A Bloomberg Professional Services Offering

MYBB <GO>
My Bloomberg
Help Page

Enter MYBB <GO>, then press <Help>

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Bloomberg

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Definitions

For terms in blue throughout this document, see *Definitions on p.13.*

Frequently Asked Questions

What Is My Bloomberg (MYBB)?

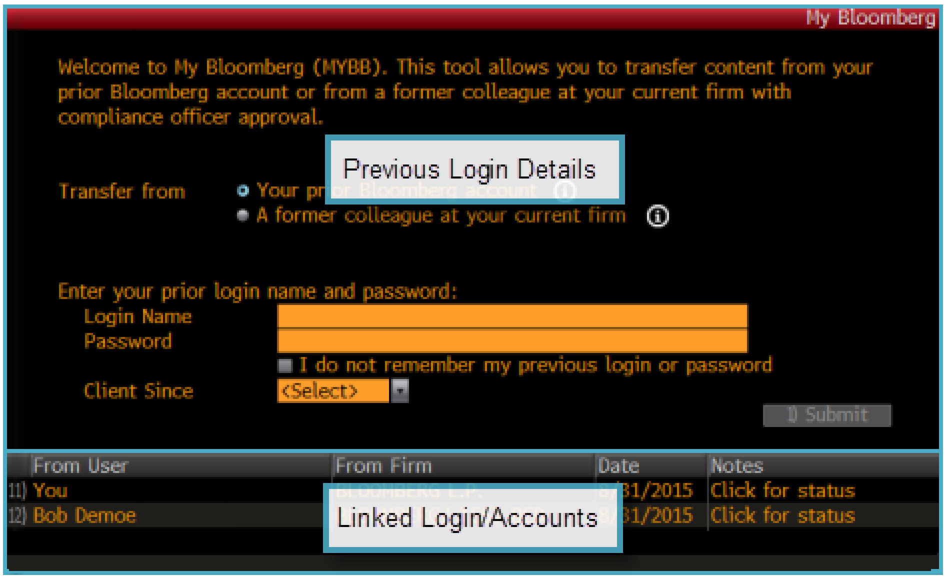
MYBB allows you to transfer key items of your profile from a previous login/account on the BLOOMBERG PROFESSIONAL® service, so you can reduce the amount of time it takes for you to get back to work when you change firms. You can also use MYBB to transfer content from a previous coworker's account at your current firm, so you can retain BLOOMBERG LAUNCHPAD® views, contacts from the *Contact List* (SPDL) function, and *Instant Bloomberg* (IB) persistent chats used by your former colleagues. You can restore or transfer history, settings, and saved alerts, as well as community features from functions such as the *Restaurant Guide* (DINE) function. MYBB also allows you to restore proprietary items, provided you receive approval from a firm compliance officer via the MYBB transfer request form.

MYBB consists of three views: an initial login view, an ID management view that displays items from your previous login/account (if applicable), and a former colleague transfer view, which allows you to manage a previous colleague's transfer items. Once you have linked to a previous login/account (yours or a colleague's), you can access the corresponding transfer view by selecting a linked account from the initial *My Bloomberg* screen.

Note: Some items that can contain sensitive or proprietary content require additional compliance approval, while others may not. For a complete list of transfer items and their compliance restrictions, see Item Restrictions.

My Bloomberg Screen

The *My Bloomberg* screen allows you to enter the login and password for the account you want to transfer or restore and displays any previously linked logins, if applicable. The *My Bloomberg* screen is the default screen and appears when you run MYBB <GO>.



- **Previous Login Details**: Allows you to choose whether you want to transfer account details from a previous personal or former colleague's login/account and confirm corresponding account details.
  - For more information on transferring your previous login/account, see Linking a Previous Login.

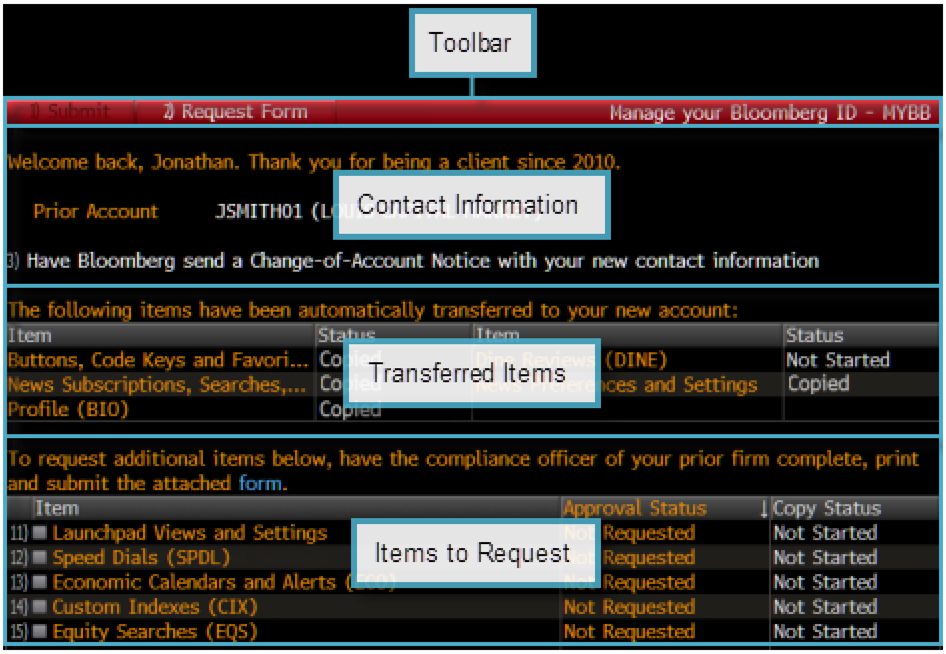
- For more information on linking a former coworker's login/account, see Linking Former Colleagues.

- **Linked Logins/Accounts**: Displays a list of logins/accounts that you have previously verified, if applicable.

Note: If you have already provided your old login/password using the *User Self Registration* (UREG) function, the *My Bloomberg* screen is skipped and the item history view appears by default. For more information on UREG, see UREG <Help>.

ID Management View

Once you provide the login and password for your previous account, the ID management screen displays historical items from the linked login/account that are either automatically copied, or which can be requested after you complete the transfer request form.



- **Toolbar**: Allows you to download the MYBB transfer request form and submit requests for restoration of specific content for a previous BLOOMBERG PROFESSIONAL® service login. For more information on downloading the transfer request form, see Transfer Request Form.

- **Contact Information**: Displays your former Bloomberg ID information and a link that allows you to have Bloomberg send a one-time change-of-account notification to all users that have your previous login in their *Contact List* (SPDL) function contact lists. For more information on sending a change-of-account notification, see Change-of-Acct Notices.

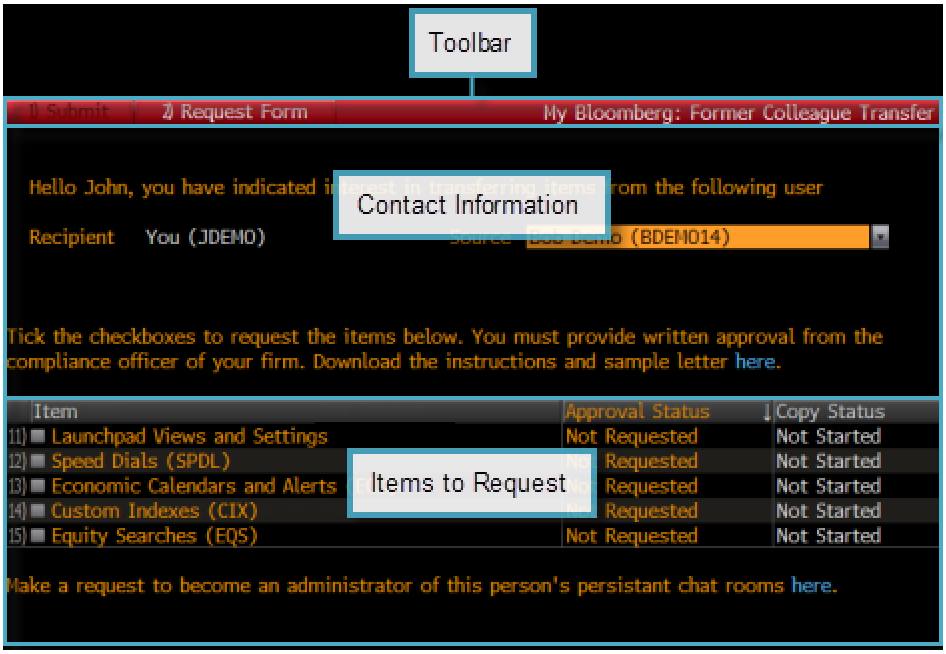
- **Transferred Items**: Provides a list of the Bloomberg items that are automatically transferred to your new account, so you can quickly see which settings are maintained between your old and new accounts. The *Status* columns indicate whether or not the transfer is *Not Started* or *Copied*.

- **Items to Request**: Provides a list of specific items that may be proprietary to your previous firm. You can request any item you want to transfer, provided that Bloomberg receives the MYBB transfer request form from your previous firm's compliance officer. This further facilitates the process of reverting your Bloomberg settings to their previous state, so you can spend more time working and less time recreating Launchpad views and other settings and alerts. For more information on transferring items that require compliance approval, see Requesting Items.

Note: When leaving a firm, note the name and contact of your compliance officer. The registered compliance officer at your previous firm must provide Bloomberg with the completed transfer request form, on the previous firm's corporate letterhead, stating which Bloomberg items you can restore once you leave the firm. A compliance officer may allow all the items you request, or just a few. Obtaining your prior firm's permission allows you to retain more of your previous work when you start a new position. If your compliance officer does not allow you to transfer certain items, a Bloomberg representative can help you rebuild your workflow as quickly as possible.

Colleague Transfer View

The former colleague transfer view allows you to request a former colleague's BLOOMBERG LAUNCHPAD® views and settings, *Contact List* (SPDL) groups and contacts, custom indexes, and more. Data transferred from a former colleague's account is added to your account, but does not overwrite your data. You can also request to become an administrator for a former colleague's *Instant Bloomberg* (IB) persistent chats.



- **Toolbar**: Allows you to download the MYBB transfer request form and submit requests for restoration of specific content for a former colleague's BLOOMBERG PROFESSIONAL® service login. For more information on downloading the transfer request form, see Transfer Request Form.

- **Contact Information**: Displays your current login/account and allows you to select the former colleague's linked login/account from which you want to transfer items.

- **Items to Request**: Provides a list of transferrable items from your former colleague's account.
  - For more information on transferring items from a former colleague, see Linking Former Colleagues.

- For more information on requesting to become an administrator of a former colleague's persistent chats, see Requesting P-Chats.

Using MYBB

The following topics explain how to use MYBB to restore and transfer settings and history from a BLOOMBERG PROFESSIONAL® service login/account that previously belonged to you or a former colleague at your firm.

For a description of the function, see What Is MYBB?.

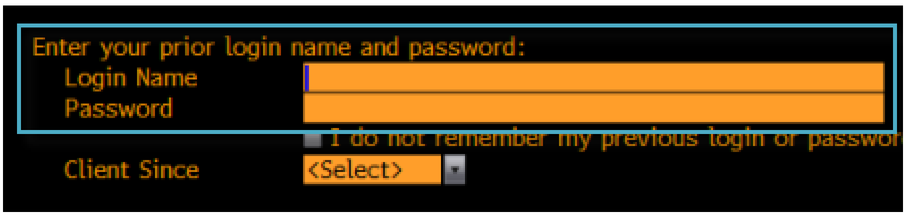
Linking a Previous Login

MYBB allows you to restore history from a previous login/account by confirming your prior login information, so you can automatically transfer your toolbar buttons, favorites, and other items.

Steps:

1. From the *Transfer From* options, select **Your Prior Bloomberg Account**.

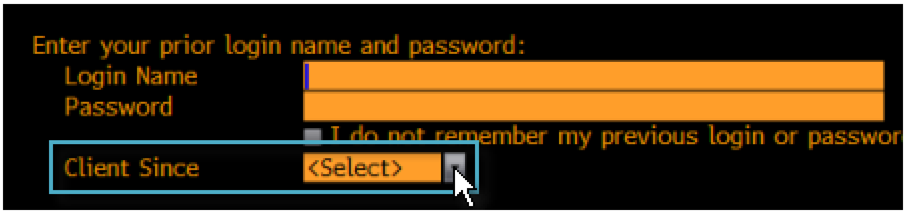
2. In the *Login Name* and *Password* fields, enter your previous Login Name and Password.



Note: You cannot link to or restore an account that is currently active.

If you do not remember your previous login credentials, select the *I Do Not Remember My Previous Login Or Password* checkbox to create a *Help Desk* (HDSK) ticket.

3. From the *Client Since* drop-down menu, select the year your login/account was established.



4. Click the **Submit** button.

   When the link to the previous login is complete, the corresponding ID management view appears. A list of items that can be transferred appears in the lower portion of the screen. For more information on requesting items, see Requesting Items.

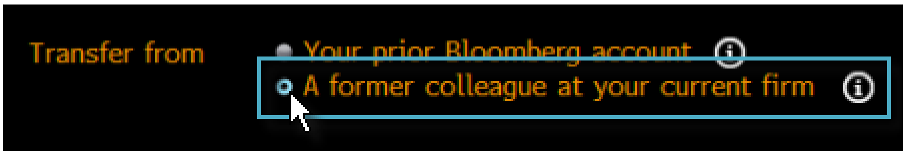
   Note: The item history view does not appear until the link to the previous login is complete. You cannot access the view by contacting the Help Desk.

Linking Former Colleagues

You can use MYBB to request transfer of a former colleague's Launchpad templates, Speed Dial contacts, and more.

Steps:

1. From the *Transfer From* options, select **A Former Colleague At Your Current Firm**.



2. In the *Enter Your Colleague's Name or Login Name* field, start typing the name or login name of a former colleague, then select the login/account from the list that appears.

   Note: The list that appears is limited to your colleagues whose logins have been deleted within the last 6 months.
3. Click the **Submit** button.

   When the link to the colleague's login is complete, the corresponding *My Bloomberg: Former Colleague Transfer* screen appears. A list of items that can be transferred appears in the lower portion of the screen. For more information on requesting items, see Requesting Items.

   Note: The item history view does not appear until the link to the previous login is complete. You cannot access the view by contacting the Help Desk.

Transfer Request Form

MYBB provides a *MYBB Login Information Transfer Request* form in PDF format that allows you to request the transfer of Speed Dial, Launchpad, Economic Calendars and Alerts, Custom Charts, Custom Indexes, Equity Searches, or other MYBB items that require the approval of a firm compliance officer.

To complete and submit your request:

1. From the *My Bloomberg* screen, link a previous login or former colleague or click a linked account in the section at the bottom of the screen.

    - For more information on linking a previous login/account, see Linking a Previous Login.

    - For more information on linking a former colleague's login/account, see Linking Former Colleagues.

    Depending on whether you select your or a colleague's login/account, the corresponding *Manage Your Bloomberg ID - MYBB* or *My Bloomberg: Former Colleague Transfer* screen appears.

2. From the toolbar, click the **Request Form** button.

    The transfer request form downloads and opens.

3. Send the request letter to the compliance officer, along with the relevant login and firm names.

    - To link a prior personal login/account, send the request form to the compliance officer at your previous firm.

    - To link a colleague's login/account, send the request form to the compliance officer at your current firm.

4. Ask the compliance officer to print the request form on the firm's letterhead, enter the login information you provided, select the items you want to transfer, and sign it.

5. Once the form is completed and signed, e-mail the letter to mybloomberg@bloomberg.net with your name in the subject line.

    When the form is received, the Bloomberg Help Desk reviews and processes the request. You are contacted by a representative who confirms the completion of the transfer and answers any additional questions.

6. If you want to monitor the status of your request, enter MYBB <Go>.

    Note: The transfer of portfolios between firms requires a separate process. For more information, contact Bloomberg's 24-hour Analytics Desk by pressing the <Help> key twice.

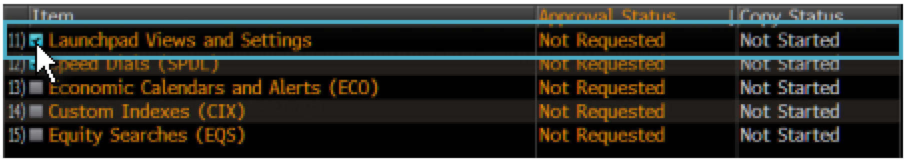
Requesting Items

Once you have received approval from the compliance officer using the MYBB transfer request form, you can request to copy historical login/account items.

Note: For more information about acquiring compliance approval by using the transfer request form, see Transfer Request Form.

Steps:

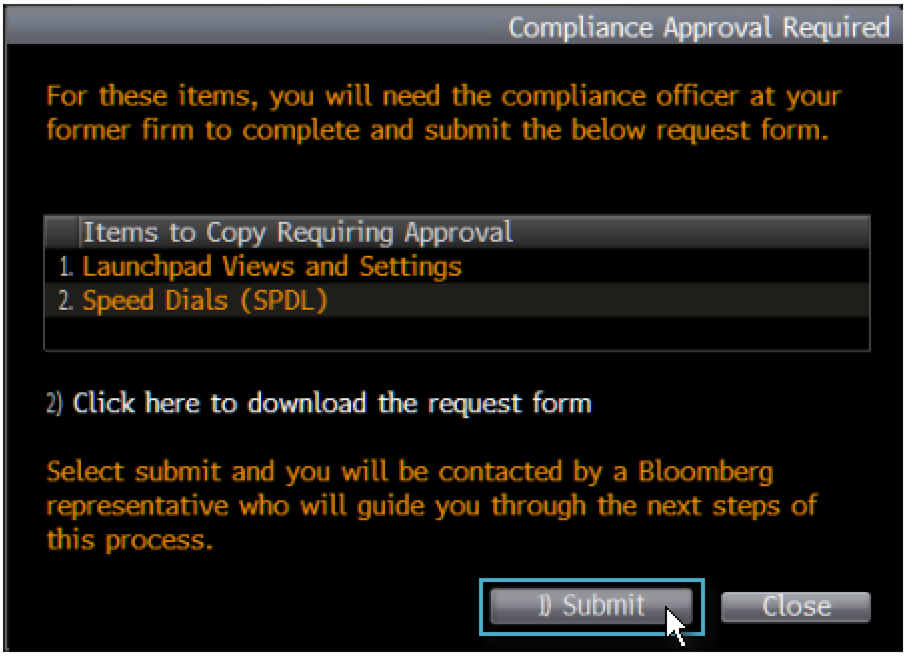
1. In the bottom of the *Manage Your Bloomberg ID - MYBB* or *My Bloomberg: Former Colleague Transfer* screen, select the items you want to transfer (e.g., *Launchpad Views and Settings*).



2. From the toolbar, click the **Submit** button.

   The *Compliance Approval Required* window appears with a confirmation of your selected items and further instructions regarding the next steps for the process.

3. Click the **Submit** button.



Note: If you need to download the transfer request form, click the **Click here to Download the Request Form** link.

The window closes. You will be contacted by a Bloomberg representative.

Requesting P-Chats

You can request to become the administrator of *Instant Bloomberg* (IB) persistent chats that were previously owned by a former colleage.

Steps:

1. Link the login/account of the former colleague whose persistent chats you want to claim by following the steps in Linking Former Colleagues or, from the *My Bloomberg* screen, select a previously linked colleague's account.

   The *My Bloomberg: Former Colleague Transfer* screen appears.

2. In the *Make a request to become an administrator of this person's persistent chat rooms here* text, click the **Here** link.

   The request is submitted.

Change-of-Acct Notices

Once you link your current account to your prior login, you can request that Bloomberg send a change-of-account notice to users who have your previous contact in their *Speed Dial List* (SPDL). This allows you to notify other users about your new account information to better keep in touch and preserve business continuity. The notification includes the name and firm of the new login and allows the recipients to update the existing SPDL record to reflect the new contact information.

Note: The change-of-account notice can only be sent once and is sent to all users that have your previous account in their SPDL list. You cannot see or customize the list of notification recipients.

For information on managing contacts in SPDL, see SPDL <Help>.

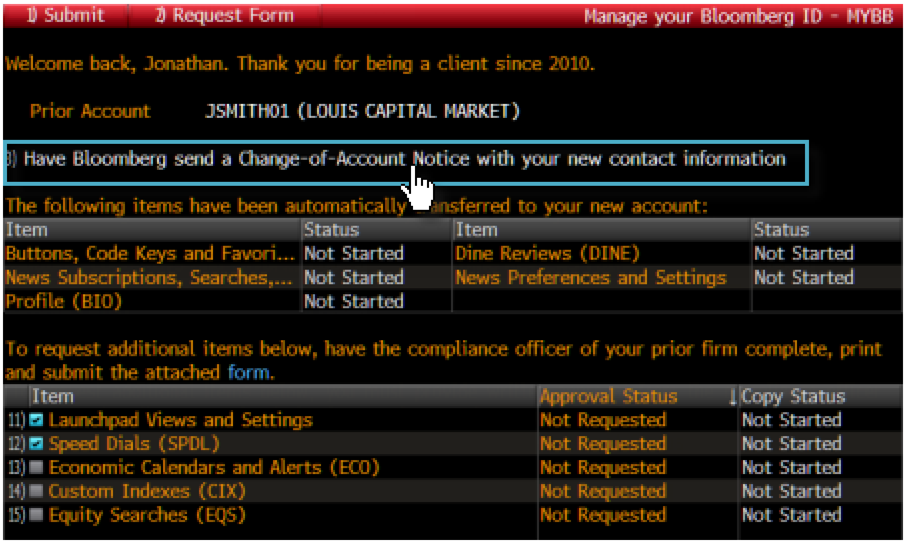
Sending Notices

You can request that Bloomberg send a change-of-account notice to users who have your previous account information in their SPDL contact list.

Note: If you are using the *User Self Registration* (UREG) function to create a new login for yourself, you can send a change-of-account notice to your SPDL contacts by selecting **Yes** in the *Send a Change-of-Account Notice to Users with Your Prior Account in their Speed Dial* field.

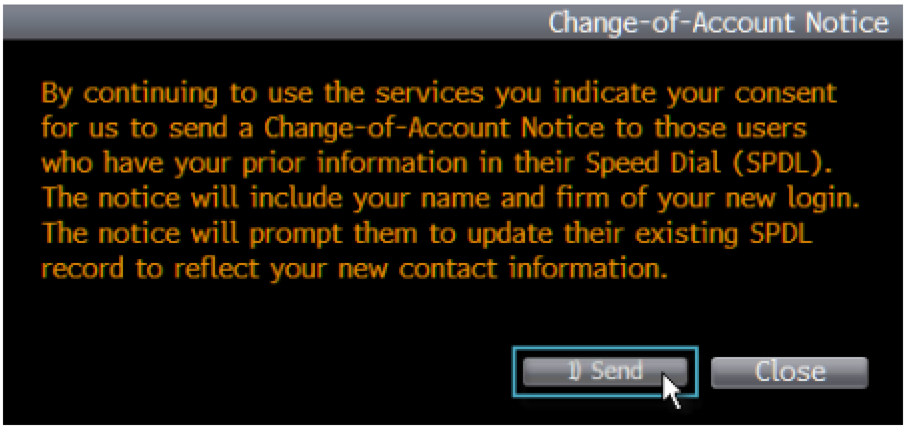
Steps:

1. In the item history view, click the **Have Bloomberg Send A Change-of-Account Notice With Your New Contact Information** link.



The *Change-of-Account Notice* window appears.

2. To send the change-of-account notice, click the **Send** button.



Note: Notices are not sent to users in shared SPDL groups.

A notification with the subject line "Change-of-Account Notice" is sent to all users who have your previous login information in their SPDL contacts. The message, as illustrated below, allows the users to directly update the SPDL record linked to your previous login/account.

Recipients of change-of-account notices can stop receiving change-of-account notices in the future by contacting the Bloomberg Help Desk. To contact the Help Desk, press the <Help> key twice.

Item Restrictions

Some items can be transferred as soon as the corresponding login/accounts are linked, while others that may contain more sensitive or proprietary content require additional compliance approval.

Transfer item	Requires compliance approval
Buttons, code keys, and favorites	No
News subscriptions, searches, filters, and alerts without ticker lists (BRIE, SALT, FIRS, and NLRT)	No
Profile (BIO)	No
DINE reviews (DINE)	No
News preferences and settings (NZPD)	No
Launchpad views and settings	Yes
Speed Dial (SPDL) contacts and groups	Yes
Economic calendars and alerts (ECO)	Yes
Custom indexes (CIX)	Yes
Equity Screens (EQS)	Yes

For more information about requesting compliance approval for transfer items with the Transfer Request Form, see Transfer Request Form.

Definitions

Term	Definition
Approval Status	The approval status for the compliance item.
Automatically Transferred Items	The historical items not requiring compliance approval that are automatically transferred from the previous login.
Client Since	The year in which you initially became a BLOOMBERG PROFESSIONAL® service user. This option allows you to carry over your original date as a Bloomberg client.
Content	The historical items that require a letter from your previous firm's compliance officer for transfer.
Copy Status	The approval status for the automatically transferred item.
I Do Not Remember My Previous Login or Password	Indicates that you do not know your previous login or password.

Term	Definition
Items to Copy Requiring Approval	The items for which you are making your request.
Login Name	Your most recent BLOOMBERG PROFESSIONAL® service user name.
Password	Your most recent BLOOMBERG PROFESSIONAL® service password.
Previous Firm	The name of the firm associated with your login for your previous BLOOMBERG PROFESSIONAL® service account.
Previous Login	The login for your previous BLOOMBERG PROFESSIONAL® service account.

Frequently Asked Questions

Get answers to the most commonly asked questions.

Can I transfer settings from my old account or a former colleague's login and add them to my current account?

You can use the *My Bloomberg* (MYBB) function to transfer settings from your old account or a former client's account to your current account. On MYBB <GO>, you must complete a MYBB Login Information Transfer Request form in PDF format. You can request the transfer of the following from your old login or a former colleague's login:

- Launchpad Views and Settings
- Speed Dials (e.g., contact lists in SPDL)
- Custom Charts (G)
- Custom Indexes (CIX)
- Equity Searches (EQS)
- Economic Calendars and Alerts (ECO)
- Fixed Income Searches (SRCH)
- Whisper (WHIS)
- Any other MYBB item that requires the approval of a compliance officer

Take the next step.

For additional information, press the <HELP> key twice on the Bloomberg Terminal®.

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