Bentley University Trading Room
(Important information as we switch to an online mode due to COVID-19)
(Update: September 9, 2020)

Virtual Front Desk
(Staff on Duty: hours posted on next page)
Please click on the Zoom Id below to connect with our analyst on duty:
https://bentley.zoom.us/my/tradingroomvirtual assistants

Trading Room Calendar
(https://www.bentley.edu/centers/trading-room/calendar)

Provides information on:
- Tutorials sessions on Bloomberg, FactSet, Cap IQ, and Morningstar (click on a desired tutorial slot on the calendar)
- Zoom sessions for Fireside Chats
- Other virtual events

Click here https://www.bentley.edu/centers/trading-room/wall-street-101 to read about Wall Street 101 Summer Camps

Bentley Trading Room Operating Policy

The Trading Room databases may be accessed remotely by obtaining access id and password from the database providers. Fireside Chats and Tutorials will be conducted online. Staff will be available online during our normal hours to answer questions. We will use Zoom to communicate with faculty, staff, and students. All information about Zoom meeting id hours will be posted online on our web calendar: (https://www.bentley.edu/centers/trading-room/calendar). Details of our online service mode are provided below:

On-Campus Working Hours: 9 am to 11 pm (M-Th), 9 am – 5 pm (Friday), 12 pm-5 pm (Saturday), and 12 pm -10 pm (Sunday). **European and Asian Hours (Virtual Front Desk Zoom Session)**: The TR is open during non-US hours to accommodate Bentley students currently living in foreign countries in different time zones (Europe and Asia). **7 am – 9 am (M-F), and 11 pm – 1 am (M-Th).** Front Desk Zoom Session Id: https://bentley.zoom.us/my/tradingroomvirtualassistants

Maximum Number of Visitors to the TR at Any Time (21): Due to strict adherence to university guidelines for social distancing, the maximum number of visitors is **21** at a time (excluding 2 TR staff).

Mandatory Card Swipe, Face Mask, and Social Distancing: All faculty and students will be required to use the card swipe to enter the Trading Room. There will be a sign-in sheet for Bentley guests. The Trading Room will not allow anyone to enter without an approved face mask. Please comply with all guidelines for COVID testing and social distancing rules, as mandated by Bentley University.

Zoom Sessions: Tutorials and Fireside Chats

Zoom Tutorial Sessions on Bloomberg, FactSet, Morningstar, and Cap IQ: We will be offering tutorials on Bloomberg, FactSet, Morningstar, and Cap IQ databases, taught by our TR staff. The plan is to offer each of these tutorials once a week. We will post the time slots and Zoom session ids for these 30-min long sessions on our Trading Room Calendar. Simply join the Zoom session that fits your schedule. Only Bentley students, faculty, and staff with valid Bentley email can join these sessions. Click on a session that fits your schedule, register, and then show up at scheduled time.
https://www.bentley.edu/centers/trading-room/calendar

Fireside Chats: Fireside Chats will be hosted on Zoom from now on until further notice. Please monitor our calendar for additional information (time of events). The Zoom link is:
https://bentley.zoom.us/my/tradingroomfiresidechat

Remote Access to Bloomberg, FactSet, and CapIQ

Bloomberg Terminal: Remote access to the Bloomberg terminals requires a new user to first create a Bloomberg account using a Bentley issued email id. See next page for detailed description. Please reach out to the TR staff at our virtual front desk for assistance.

FactSet and Cap IQ: Bentley University students, faculty, and staff can have personal accounts for online access to these databases. It takes up to 7 days to get an account. To get started, see below:
https://bentley.co1.qualtrics.com/jfe/form/SV_d51IgfHUjoHKSoZ

Morningstar: The Bentley University library subscribes to the Morningstar database. Please visit Bentley University library website to get more information on how to access the database remotely. For other databases, please visit the library website.

Contact: Jahangir Sultan, Founding Director, The Hughey Center for Financial Services/Trading Room
Tel: 781-891-2518

Remote Access to Bloomberg

Bloomberg Terminal Access

Due to the COVID-19 pandemic, Bentley University reached out to Bloomberg and received permission to enable "Disaster Recovery" (DR) mode for remote access to Bloomberg Terminals. Under the DR mode, 24 Bloomberg open terminals in the Bentley University Trading Room will be made available to faculty, staff, and students for remote access. Please use this document to get **directions for** remote access to the terminals.

<u>IMPORTANT NOTE:</u> Only 24 users simultaneously can use these terminals. We rely on an honor system to provide additional users with equal access to use these terminals. Additional users (user 25 and so on) will see a Bloomberg software window dialog at login showing Terminal is being used by another user. A new user can force an online user to log off and gain access to Bloomberg Terminal. (Not recommended). The Trading Room has no control over Bloomberg's DR technology for remote access.   As such, if your work is urgent, please notify the existing user (via email) and request that you be allowed access for 30 minutes. Do not terminate his or her connection without prior notice.

Usage Limitation: We are hoping that we can rely on an honor system to control remote access. Please exit your terminal session after 30 minutes so other users can gain access and use the Bloomberg Software. You can wait 30 minutes to log back into the terminal.

Unauthorized use: Bentley is making this service available to current faculty, staff, and students for the following purposes: teaching, research, and course projects. Any unauthorized use of this service for personal or commercial use is prohibited.

Remote Access to Bloomberg: Existing User

Existing Users with Bloomberg Account

- Navigate to https://bba.bloomberg.net/
- Follow login instructions on the screen.

Remote Access to Bloomberg: New User

New Users without a Bloomberg Account

Option 1: Creating a Bloomberg Account by visiting the Trading Room
Log in to any computer in the Trading Room:
- Id: studentuser
- Pwd: studentuser
- Next, click on the Bloomberg icon on the desktop to launch Bloomberg
- Towards the bottom of the screen, click on **Create a New Login**
- Provide information for verification. Once authorized (in 1 minute), you can use your new account id and pwd to login to Bloomberg Terminal in the Trading Room.
- **Remote Access with your id**: **Log in to** https://bba.bloomberg.net/

Option 2: This option requires that you first create a Bloomberg Market Concept (BMC) account. Once a BMC account has been created, contact Fred Monshi at Bentley to request access to Bloomberg Terminal (see below).
- **Create a BMC account at:** https://portal.bloombergforeducation.com/sign_up. Go through the Bloomberg verification process. Once complete,
- Email Fred Monshi (Fmonshi@bentley.edu) and indicate that you would like access to a Bloomberg Terminal. Make sure you provide information on your BMC username. Once you are authorized by Fred, you are all set.
- Now, you are an existing user. You can go to the Trading Room and login to a terminal or you can access Bloomberg remotely.
- **Remote Access: Log in to** https://bba.bloomberg.net/ and follow login directions on the screen.