

# Quick Start Guide

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

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# Install and Log In

## I. INSTALL THE APPLICATION

## II. SIGN IN

## III. CONTACT SUPPORT

## IV. 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 *Check My Computer*.
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/Thomson Reuters Account Manager requests a Thomson Reuters Eikon ID on your behalf.
2. You 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?

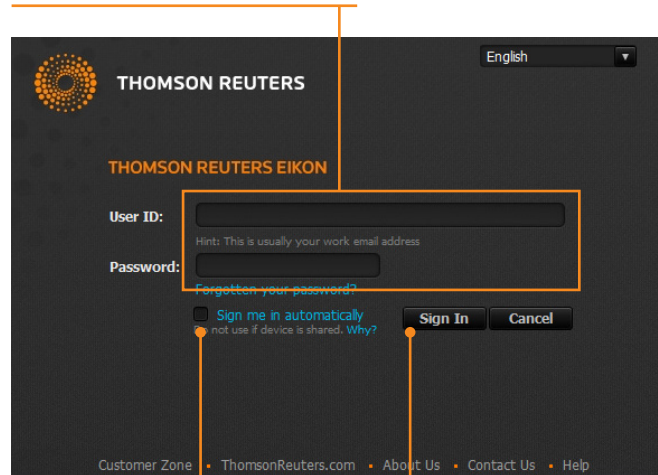
After checking that your computer meets the requirements and activating your account, you are ready to install Thomson Reuters Eikon:

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

### II. SIGN IN

#### On your desktop

1. Point to *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 the following mobile devices: Apple, Android, and BlackBerry.

#### For eLearning, go to

<http://training.thomsonreuters.com/eikon/mobile-solutions>.

### III. CONTACT SUPPORT

#### If you cannot sign in

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

Thomson Reuters Eikon online help provides a number of troubleshooting solutions: <http://bit.ly/14tX8u> (sign-in not required)

After logging in, you can always access help by pressing *F1* or using the right-click menu.

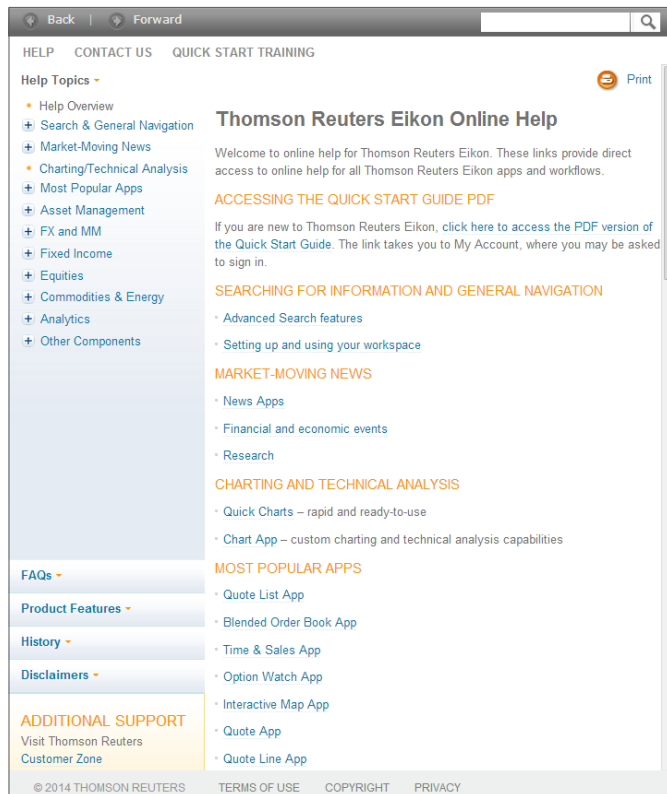
Should none of these solutions work, please contact Thomson Reuters:

1. Click the *Contact Us* link in the *Sign In* dialog box.
2. Fill in the *Contact Us* page that appears, and click *Submit*.

## Get support after signing in



If you encounter problems when working with Thomson Reuters Eikon or receive error messages and would like more information, you can contact Support.

Go to  > *Help* > *Contact Us*.



The screenshot shows the Thomson Reuters Eikon Online Help page. The page has a dark header with navigation links: HELP, CONTACT US, and QUICK START TRAINING. Below the header is a search bar and a 'Print' button. The main content area is titled 'Thomson Reuters Eikon Online Help' and contains several sections: 'ACCESSING THE QUICK START GUIDE PDF', 'SEARCHING FOR INFORMATION AND GENERAL NAVIGATION', 'MARKET-MOVING NEWS', 'CHARTING AND TECHNICAL ANALYSIS', and 'MOST POPULAR APPS'. A left sidebar contains a 'Help Topics' menu with categories like Search & General Navigation, Market-Moving News, Most Popular Apps, Asset Management, FX and MM, Fixed Income, Equities, Commodities & Energy, Analytics, and Other Components. At the bottom, there are links for FAQs, Product Features, History, Disclaimers, and Additional Support. The footer contains copyright information for 2014 Thomson Reuters and links for Terms of Use, Copyright, and Privacy.

## Get more help or training

- To find out what's new in Thomson Reuters Eikon, click  in the top right of your toolbar.
- Go to  > *Help* for all help-related options, including eLearning tutorials and training. Register for interactive training sessions directly via [eikon.thomsonreuters.com/training](http://eikon.thomsonreuters.com/training)
- For more detailed information on installation, configuration, or migration, see online help for Thomson Reuters Eikon Installation & Configuration: <http://bit.ly/19OvDnz>
- My Account (<http://financial.thomsonreuters.com/myaccount>) is the single online entry point to Thomson Reuters service and support. You can find numerous documents, including the latest version of this guide.

## IV. CUSTOMIZE YOUR PROFILE

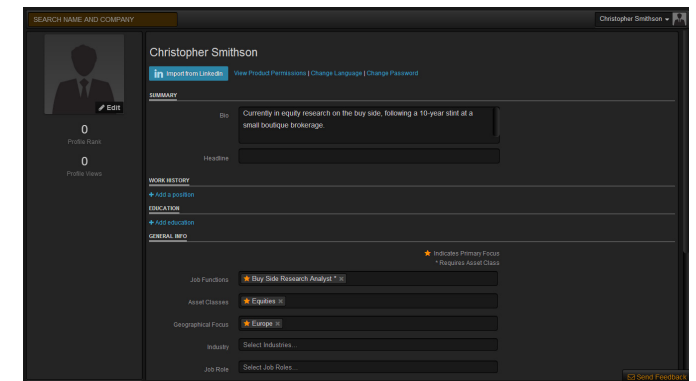
### Create your profile

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 to 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.



The screenshot shows the user profile page for Christopher Smithson. The page has a dark theme and a search bar at the top. The profile information includes a name, a LinkedIn icon, and a 'View Product Permissions | Change Language | Change Password' link. The profile is divided into several sections: 'SUMMARY' with a bio, 'WORK HISTORY', 'EDUCATION', and 'GENERAL INFO'. The 'GENERAL INFO' section includes fields for Job Functions (set to 'Buy Side Research Analyst'), Asset Classes (set to 'Equities'), Geographical Focus (set to 'Europe'), Industry (set to 'Select Industries'), and Job Role (set to 'Select Job Roles'). There are also links for 'Edit' and 'Send Feedback'.

### Update your profile

You can edit your profile information at any time.

Go to  > *Preferences* > *My 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. BOOKMARK YOUR FAVORITE CONTENT FOR EASY ACCESS

## 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.



**More help:** <http://bit.ly/1b1XT7S>

### For eLearning, go to

<http://training.thomsonreuters.com/eikon4/getting-started/> and choose *Getting Started with Eikon – Version 4*.

## 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.

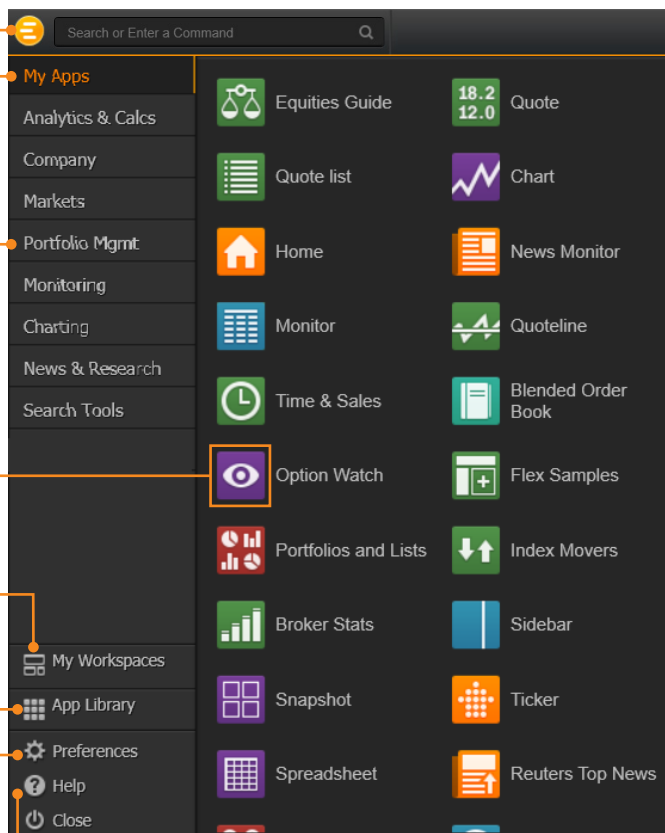
Other apps are displayed by category.

Click any app to open it.

*My Workspaces* holds all your saved workspaces and layouts

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

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



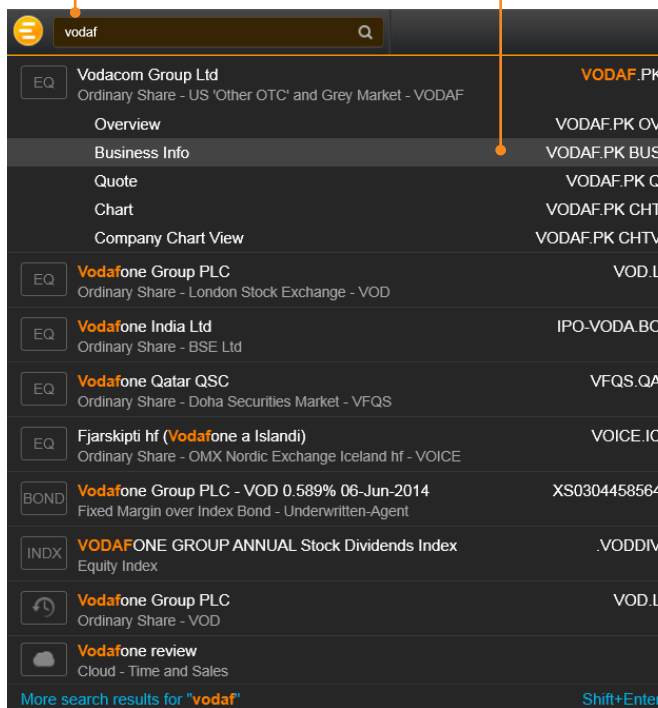
Click *Help* to access online help, to contact us, to find out what's new, and other support options.

## 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.

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

The screenshot shows a search bar with the text 'ford vs gm sales'. Below the search bar, a list of search results is displayed, each starting with 'ANS' (Answers) and followed by a query. The first result is 'Ford Motor (F) vs GM (GM) sales', which is highlighted. A callout box points to this result with the text: '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:** Answers is constantly enhanced to give more detailed results. For more information and to see examples, type *ANSWERS* in the Search box and choose the top result.

### Sample Answers queries

- Ford vs GM sales
- Google EBITDA estimate
- French tech companies

## IV. BOOKMARK YOUR FAVORITE CONTENT FOR EASY ACCESS

Add apps and other content to your Favorites for easy retrieval later on. Open the Favorites Center by clicking in the top right of any screen.

- Open an app.
- Right-click the app and go to *File > Favorites > Add to Favorites*.

The screenshot shows the 'Option Watch' application for 'RENA.PA'. A right-click context menu is open over the application, showing various options. The 'File' option is selected, and a sub-menu is visible with 'Add to Favorites...' highlighted. A callout box points to this option with the text: '3. Give your Favorite a name, choose a folder to save it in (or create a new one), and click Add to save it.'

The 'Add a Favorite' dialog box is shown. It contains a star icon and the text 'Add a Favorite'. Below this, it says 'Add this page as a favorite. To access your favorites, visit the Favorites Center.' There is a text field for 'Name:' containing 'Option Watch\_ RENA.PA'. Below that is a dropdown menu for 'Create in:' set to 'Favorites', with a 'New Folder' button next to it. At the bottom, there are buttons for 'Keyboard Options ...', 'Add', and 'Cancel'.

**Tip:** Use the *Right-Click Favorites* folder and your Favorites will be available in the right-click menu of any app.

**More help:** <http://bit.ly/1IABHG2>

# 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
- V. SAVE OR SHARE YOUR WORKSPACE
- VI. GET ALERTS FOR MARKET-MOVING EVENTS
- VII. SYNC YOUR DESKTOP TO YOUR MOBILE DEVICE WITH MY BRIEFCASE

Thomson Reuters Eikon 4 features a floating workspace concept that consists of 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:

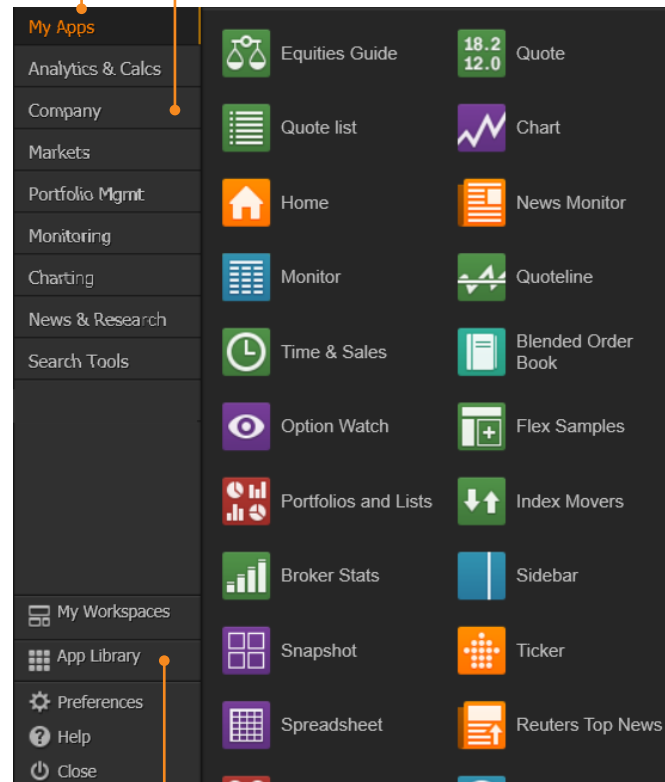
- add the apps you want
- size them to meet your requirements
- “snap” them together so that they move as a single entity
- stack them to create tabbed windows so that you can flip back and forth
- arrange them around other applications such as Microsoft Excel or Outlook
- link them together so that 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 equities trader include Quote List, Option Watch, and Time & Sales App.

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

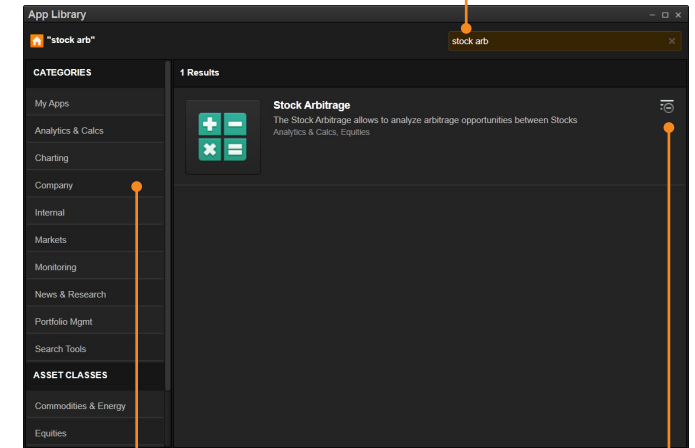


Click *App Library* to view the full list of available apps.

**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.

## II. BROWSE THE APP LIBRARY

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

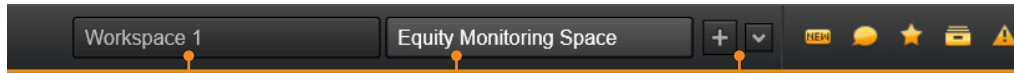


Click a category to view only certain apps. Click the category name again to clear the selection and view all apps.

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

### 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.

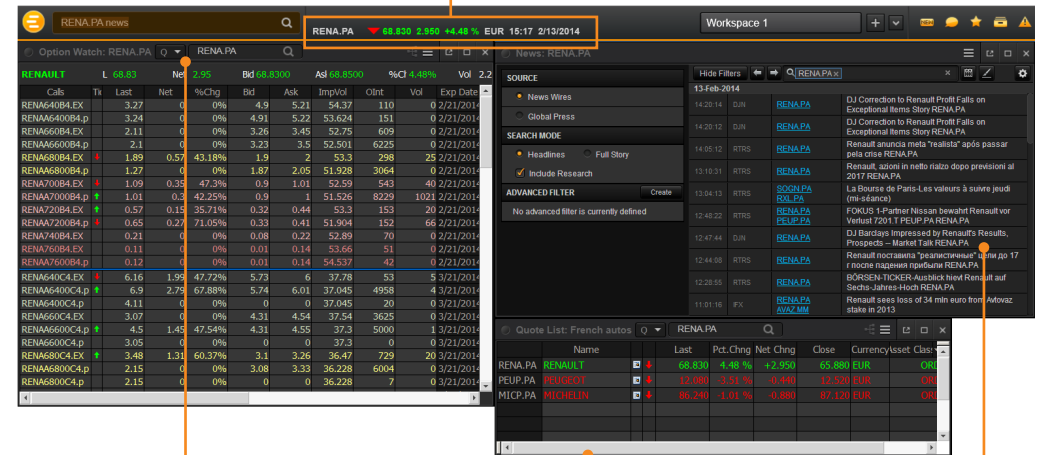
Click + to add a new workspace. The tabbed arrow gives access to workspace templates for different asset classes, and to save and share workspace layouts.

#### 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 Quote List, Option Watch, and News Monitor.

The active symbol (in this case, Renault <RENA.PA>) is the most recent financial instrument you have focused on. When you add an app, it automatically displays data for the active symbol.



Click an app title bar to move the app. Click and slowly drag an app until its frame touches another app: the two apps “snap” 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.

Add News Monitor to your workspace to get:

- the latest market-moving news
- historical news archives
- feature-rich, intuitive user interface

**More help:** <http://bit.ly/1c6qZgO>

**For eLearning, go to**  
<http://training.thomsonreuters.com/eikon4/getting-started/> and choose *The News Monitor App*.



## IV. LINK APPS TOGETHER

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.

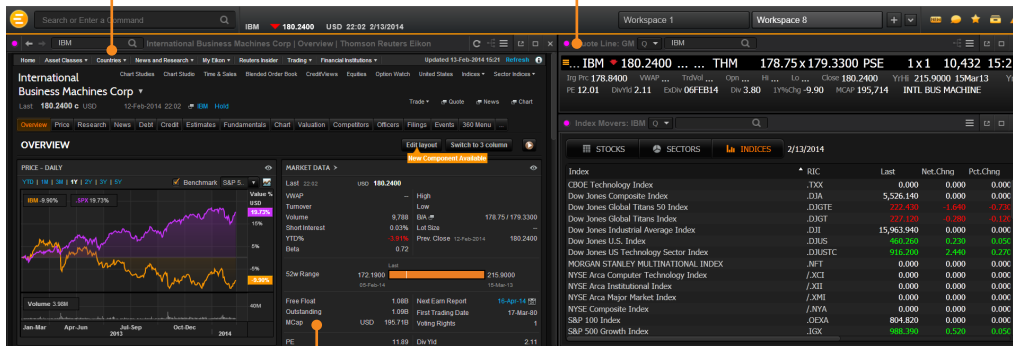
1. This example includes Index Movers App, Quote Line App, and a company overview page.

2. In the top left of each app, click to choose a color. In this case, all three apps are tuned to purple.

Choose whichever color you prefer.



**Tip:** When you snap apps together, if one is already tuned to a color, the other one links to the same color.

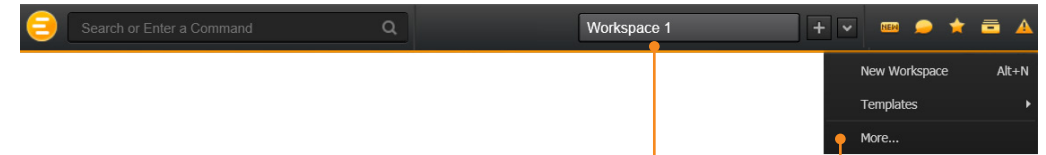


3. Now that the apps are linked, type a new instrument code into any app. All other apps will automatically display content for the new instrument.

**More help:** <http://bit.ly/InTLLm1>

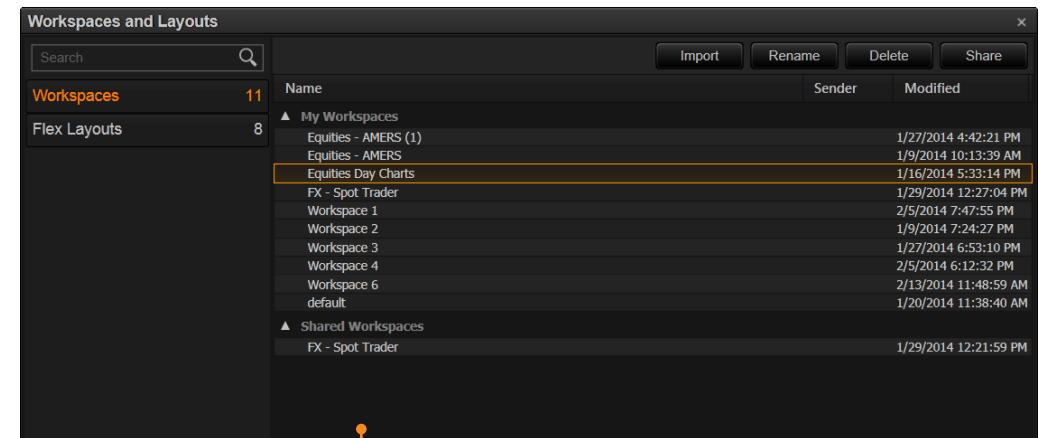
## V. SAVE OR SHARE YOUR WORKSPACE

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 the down arrow and choose *More*.



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


**For eLearning, go to**

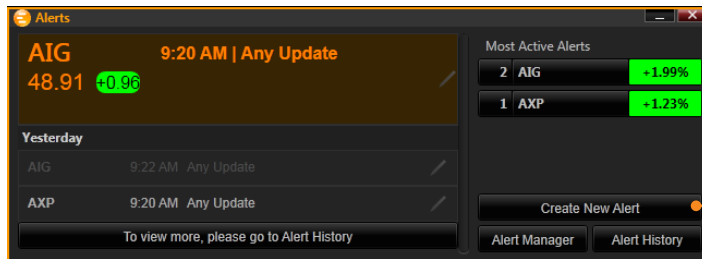
<http://training.thomsonreuters.com/eikon4/getting-started/> and choose *Managing the Eikon – Version 4 Workspace*.

## VI. GET ALERTS FOR MARKET-MOVING EVENTS

Get informed immediately of market-moving information with Alerts.



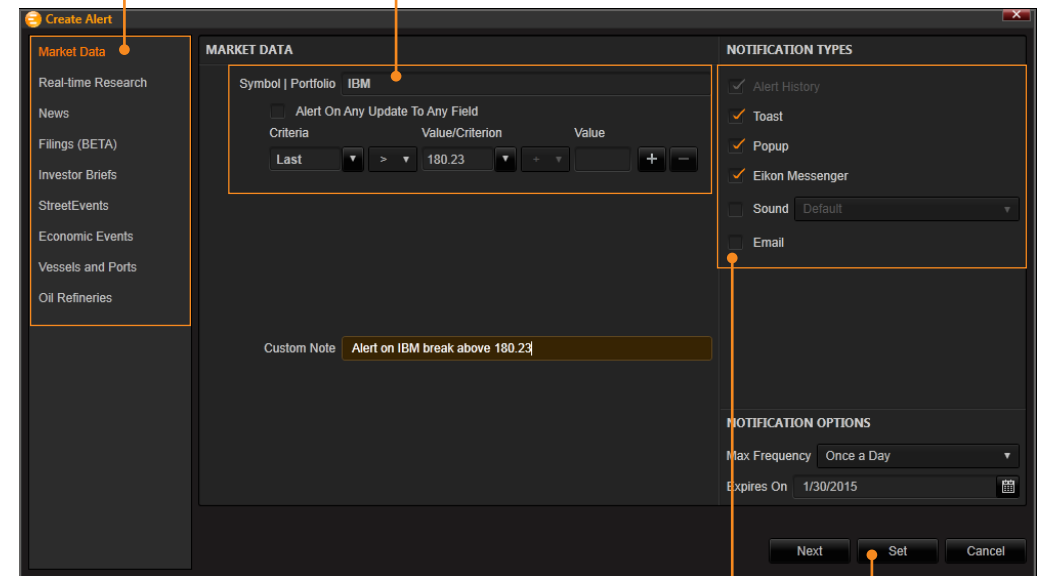
1. Click  in the top right of the toolbar to open Alerts.



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. Choose how you want to receive alerts.

6. 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*.


**More help:** <http://bit.ly/1nTsvox>

**For eLearning, go to**

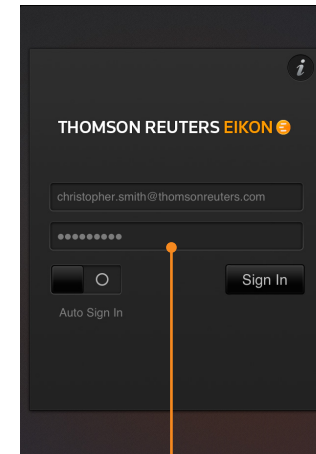
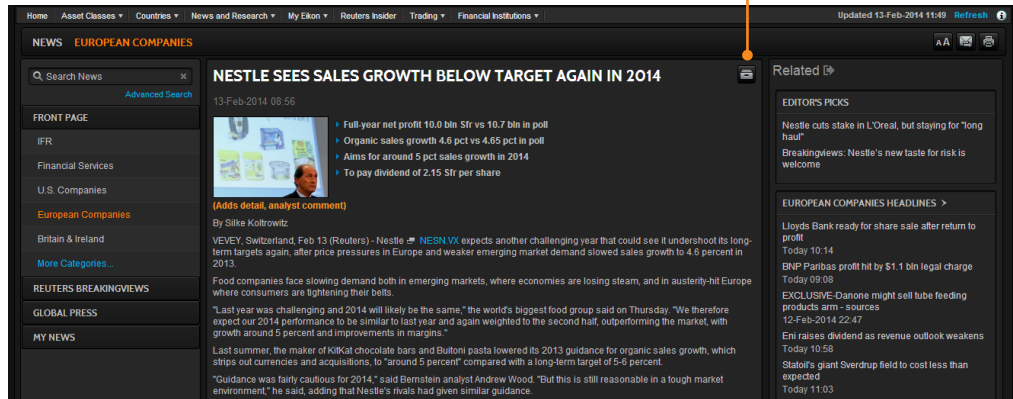
<http://training.thomsonreuters.com/eikon4/getting-started/> and choose *Creating and Managing Alerts in Eikon – Version 4*.

## VII. SYNC YOUR DESKTOP TO YOUR MOBILE DEVICE WITH MY BRIEFCASE

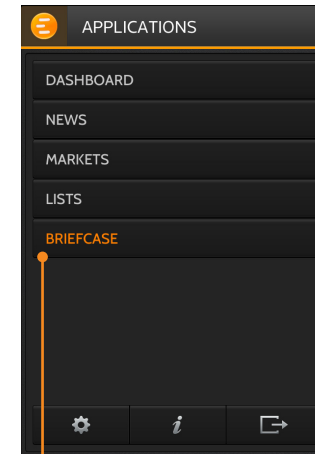
With *My Briefcase*, you can collect news and documents and read them later, either on your desktop application or from your mobile device, even when you are offline. You can open *My Briefcase* by clicking  in the top right of any screen.

1. Open an app and display content or news. For example, country news is available in  > *Markets* > *Countries & Regions*.

2. Click *Add to Briefcase*.



3. Sign into your mobile device.



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

**More help:** <http://bit.ly/LPUa1s>

**For eLearning, go to**

<http://training.thomsonreuters.com/eikon4/getting-started/>  
and choose *Using the Briefcase in Eikon – Version 4*.

# Create and Manage Portfolios

- I. MAKE A PORTFOLIO OR LIST
- II. DISPLAY A LIST OF INSTRUMENTS IN QUOTE LIST
- III. WATCH THE MARKETS WITH MONITOR APP

## 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
- save lists and portfolios
- share them with other colleagues
- reuse them in other apps, or on your mobile device

### 1. Open Portfolios and Lists.

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

**More help:** <http://bit.ly/1jfBlmq>

2. Choose whether you want to make a portfolio or a list. In this example, let's make a portfolio. On the *Portfolios* tab, click *New*.

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

Name	Code	Benchmark	Currency	No. of Securities	Owner	Last Modified
US LARGE CORE	SAMPLE_US_LRGCORE	S&P 500	USD	51	SAMPLEPORTFOLIOS	2/1/2014 2:48:45 PM
JAPAN LARGE CORE	SAMPLE_JP_LRGCORE		USD	51	SAMPLEPORTFOLIOS	2/1/2014 2:48:40 PM
US SMALL VALUE	SAMPLE_US_SMVALUE	Russell 2000 Value	USD	61	SAMPLEPORTFOLIOS	2/1/2014 2:48:54 PM
US LARGE GROWTH	SAMPLE_US_LRGGRO	Russell 1000 Growth	USD	61	SAMPLEPORTFOLIOS	2/1/2014 2:48:52 PM
US LARGE CORE WITH SHORTS	SAMPLE_US_LRGCORE_SH	S&P 500	USD	62	SAMPLEPORTFOLIOS	2/1/2014 2:48:50 PM
US LARGE CORE WITH FIXED INC	SAMPLE_US_LRGCORE_FI	S&P 500	USD	76	SAMPLEPORTFOLIOS	2/1/2014 2:48:49 PM
US LARGE CORE WITH ETFS	SAMPLE_US_LRGCORE_EF	S&P 500	USD	56	SAMPLEPORTFOLIOS	2/1/2014 2:48:47 PM
AFRICA LARGE CORE	SAMPLE_SAF_LRGCORE	Thomson Reuters Afr...	USD	51	SAMPLEPORTFOLIOS	2/1/2014 2:48:43 PM
RUSSIA LARGE CORE	SAMPLE_RU_LRGCORE	Russia MICEX	USD	26	SAMPLEPORTFOLIOS	2/1/2014 2:48:42 PM
LATIN AMERICA LARGE CORE	SAMPLE_LAM_LRGCORE		USD	24	SAMPLEPORTFOLIOS	2/1/2014 2:48:41 PM
INDIA LARGE CORE	SAMPLE_IN_LRGCORE		USD	31	SAMPLEPORTFOLIOS	2/1/2014 2:48:38 PM
GLOBAL DEVELOPED WITH FIXED INC	SAMPLE_GL_DEV_FI	MSCI World	USD	163	SAMPLEPORTFOLIOS	2/1/2014 2:48:37 PM
GLOBAL DEVELOPED	SAMPLE_GL_DEV	MSCI World	USD	69	SAMPLEPORTFOLIOS	2/1/2014 2:48:33 PM
CANADIAN LARGE CORE WITH SHOR...	SAMPLE_CD_LRGCORE_SH	S&P/TSX 60	USD	61	SAMPLEPORTFOLIOS	2/1/2014 2:48:30 PM
CANADIAN LARGE CORE WITH FIXE...	SAMPLE_CD_LRGCORE_FI	S&P/TSX 60	USD	60	SAMPLEPORTFOLIOS	2/1/2014 2:48:29 PM
CANADIAN LARGE CORE WITH ETFS	SAMPLE_CD_LRGCORE_EF	S&P/TSX 60	USD	57	SAMPLEPORTFOLIOS	2/1/2014 2:48:27 PM
CANADIAN LARGE CORE	SAMPLE_CD_LRGCORE	S&P/TSX 60	USD	51	SAMPLEPORTFOLIOS	2/1/2014 2:48:25 PM
AUSTRALIA LARGE CORE	SAMPLE_AU_LRGCORE	S&P ASX 300	USD	51	SAMPLEPORTFOLIOS	2/1/2014 2:48:24 PM
ASIA EX JAPAN LARGE CORE	SAMPLE_ASIA_LRGCORE		USD	51	SAMPLEPORTFOLIOS	2/1/2014 2:48:22 PM
PAN ARAB LARGE CORE	SAMPLE_ARAB_LRGCORE		USD	51	SAMPLEPORTFOLIOS	2/1/2014 2:48:20 PM

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 also indicate transaction dates and values on the *Transactions* tab.

## II. DISPLAY A LIST OF INSTRUMENTS IN QUOTE LIST

Quote List lets you monitor real-time and referential data for a list of instruments and for a portfolio. The Quote List is customizable, allowing you to display the data items you care about most, create groups, build calculated columns, view indicators, and determine display settings so you see important updates.

You will find Quote List in the *Monitoring* app menu.

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

Add instruments to your Quote List by typing the instrument code or name. You can also add a portfolio or list by typing its name.

Open the menu to access advanced and customization features. You can add new data fields, rearrange columns, create groups of instruments, and more.

	Name	Last	Pct.Chng	Net Chng	Close	Currency/Asset	Clas	
T	AT&T	32.9400			32.9400	USD	ORD	
VOD.L	VODAFONE GROUP	218.20	-1.267 %	-2.80	221.00	GBP	ORD	
ORAN.PA	ORANGE	9.100	-0.23 %	-0.021	9.121	EUR	ORD	
BT.L	BT GROUP	391.744	-1.111 %	-4.4	396.2	GBP	ORD	
SCMN.VX	SWISSCOM N	504.0	-0.2 %	-1.0	505.0	CHF	ORD	

Double-click here to display related news.

**Note:** This icon only appears if you have permission to view news stories.

Click the arrow at the top of any column header to access sorting features.

**More help:** <http://bit.ly/1is3uDW>

## III. WATCH THE MARKETS WITH MONITOR

Monitor is a new app that 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.

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.

	RIC	Name	Last	Net Chng	Pct.Chng	Close	Currency	TR.TotalRe
	F	FORD MOTOR CO	14.9399	-0.0601	-0.4007 %	15	USD	
	GM	GENERAL MOTORS	35.100000	-0.460000	-1.2936 %	35.56	USD	155427...
	DAIGn.DE	DAIMLER AG N	65.6500	-0.8000	-1.2 %	66.45	EUR	117982...
	7203.T	TOYOTA MOTOR CO	5,891	-129	-2.14 %	5891	JPY	220641...
	MICP.PA	MICHELIN	86.540	-0.580	-0.67 %	87.12	EUR	202470...
	.DJI	DJ INDU AVERAGE	15,878.40	-85.54	-0.54 %		USD	

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

Double-click a header name to change the data field. Autosuggest helps you find the Thomson Reuters data you are looking for.

**For eLearning, go to**  
<http://training.thomsonreuters.com/eikon4/getting-started/> and choose *About the Monitor App*.

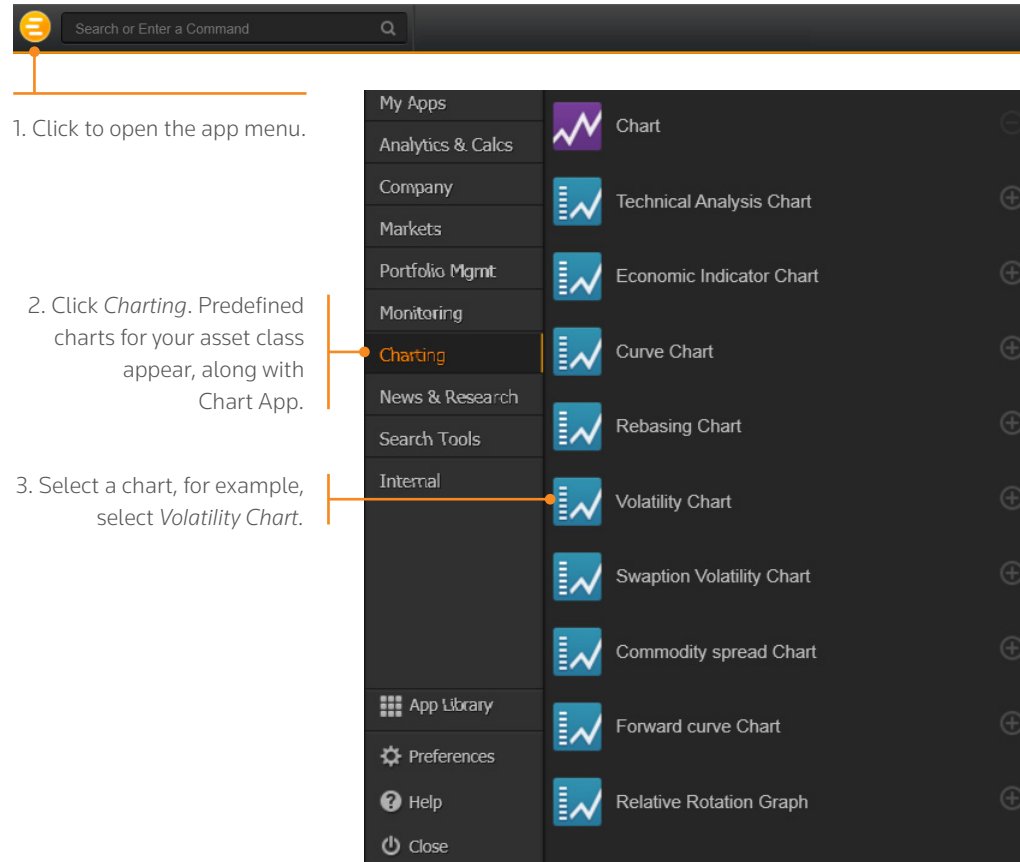
**More help:** <http://bit.ly/1lAH7kn>

# Charting and Technical Analysis

- I. USE A PREDEFINED CHART
- II. CREATE A CUSTOM CHART IN CHART APP

## I. USE A PREDEFINED CHART

Predefined charts for various asset classes are available in the app menu under *Charting*.

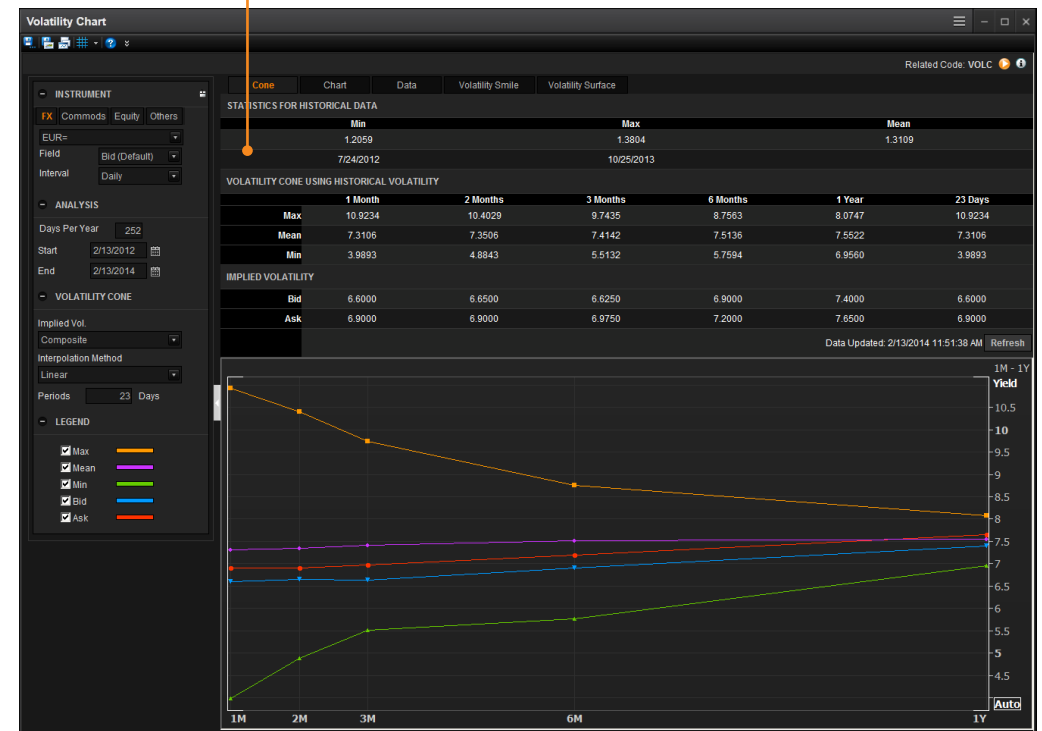


1. Click to open the app menu.

2. Click *Charting*. Predefined charts for your asset class appear, along with Chart App.

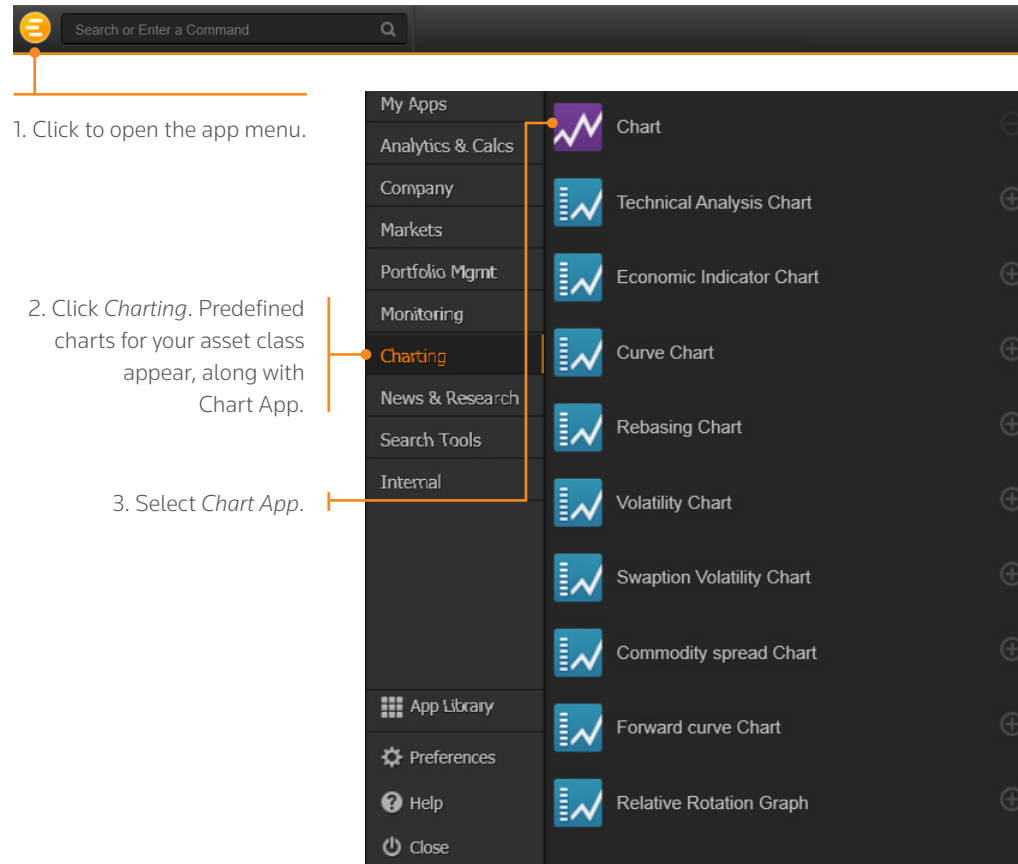
3. Select a chart, for example, select *Volatility Chart*.

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



## II. CREATE A CUSTOM CHART IN CHART APP

The 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*. Predefined charts for your asset class appear, along with Chart App.

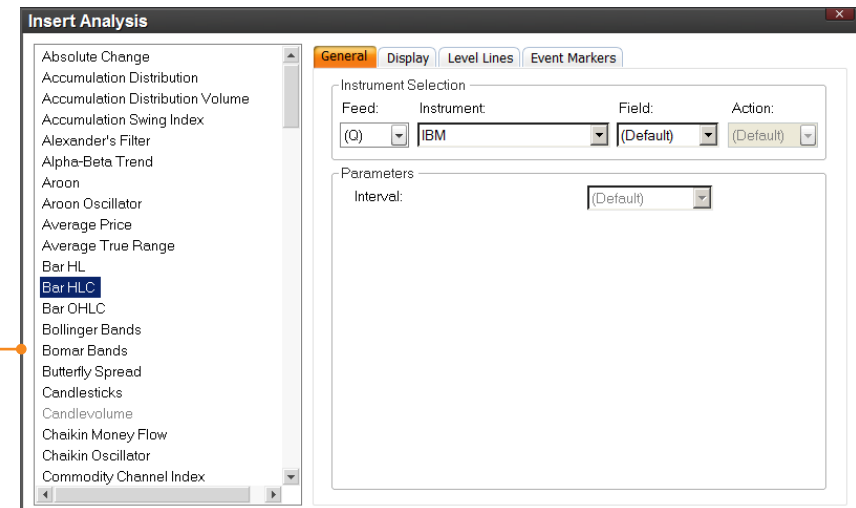
3. Select *Chart App*.

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.

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

For eLearning, go to <http://training.thomsonreuters.com/eikon4/getting-started/> and choose *Getting Started with the Chart App in Eikon – Version 4*.

5. Use toolbar buttons to adjust your chart range, interval, and line types.
  4. Type an instrument code and press *Enter*.
- Go to > *Insert Analysis* to add a new analysis.



More help: <http://bit.ly/14cMiKM>

# Financial Communities

- 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

## I. USE THOMSON REUTERS MESSENGER

Click  on the toolbar to open Messenger.

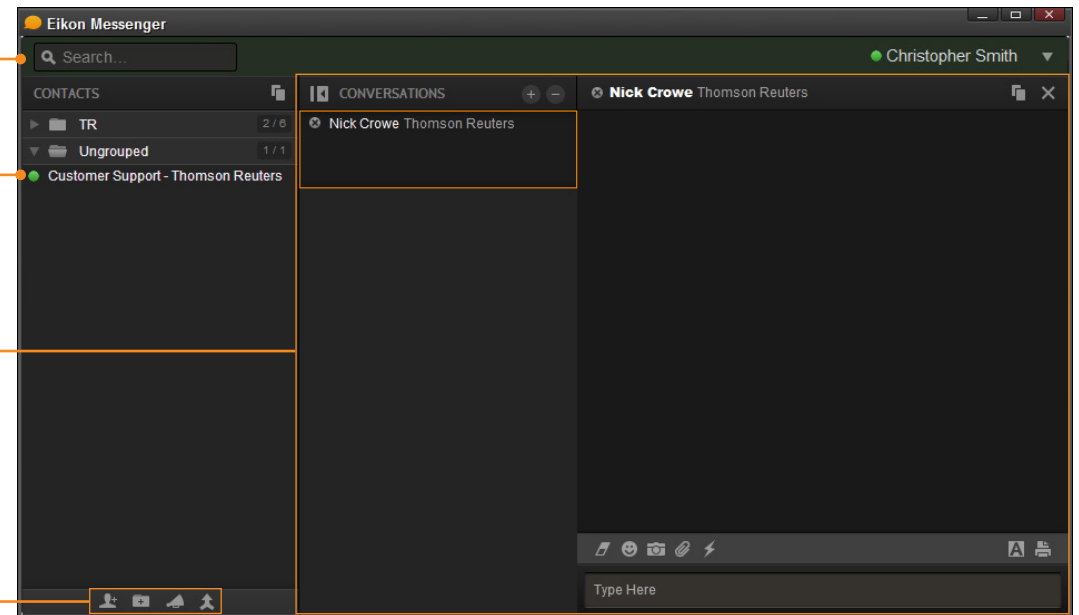


Begin typing here to search the directory or your contacts.


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, go to**

<http://training.thomsonreuters.com/eikon4/getting-started/>  
and choose *Getting Started with Messenger in Eikon*.

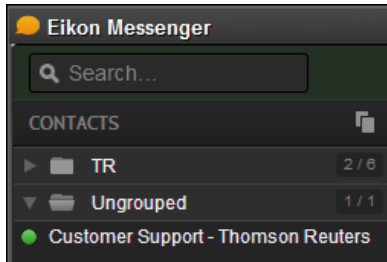
Messenger is also a venue for chats and forums. Check out the weekly Global Markets Forum, where you can get commentary from leading Reuters journalists.

**Visit** <http://online.thomsonreuters.com/trading/gmf/>



## II. CONTACT CUSTOMER SUPPORT FOR HELP

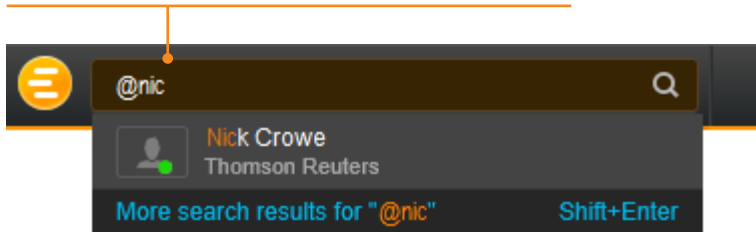
If you need help, you can contact Thomson Reuters Customer Support anytime from Messenger. Just click *Customer Support* in the Ungrouped category of contacts.



## 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

The Thomson Reuters Financial Directory puts you in touch with financial professionals around the globe. You can search by name or company, view profiles and contact details, and request to add people to your network of contacts.

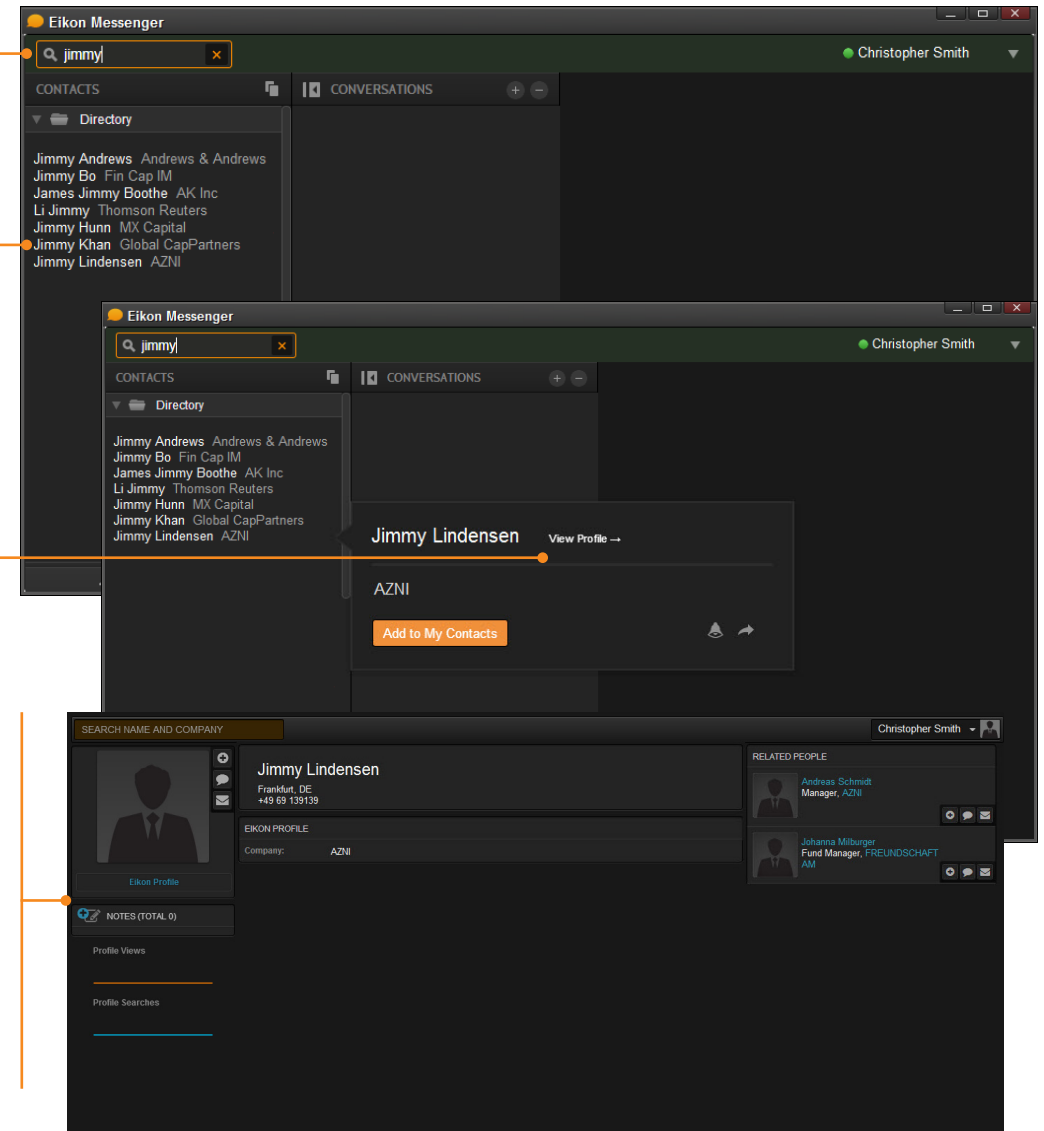
1. In Messenger, begin typing to search for a person or company.

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
- IV. ACCESS DEAL ANALYTICS, LINKING, AND PRESENTATION TOOLS
- V. USE ADFIN ANALYTICS AND OTHER ADVANCED FEATURES

## I. DISCOVER THOMSON REUTERS EIKON – MICROSOFT OFFICE

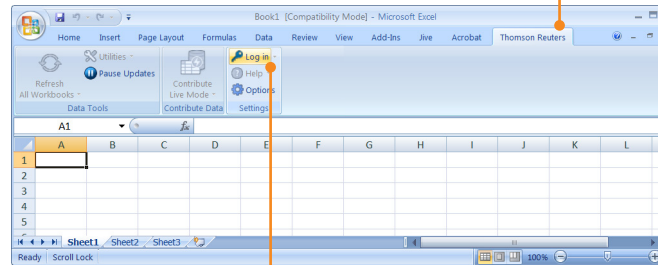
Thomson Reuters Eikon – Microsoft Office, an integral part of Thomson Reuters Eikon, is a self-installing Microsoft Excel add-in. With it, you can:

- 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.

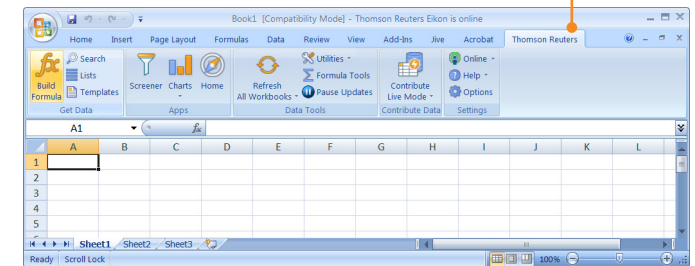
2. Click the Thomson Reuters tab to open the Thomson Reuters Eikon menu.



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

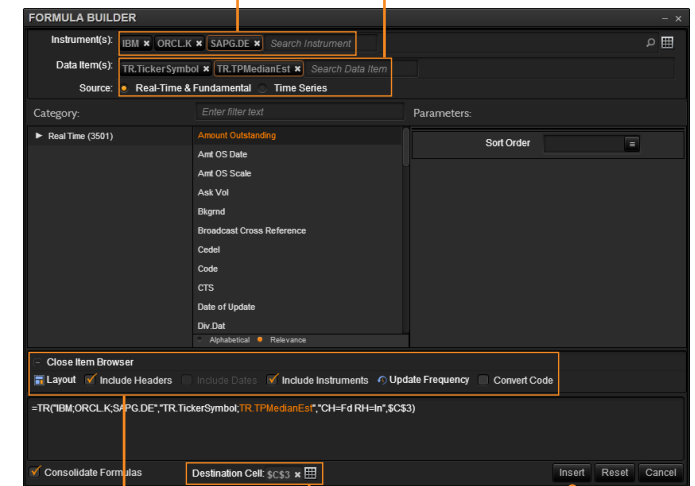
## III. USE THE FORMULA BUILDER TO RETRIEVE THOMSON REUTERS DATA

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



2. In the *Formula Builder*, enter (or search for) the instruments you want data for.

3. Select the data source you require (real-time & fundamental or time series), then enter the data item(s) you want to include. For each data item, you can define settings in the *Parameters* area.



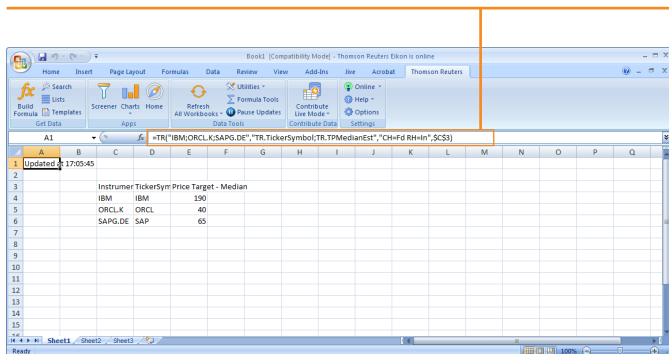
4. Select other settings, if required.

5. Select a destination cell for the data.

6. 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 <http://bit.ly/1ijec1W>

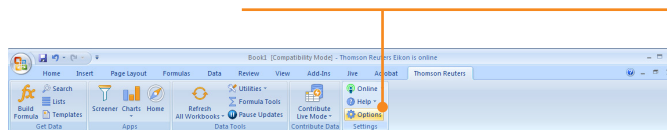


#### IV. INSTALL THE DEAL ANALYTICS, LINKING, AND PRESENTATION TOOLS APPS

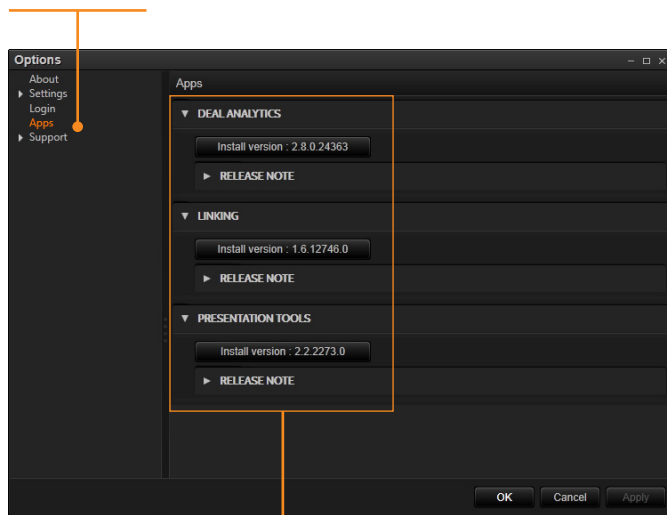
Thomson Reuters Eikon – Microsoft Office includes additional apps to enhance your productivity.

**Note:** Special permissioning required.

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



2. Open *Apps*.



3. Click to install the app(s) you require:

- *Deal Analytics* provides tools to analyze M&A, equity, and bond deals, as well as loans. It supports legacy Thomson products.
- *Linking* lets you link charts and tables in Excel and Word/PowerPoint, and update them automatically.
- *Presentation Tools* help you create custom presentations/documents that adhere to your company's visual identity.

**More help:** <http://bit.ly/1h1Jixa>

#### 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.

**More help:** <http://bit.ly/15g0lMo>

**For eLearning, go to**

<http://training.thomsonreuters.com/eikon4/getting-started/> and choose *Getting Started with Thomson Reuters Eikon Office*.



## CONTACT INFORMATION

For online help: <http://bit.ly/1n8tB37>

For more information on training: [eikon.thomsonreuters.com/training](http://eikon.thomsonreuters.com/training)

Or contact your Thomson Reuters representative.