Bloomberg

Access Point on Demand (APOD)

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Contents

Overview

APOD, Access Point, Terminal Types

Access Point On Demand (APOD) has been designed to allow a user to install the Bloomberg software on a PC.

Depending on the connection type (Bloomberg router or Internet) different authentication methods will be required.

APOD

- **A**ccess **P**oint **O**n **D**emand (APOD) allows you to create a configured Bloomberg Access Point independently, without having to contact Bloomberg.

- For a PC *with connectivity* to a Bloomberg provided router/circuit (also known as "Private IP"), the APOD can quickly be created without required authentication (such as name/password or B-Unit screen sync), and is enabled for trading functionality by default. If the Bloomberg router is shared by more than 1 firm, a Bloomberg login name will be required to create the APOD (see note on page 10).

- For a PC *with **no** connectivity* to a Bloomberg router (i.e., Internet connection), a valid Bloomberg Anywhere login, password and a B-Unit screen sync is required. The APOD is created without trading functionality, by default.

- The Access Point tab on the Connection Wizard (CONN <GO>) allows you to create a Bloomberg Access Point (APOD) independently.

Access Point

- A Bloomberg Access Point (BAP) is necessary for users who would like to access trading applications. This installation of the Bloomberg software requires an order to be placed with Bloomberg before being installed. Please speak with your account manager for further details.

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Overview

Useful Information

- To verify if a computer meets the recommended specifications to support Bloomberg software and hardware, please review the necessary documentation and other technical specifications located on www.bloombergsoftware.com. (Scroll to Documents, PC Requirements), or to http://www.blpprofessional.com for users in mainland China.

- Check your desktop for presence of the Bloomberg icon. (See Fig.3)
  If there is no Bloomberg icon on your desktop, proceed to Software Download.
  If the icon is present, double-click on it. If the Bloomberg application is active, the Bloomberg service will launch and you'll be able to login. If the Bloomberg application is not active, you'll need to recreate the APOD.

- Bloomberg Anywhere Users can create APODs on multiple PC's.

- There can only be one APOD/Access Point per workstation/PC.

- Bloomberg APOD/Access Points are set with an automatic expiration.
  If not logged into, the serial number will automatically expire after the following time frames, and you will need to create a new APOD/Access Point.

  Automatic expiration
  30 Days = Internet Connection
  60 Days = Router Connections/Private IP

- Non-Bloomberg Anywhere users are encouraged to contact their account representative to convert to Bloomberg Anywhere to be able to take advantage of this service.

- Bloomberg Software is Windows based and is not supported on Macs. Bloomberg Software can be installed if the Mac is running a Windows Operating System.

Access Point on Demand Creation Steps

Step 1:

Download the latest version of the Bloomberg Professional software from the Bloomberg website:
http://www.bloombergsoftware.com ,
for users in mainland China, go to http://www.blpprofessional.com.
Click the option that says "Terminal - New Installation".
We recommend saving the application to your desktop and then running the application to complete the installation.
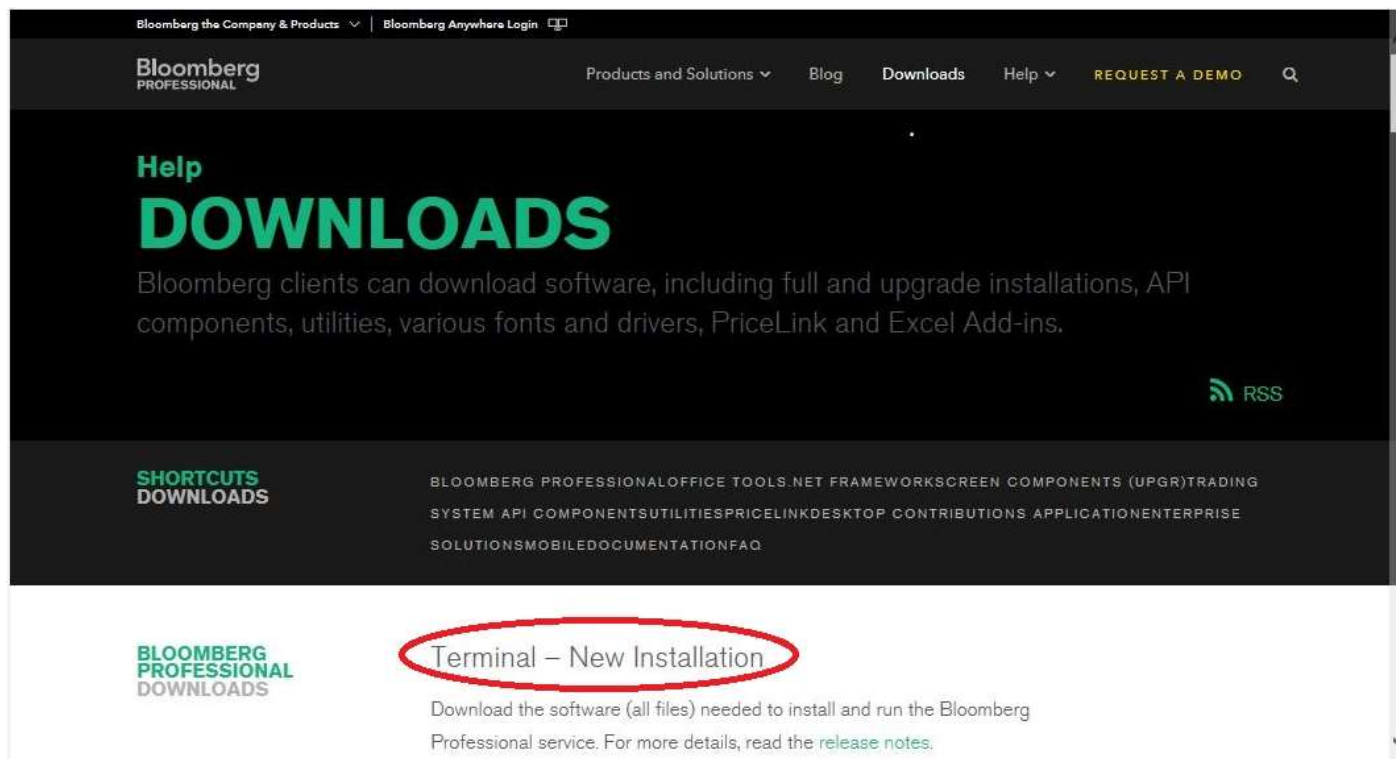

Figure 1

"Software Installation Guide" is available under the **Documentation** section on the **Bloomberg Professional** website.

For users in mainland China, the "Software Installation Guide" is available under the Documents section of **http://blpprofessional.com/**

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Access Point on Demand Creation Steps

Step 2:
Click "Accept" and "OK" (use default settings) through the steps in the Installation Wizard until following screen appears. This confirms the Bloomberg Software has been installed
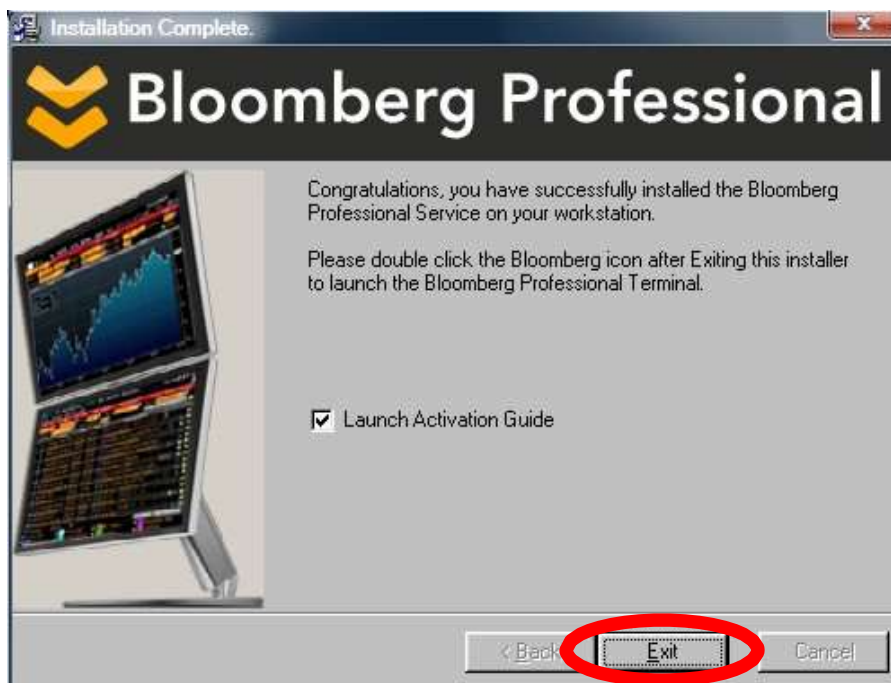
Figure 2

Step 3:
Select "Exit" and the following Bloomberg Icon will appear on your desktop

Figure 3

Access Point on Demand Creation Steps

Step 4:
Double click the Bloomberg Icon and the "Connection Wizard" window will launch automatically to the 'Serial Number' tab. The "Connection Wizard" can also be accessed manually by typing CONN<GO> from the Bloomberg Application once it is installed.
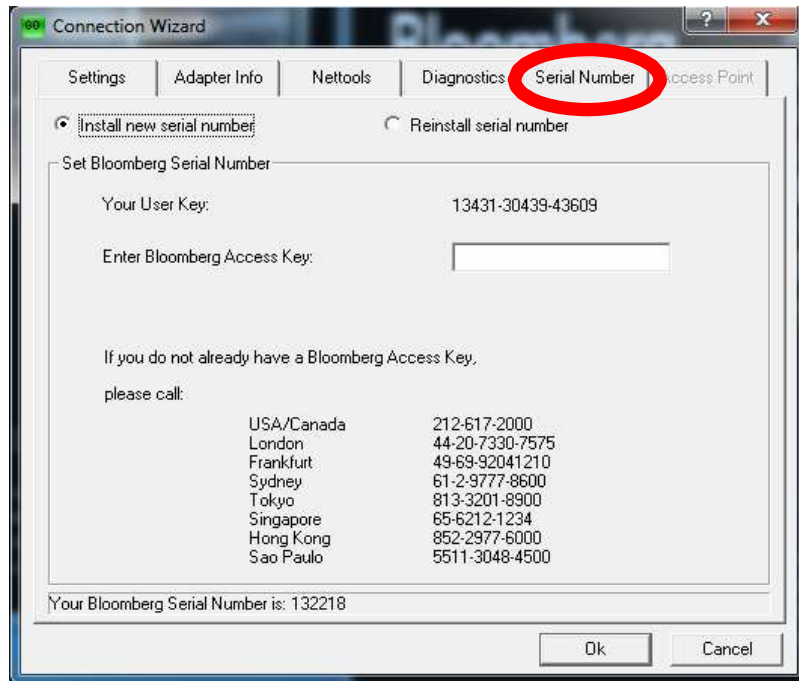
Figure 4

Access Point on Demand Creation Steps

Step 5:
Select the "Settings" tab and the following screen will appear
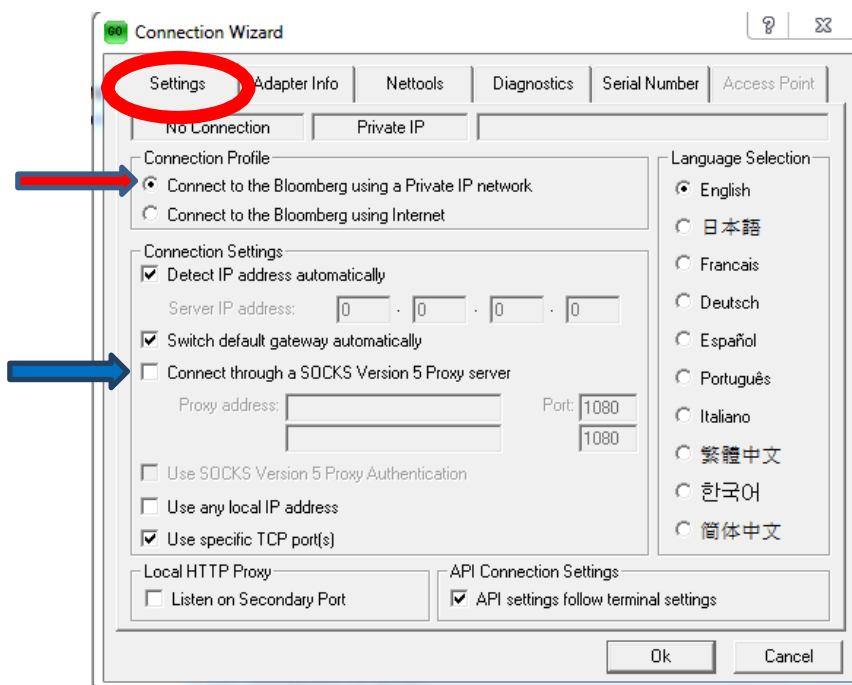
Figure 5

a. ➡️ Check your "Connection Profile" to ensure the type of connection you have to Bloomberg is correct. Private IP or Internet. If a change is needed, be sure to click OK to save the settings.

b. ➡️ If your workstation connects to a Proxy Server, you will need to indicate this within the Settings tab, in the field labeled "Connect through a SOCKS Version 5 Proxy server", enter the IP addresses, and click OK to save the settings. Once complete, proceed to step 6.

c. If your workstation does not connect to a Proxy Server, then leave the default settings and proceed to step 6.

Access Point on Demand Creation Steps

Step 6:
Select the Access Point tab and the following screen is displayed:
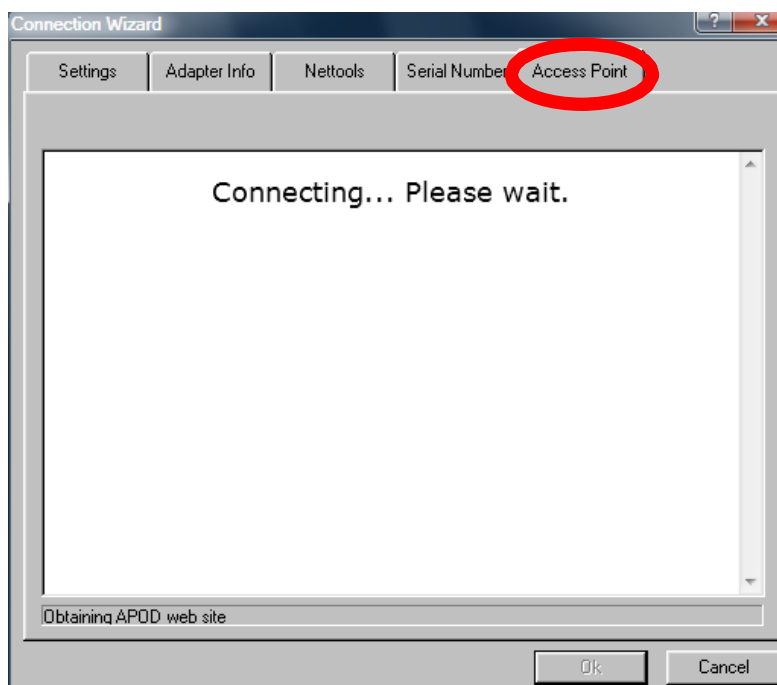
Figure 6

The embedded web-page communicates with Bloomberg either via Private IP if a Bloomberg router is detected, or via the Internet if no router is detected. The 'Ok' button is inactive during this process, which can take up to 15 seconds to complete. If you connect via Private IP proceed to step 7. If you connect via internet proceed to step 8.

IMPORTANT NOTE ABOUT TRANSACTIONAL PRODUCTS (TRADING) FUNCTIONALITY:

- If a Bloomberg router is detected, the APOD will be created with transactional product functionality.

- If no Bloomberg router is detected, the APOD will be created without transactional product functionality.

- See APOD Administrator section at the end of this document for transactional product enablement.

Access Point on Demand Creation Steps

Step 7:
After verifying the Private IP connection, the system will complete the APOD installation without authentication.
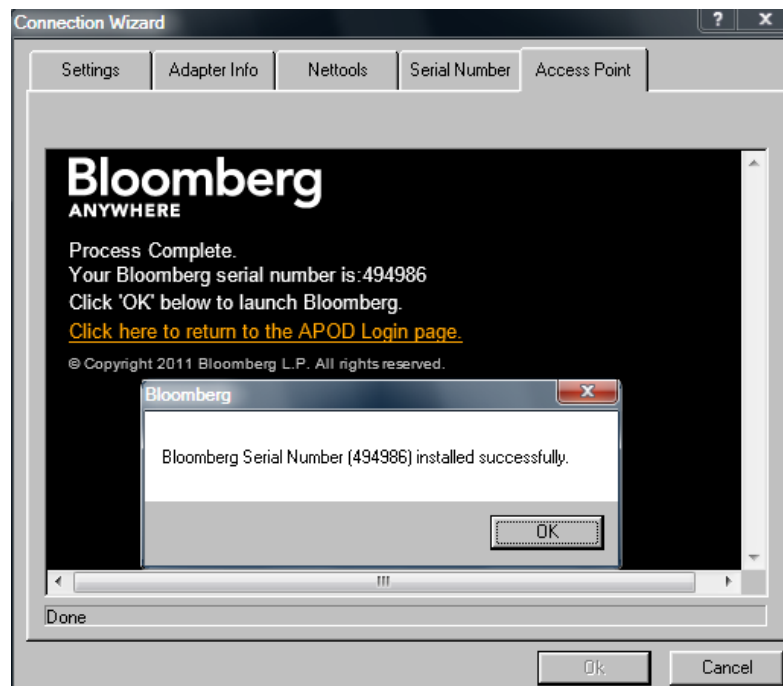
Figure 7

IMPORTANT NOTE ABOUT CONNECTING OVER PRIVATE IP:

- If APOD detects multiple firms associated with the Bloomberg router, the system will prompt for a login name. This login name can be any login name listed under the customer number. No B-Unit authentication is required. This is to allow the APOD to be installed in the same account as the creator's login.

Access Point on Demand Creation Steps

Step 8:
After establishing an internet connection, a Bloomberg Anywhere user with an enrolled B-Unit enters their login/password, and then selects 'Log In'.

Figure 8

Step 9:
The User is then prompted with three options:
1) Option 1: Perform the B-Unit screen sync and enter the B-Unit code (as seen in Fig 9)
2) Option 2: If the flasher does not appear, the user can select the option **Click here "If the B-Unit Flasher does not display"** and sync against the flashing box (as seen in Fig 10).
3) Option 3: If the user does not have their B-Unit or they encounter a technical issue with the B-Unit, they can select **Click here "if you are unable to get the B-Unit code"** (as seen Fig 11)

Figure 9   **Figure 10**   **Figure 11**

Access Point on Demand Creation Steps

By clicking any of the four options shown in figure 11, users can send themselves an SMS text message or automated call validation to proceed with the APOD creation (Fig.12)

Figure 12

If the numbers presented cannot be used by the user at this time, selecting "Click here if you are unreachable via the above numbers" will allow the user to request a callback & a ticket with reference number will be generated for a Bloomberg representative to follow-up. (See figure 13 & 14)

Access Point on Demand Creation Steps

If a user can receive a text message or automated call, they should enter the code sent to them into the yellow field seen below (Fig.13)
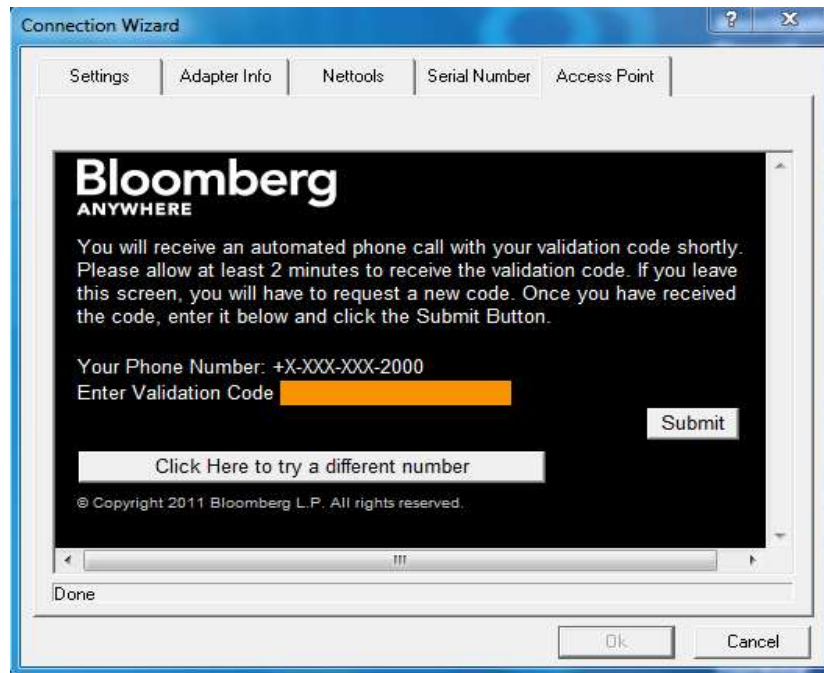
Figure 13
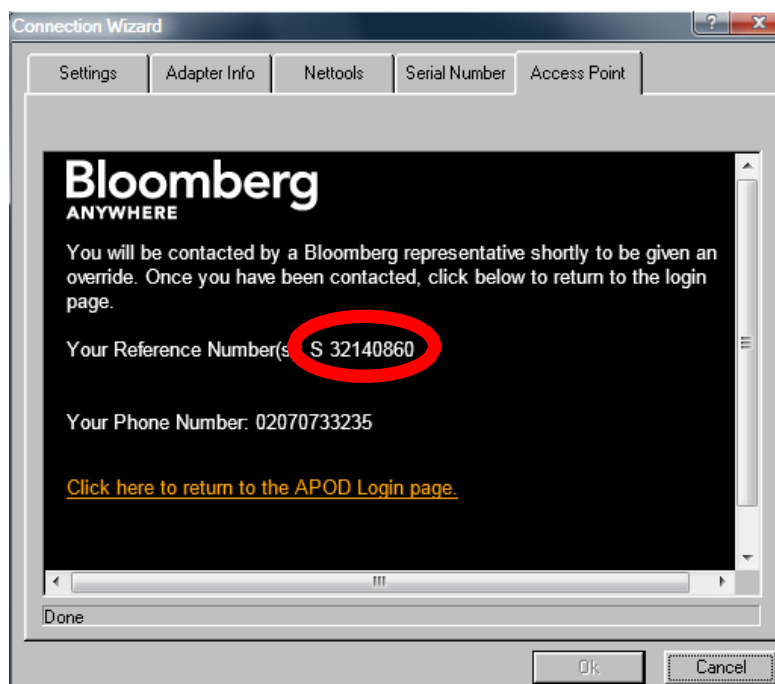
Figure 14

Access Point on Demand Creation Steps

If you requested a call back (Fig 12), a Bloomberg Representative will contact you after the reference number is generated. Click on the link "Click here to return to the APOD Login Page" to create the APOD.

After entering the validation code (within 2 minutes) the following Bloomberg window will appear. Select "OK" to connect and launch the Bloomberg application (see figure 15).
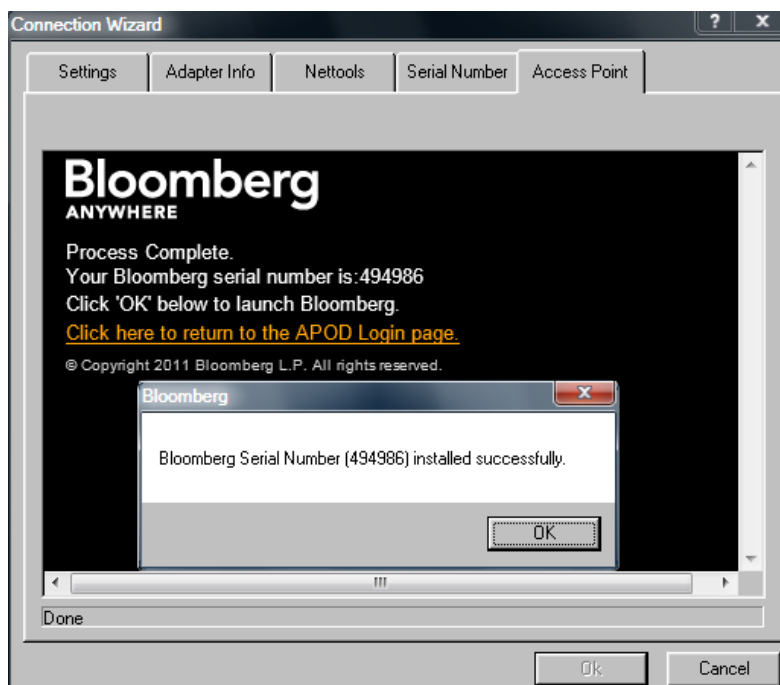
Figure 15

At this point, the user will be required to log into Bloomberg as normal using their login name, password and B-Unit

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IMPORTANT NOTE ABOUT ADDING YOUR MOBILE NUMBER FOR SELF-VALIDATION

■ To update your mobile number on your profile so you can utilize the SMS text messaging or IVR validation functionality, please contact Global Customer Support or run CTOC<GO> to request a callback.

■ A list of Global Customer Support numbers are available GCSN<GO> or under "Customer Support Contacts" located at the bottom of www.bloomberg.com

Software Testing – TOUR INSTALL

For technicians who are creating an APOD for a user, you can use the TOUR INSTALL procedure to test the following Bloomberg functionality.

1) Software Update
2) Keyboard Test
3) PDF Download
4) Bloomberg Video/Audio
5) Bloomberg API
6) Bloomberg Smart Client
7) Web Access
8) Printing

From the **1-Bloomberg** window, hit **Esc**, type: "TOUR INSTALL" and press <**Enter**>
The system will log in, using TOURINST as the user name. The TOUR INSTALL language option page will appear, select the language to continue. Please run each step manually.

Any functions required during the testing process will be run on the 2-Bloomberg screen.
If a test fails, correct the problem and retest until each test has been performed and passed.

FAQ

Q. Where do I download the software from?

A. Download the "New Installation" file from www.bloombergsoftware.com

Q. How do I install the software?

A. Please review the 'Software Installation Guide' from http://www.bloomberg.com/professional/systems-support/downloads/
For users in mainland China, go to:
http://www.blpprofessional.com

Q. I created the APOD but it won't connect?

A. Please review the Transport and Security Specifications Document which can be downloaded from our website.
https://data.bloomberglp.com/professional/sites/4/Transport_Security_Specification_61.pdf
For users in mainland China, go to:
https://www.bbhub.io/software/sites/2/2016/06/Transport_Security_Specification_61.pdf

Q. Is there a FAQ page for troubleshooting?

A. Yes. Please review our comprehensive FAQ section on the website
http://www.bloomberg.com/professional/systems-support/faqs/
For users in mainland China, go to:
http://www.blpprofessional.com/faq/

Q. I am a technician and do not have a login. Is there a test login I can use to test the software?

A. Yes, from the **1-Bloomberg** window, hit **Esc** and type "Tour Install" and press <**Enter**>, which will enable you to test some functionality of the terminal including Software Update, Keyboard Type, Bloomberg Video/Audio, API, Smart Client, Web Access and Printing.

APOD Administrator

APOD Administrator Access Point On Demand (APOD) is a function that allows authorized administrators to enable and disable access to transactional product/trading system functionality on all APODs, Access Points and Mobile Devices within their firm or account.

Your firm's compliance officer will need to contact Bloomberg to designate the authorized APOD administrator; this user/s must also be a Bloomberg Anywhere user/s.

Once authorized, the APOD administrator will be required to electronically accept the terms of the APOD Agreement (required just once per APOD administrator on initial access). Upon acceptance, the administrator will be permitted to update the APODs access to transactional product functionality.

The APOD administrator can run the function APOD from any Bloomberg terminal. APOD Main Menu
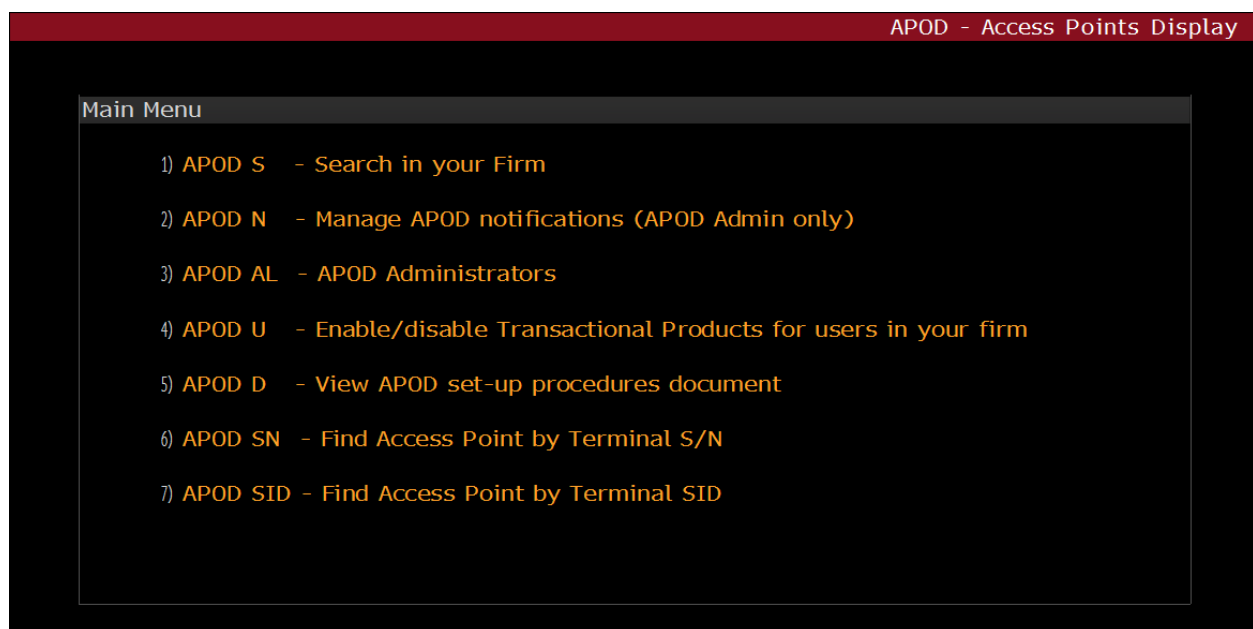
APOD Main Menu

APOD Administrator

1) APOD S Search in your Firm

Provides terminal search options for APOD's, Access Points and Mobile devices. You may expand the search results by checking the "Include Inactive" box. Additionally, using the "Customer Number / Name", you may search for terminals within your firm, by Customer Name or Number, as well as terminals created by a specific user, by using the "Creator" field.

- **TP (Far Right Colum)** stands for **T**ransactional **P**roducts (trading system functionality).
Y = Yes it is enabled for Transactional Products (trading system functionality).
N = No it is not enabled for Transactional Products (trading system functionality).

- **CONN (Connection Type)**
  RTR = Router/Private IP (PIP) connectivity **INET** = Internet connectivity

- **Show**

All = Displays all APOD, Access Point & Mobile Device id's
APOD = Terminal serial # created by the user, without a Bloomberg order #. **Access Point** = Terminal serial # created with a Bloomberg order #. **Mobile Device** = Bloomberg terminal access via mobile device (iPad).

2)APOD N Manage APOD notifications (APOD Admin only)

This allows the APOD Administrator to opt into receiving notifications when APODs are created on an Internet connection. The frequency of the notifications can be adjusted between immediate and daily, and a preferred time for receiving them can also be specified.

3)APOD AL Display APOD administrators for your firm

4) **APOD U Enable/disable Transactional Products for users in your firm**

This allows the APOD Administrator to enable by USER, for transactional product functionality on any configured terminal the user logs into, with biometric authentication. It also accommodates enabling a user for transactional product functionality while they are logged in with a biometric authentication override.

Select or Lookup a user & the following screen is presented:

Option 1) Allow Trans. Products will enable the user for transactional product functionality, regardless if the terminal the user logs into is enabled for transactional product functionality or not.

Option 2) Allow Override Trans. Products will enable the user for transactional product functionality, while they are logged in with a biometric authentication override.

5)APOD D View APOD set-up procedures document

Open's a link to this document in user's default language setting.

6)APOD SN Find Access Point by terminal S/N

Search for the APOD/Access Point by serial number. The S/N is located in the bottom left of any Bloomberg screen after hitting the CANCEL/Esc key.

7)APOD SID Find Access Point by terminal SID

Search for the APOD/Access Point by SID. The SID number is located in the bottom right of any Bloomberg screen after hitting the CANCEL/Esc key or from a SID report

APOD Administrator

How to enable / disable APODs for transactional product/trading system functionality once you have found the S/N - SID you want to update.

- Click on **95<go>** to allow or block transactional product/trading system functionality
  The following screen will appear:

APOD Administrator

- Click on **96<go>** to view the history of all changes made to the APOD's transactional product/trading system functionality: