button to page up in the screen.



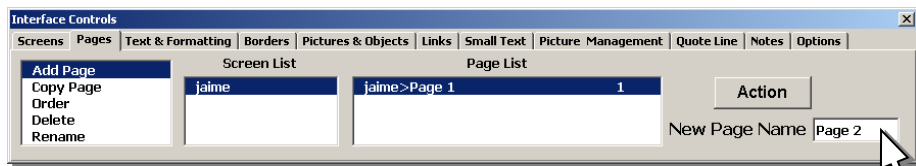
■ ADDING A NEW PAGE

All commentary screens consist of at least one page, but you can add more pages to enable page forwarding (meaning that users will need to type <Page Fwd> or <Page Back> to view subsequent pages).

● To add a page:

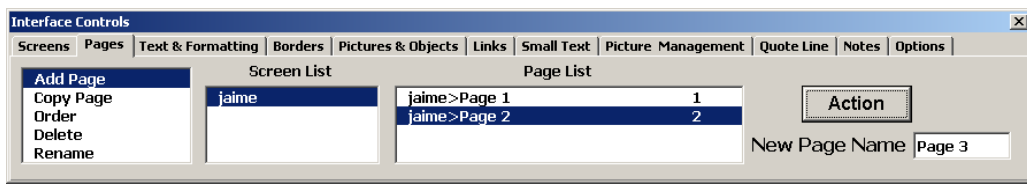
1) From the **Pages** tab, select **Add Page** on the menu.

2) In the **New Page Name** box, type the new page name (defaults to the next page number).



3) Click **Action**.

The new page is opened on the template and added to the **Page List**:



■ COPYING A PAGE

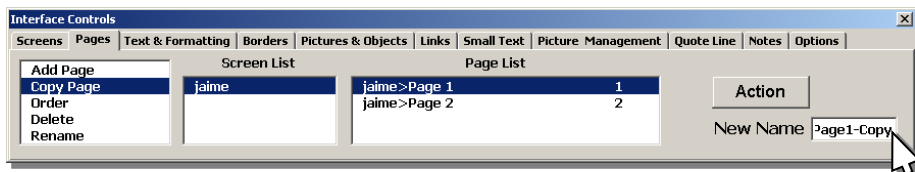
Instead of adding a blank page, you can copy an existing page and then modify the new one to make it unique. This is a helpful technique for setting up numerous pages under the same screen.

● To copy a page:

1) From the **Pages** tab, select **Copy Page** on the menu.

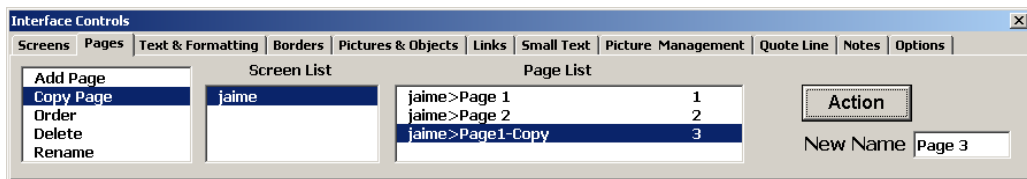
2) From the **Page List**, select the page that you want to copy.

3) In the **New Name** box, type the page name.



4) Click **Action**.

The copied page is opened on the template and added to the **Page List**:



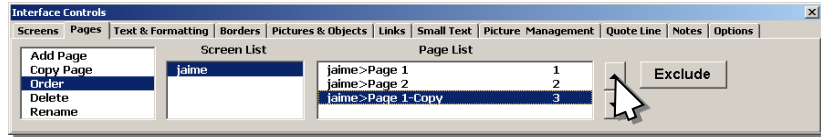
■ REORDERING A PAGE

Pages are organized in the **Page List** according to their order of appearance on the Bloomberg. By moving pages in the list, you can rearrange the viewing order.

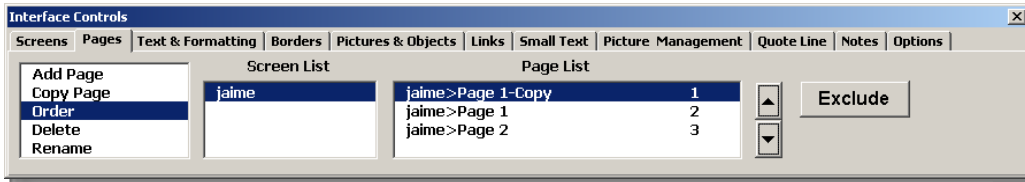
● To reorder a page:

1) From the **Pages** tab, select **Order** on the menu.

- 2) From the **Page List**, select the page that you want to reorder.
- 3) Click the **up arrow** or **down arrow** buttons as many times as needed to move the page in the list.



The page is reordered in the **Page List**.

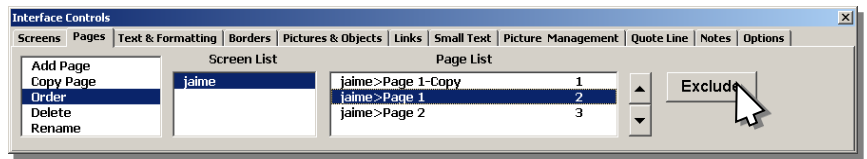


EXCLUDING A PAGE

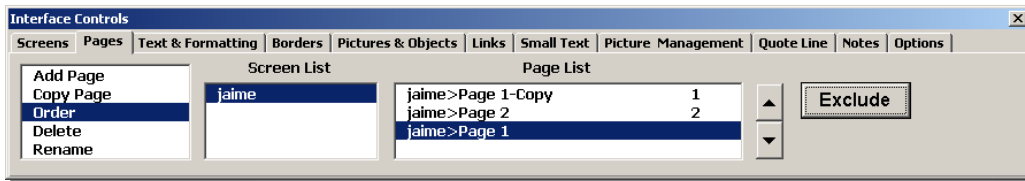
*You can exclude a page in the page sequence without deleting it. When you exclude a page, the page remains in the **Page List**, but it does not appear when the screen is viewed on the Bloomberg.*

To exclude a page:

- 1) From the **Pages** tab, select **Order** on the menu.
- 2) From the **Page List**, select the page that you want to exclude.
- 3) Click **Exclude**.

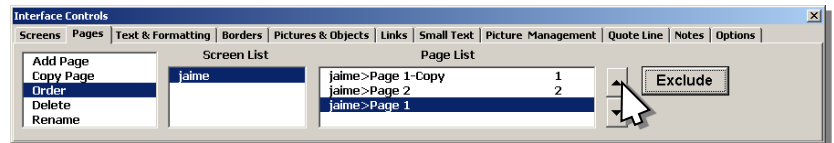


The page is excluded and moved to the bottom of the **Page List**.

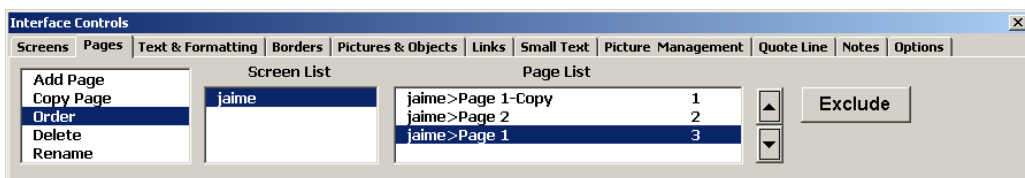


To add an excluded page back in the page sequence:

- 1) From the **Pages** tab, select **Order** on the menu.
- 2) From the **Page List**, select the excluded page that you want to add back.
- 3) Click the **up arrow** button.



The excluded page is added back to the sequence in the **Page List**.

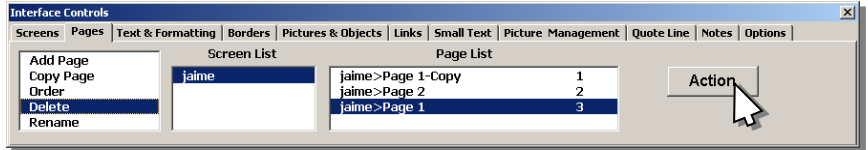


DELETING A PAGE

 **Warning!** When you delete a page on your screen, it is completely removed from the commentary file.

To delete a page:

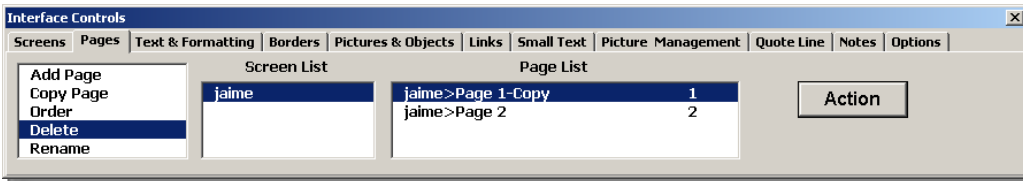
- 1) From the **Pages** tab, select **Delete** on the menu.
- 2) From the **Page List**, select the page to delete.
- 3) Click **Action**.



The **Delete Page** dialog opens.

- 4) Click **Yes**.

The page is deleted and removed from the **Page List**.

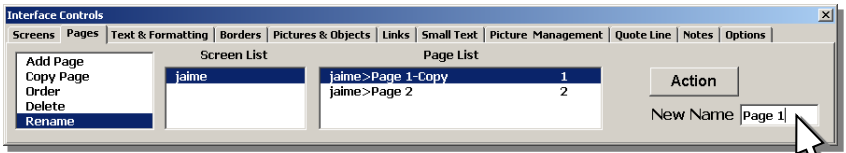


RENAMING A PAGE

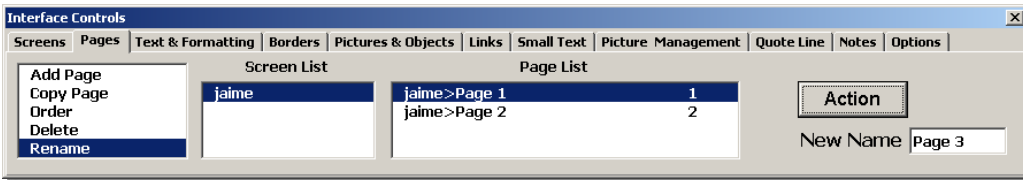
By default, pages are named by their respective page number in the viewing order. If necessary, you can rename pages. Page names are saved in the commentary file so they are imported when the screen is opened.

To rename a page:

- 1) From the **Pages** tab, select **Rename** on the menu.
- 2) From the **Page List**, select the page that you want to rename.
- 3) In the **New Name** box, type the new page name.
- 4) Click **Action**.



The page is renamed in the **Page List**.



PART 3

Working With Screens Contents

In this section, you will learn:

- How to Add or Import Text
- How Add Special Characters
- How to Edit Text
- How to Format Screen and Text
- How to Maintain Screen Contents
- How to Add and Clear Borderlines
- How to Add, Maintain, and Clear Images
- How to Add, Edit, and Delete Links
- How to Import and Delete Images in the Picture Library



TEXT & FORMATTING TAB

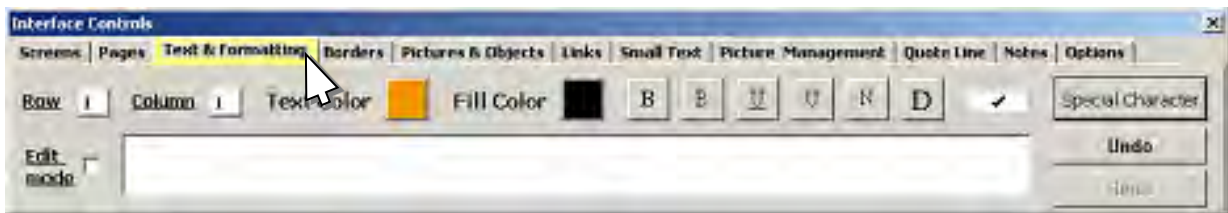


ABOUT THE TEXT & FORMATTING TAB

Use the **Text & Formatting** tab to add, import, edit, or format text (excluding small text), as well as change the background color of your screen.

To access the Text & Formatting tab:

- Click the **Text & Formatting** tab at the top of the control panel.



- Take a moment to study the features at this tab:

Row & Column boxes: Indicates where the cursor is currently located on the template screen.

Format buttons: Formats selected text or screen in various attributes. (Tip: When you point over a format button, a name box appears to identify the button.)

Special Character box: Adds the special character displayed in box (defaults to the most recently selected special character). To change the character, click the **Special Character** button.

Undo & Redo buttons: Takes back or restores last changes on screen.

Text box: Adds text on screen.

Edit Mode check box: Imports selected text in the text box for editing.

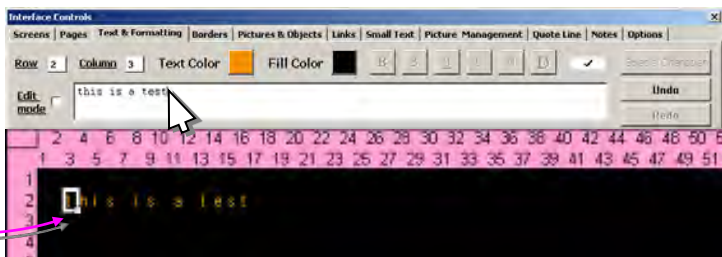
ADDING OR IMPORTING TEXT

You can add or import text on your screen starting from a specific cell in the template. When you add or import text, it overwrites any existing text on the screen.

To add or import text:

- On the template screen, select the cell where you want to begin adding text.
- If copying text from another application, copy text (**CTRL+C**).
- From the **Text & Formatting** tab, click inside the text box and begin typing text, or type **CTRL+V** to paste text.

(Notice that text appears on the screen while you are typing in the text box.)



Text is added on the screen.



Tip: To enter a line break while typing in the text box, press **ENTER**.

ADDING SPECIAL CHARACTERS

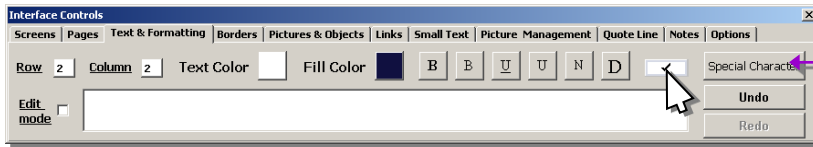
You can add a special character to any cell your screen. Special characters are font characters not typically found on the standard keyboard. Once you add a special character on your screen, it can be treated just like a normal text character.

To add a special character:

- 1) On the template screen, select the cell where you want to add the special character.

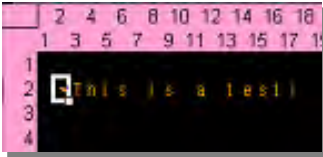


- 2) From the **Text & Formatting** tab, click the **special character box** to add the character displayed in the box. To change the character, click the **Special Character** button and select a different character.



(Click to change the special character shown in box.)

The special character is added on the screen.



Tip: You can quickly add a special Bloomberg menu number on your screen by pressing and holding **CTRL**, **SHIFT** and the **number** at the same time directly on the template screen. For a special Bloomberg *non-menu* number, press and hold **CTRL** and the **number** at the same time instead.

EDITING TEXT

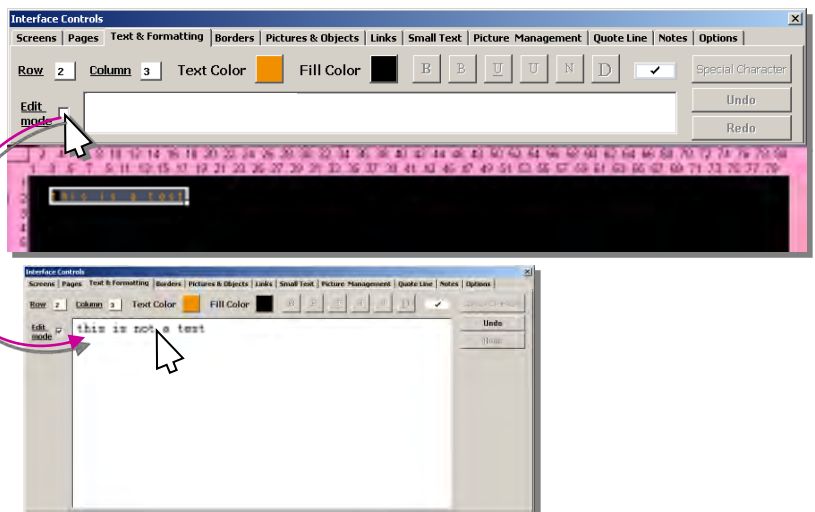
You can edit text on your screen, so that any new text you type is inserted between existing text.

To edit text:

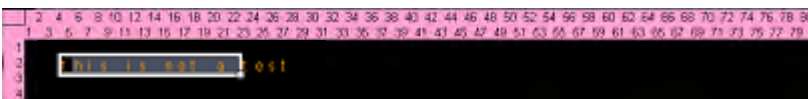
- 1) On the template screen, select the range of cells that contain the text you want to edit.
- 2) From the **Text & Formatting** tab, click the **Edit Mode** check box to select it.

The selected text imports in the text box.

- 3) Edit text in the text box.
- 4) Click the **Edit Mode** check box again to clear it and return text (now edited) back on the screen.



Text is edited on the screen.

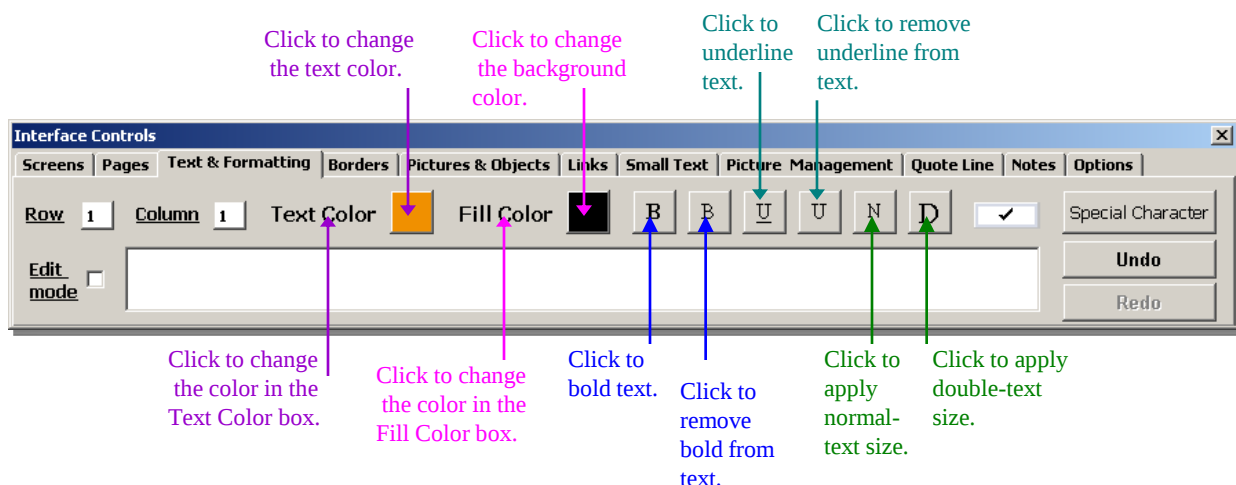


■ FORMATTING SCREEN CONTENTS

You can format your screen and text in a variety of different styles and attributes.

● To format text or background:

- 1) On the template screen, select the cells that contain the text or background you want to format.
- 2) From the **Text & Formatting** tab, click one of the following format buttons that you want to apply:



Tip: When you point over a format button, a name box appears to identify the button.

■ MAINTAINING SCREEN CONTENTS

The right-click menu provides options for maintaining text and other contents of your screen.

● To move, copy or clear screen contents:

- 1) On the template screen, select cells that you want to move, copy or clear.
- 2) Right-click on the selected range and select one of the following options:

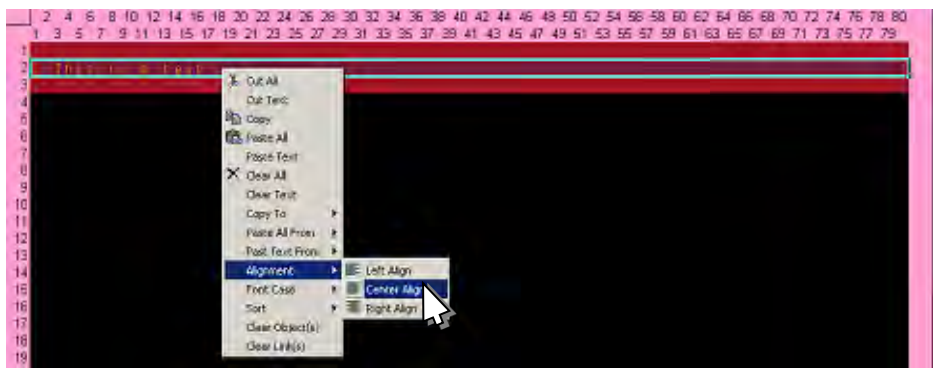
Cut All	<i>Cuts text, links, borders, and background</i>
Cut Text	<i>Cuts text and links</i>
Copy	<i>Copies text, links, borders, and background</i>
Clear All	<i>Clears text, links, and background</i>
Clear Text	<i>Clears text</i>
Copy To	<i>Copies text, links, borders, and background to a clipboard</i>

- 3) To paste contents, right-click on the cell where you want to paste and select one of the following options:

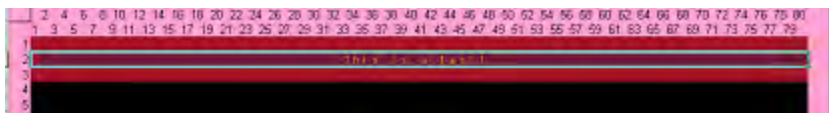
Paste All	<i>Pastes text, links, borders, and background</i>
Paste Text	<i>Pastes text and links</i>
Paste All From	<i>Pastes text, links, borders, and background from a clipboard</i>
Paste Text From	<i>Pastes text and links from a clipboard</i>

To align text:

- 1) On the template screen, select the range of cells that you want to align text within.
- 2) Right-click on the selected range and select **Alignment**.
- 3) From the submenu, select **Left Align**, **Right Align**, or **Center Align**.

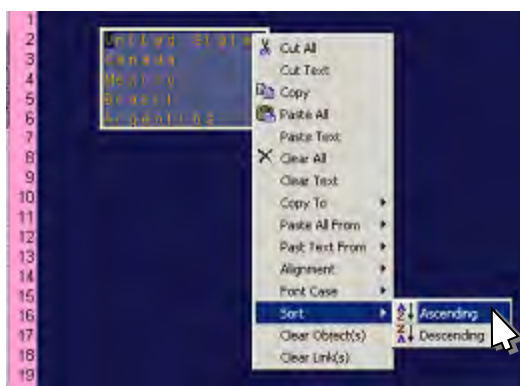


Text is aligned on the screen.

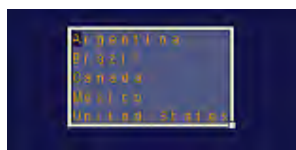


To sort text:

- 1) On the template screen, select the range of cells that contain the text you want to sort.
- 2) Right-click on the selected area and select **Sort**.
- 3) From the submenu, select **Ascending** (A to Z), or **Descending** (Z to A).



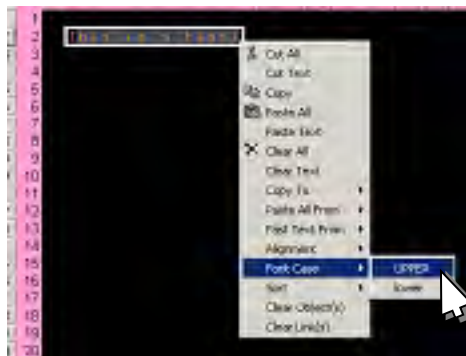
Text is sorted on the screen.



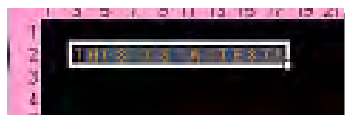
Tip: To sort text within multiple ranges of cells, hold down the **CTRL** key to select additional ranges on screen. *(Note: All selected ranges must contain the same amount of cells as the first selected range.)

To change font case for text:

- 1) On the template screen, select the range of cells that contains the text you want to change the font case for.
- 2) Right-click in the selected range and select **Font Case**.
- 3) From the submenu, select **UPPER** (to capitalize), or **lower** (to use lower case letters) for all characters of each word.



The font case is changed on text.



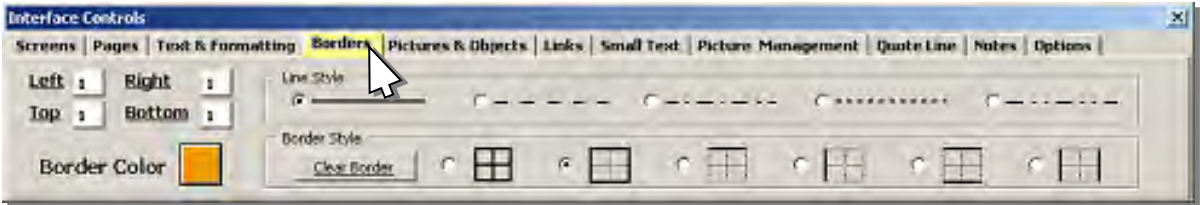
BORDERS

ABOUT THE BORDERS TAB

Use the **Borders** tab to add or remove borderlines on your screen.

To access the Borders tab:

- Click the **Borders** tab at the top of the control panel.



- Take a moment to study the features at this tab:

Left, Right, Top & Bottom boxes: Indicates the column (Left, Right) and row (Top, Bottom) coordinates for the range of cells currently selected on the template screen.

Border Color box: Adds a border on screen in color displayed. (To change the color appearing in the box, click the heading "Border Color" and click a color name.)

Line Style section: Sets the line style of border.

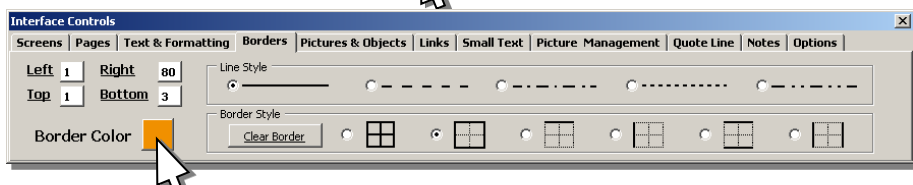
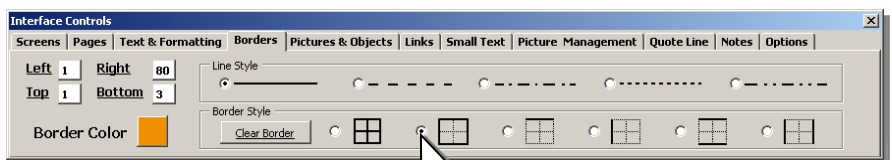
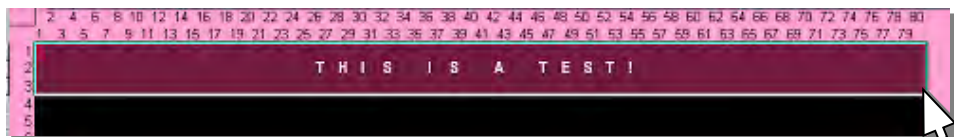
Border Style section: Defines the placement of the border.

ADDING BORDERLINES

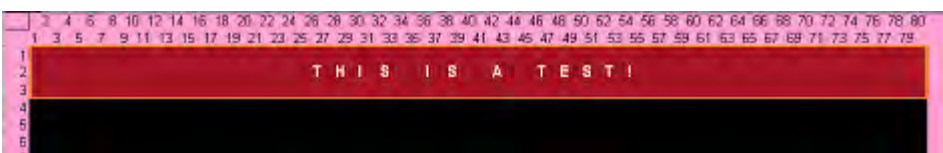
You can add a borderline on your screen in a variety of colors and styles.

To add a border:

- On the template screen, select the range of cells that you want to add a border to.
- From the **Borders** tab, under the **Border Style** section, select the type of border that you want to add.
- Click the **Border Color** box to add a borderline in the color shown, or click the words "**Border Color**" to choose a different color.



The borderline is added on the screen.



CLEARING BORDERLINES

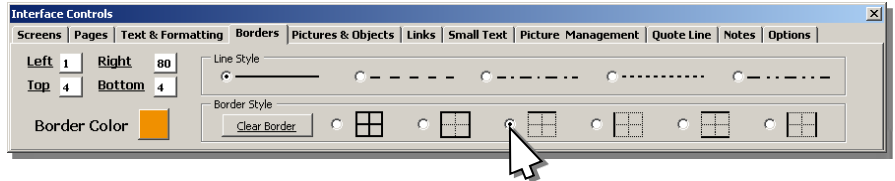
You can remove a borderline on your screen by clearing it.

To clear a border:

- 1) On the template screen, select the range of cells that contain the borderline you want to clear.



- 2) From the **Borders** tab, under the **Border Style** section, select the type of the border that you want to clear.



- 3) Click the **Clear Border** button.



The borderline is removed on the screen.



Tip: To clear all borders in a selected area, select the All Lines border style, and then click the Clear Border button.



PICTURES & OBJECTS

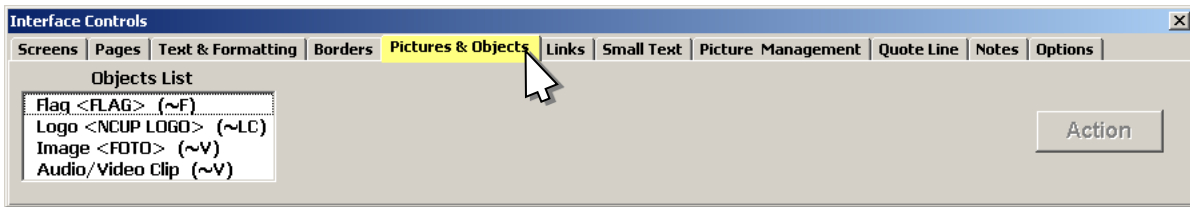


ABOUT THE PICTURES & OBJECTS TAB

Use the *Pictures & Objects* tab to add images on your screen.

To access the Pictures & Objects tab:

- Click the **Pictures & Objects** tab at the top of the control panel.



- Take a moment to study the features at this tab:

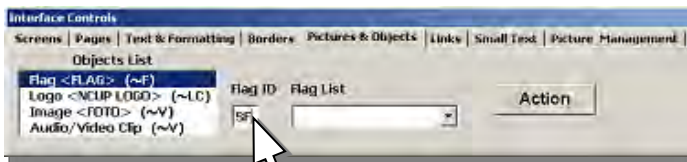
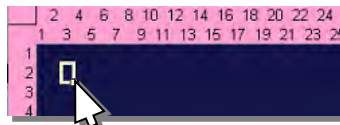
Object List: Lists the various types of objects that can be added on a screen, including flags, images, and audio/video clips.

ADDING <FLAG> IMAGES

You can add any image from FLAG<Go> on your screen.

To add an image from <FLAG>:

- On the template screen, select the cell where you want the upper-left corner of the flag to begin.
- From the **Pictures & Objects** tab, select **Flag <FLAG> (~F)** from the **Objects List**.
- In the **Flag ID** box, type the flag identifier, or select one from the **Flag List** dropdown.
- Click **Action**.



The <FLAG> image is added on the screen.

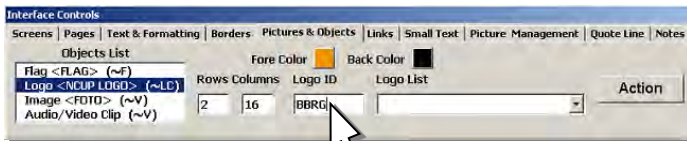
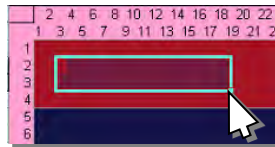


ADDING <NCUP LOGO> IMAGES

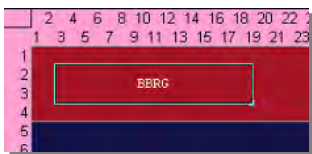
You can add images from the **NCUP LOGO<Go>** function on your screen. (Please note: In order to view the actual image, you will need to import it first. To find out how to import <NCUP LOGO> images, see **Picture Management**.)

To add an image from <NCUP LOGO>:

- 1) On the template screen, select the cell where you want the upper-left corner of the image to begin. For images not imported in the Picture Library, select the range of cells that best represents the image size.
- 2) From the **Pictures & Objects** tab, select **Logo <NCUP LOGO> (~LC)** from the **Objects List**.
- 3) In the **Logo ID** box, type the logo code, or if your image is imported in the Picture Library, select it from the **Logo List** dropdown.
- 4) The colors shown in the color boxes next to **Fore Color** / **Back Color** are the colors that will be assigned to the image. To change the colors, click the headings **Fore Color** / **Back Color**.
- 5) Click **Action**.



The image is added on the screen.

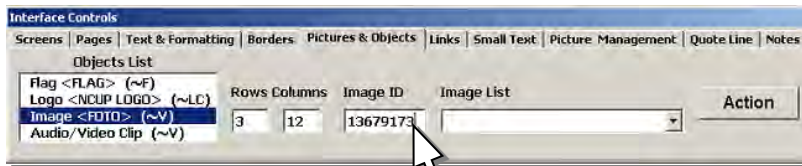


ADDING <FOTO> IMAGES

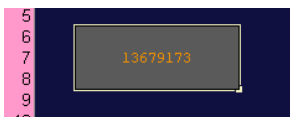
You can add images from the **FOTO<Go>** function on your screen. (Please note: In order to view the actual image, you will need to import it first. To find out how to import <FOTO> images, see **Picture Management**.)

To add an image from <FOTO>:

- 1) On the template screen, select the cell where you want the upper-left corner of the image to begin. For images not imported in the Picture Library, select the range of cells that best represents the image size.
- 2) From the **Pictures & Objects** tab, select **Image <FOTO> (~V)** from the **Objects List**.
- 3) Type the image number in the **Image ID** box, or if your image is imported in the Picture Library, select it from the **Image List** dropdown.
- 4) Click **Action**.



The image is added on the screen.



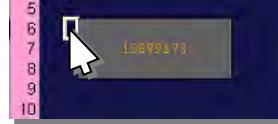
MAINTAINING IMAGES

The right-click menu has options for maintaining images on your screen.

To copy or move an image:

- 1) On the template screen, select the first cell to the left of the image's upper-left corner.
- 2) Right-click on the cell and select **Cut All**, or **Copy**.
- 3) Right-click on the cell where you want to move the image (or start the upper-left corner of image) and select **Paste All**.

The image is pasted.



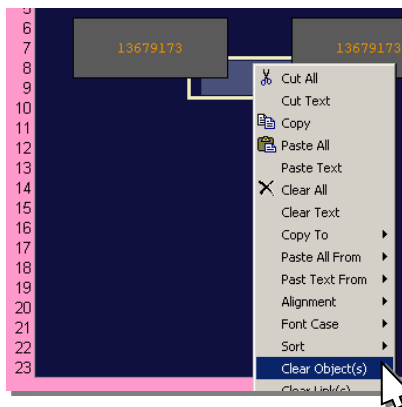
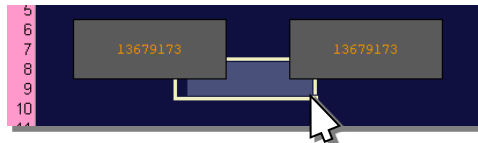
Tip: To change the position of images on your screen, type <CTRL>+P to access the **Picture Ref** dialog box.

DELETING IMAGES

To clear an image:

- 1) On the template screen, select the first cell to the left of the image's upper-left corner, or select a range of cells that includes at least part of the image(s) you want to clear.
- 2) Right-click on the cell, or range of cells, and select **Clear Object(s)**.

The images are cleared.



Tip: To clear all images on your screen, select the entire screen, right-click and then select **Clear Object(s)**.



LINKS



ABOUT LINKS

Links are the way users navigate throughout the screens in your function. Links connect screens and make them accessible. On the Bloomberg system, links are most common on menu screens. A menu screen consists of a numerical list of options that enable users to access more information by typing the option number, followed by <GO>, or by clicking the option. When users move the mouse over a clickable link on a Bloomberg screen, a white box appears around the link to indicate that the link is clickable and will perform an action as a result.

Besides menus, links can also be created on screens without displaying the option number. When this is the case, you are still required to assign the option number for the link code, however only the clickable box will exist on the screen to indicate that a link has been added there.

Destinations

When users click a link, they go to a destination. The destination can be to a different page in the same screen, to another screen in the same function, or to a screen in a different function. Links can even download PDF files, or run scripts saved in a commentary tour file.

Creating and testing links

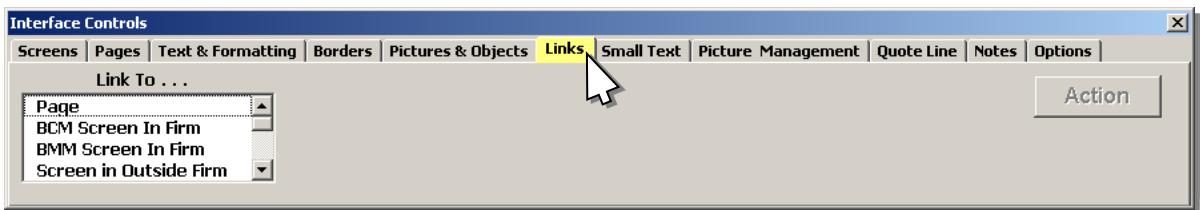
You can create links on your screen in the Commentary Interface, as well as see the destination that links are assigned to go to. Use the Bloomberg to test links or the clickables that correspond.

ABOUT THE LINKS TAB

Use the *Links* tab to add or edit links on your screen.

To access the Links tab:

- Click the **Links** tab at the top of the control panel.



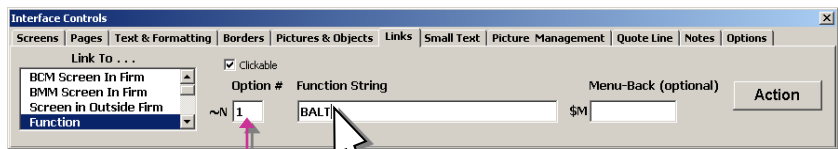
- Take a moment to study the features at this tab:
Link To...: Lists the various types of links that can be added on a screen.

ADDING LINKS

You can create a link on your screen to bring users to a specific destination on the Bloomberg system, or to perform an action of some sort.

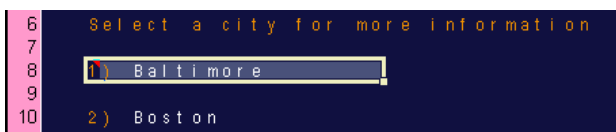
To add link:

- 1) On the template screen, select the range of cells that you want to designate as the clickable area for the link (or the area on the screen that you click to select the link).
- 2) From the **Links** tab, select the type of link you want to add from the **Link To...** menu, and then fill-in the required fields.
- 3) Click **Action**.



(Notice that the menu # from the selected area on the screen automatically fills-in the **Option #** field.)

The link is added on the screen.



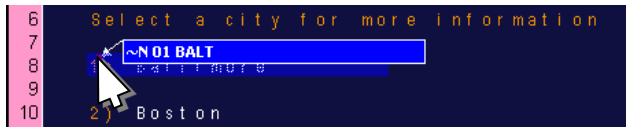
Notice that the first cell in the selected range now displays a red flag in the upper-right corner. The red flag indicates that a link has been added there.

VIEWING LINKS

There are a few different ways to view links on your screen.

To view a link:

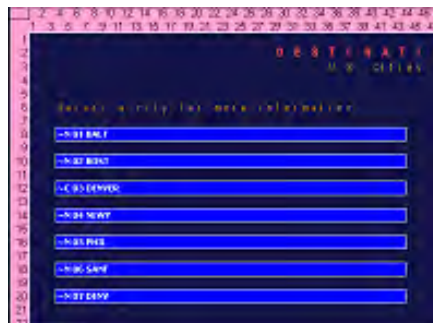
On the template screen, point mouse over the red link flag.



The blue box displays the link code information, or the destination, while the shadow appearing below it represents the clickable area.

To view all links (Link View):

- 1) From the **Links** tab, hold down the **CTRL** key while you point mouse over the **Action** button. To leave the **Link View** on the screen, continue to move mouse off the **Action** button (while still holding down the **CTRL** key).
- 2) To clear the **Link View**, move mouse over the **Action** button again.



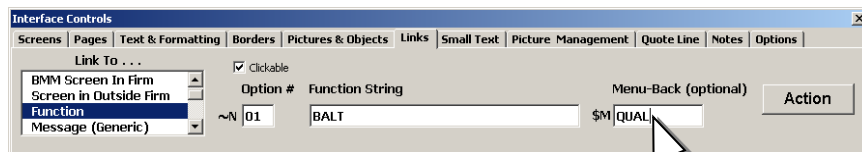
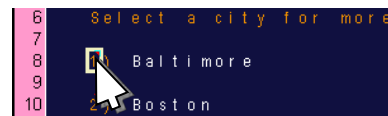
Link View

EDITING LINKS

You can change the information assigned for each link on your screen.

To edit the link information:

- 1) On the template screen, select the cell that contains the link flag for the link you want to edit.
- 2) From the **Links** tab, change the link information in the necessary field(s), or click a new link type from the **Link To...** menu and fill-in the necessary fields.
- 3) Click **Action**.



The link information is changed.



To edit the link clickable size:

- 1) On the template screen, select the cell that contains the link flag for the link you want to edit the clickable size for.
- 2) Reselect a new clickable size (starting from the same cell as the link flag).
- 3) From the **Links** tab, click **Action**.

To edit the menu option number(s) in link code(s):

- 1) On the template screen, manually change the option numbers appearing on the screen.
- 2) To reset the option number in each link code (to match the menu number appearing on the screen), type **CTRL + L**.

To move or copy a link, or change the clickable location:

Do one of the following:

- Cut or copy the cell containing the link flag (the same way you would for text), and then paste.
- OR -
- From the template screen, type **CTRL + I** to access the **I-CLICK Ref.** dialog box. Find the link that you want to change the clickable location for and adjust the **Row** or **Col** coordinates to change the starting location of the clickable box.

DELETING LINKS

You can remove links on your screen by clearing them.

To delete a link:

- 1) On the template screen, select the cell, or range of cells, that contains the link flag(s) you want to delete.
- 2) Right-click and select **Clear Link(s)**.



SMALL TEXT

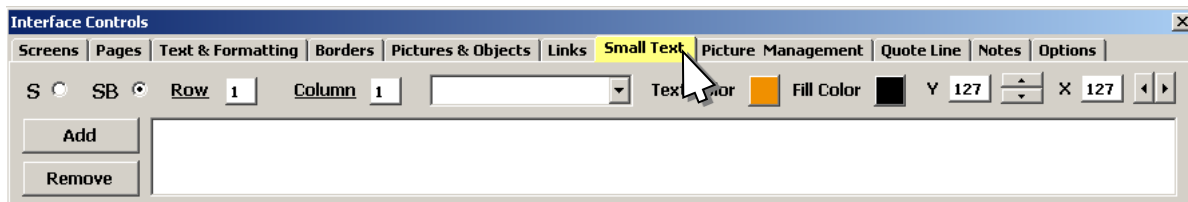


ABOUT THE SMALL TEXT TAB

Use the *Small Text* tab to add, edit, or remove small text on your screen.

To access the Small Text tab:

- Click the **Small Text** tab at the top of the control panel.



- Take a moment to study the features at this tab:

S & SB selections: Indicates which small text code to use (~S or ~SB) (defaults to SB).

Row & Column boxes: Indicates where the cursor is currently located on the template screen.

Dropdown box: Lists the small text phrases on the screen.

Text Color box: Formats small text phrase in color displayed.

Fill Color box: Formats the background of small text phrase in color displayed.

Y box: Indicates the vertical coordinate within the cell where small text is placed (0 > 255).

X box: Indicates the horizontal coordinate within the cell where small text is placed (0 > 255).

ADDING SMALL TEXT

You can add a phrase in small text on your screen.

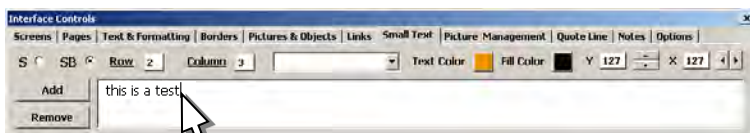
To add small text:

- On the template screen, select the cell where you want to begin adding text.

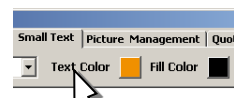


- From the **Small Text** tab, click inside the **text box** and begin typing text.

- The colors shown in the color boxes next to **Text Color** and **Fill Color** are the colors that will be assigned to the small text object. To change the colors, click the headings **Text Color/Fill Color**, and select a color from the color chart.



- To adjust the placement of the small text object within the cell where you are adding it, use the arrow buttons to adjust the **Y** or **X** positioning coordinates (0 > 255).
- Click **Add**.



The small text object is added on the screen.

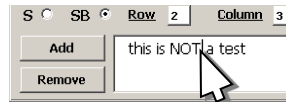
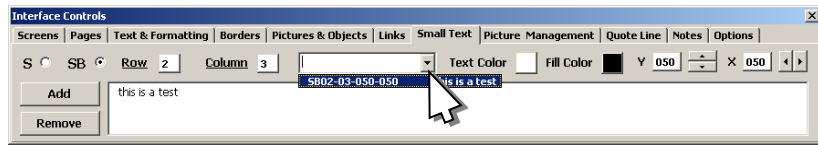


EDITING SMALL TEXT

You can edit small text objects on your screen.

To edit small text:

- 1) From the **Small Text** tab, click the dropdown box and select the small text phrase that you want to edit from the list.
- 2) Click **Remove**.
- 3) Edit the small text phrase in the text box.
- 4) Click **Add**.



The small text phrase is edited on the screen.

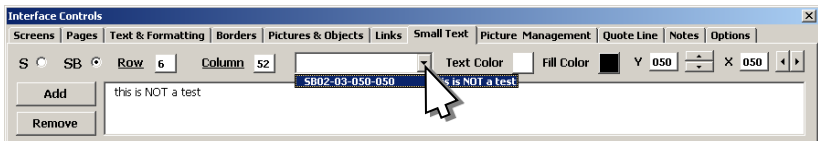


MOVING SMALL TEXT

You can move small text objects on your screen.

To move small text:

- 1) From the **Small Text** tab, click the dropdown box and select the small text phrase that you want to move from the list.
- 2) Click **Remove**.
- 3) On the template screen, select the cell where you want to move the small text phrase.
- 4) Click **Add**.



The small text phrase is moved on the screen.

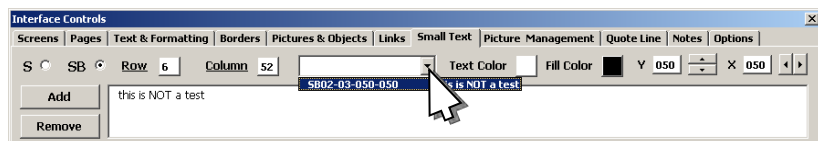


COPYING SMALL TEXT

You can copy small text objects on your screen.

To copy small text:

- 1) From the **Small Text** tab, click the dropdown box and select the small text phrase that you want to copy from the list.
- 2) On the template screen, select the cell where you paste the small text phrase.
- 3) Click **Add**.



The small text phrase is copied on the screen.

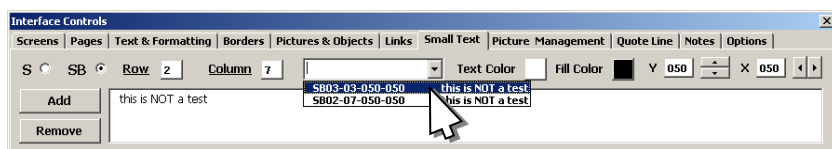


CLEARING SMALL TEXT

You can clear a small text object to remove it from the screen.

To clear small text:

- 1) From the **Small Text** tab, click the dropdown box and select the small text phrase that you want to clear from the list.



- 2) Click **Remove**.

The small text object is removed on the screen.





PICTURE MANAGEMENT

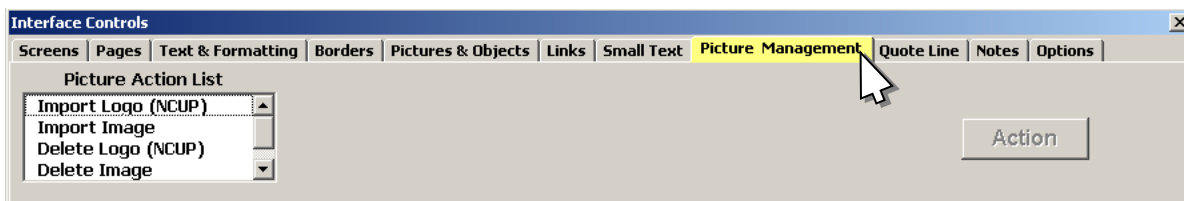


ABOUT THE PICTURE MANAGEMENT TAB

Use the **Picture Management** tab to import or delete images in the Picture Library.

To access the Picture Management tab:

- Click the **Picture Management** tab at the top of the control panel.



- Take a moment to study the features at this tab:

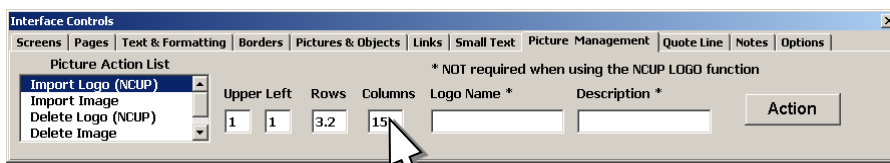
Picture Action List: Provides options for importing and deleting images in the Picture Library.

IMPORTING <NCUP LOGO> IMAGES

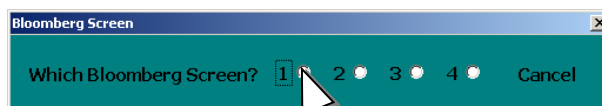
You can import an image from <NCUP LOGO> so that when you add the image on your screen, you can view it on the template screen.

To import an image from <NCUP LOGO>:

- On the Bloomberg, type **NCUP LOGO<GO>** and pull up the image that you want to import.
- From the **Picture Management** tab, select **Import Logo (NCUP)** from the **Picture Action List**.
- Using the **Rows** and **Columns** fields, fill-in the image size. To figure out the image size, type **GRID2<GO>** on the screen where you have the image pulled up, and determine the total amount of rows and columns that the image takes up (number can be rounded to the nearest tenth).



- Click **Action**.
- From the **Bloomberg Screen** dialog box, select the screen where the image is pulled up.



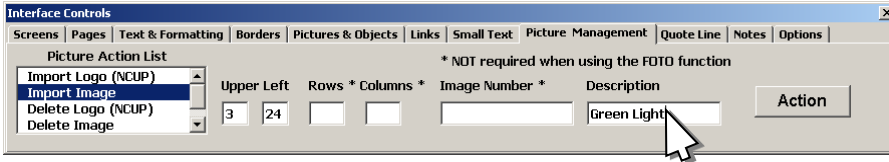
The image is imported. (Go to the **Pictures & Objects** tab to verify the image is now added in the **Logo List** dropdown list).

IMPORTING <FOTO> IMAGES

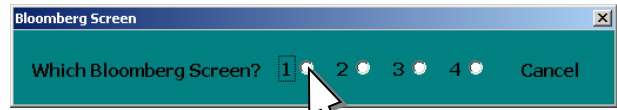
You can import an image from <FOTO> so that when you add the image on your screen, you can view it on the template screen.

To import an image from <FOTO>:

- 1) On the Bloomberg, type **FOTO<GO>**, **4<GO>**, and pull up the image that you want to import.
- 2) From the **Picture Management** tab, select **Import Image (FOTO)** from the **Picture Action List**.
- 3) Fill-in the **Description** field with a small description of the image.



- 4) Click **Action**.
- 5) From the **Bloomberg Screen** dialog box, select the screen where the image is pulled up.



The image is imported. (Go to the **Pictures & Objects** tab to verify the image is now added in the **Image List** dropdown list.)

DELETING IMAGES FROM THE PICTURE LIBRARY

You can delete images that are saved in the Picture Library.

To delete an image from the Picture Library:

- 1) From the **Picture Management** tab, select one of the following options from the **Picture Action List** menu:
 - **Delete Logo (NCUP)** – select to delete an image imported from <NCUP LOGO>.
 - **Delete Image (FOTO)** – select to delete an image imported from <FOTO>.
- 2) From the **Logo List** or **Image List** dropdown, select the image that you want to delete.
- 3) Click **Action**.

The image is deleted in the Picture Library.

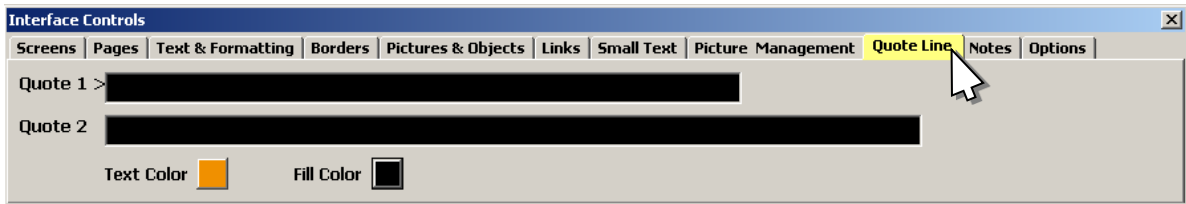
QUOTE LINE

ABOUT THE QUOTE LINE TAB

Before the first row of every commentary screen, there are 2 “quote lines” that can be used for displaying text and background color. Use the **Quote Line** tab to add, edit or clear text in the first or second quote line on your screen.

To access the Quote Line tab:

- Click the **Quote Line** tab at the top of the control panel.



- Take a moment to study the features at this tab:

Quote 1: Places text at the first quote line.

Quote 2: Places text at the second quote line.

Text Color box: Sets the text color.

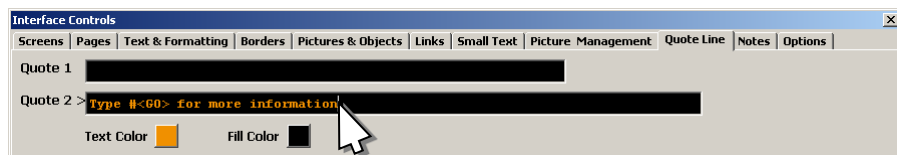
Fill Color box: Sets the background color.

ADDING TEXT IN QUOTE LINE 1 OR 2

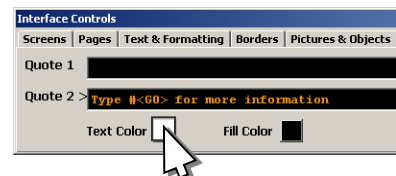
You can add text in either or both of the quote lines on your screen. (Even though you will not be able to view quote lines on the template screen, you can upload your screen and view on the Bloomberg.)

To add text in quote line 1 or 2:

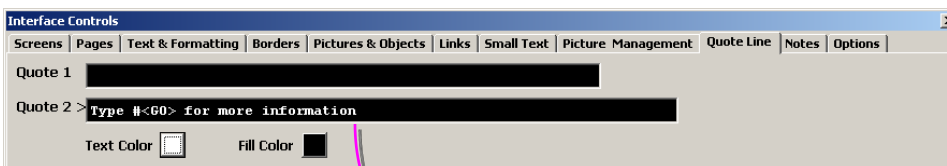
- From the **Quote Line** tab, place cursor in the text box next to **Quote 1** or **Quote 2** and begin typing text.



- To change the color of the text or the background, click the headings **Text Color/Fill Color** and select a new color. Once the color is displayed in the color box, click the **color box** to change the color.



The text is added to Quote Line 2.

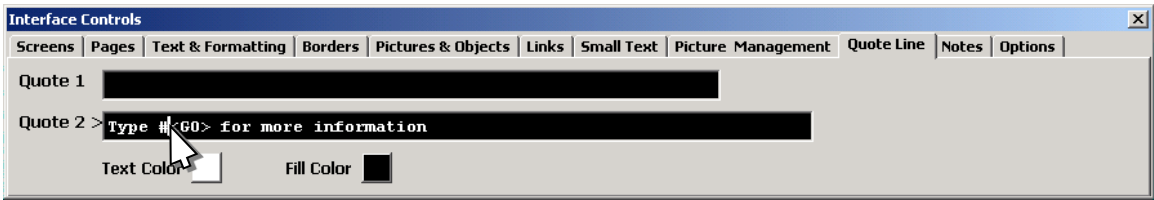


■ EDITING TEXT IN QUOTE LINE 1 OR 2

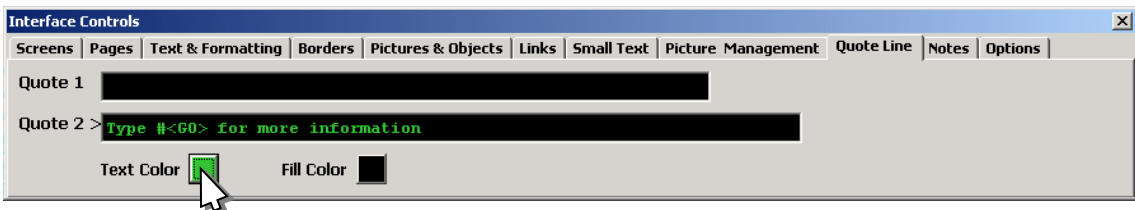
You can edit text in quote line 1 or 2.

● To edit text in quote line 1 or 2:

- 1) From the **Quote Line** tab, place cursor inside the text box for the quote line you want to edit.



- 2) Begin editing text, or to change the color of text or background, click the heading **Text Color** or **Fill Color** and select a new color from the chart – then once the new color is displayed in the color box, click the **color box** to change the color in the quote line.

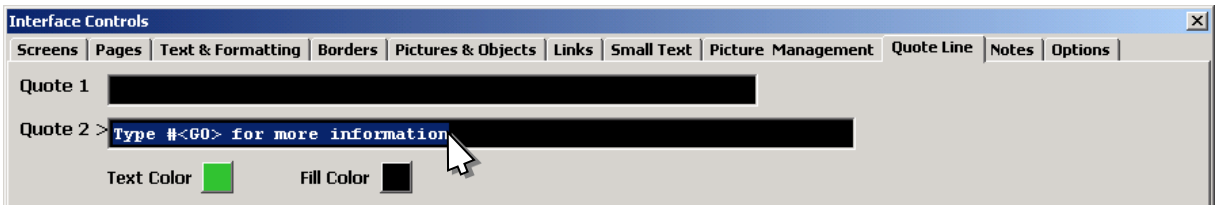


■ DELETING TEXT IN QUOTE LINE 1 OR 2

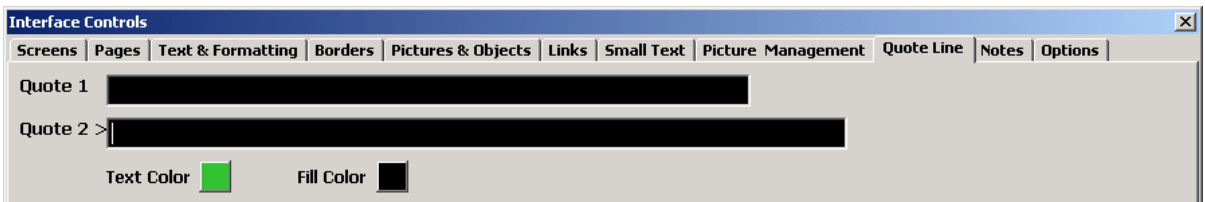
You can delete text in quote line 1 or 2.

● To delete text in quote line 1 or 2:

- 1) From the **Quote Line** tab, select (highlight) the text you want to delete inside the appropriate quote line text box.



- 2) Hit the <Backspace> key on keyboard to delete the text.



PART 4

Other Information

In this section, you will learn:

- How to Add, Edit, or Delete Notes
- How to Select/Deselect Options



NOTES

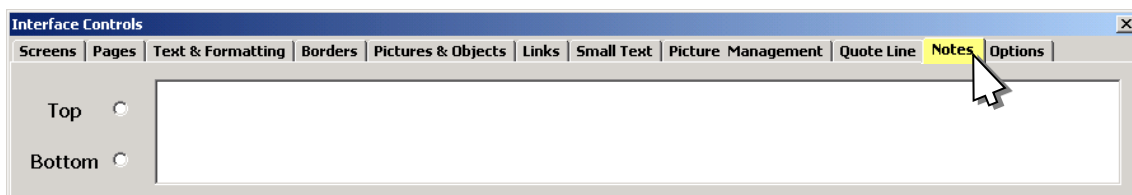


ABOUT THE NOTES TAB

The Notes tab is available for adding, editing, or deleting a note for a specific page on your screen. When a note exists, the text will be saved in the commentary file for future reference, but it will not be displayed on the screen.

To access the Notes tab:

- Click the **Notes** tab at the top of the control panel.



- Take a moment to study the features at this tab:

Top selection: Select to enter or view a note located at the top of the page in the commentary file.

Bottom selection: Select to enter or view a note located at the bottom of the page in the commentary file.

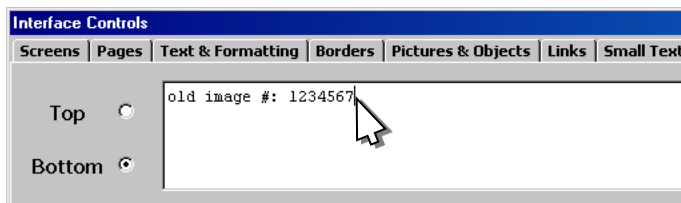
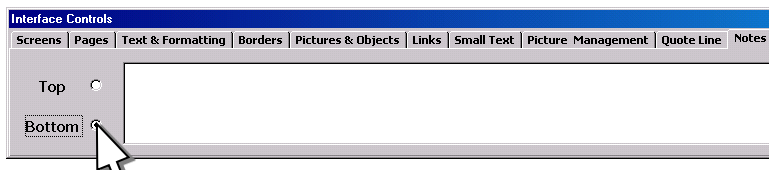
Text box: Adds text as a note in the commentary file.

ADDING A NOTE

You can add a note on individual pages in your screen. When you add a note, text will be saved in the commentary file, but it will not be displayed on the screen,

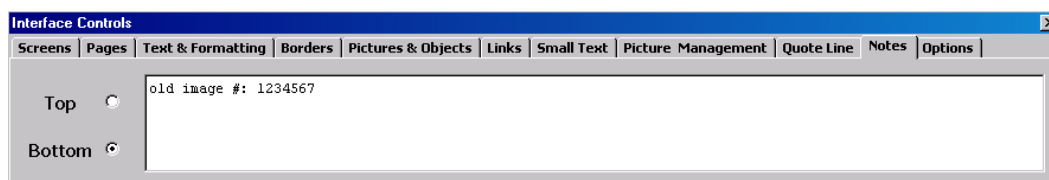
To add a note:

- From the **Notes** tab, click either the **Top** or **Bottom** selection to indicate where the note should be placed on the page in the commentary file.
- Click inside the text box and begin typing text, or type **CTRL+V** if you are pasting text.



Tip: To enter a line break while typing in the text box, press **ENTER**.

The note is added on the page.

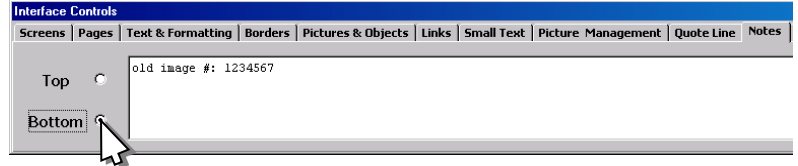


EDITING AND DELETING A NOTE

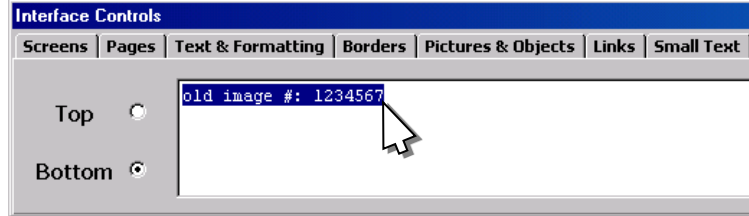
You can edit or delete a note saved on individual pages in your screen.

To edit or delete a note:

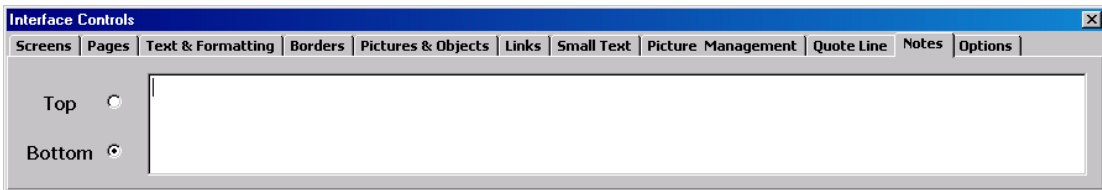
- 1) From the **Notes** tab, click either the **Top** or **Bottom** selection to indicate where the note is saved in the commentary file.



- 2) Click inside the text box and edit text as necessary – or to delete text, select text by highlighting it, and then hit **<Backspace>** on keyboard.



The note is deleted from the page.





OPTIONS

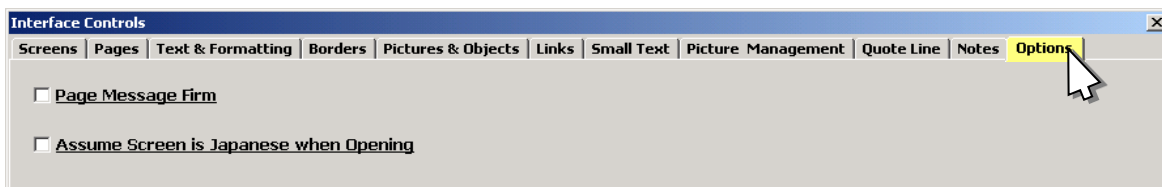


ABOUT THE OPTIONS TAB

The Options tab is available for setting options that may apply to the commentary firm that you are uploading to.

To access the Options tab:

- Click the **Options** tab at the top of the control panel.



- Take a moment to study the features at this tab:

Page Message in Firm selection: Select this option if the commentary firm you are uploading to has the *Page Message firm* setting. A *Page Message firm* setting means that the first row of every screen in the firm displays the page number in the viewing order.

Assume Screen is Japanese when Opening selection: Select this option if the commentary firm you are uploading to has a Kanji language setting.

SELECTING/DESELECTING AN OPTION

You can select or deselect an option to apply it to every screen opened from that point forward.

To select an option:

- From the **Options** tab, click either the **Page Message Firm** selection, or the **Assume Screen is Japanese when Opening** selection, to apply it to every screen opened from that point forward.

