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 ......................................... 14
Eikon Messenger .................................................................... 16
Thomson Reuters Eikon – Microsoft Office ......................... 18
Install and Sign In

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 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.

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
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.
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.

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

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

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

My Apps gives you one-click access to the apps most frequently used in your asset class. For example, default apps for an equities trader include Quote List, Option Watch, and Time & Sales App.

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.

Choose a category or asset class to narrow down your results.

Tip: Use keyboard shortcuts to quickly access:

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

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

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.
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.

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, Option Watch, News Monitor, and a chart.

Type in FTSE 100, click the drop down triangle to see all constituents. Group and ungroup the apps.

Click a workspace name to make it the active workspace.

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

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.

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.

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.
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.

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. MAKE A PORTFOLIO OR LIST

Lists are sets of financial instruments that you define. Portfolios are predefined or custom lists that include the quantity of each financial instrument, as well as historical purchase prices. You can:

- create lists and portfolios
- use predefined portfolios, for example, based on major stock indices
- share them with other colleagues
- reuse them in other apps, or on your mobile device
- export them to Microsoft Excel

1. Open Portfolios and Lists.

Remember, you can open an app from the app menu, or find it using the Search box, just type in Portfolio and Lists.

Tip: Thomson Reuters Integration Services can help upload your portfolios easily. Contact your Thomson Reuters representative.

2. In this example, let’s make a portfolio. On the Portfolios And Lists tab, click Create New.

3. Enter details for your new portfolio, including a name, benchmark index, primary asset class, and currency.

4. Click Create to make your new empty portfolio. On the next screen, you will add instruments and other details.

5. Use the tabs at the top of the app to run analytics, create reports, search for news about the instruments in your portfolio, and more.

6. Add holdings to your portfolio here. You can then indicate transaction dates and values on the Transactions tab.

Thomson Reuters Integration Services can help upload your portfolios easily. Contact your Thomson Reuters representative.
II. FOLLOW NEWS THAT AFFECTS YOUR PORTFOLIO OR 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.

III. WATCH THE MARKETS WITH 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.

You will find Monitor in the Monitoring app menu.

Remember, you can open an app from the app menu, or find it using the Search box in the App library.

To create your instruments, launch Monitor and just start typing. Enter ticker symbols, or type a company name and choose from Autosuggest.

Press Enter to go to the next line, Delete to delete a row, Insert to add one, Ctrl-z to undo an action, or Ctrl-y to redo one.

Right-click a header to sort data or add columns. Also use the right-click menu to access display preferences.

You can create multiple Monitor lists. The app saves your changes automatically. To access saved lists or to rename lists, click the app menu and choose File > Open or Rename.

For indices, you can expand or contract the list of constituents by clicking the gray arrow.

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.

For more help, press F1 in the Monitor app.
Charting and Technical Analysis

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 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

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

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
- analyze equities using the integrated Screener
- build charts with your financial data in your worksheets for market analyses
- access and customize advanced templates provided by Thomson Reuters
- build lists and portfolios, and access those created in Thomson Reuters Eikon Desktop
- export and link Excel data and charts to documents or presentations in Word or PowerPoint
- create presentations and documents customized to your company’s own visual identity

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.

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 Functions 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.

For eLearning, type Training into the Eikon search bar, select Training for Eikon, choose Eikon - Microsoft Office, for a full list of training guides.
IV. ENABLE DATASTREAM, DEAL ANALYTICS, LINKING, AND PRESENTATION TOOLS

Thomson Reuters Eikon – Microsoft Office includes additional apps to enhance your productivity.

**Note:** You must be permissioned to enable these apps.

1. Click **Options** on the Thomson Reuters tab.

2. Open **Apps**.

3. Click to read about and enable the app(s) you require:
   - Datastream
   - Datastream Charting
   - Deal Analytics
   - Linking

V. USE ADFIN ANALYTICS AND OTHER ADVANCED FEATURES

Adfin Analytics is a set of powerful cross-market financial calculation libraries. The libraries are targeted for financial spreadsheet users and developers of financial applications. The libraries can be used in different environments, for example in Thomson Reuters Eikon – Microsoft Office.

**Tip:** In Microsoft Excel, go to **Formulas > Insert Function** to access the Adfin Analytics functions.

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.