THOMSON REUTERS
EIKON™

Eikon Core Quick Start Guide

For today's financial professional. Your new desktop has arrived.

Contents:

Install and Sign In 2
Basic Navigation 4
Use your Floating Workspace 7
Monitor your Portfolios 12
Charting and Technical Analysis 16
Eikon Messenger 18
Thomson Reuters Eikon – Microsoft Office 20

the answer company™
THOMSON REUTERS®

Install and Sign In

I. INSTALL THE APPLICATION

II. SIGN IN

III. CONTACT SUPPORT

IV. RESET PASSWORD

V. CUSTOMIZE YOUR PROFILE

I. INSTALL THE APPLICATION

Does my computer meet the requirements for Thomson Reuters Eikon?

1. Go to https://customers.thomsonreuters.com/Eikon
2. Click on *Run the Test* under System and Network Test.
3. Follow the on-screen instructions to run System Test.

How do I get my Thomson Reuters Eikon account?

1. Your company's Market Data team or Thomson Reuters Account Manager requests a Thomson Reuters Eikon ID on your behalf.
2. You, or your Market Data team, will receive a Welcome email from Thomson Reuters Eikon.
3. Click the link in the Welcome email to activate your account.

How do I install Thomson Reuters Eikon?

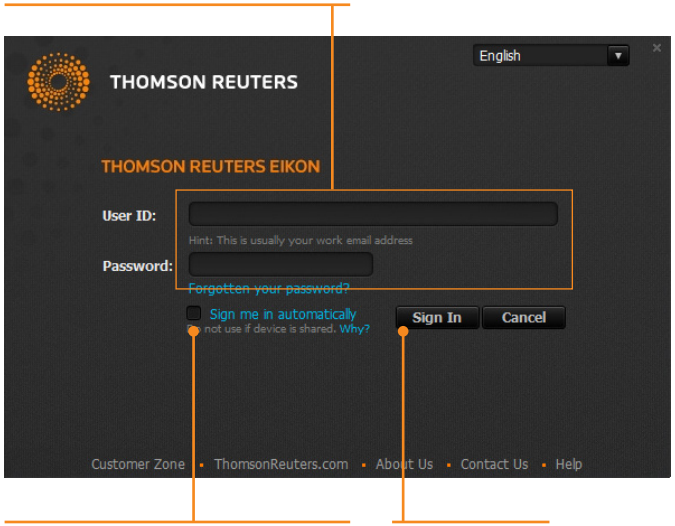
After checking that your computer meets the requirements and activating your account, you are ready to install Thomson Reuters Eikon:

1. Go to https://customers.thomsonreuters.com/Eikon/
2. Click *Sign in & Download*.
3. Follow the on-screen instructions to install Thomson Reuters Eikon.

II. SIGN IN

On your desktop

1. Click *Start* > *Programs* > *Thomson Reuters* and choose *Thomson Reuters Eikon*.
2. Type your user ID and password.



3. Select *Sign me in automatically* to avoid signing in the next time you start the application.
4. Click *Sign In*.

On your mobile device

The single sign-on (SSO) feature with single exchange fees lets you access Thomson Reuters Eikon on iOS, Android, and BlackBerry devices.

Download the Universal App for iPhone and iPad from the Apple App Store. For BlackBerry, go to BlackBerry World. For Android, go to the Google Play App Store.

For eLearning, go to
http://training.thomsonreuters.com/eikon/mobile-solutions

On the web

You can now access key Thomson Reuters Eikon news and data on the web, without having to download an application. Just go to http://eikon.thomsonreuters.com/login and use your user ID and password.

III. CONTACT SUPPORT

If you cannot sign in

Unable to sign in? The most likely cause is an incorrect password or no internet connection.

Should the problem continue, contact:

1. Your local IT or Market Data team.
2. Thomson Reuters:
   - Content & Functionality: 0800 44 20 00
   - Technical: 0800 44 30 00
   - Eikon Messenger: "Support" button at the top

After logging in, you can always access help by pressing *F1* or using *Help* in the app menu.

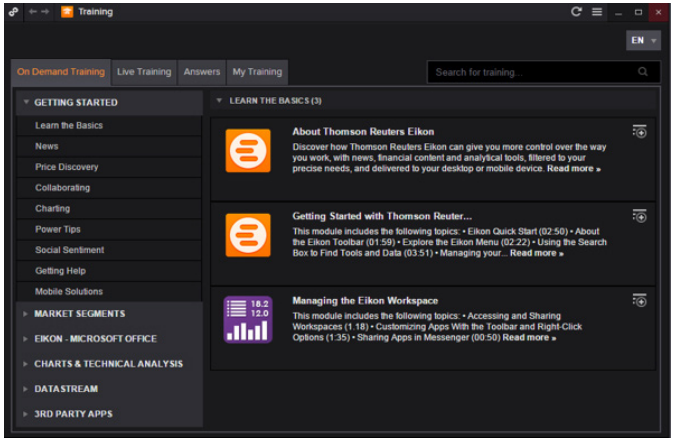
Get more help

- Click ? in the top right of your toolbar to find out what's new in Thomson Reuters Eikon.

Get training

Type TRAINING into the Search box to open the Training App:

- View on-demand video tutorials to help you get the most out of Thomson Reuters Eikon.
- Learn the basics so you can get up and running quickly.
- Explore learning by segment to ensure you are making the most of the tools available for your market.
- Bookmark training so you can complete it at a time convenient to you.



IV. RESET PASSWORD

If you have forgotten your password, open Eikon and click '*Forgotten your password?*' on the sign-in pop up. This is located below the '*Password*' box.

V. CUSTOMIZE YOUR PROFILE

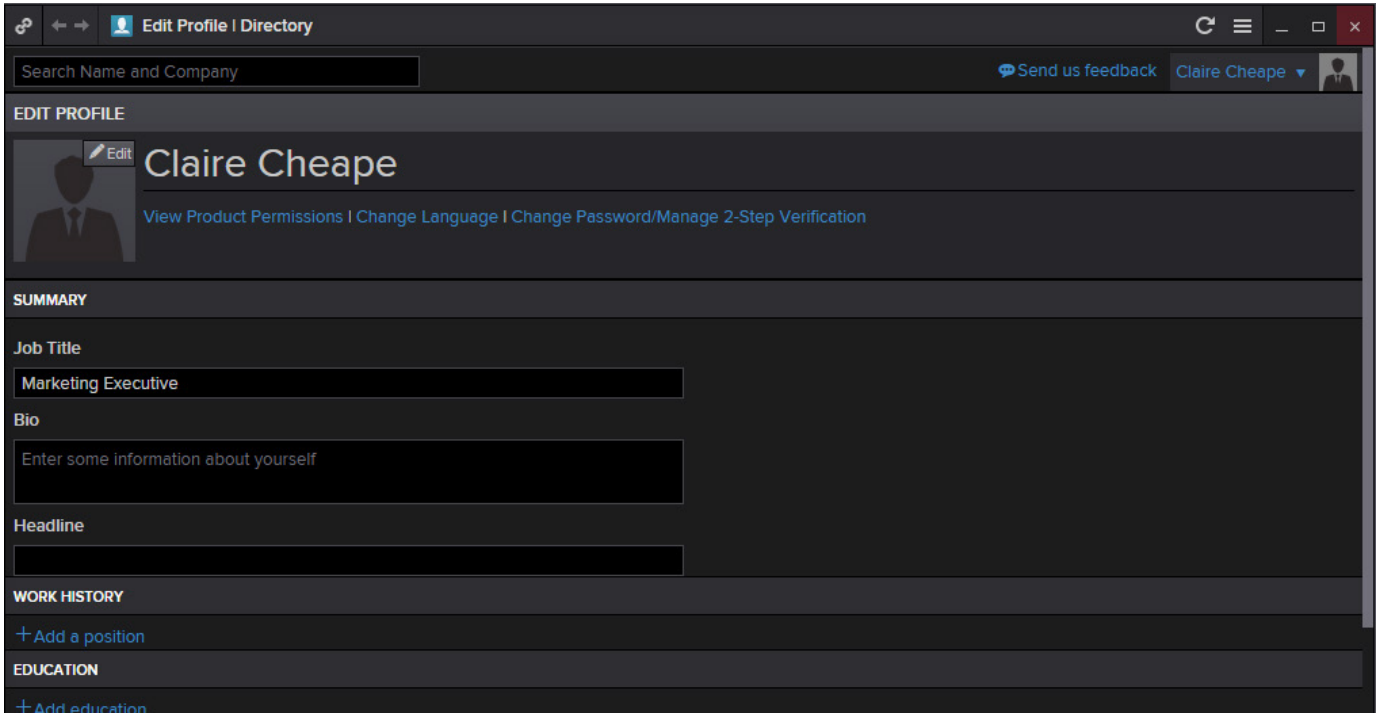
Create your profile

When you sign in for the first time, Thomson Reuters Eikon prompts you to customize your profile. Be sure to fill in *Job Functions* and *Asset Classes:* this information is used to suggest the features and apps most appropriate for your role.

You can:

- import your LinkedIn™ profile
- add a photo
- fill in your work history and education
- give details about your job role in *General Info*
- enter contact details

This information appears in the Thomson Reuters financial directory and improves the results of people-related searches.



Update your profile

You can edit your profile information at any time.

Go to > *Settings* > *Profile* to reopen your profile page and make your changes.

Basic Navigation

I. GET TO KNOW THE TOOLBAR

II. FIND APPS AND DEFINE SETTINGS

III. SEARCH FOR CONTENT AND GET ANSWERS

IV. NAVIGATING THE HOMEPAGE

I. GET TO KNOW THE TOOLBAR

Immediately after logging in, the toolbar appears at the top of your screen.

Tip: To move the toolbar, just right-click it and choose *Undock*, then drag it to a new position.

Tip: To minimize the toolbar, right click it and choose minimize.

Tip: To lock the undocked toolbar to the top of your screen, right click on the bar and choose *Always On Top*.

Click to undock the toolbar.

Access My Files, My Briefcase, Settings and Favourites.

Set and find alerts.

Thomson Reuters Eikon button. Click here to access the app menu, App Library, saved workspaces, settings, and Help.

The Search box is powered by **Autosuggest** and **Answers**. Use it to find apps, data, or answers to your questions. For more information, see page 5.

Open workspaces appear here. Workspace 1 is open by default.

You can create, save, close, or load workspaces.

Set and find notifications for your areas and topics of interest.

You can access tips, help, training and find out about new features in Eikon.

For eLearning, type *Training* into the Eikon search box, select *Training for Eikon*, choose *Getting Started* and *Learn the Basics*.

II. FIND APPS AND DEFINE SETTINGS

Click to open the app menu.

My Apps features apps for your specific asset class. You can add, remove, or rearrange apps in this menu.

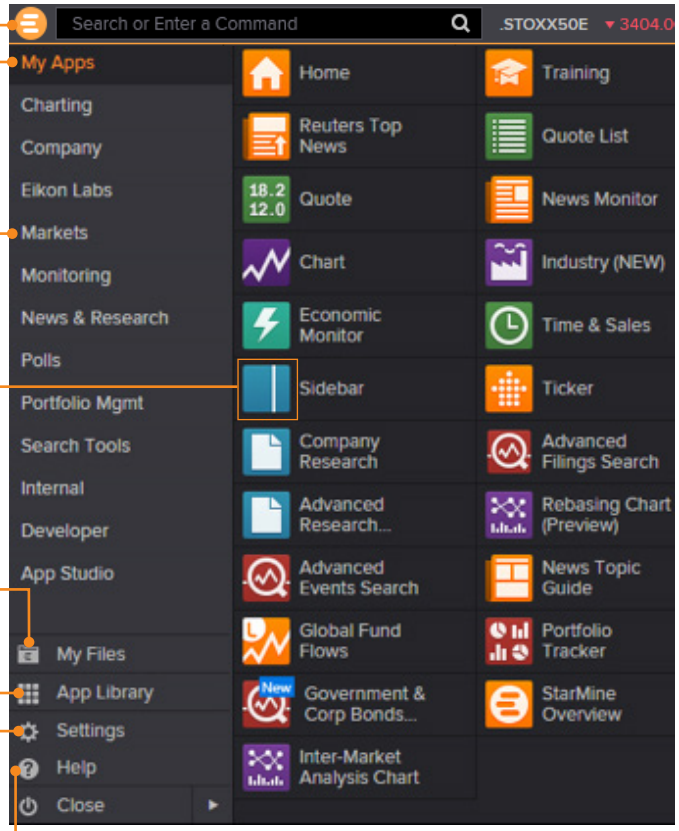
Other apps are displayed by category.

Click any app to open it.

My Files holds all your saved workspaces and layouts

The *App Library* is a searchable database of all apps.

Click *Settings* to define global options, trading settings, and more.



Click *Help* to access online help, to contact us, to find out what's new, and other support options.

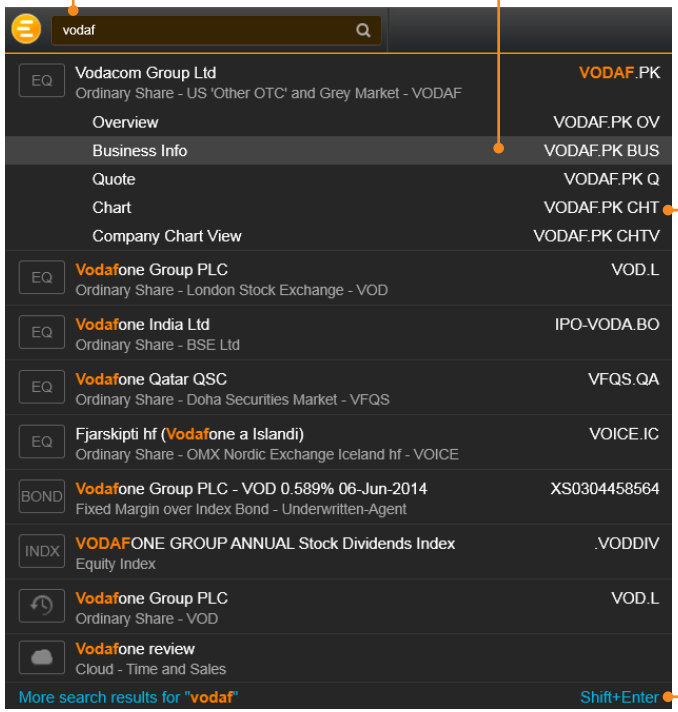
III. SEARCH FOR CONTENT AND GET ANSWERS

Search box: a starting point for your workflow

The search box is your starting point to navigate anywhere. Just start typing and Autosuggest will propose results.

1. Start typing *Vodafone* in the search box.

2. Autosuggest displays results.



3. Click a result to load content. For example, you can open the Chart App with data for Vodafone already loaded.

4. If you don't find what you are looking for, press *Shift+Enter* or click here to run an advanced search.

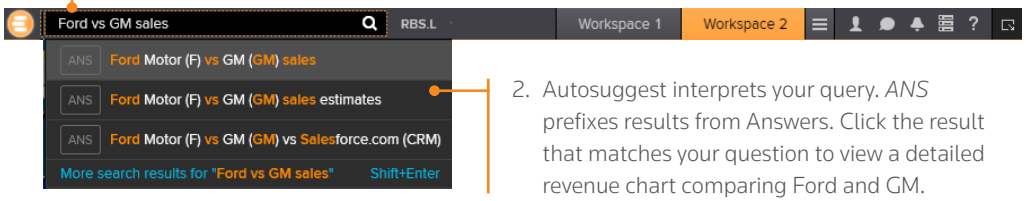
Sample searches

Company names or common abbreviations	Microsoft, Vodafone, ibm
Descriptive terms	Comex copper, vodafone common stock
Standard industry codes	Ticker, ISIN, Cusip, Sedol, WERT
Specific and partial codes	US4592200HJ3, MSFT, USTB
Ticker, coupon, and maturity	VOD >7.5%, Vodafone 2015
Country names for country guides	France, UK, Japan
News searches on specific instruments or topics	IBM news, China news, UST news

Answers: ask your questions in natural language

Type a query using natural language. Thomson Reuters Eikon Answers will appear at the top of the results.

1. For example, you want to compare recent top-line trends for Ford and GM. Type *Ford* vs *GM sales*.



2. Autosuggest interprets your query. *ANS* prefixes results from Answers. Click the result that matches your question to view a detailed revenue chart comparing Ford and GM.

Tip: You can find answers to frequently-asked questions. Start typing How do I... and you will see FAQs in the Search results.

For more help and to see examples, type ANSWERS in the Search box and choose the top result.

Sample Answers queries

Ford vs GM sales 2000 – 2016

Google EBITDA estimate

French tech companies

IV. NAVIGATING THE EIKON HOMEPAGE

Explore Eikon Assets and Related Content

Type Home into the App Library or the Search box to find the Homepage app.

Navigate through news and features via the top or left hand content menu.

The Home page is personalized to your profile.

Use your Floating Workspace

I. EXPLORE APPS FOR YOUR ASSET CLASS

II. BROWSE THE APP LIBRARY

III. SET UP YOUR WORKSPACE

IV. LINK APPS TOGETHER AND ACCESS RELATED INFORMATION

V. SAVE OR SHARE YOUR WORKSPACE

VI. GET ALERTS FOR MARKET-MOVING EVENTS

VII. READ NEWS AND BROKER REPORTS OFF LINE

Thomson Reuters Eikon features a floating workspace that displays multiple apps of your choosing. This flexible format means you are not restricted to one size or shape, and can customize screen real estate to suit your needs. With just a few clicks, you can:

- add the apps you want
- size them to meet your requirements
- group them together so that they move as a single entity
- stack them to create tabbed windows so that you can flip back and forth
- arrange them around other applications such as Microsoft Excel or Outlook
- link them together so that they share data

I. EXPLORE APPS FOR YOUR ASSET CLASS

My Apps gives you one-click access to the apps most frequently used in your asset class. For example, default apps for an Investment Manager include Monitor, Chart and News Monitor.

Other categories help you find the apps suited to your workflow.

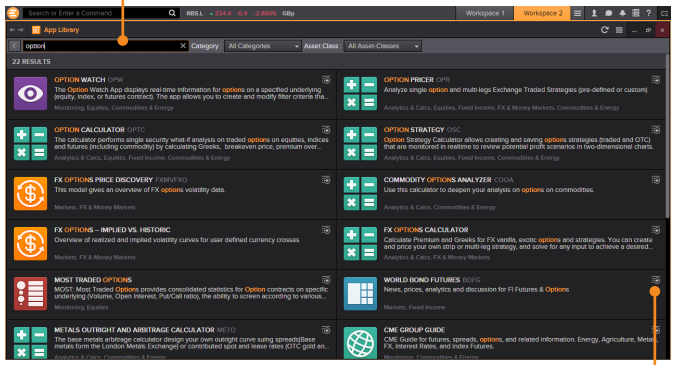
Click *App Library* to view the full list of available apps.

Tip: You can rearrange apps in *My Apps* by dragging the icons and dropping them to a new location. You can also add or remove apps by clicking on the + beside the App name.

II. BROWSE THE APP LIBRARY

Go to App Library within the app menu.

Begin typing an app name in the search box. Results appear below.



Click + to add an app to *My Apps* for faster access.

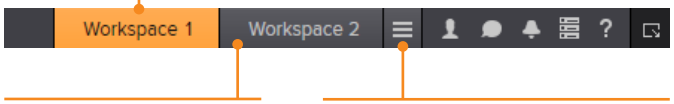
Tip: Use keyboard shortcuts to quickly access:

F1 – Help
F4 – Quote
F9 – News
F10 – Charts

III. SET UP YOUR WORKSPACE

Create a new workspace

Click a workspace name to make it the active workspace.
You can have up to ten workspaces open at any time.

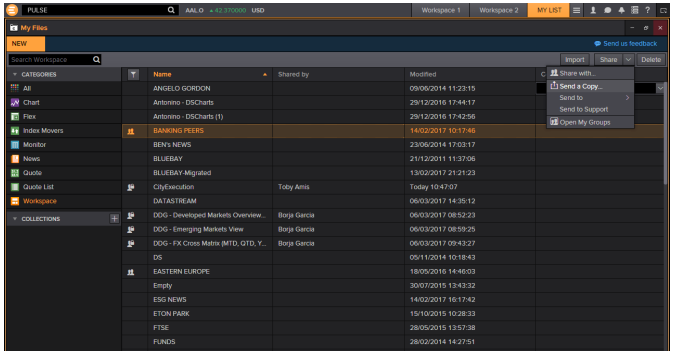


Right-click a workspace to save, close, or rename it.

Click *Show Workspace Menu* to:

- add a new workspace
- share and save workspaces

Tip: You can share workspaces using Eikon Messenger by clicking on the workspace menu > open workspaces > see more workspaces > click on any workspace > click the share button > click send a copy > type the name of recipient and send.



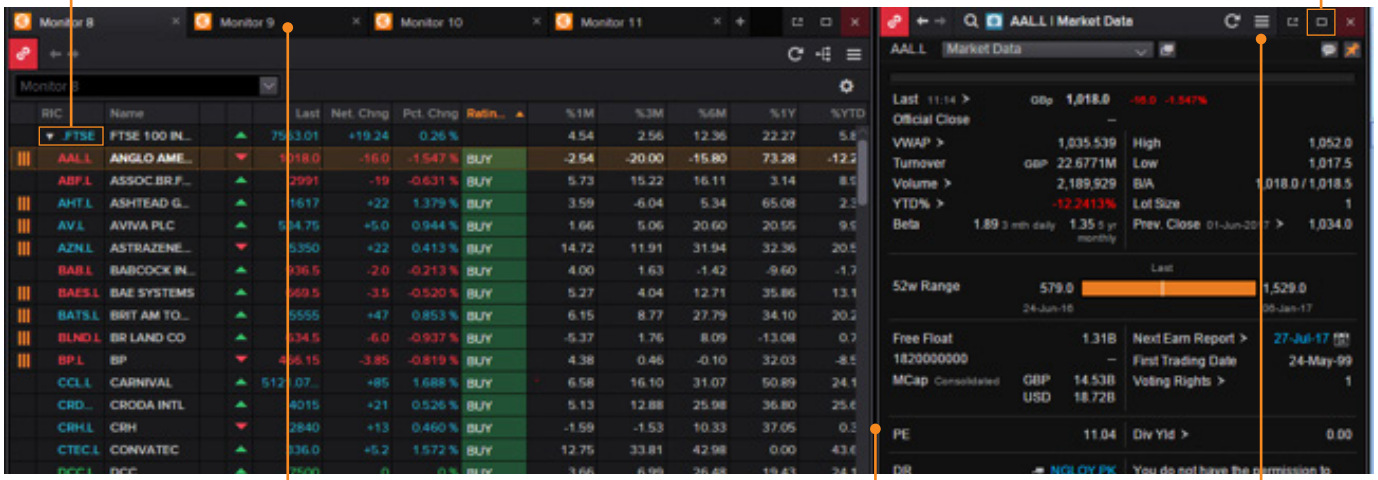
Add apps to your workspace

When you open an app by selecting it in the app menu, the App Library, or through the Search box, it automatically becomes part of your active workspace.

This example includes a Monitor, News Monitor, and a chart.

Type in FTSE 100, click the drop down triangle to see all constituents.

Group and ungroup the apps.



Click an app title bar to move the app. Click and slowly drag an app until its frame touches another app: the two apps group together, and you can move them around as a single entity.

Resize an app as you would any other window: just click the frame and drag to the new size.

Use auto-stacking so that new apps open automatically as tabs in the same window. This saves screen real estate.

Within the app, go to > *View* > *Auto Stack Window* to turn auto-stacking on.

Tip: In the monitor, add any financial instrument. i.e 10Y Benchmark bond.

For more help, press F1 when in the app

For eLearning, type *Training* into the Eikon Search Box, select *Training for Eikon* app, choose *Getting Started*, select *News* and click *The News Monitor App*.

IV. LINK APPS TOGETHER AND ACCESS RELATED INFORMATION

You can link apps together so that they share the content of your chosen instruments. Color-coded apps "tune in" to the same data stream.

1. Chart, FX Matrix, FTSE Movers, Cross Asset Monitor, News and a Quote.

2. In the top left of each app, click *Link Channel* to choose a color. Choose whichever color you prefer.

3. Now that the apps are linked, click any instrument on the Monitor, all other apps will automatically display content for the new instrument.

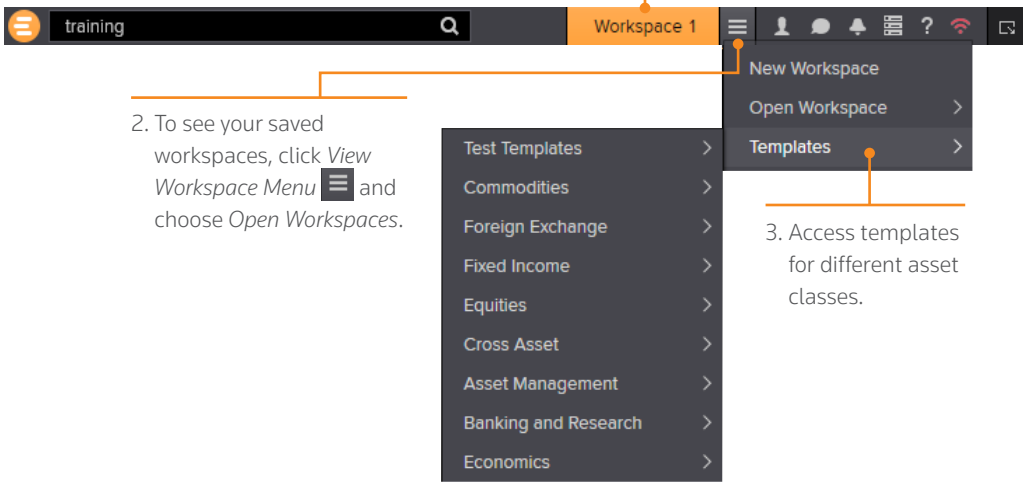
Tip: Right click on any instrument to access any related information.

For eLearning, type *Training* into the Eikon search box, select *Training for Eikon*, choose *Getting Started*, select *Learn the Basics* and click *Managing the Eikon Workspace*.

V. SAVE OR SHARE YOUR WORKSPACE

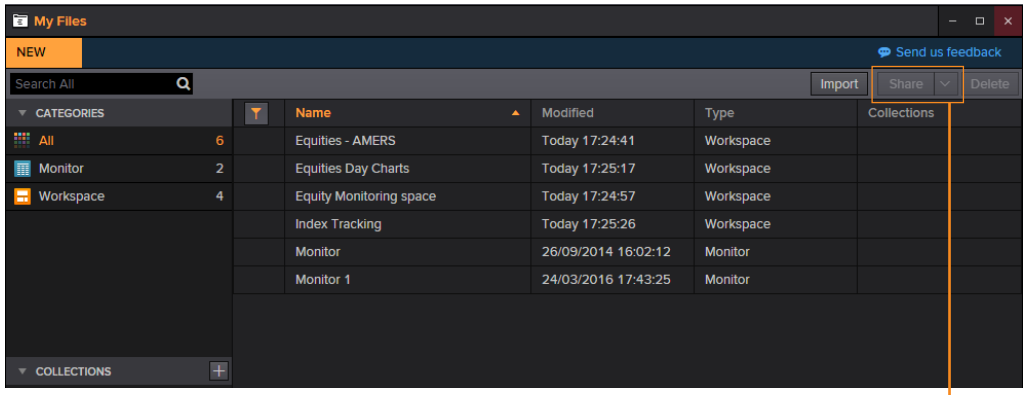
After creating your workspace, you can save it for later use or share it with colleagues. Just right-click the workspace tab in the application toolbar, and choose *Save*. You will also be prompted to save any unsaved workspace changes when you close Thomson Reuters Eikon.

1. Right-click the workspace tab and choose *Save*.



2. To see your saved workspaces, click *View Workspace Menu* and choose *Open Workspaces*.

3. Access templates for different asset classes.

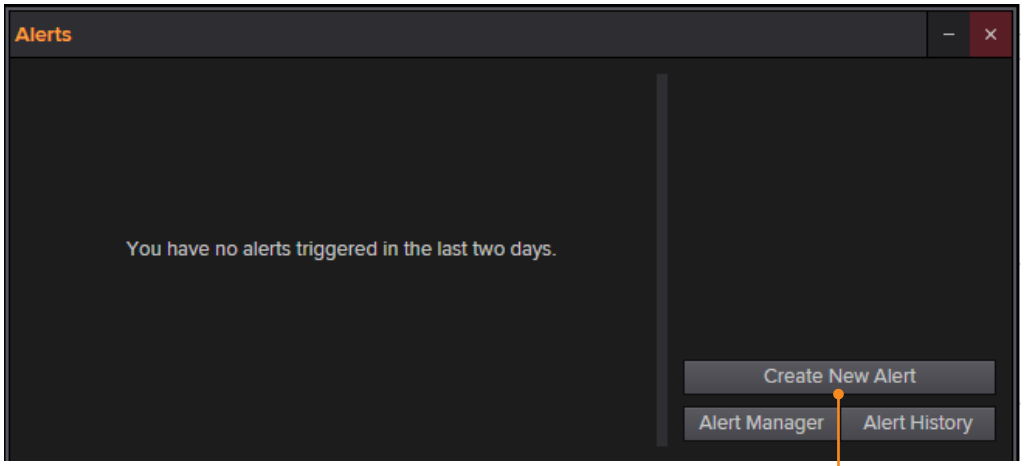


4. View your saved workspaces and layouts. You can share content with your colleagues or other Messenger contacts – just click *Share*.

VI. GET ALERTS FOR MARKET-MOVING EVENTS

Get informed immediately of market-moving information with Alerts.

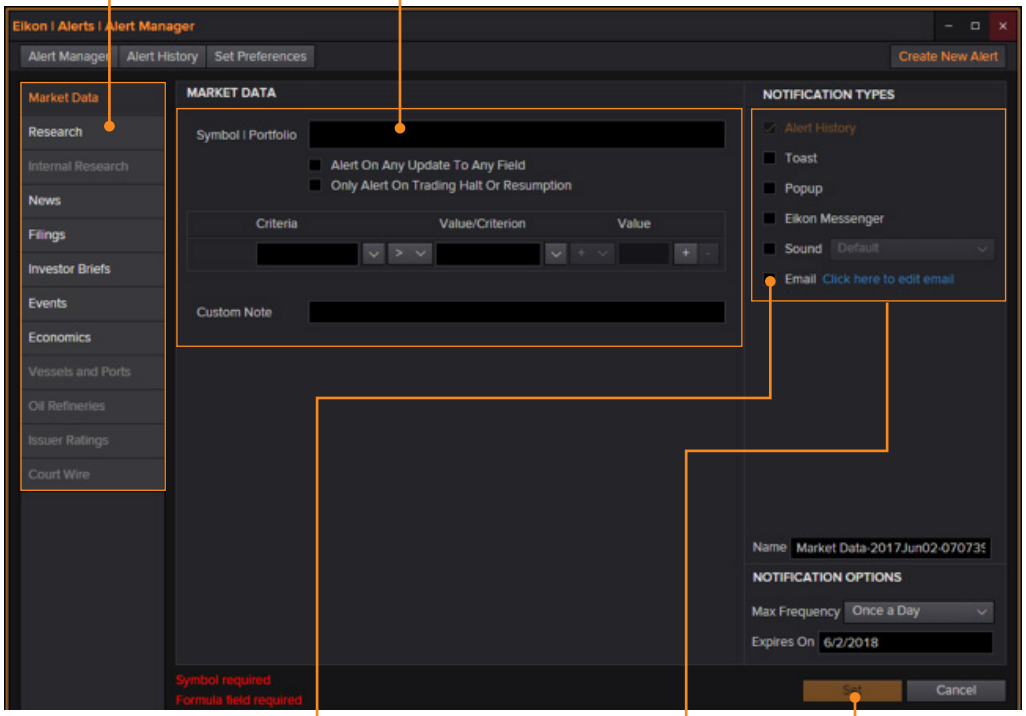
1. Click in the top right of the toolbar to open Alerts.



2. Click *Create New Alert*.

3. Choose the type of data or event to trigger the alert.

4. Fill in the alert criteria. For example, you can receive an alert when the instrument price hits a certain threshold. You can easily combine criteria, and Autosuggest helps you find the right instrument quickly.



5. Sign up for email alerts by validating your email address in *Set Preferences* tab.

6. Choose how you want to receive alerts.

7. Click *Set* to activate your alerts.

Tip: You can set alerts directly from other apps. Just right-click the instrument you are interested in and choose *Set Alert*.

For eLearning, type *Training* into the Eikon search box, select *Training for Eikon*, choose *Getting Started*, select *Price Discovery* and click *Creating and Managing Alerts*.

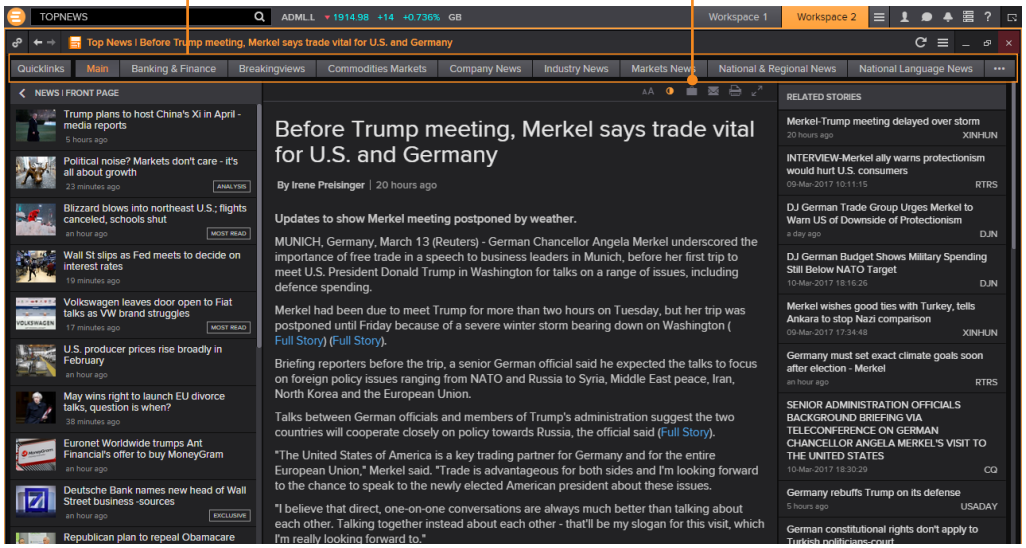
VII. READ NEWS AND BROKER REPORTS OFF LINE

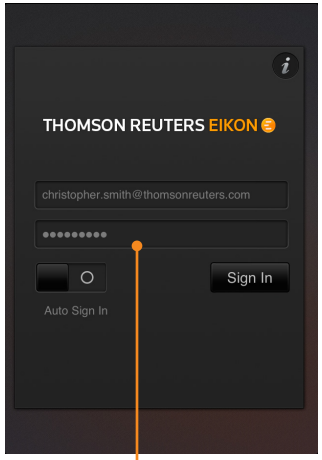
With *My Briefcase*, you can collect news and documents and read them later, either on your desktop application or from your mobile device, even when you are offline. You can open *My Briefcase* by clicking in the top right of your toolbar and click My Briefcase My Briefcase .

1. Open an app and display filings, research, events, or news.
   For example, type TOPNEWS in the search bar to access Top News page, click on any story.

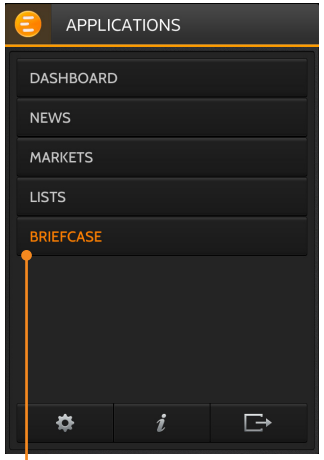
2. Use the top menu to navigate through topics.

3. Click *Add to Briefcase*.





4. Sign into your mobile device.



5. Go to *Briefcase* in the *Applications* menu to find the article you saved.

Tip: Use the back button to navigate back to the main Top News page from a story.

For eLearning, type *Training* into the search box, select *Training for Eikon*, choose *Getting Started*, select *News* and click *Using the Briefcase.*

Monitor your Portfolios

I. CREATE A MONITOR

II. FOLLOW NEWS THAT AFFECTS YOUR MONITOR

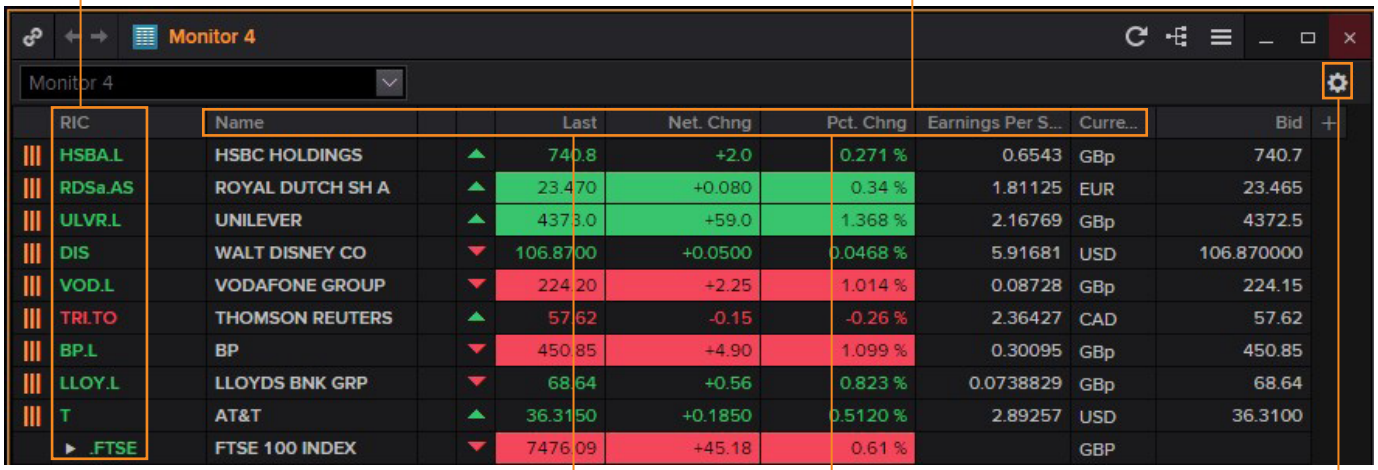
I. CREATE A MONITOR

Monitor lets you watch instruments and multiple portfolios. You can create and modify your Monitor quickly and easily, choosing data fields from the Thomson Reuters Eikon database and sharing your list with colleagues.

To access the Monitor app, search for Monitor or enter MON in the search box.

Quickly and easily add new instruments by typing in the column and selecting from the autosuggest results

Drag a column heading to move or click the + to add a new item. You can also add your own formulas, e.g., =(Bid+Ask)/2



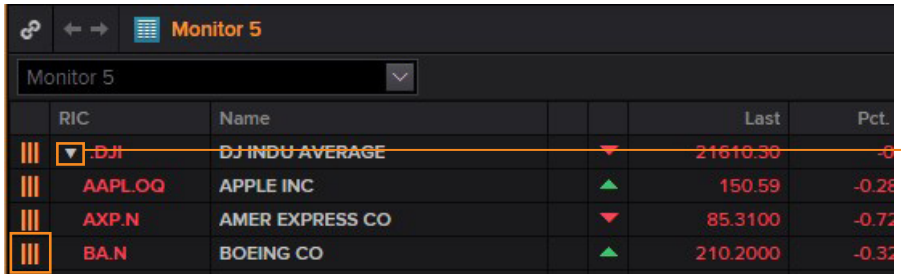
Right-click a column heading and use the Format option to format values such as percentage, change display styles and more

Click a column heading to sort the data

Click here to select template

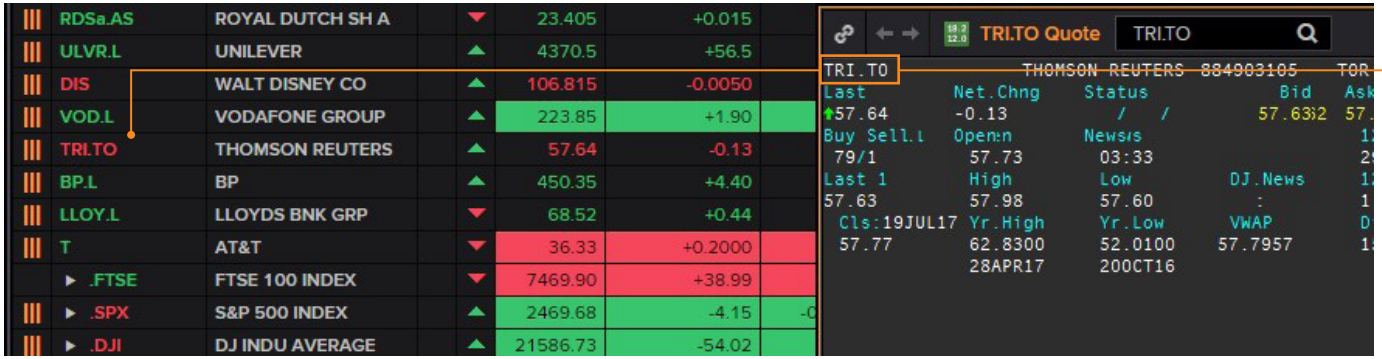
Key facts

- Use the cog wheel to select a template for specific asset classes. These contain the columns most suited to the particular asset class.
- Monitor automatically saves your list of instruments in regular intervals or when you close your workspace.



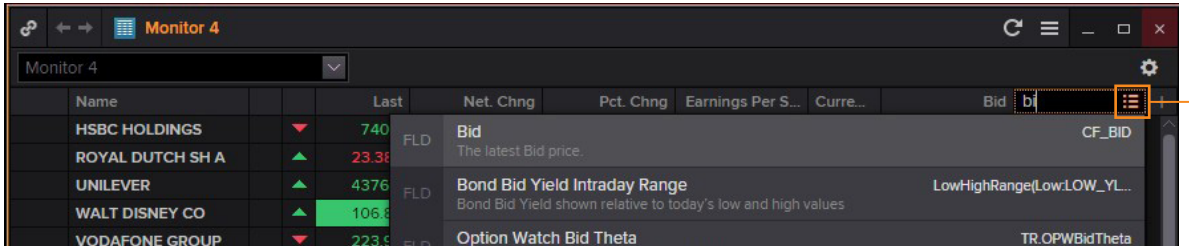
Top tips on how to use the app

- Simply type the name of the instrument or portfolio you wish to add to the new Monitor window. To add the constituents of an index, search and select the index, then click the arrow to the left of the symbol to expand the list.
- The orange bars to the left of the RIC indicate there is news available. Hover over this news icon to view a quick time stamp. Double-click on the icon to open the News App showing all news for the instrument.
- You can also drag and drop symbols from other apps into the list. For example, drag the symbol from a quote box directly into Monitor to add it to your list.



Drag and drop ticker to Monitor app

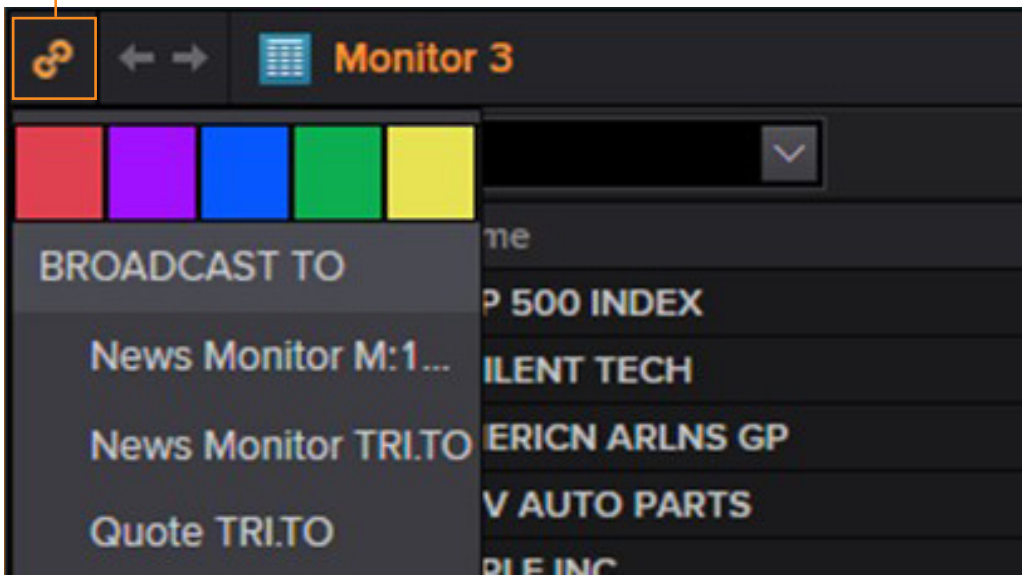
- To delete from the list, simply click on the line of the item you would like to remove and click delete on your keyboard.
- The Monitor list is created with a default list of columns. The column headings displayed can be updated to suit your workflow needs. Simply click the plus + sign at the end of the column and enter the item you would like to add. Select from the Autosuggest options provided. The Autosuggest will provide a definition to help you pick the most relevant item. Or open the Universal Data Item Picker to search for an item.



Click to open Universal Data Item Picker

- Monitor allows you to load one or multiple lists in a single instance of Monitor. So, for example, your Monitor might contain both the constituents of the S&P 500 Index and the constituents of the Dow Jones Industrial Index.
- The default on the Monitor is to number each table as the name (for example, Monitor 1, Monitor 2, etc.). If you want to give your Monitor a custom name, select **Rename** from the drop-down menu.

- You can link the active symbol in Monitor to other apps in Eikon. For example, right-click on the linking icon and select the red box. Then in the News Monitor, click on the linking icon again and select red as well. The News Monitor will now update automatically to display information pertaining to the currently selected symbol in the Monitor App.



II. FOLLOW NEWS THAT AFFECTS YOUR MONITOR

News Discovery offers different insight into NewsWires, Global Press, and Reuters Top News through data visualization.

- Get streaming and historical news enhanced by charts, videos, tweets, and more.
- Charts and story snippets in the headline dashboard tell you the crux of the story at a glance.
- View news on the companies in your portfolios.
- Filter by story sentiment (NewsWires only), or by date and time.
- Add advanced filters and save them just as you do in News Monitor.
- Create filters, order by date/time or sentiment, or simply view news for the current day.

News Discovery is available in the *News & Research* app menu, or by typing *NEWSD* in the Search box.

For eLearning, type *Training* into the Eikon search bar, select *Training for Eikon*, choose *Market Segments*, select *Asset Management* click *Monitor your Portfolios and Lists*.

Choose how you want to filter news. In this example, let's filter by portfolio.

Select the portfolio you want. All news articles related to instruments in your portfolio are displayed.

Hover over the top right of an article to display the Briefcase icon. Click *Add* to *Briefcase* to save your article so that you can read it on the go from your mobile device or web browser.

Select the news sources you require, and add advanced filters in this area.

Use the Timeline toggle button to display news in reverse chronological order or based on the date and time criteria you have chosen.

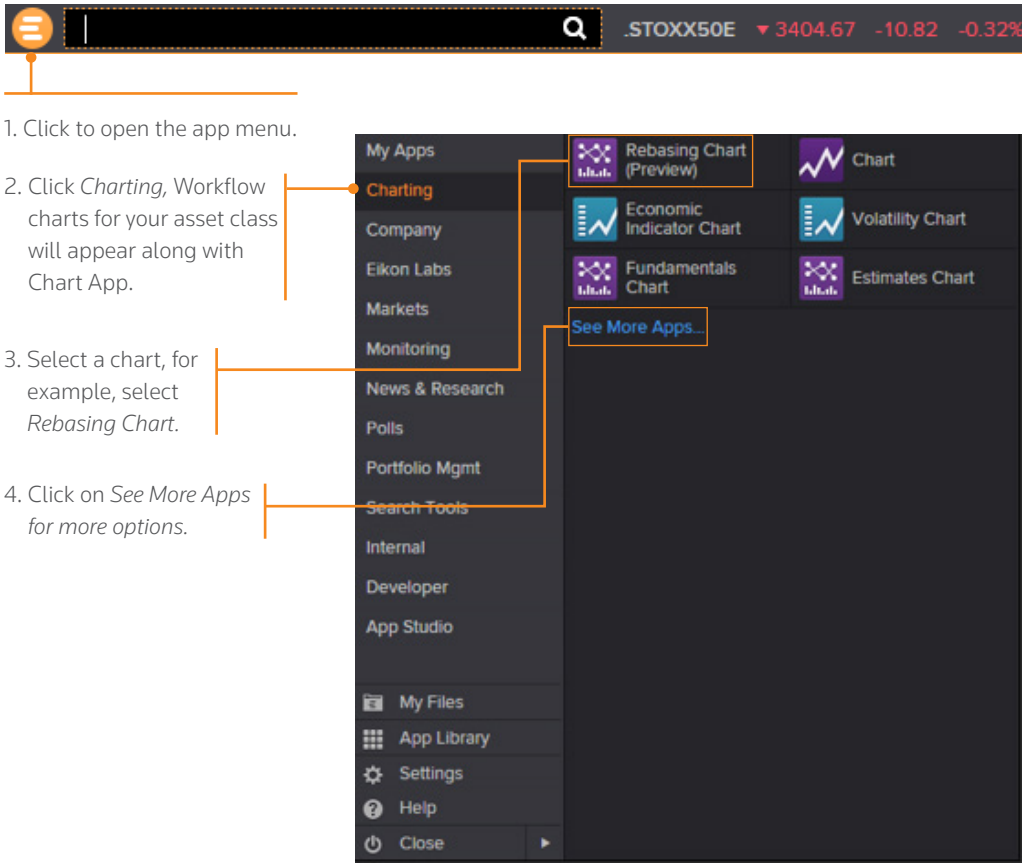
Charting and Technical Analysis

I. USE A WORKFLOW CHART

II. CREATE A CUSTOM CHART IN CHART APP

I. USE A WORKFLOW CHART

Workflow charts are predefined charts for various asset classes. You can find them under *Charting*.

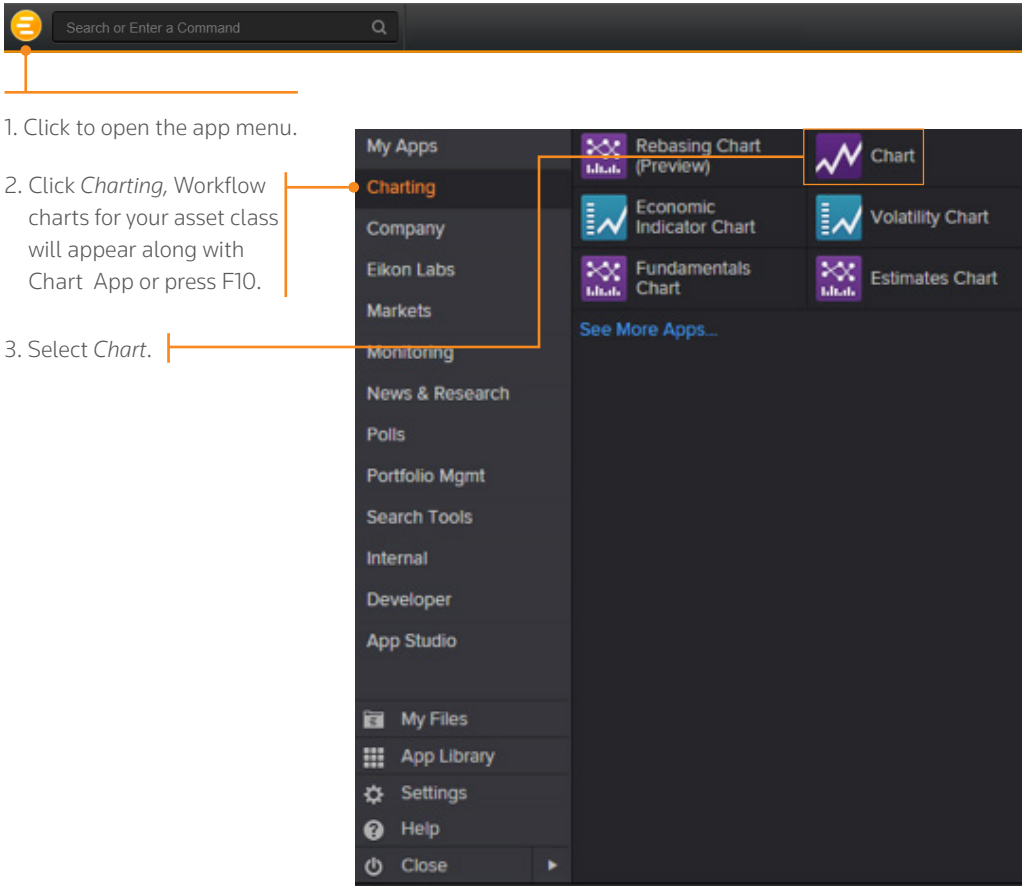


1. Click to open the app menu.
2. Click *Charting*, Workflow charts for your asset class will appear along with Chart App.
3. Select a chart, for example, select *Rebasing Chart*.
4. Click on *See More Apps for more options.*

4. Fill in the instrument, analysis parameters, and other settings.

II. CREATE A CUSTOM CHART IN CHART APP

Chart App is a powerful, flexible tool for technical analysis. Build your analysis from scratch and configure it to fit your needs.

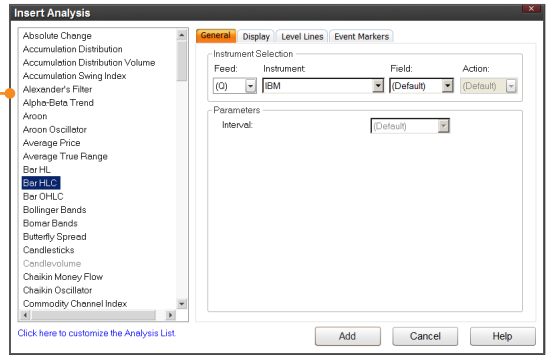


1. Click to open the app menu.
2. Click *Charting*, Workflow charts for your asset class will appear along with Chart App or press F10.
3. Select *Chart*.

4. Type an instrument code and press *Enter*.

5. Use toolbar buttons to adjust your chart range, interval, and line types. Click Analysis to add a new analysis.

6. In the *Insert Analysis* dialog box, select an analysis and click *Add* to insert it. To find out more about an analysis, select it and press *F1* to open online help.



For eLearning, type *Training* into the Eikon search bar, select *Training for Eikon*, choose *Getting Started*, select *Charting*, and click *Getting Started with The Chart App*.

Tip: To edit your chart, just click any label and choose a new setting from the drop-down box that appears.

For more help, press F1 when in the Chart app.

Eikon Messenger

I. USE THOMSON REUTERS MESSENGER

II. CONTACT CUSTOMER SUPPORT FOR HELP

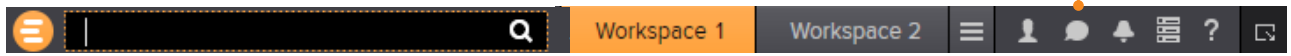
III. SEND MESSAGES DIRECTLY FROM THE SEARCH BOX

IV. SEARCH THE DIRECTORY, VIEW PROFILES, AND BUILD YOUR NETWORK

Messenger is also a venue for chats and forums. Check out the weekly Global Markets Forum, where you can get commentary from leading Reuters journalists.
Visit http://online.thomsonreuters.com/trading/gmf/

I. USE THOMSON REUTERS MESSENGER

Click on the toolbar to open Messenger.

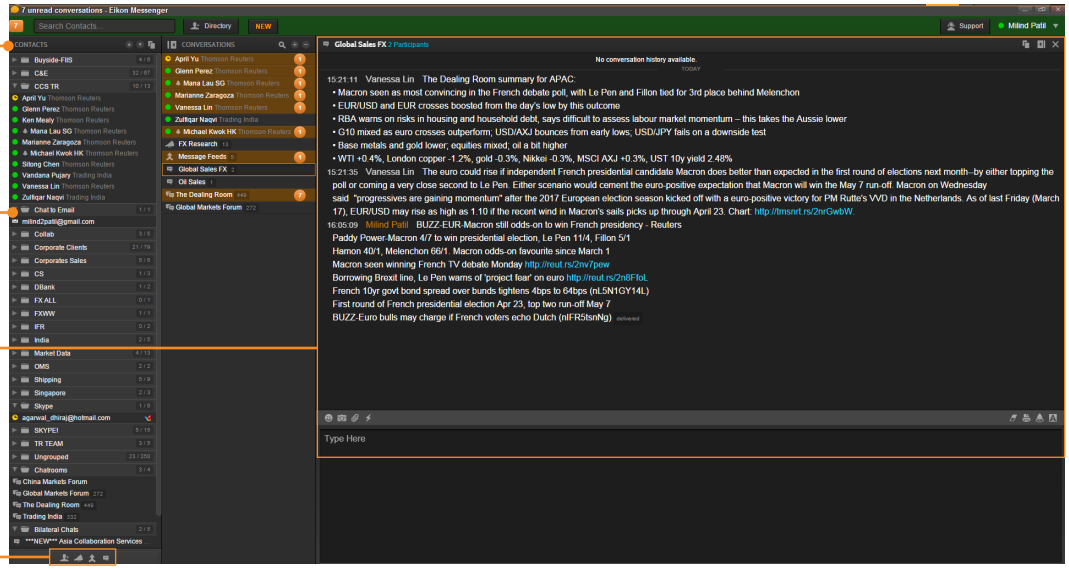


Begin typing here to search the directory or your contacts.

Right-click a contact name to view their profile, or double-click to start a conversation.

View active conversations in this area.

Use these buttons to add a contact, create a group, or send a blast.



Tip: Messenger is enhanced every month with new features.

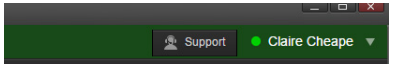
To find out about new enhancements, don't forget to check the *What's New* page frequently. Just click in the top right of your toolbar.

For eLearning, type *Training* into the Eikon search bar, select *Training for Eikon*, choose *Getting Started*, select *Collaborating*, and click *Get the Most out of Messenger.*

For more help press F1 when in the Messenger app.

II. CONTACT CUSTOMER SUPPORT FOR HELP

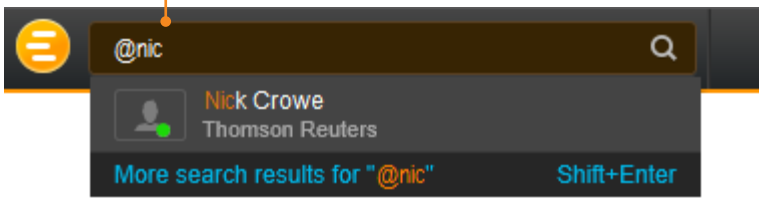
If you need help, you can contact Thomson Reuters Customer Support anytime from Messenger. Just click the *Support* button next to your name.



III. SEND MESSAGES DIRECTLY FROM THE SEARCH BOX

You can send a quick message to any of your contacts (including Customer Support) without opening Messenger.

1. Just type @ and your contact's name in the Search box...



2. ...then type your message and press *Enter*.

Tip: You can also write to chat rooms and groups you create in your list of contacts.

IV. SEARCH THE DIRECTORY, VIEW PROFILES, AND BUILD YOUR NETWORK

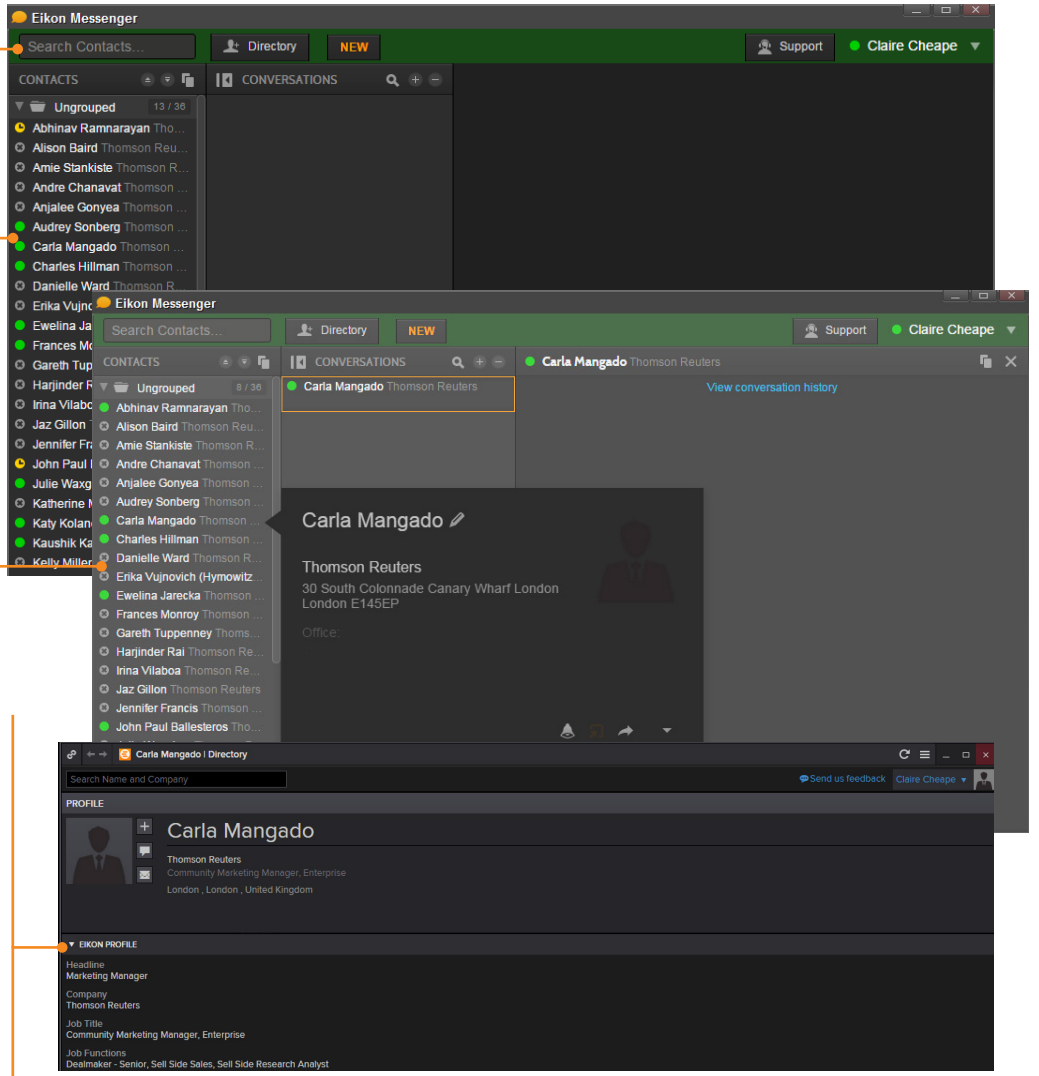
Messenger gives access to a global financial services directory for the combined Thomson Reuters Eikon and Markit Collaboration Services networks. This is the financial services industry's first open, cross-network directory. It enables users across the industry – including those on internal networks – to find and communicate with each other safely and compliantly.

Over 300,000 users are now accessible across the combined Eikon and Markit networks.

1. In Messenger, begin typing to search for a person or company.

2. Right-click a name to view more details.

3. Click *Add to My Contacts* or *View Profile*.



4. On the profile page:

- See the person's profile and contact details
- Send a message via Messenger or email
- Add your own personal notes (not visible to other users)
- View related contacts

Thomson Reuters Eikon – Microsoft Office

I. DISCOVER THOMSON REUTERS EIKON – MICROSOFT OFFICE

II. LOG INTO THOMSON REUTERS EIKON – MICROSOFT OFFICE

III. USE THE FORMULA BUILDER TO RETRIEVE THOMSON REUTERS DATA

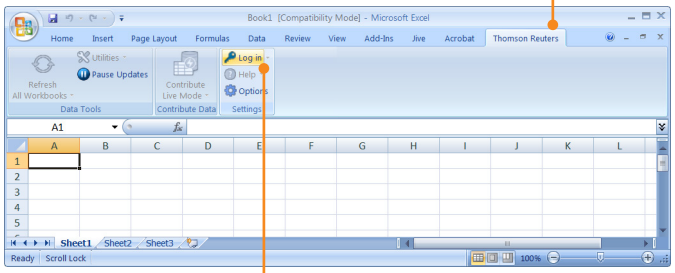
I. DISCOVER THOMSON REUTERS EIKON – MICROSOFT OFFICE

Thomson Reuters Eikon – Microsoft Office, an integral part of Thomson Reuters Eikon, is a self-installing Microsoft Excel add-in. With it, you can:

- Retrieve real-time, historical, and fundamental data by using the Formula Builder or the In-Cell Builder
- Easily transfer lists created in the Thomson Reuters Eikon Desktop to Microsoft Office using the copy and paste function keys on your keyboard

II. LOG INTO THOMSON REUTERS EIKON – MICROSOFT OFFICE

1. Start Microsoft Excel.
2. Click the Thomson Reuters tab to open the Thomson Reuters Eikon menu.

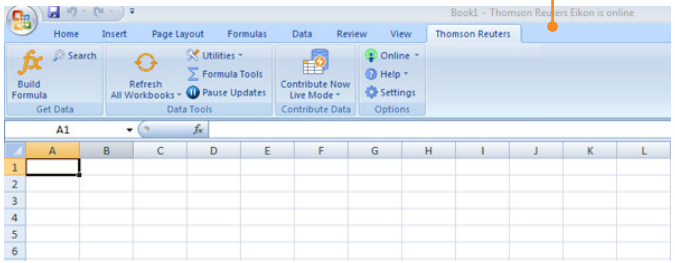


3. Click *Log in* and type your Thomson Reuters Eikon credentials if prompted.

For eLearning, type *Training* into the Eikon search bar, select *Training for Eikon*, choose *Eikon – Microsoft Office*, for a full list of training guides.

III. USE THE FORMULA BUILDER TO RETRIEVE THOMSON REUTERS DATA

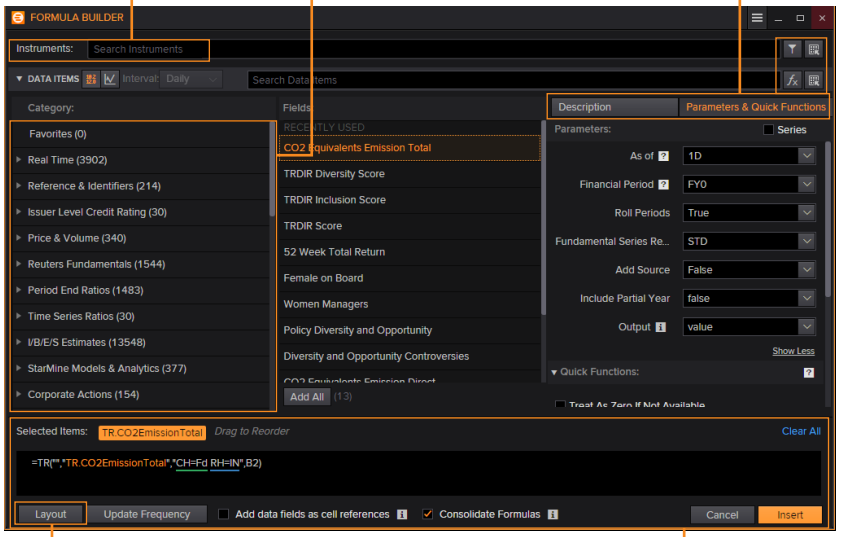
1. Select a blank cell on your worksheet, then click *Build Formula* on the *Thomson Reuters* tab.



2. Enter instruments with the help of Autosuggest.

3. Add data items rapidly with the help of Autosuggest. Or, select the category first, and then select the data items.

4. Specify parameters. Use Quick Funcitons for advanced analytics on real-time data.

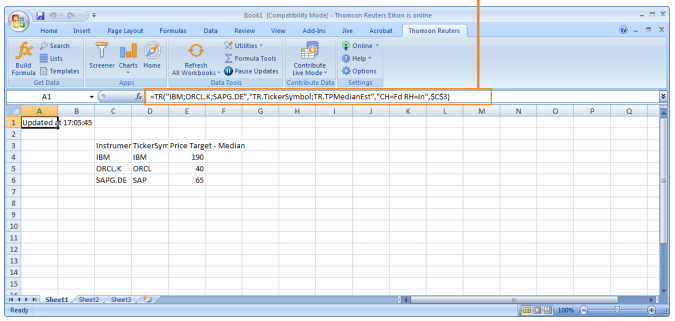


5. Set the layout, header, footers, date-display etc.

6. Review the formula, if required select *Consolidate Formulas*, then click insert.

The worksheet embeds the new formula in the cell you selected, and retrieves the related data.

In this example, the **TR function** is used. To find out more about this powerful and versatile function, see bit.ly/EikonTRfunctions



Tip: You can drag and drop from a Chart, Quote or Monitor into Excel.

For more help, click the help button in the Thomson Reuters tab on Microsoft Excel.

Contact Information

For help: **Click *Support* in Eikon Messenger**

For more information on training: **Access the *TRAINING* app**

Or contact your Thomson Reuters representative.

Visit financial.tr.com/eikon

The intelligence, technology and human expertise you need to find trusted answers.

the answer company™
THOMSON REUTERS®

S052514/9-17