



# Bloomberg Remote Access: Quick Start Guide

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## Bloomberg Remote Access

*Note: this Quick Start Guide document is for faculty and students currently registered at the University of Toronto who wish to access Bloomberg remotely while the Finance Lab is closed due to the recent university closure as a result of the COVID-19 pandemic. During this closure, Bloomberg is available for remote access; this document summarizes the necessary steps for access. Bloomberg remote access is limited to a maximum of 6 hours per week per user, and it requires an online reservation. Please refer to 'Making a Reservation' section in this document for more detailed information.*

### Creating your Bloomberg Accounts

If you do not already have a Bloomberg account, you will first need to go to the Bloomberg for Education Portal website (<https://portal.bloombergforeducation.com/>) and sign up for a **BMC (Bloomberg Market Concepts) account** using your university email as a **Learner**. This will be your **BMC account**. Then, once you log in, you will need to click the **Terminal Access** tab from the top menu bar to create your **Bloomberg Terminal account**. As shown below, a message will be displayed on the screen indicating that your Bloomberg Terminal account needs to be authorized. **Please do not contact any faculty members** as your account will be authorized by our staff member **in the next business day**. You will need to revisit this webpage later in order to check your account status and to proceed with getting access to Bloomberg remotely.

#### Shared Bloomberg Terminal Access

Your account is currently associated with: **University of Toronto**. A faculty member at your academic institution must authorize this account before you are able to create a Bloomberg Terminal login. Please refer to your school's guidelines on how to notify a faculty member of your interest in access to a Bloomberg Terminal. The Bloomberg for Education support team cannot authorize accounts for access to Bloomberg Terminals.

Once your account is approved, you will need to follow the instructions on the screen to fill out the required information to create your Bloomberg Terminal account. It will ask you to choose a verification method, and you may choose either your mobile phone number or your e-mail account to receive a verification code. Once you enter the verification code, you will be directed to create a password. This password is for the Bloomberg Terminal account which you will need to use every time you log into Bloomberg Terminal.

## Shared Bloomberg Terminal Access

You have successfully created a shared Bloomberg Terminal login. Please use the instructions below to access a Bloomberg Terminal.

Bloomberg Terminal Username:

**Step 1:** Navigate to: <https://bba.bloomberg.net>

**Step 2:** Enter Bloomberg Terminal username and password.

**Step 3:** Verify your identity with a code sent to your enrolled e-mail or mobile phone

**Step 4:** Click the down arrow to the right of the "Launch" button and select "Launch within the browser"

**Help:** For additional help during the Terminal login process, please refer to: <https://bba.bloomberg.net/help>

Please note: your **BMC** account and your **Bloomberg Terminal** account are two separate accounts with their own separate login credentials. Your BMC account is used to set up your Bloomberg Terminal account (as outlined above) and also to access BMC (please see 'BMC' section further below). Your Bloomberg Terminal account is used to access Bloomberg Terminal data remotely.

### Making a Reservation for the Bloomberg Terminal

Once you set up your Bloomberg Terminal account, you will need to [complete this form](#) in order to register for the Bloomberg Remote Access Calendar. Once your information is verified, you will receive a confirmation email so that you can book your time slot at the link below.

When booking a time slot, each time slot is one hour and a user is limited to book a maximum of 6 time slots (e.g. 6 hours) per week.

### [Bloomberg Reservation Calendar Link](#)

This link will direct you to a calendar page where you can self-sign up and book your preferred time slot. Once you complete your booking, you should also receive a confirmation email of your bookings and you should be able to make any changes to your bookings from this webpage.

Please note that remote access to Bloomberg Terminal is closely monitored and connecting to Bloomberg without reserving a time slot will result in a penalty that will make you lose your Bloomberg remote access for two weeks. Given the open remote access nature, it is very important that you respect each other's booked time slots and only connect to Bloomberg Terminal during the time slot that you booked. If you require more than two hours per week, please reach out to [financelab@rotman.utoronto.ca](mailto:financelab@rotman.utoronto.ca).

## Connecting to Bloomberg Terminal

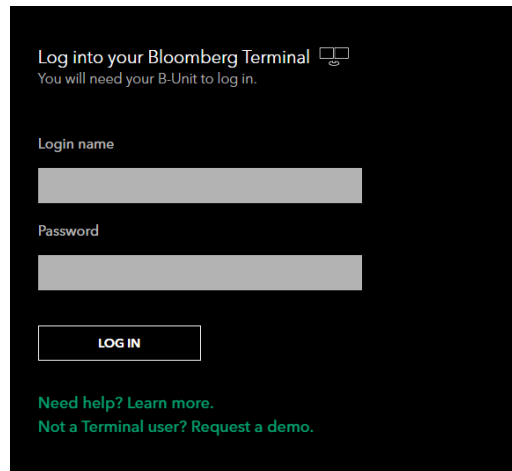
Bloomberg Remote Access can be implemented using either of two approaches: you can choose to connect to Bloomberg Terminal through a web connection (Bloomberg Anywhere) or by downloading a Bloomberg Terminal App. The recommended approach to access Bloomberg is via

Bloomberg Anywhere as downloading Bloomberg Terminal may take more time and require you to connect with Bloomberg Support for more information such as serial keys and user information.

## Bloomberg Anywhere

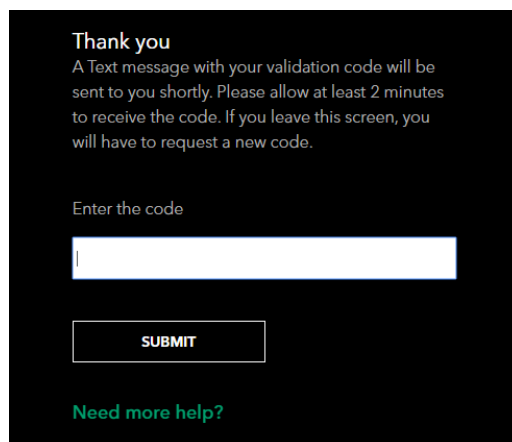
In order to connect to Bloomberg Anywhere, you can visit the Bloomberg Anywhere website by clicking on the following link: <http://bba.bloomberg.net/>

As shown in the screenshot below, you can type in your Bloomberg Login name and Password. You do not need a “B-Unit” as Bloomberg is making an exception for the University of Toronto users.



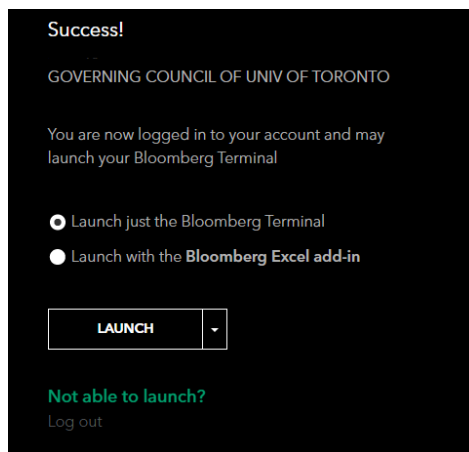
The screenshot shows a dark-themed login interface. At the top, it says "Log into your Bloomberg Terminal" with a small icon of a terminal window. Below that, it states "You will need your B-Unit to log in." There are two input fields: "Login name" and "Password". Below the password field is a "LOG IN" button. At the bottom, there are two links: "Need help? Learn more." and "Not a Terminal user? Request a demo."

Once you type in your Login name and Password, you will be asked to authenticate by receiving a call, a text, or an email containing a security code. Please choose your preferred method and insert the code once you receive it. For example, the following screen will be displayed if you choose to authenticate using a text message:



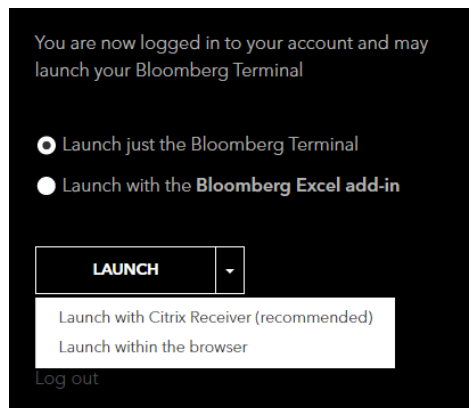
The screenshot shows a dark-themed authentication screen. At the top, it says "Thank you". Below that, it states "A Text message with your validation code will be sent to you shortly. Please allow at least 2 minutes to receive the code. If you leave this screen, you will have to request a new code." There is an input field labeled "Enter the code". Below the input field is a "SUBMIT" button. At the bottom, there is a link: "Need more help?"

Once you insert the code, you will be now asked to launch either the Bloomberg Terminal or Bloomberg Excel add-in as shown below.



It is recommended that you click on the downward arrow on the right side of the “LAUNCH” button and choose the option named “Launch within the browser” as shown in the screenshot below as the last option. This way, you can launch Bloomberg Terminal on your browser directly without having to install other additional applications.

If this option does not work, then you may choose the “Launch with Citrix Receiver” option. This will download a file named “bba.ica” which you’ll need to click on to launch Bloomberg Terminal.



Please also note that this latter option requires an installation of Citrix Receiver. If you do not have it installed on your computer or if Bloomberg Terminal does not start automatically after you click on this option, you may need to install it from the following website under the “Citrix Receiver” menu:

<https://bba.bloomberg.com/Help>

### **Bloomberg Terminal App**

You may still want to choose to use the Bloomberg Terminal App. In order to download and install Bloomberg Terminal, please visit the following link and choose “Bloomberg Terminal - New/Upgrade Installation”. Once you install the software, first try to log in using your Bloomberg Terminal account. If this does not work, you may need to reach out to Bloomberg Support directly who can help you install a serial number and initialize the software.

[https://www.bloomberg.com/professional/support/software-updates/?utm\\_source=bloomberg-menu&utm\\_medium=blp](https://www.bloomberg.com/professional/support/software-updates/?utm_source=bloomberg-menu&utm_medium=blp)

## **BMC (Bloomberg Market Concepts)**

BMC is an online, completion-based certification program which is an 8-hour self-paced introduction to the platform using various Bloomberg functions and Finance-related topics.

Generally, the BMC certificate is available at a fee of \$149 USD to complete the course from the Bloomberg Institute website. However, the Rotman Finance Lab has worked with Bloomberg to waive the fee, so the BMC certificate is available for free and the program can be accessed through your BMC account (see page 2).

## **Support**

If you have any questions related to using Bloomberg or require technical support, please feel free to contact Bloomberg directly via this email ([bbg.edu@bloomberg.net](mailto:bbg.edu@bloomberg.net)) or from the following link: <https://www.bloomberg.com/professional/support/customer-support-overview/> or by calling them at +1 212 318 2000

If you have any concerns or need any help with regards to booking, please contact the Rotman Finance Lab at [financelab@rotman.utoronto.ca](mailto:financelab@rotman.utoronto.ca)