

Refinitiv Workspace Internal Training Guide

For Internal Use Only

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The Financial and
Risk business of
Thomson Reuters
is now Refinitiv.



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About this document

INTENDED READERSHIP

This guide is for all internal Refinitiv Workspace users

IN THIS GUIDE

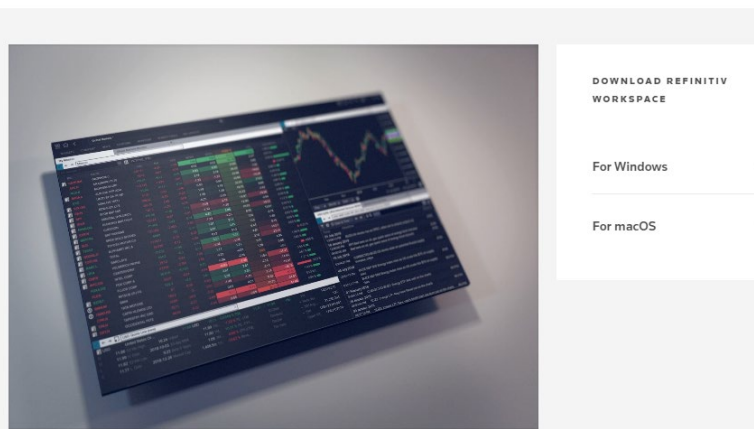
This guide is to help prepare frontline staff become familiar with the functionality in Refinitiv Workspace so they are able to train clients on the product.

Installation

- [Download](#) Refinitiv Workspace and either follow the on-screen instructions or those found in the [Basic Installation Guide](#).
- You can use your existing Ekron credentials to sign in.

Refinitiv Workspace

Welcome to the Refinitiv Workspace Early Access Program (EAP)



Launch Product

Refinitiv Workspace is tailored to each user, according to the user's profile. It will automatically create a home page for you according to your profile. This can be easily updated or changed to match your specific needs.

- If you have just installed the software, click on the 'Launch Refinitiv Workspace' button on-screen.
- If the software is already installed, click on the desktop icon or find the program in the Start menu.

Installation is complete!

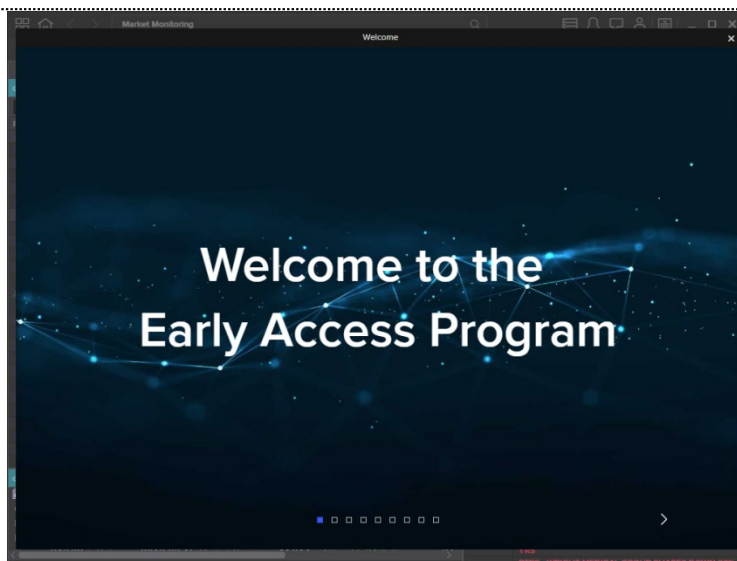


Launch Refinitiv Workspace

Exit

You'll be shown a welcome screen you can use to learn about new features.

- Close the welcome screen to start using Refinitiv Workspace.
- The first screen you will see will be the default layout.



Navigation

BROWSER

The Refinitiv Workspace browser is a single window display created to meet the needs of our users in a more tailored way than ever before. It is easy to use, with a focus on desktop performance. It can display a single app, or multiple apps via a layout, and you can open multiple browsers at a time.

BROWSER TOOLBAR

The browser toolbar brings together key capabilities to deliver a simple search and navigation experience.

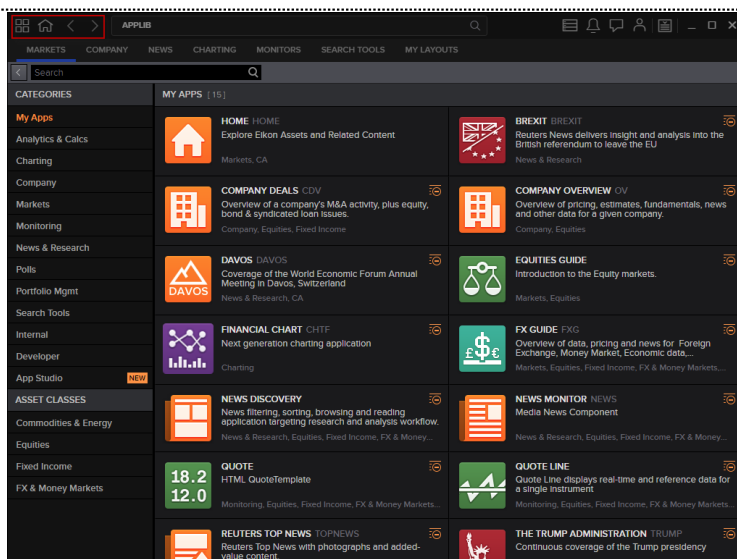
App Library and Home

The App library shows you your available apps.

- Click on any app in the App Library and it will appear in the browser window.

The home page defaults to a Layout targeted to your profile. However, the home page can be set to any app, view or Layout. This is done by clicking on 'Set as Home' in the Context Menu, discussed later.

- To return to your home page at any time use the 'Home' icon in the browser toolbar.



Forward and Backward Navigation

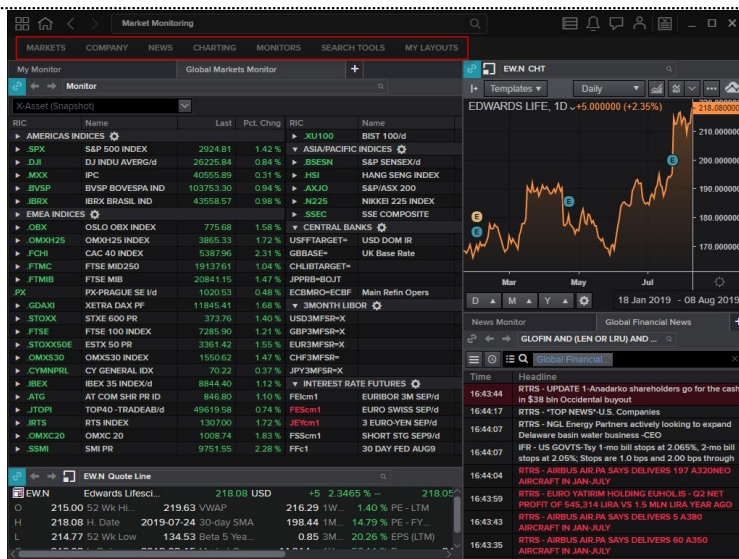
Refinitiv Workspace works in a similar way to any standard internet browser. You can use the forward and back buttons to return to previously viewed content at any time.

Navigation Bar

The navigation bar (shown in red) has menus that let you access your workflow apps most relevant to you. Use these menus to navigate to different apps. This means that the key apps and content that are important to your workflow are always available.

Recommended for Wealth users: The navigation bar contains links to apps displaying company information, News, Advanced Search, Layouts and more. These are the apps most useful to a wealth advisor's daily tasks.

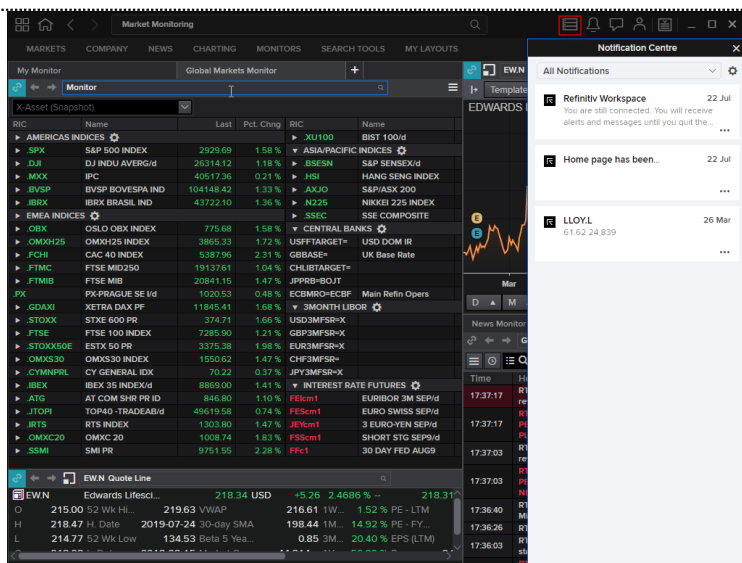
Recommended for Banking users: The navigation bar contains links to displace company information, News, Advanced Search, Deals, M&A content, Screener and Layouts. These are the apps most useful to a senior banker's daily tasks.



Notification Center

The Notification Center can keep you updated with alerts, messages and app information. Once you have set up an alert or started a conversation, notifications will start to appear.

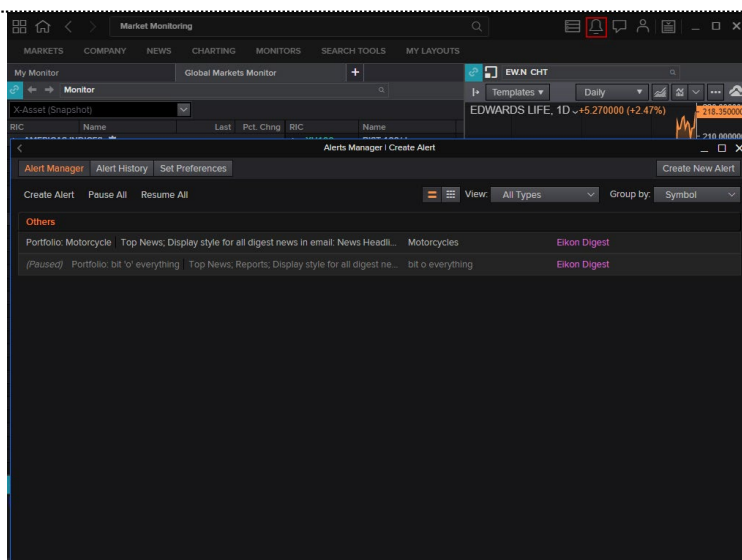
- Click on the Notification Center icon to open it.



Alerts

You can set up alerts on a range of different topics, and receive them a number of different ways.

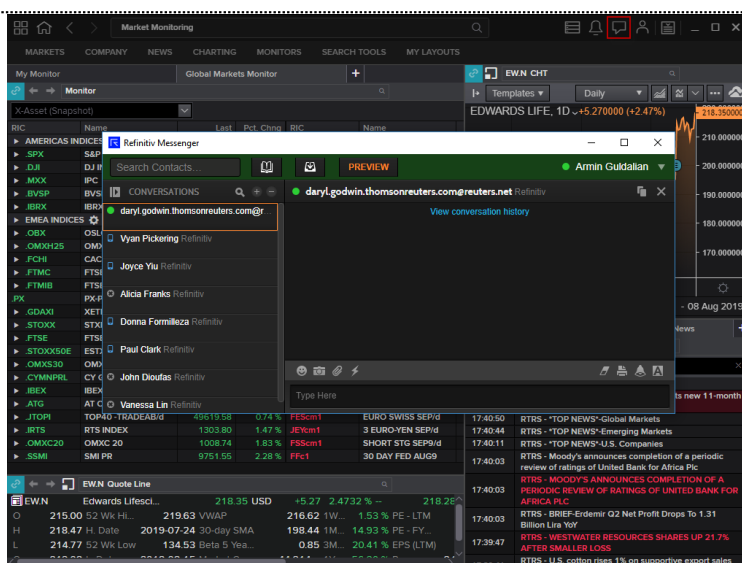
- Open Alerts and click on 'Create a new alert'
- Choose an alert topic
- Configure your alert (varies based on type)
- Choose which notification types to use
- Give your alert a name
- Choose an expiry date
- Click 'Set'



Messenger

Messenger allows you to collaborate with colleagues and communicate with clients in a secure and compliant manner. In addition to text, you can add images, files, and apps to the conversation as well.

- Open Messenger, search for a contact, and click on their name to start a conversation.

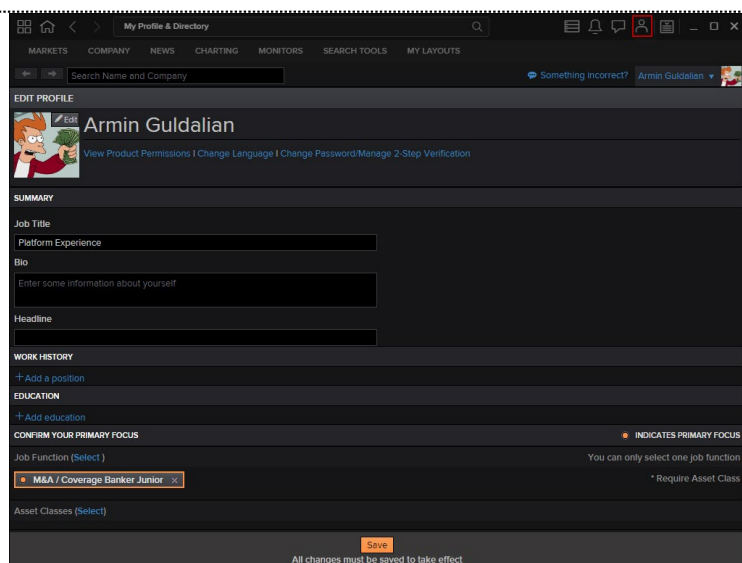


PROFILE MENU

Profile

Your Profile helps customize Refinitiv Workspace to meet your workflow needs.

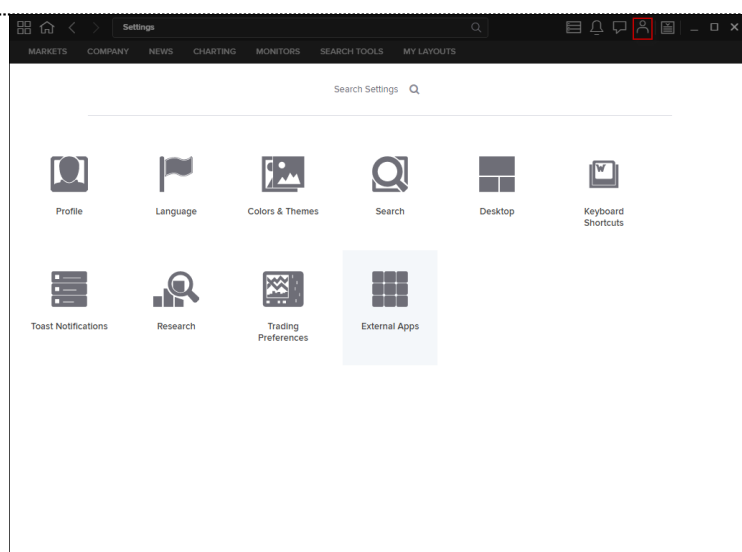
- Open the Profile Menu.
- Check that your profile information is correct.
- Add any additional information that is missing.



Settings

You can customize Refinitiv Workspace in a number of different ways.

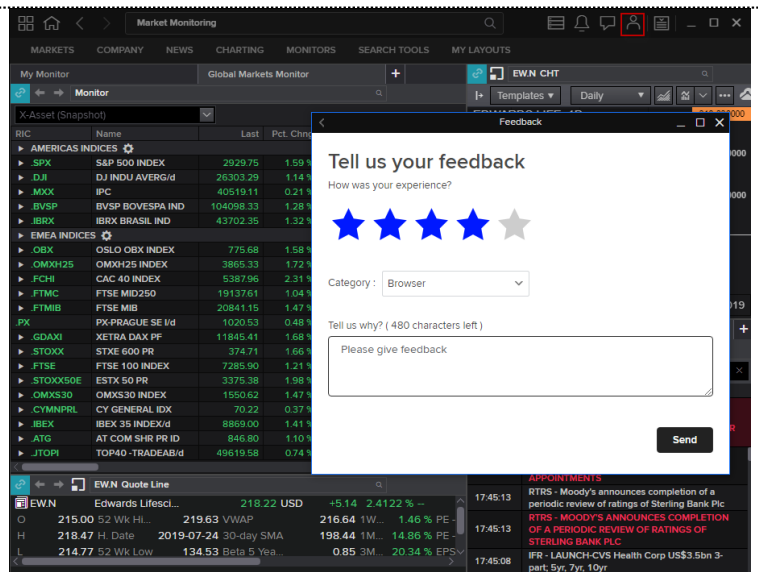
- Open Settings from the Profile Menu
- Review the list of settings
- Open the 'Colors & Themes' setting and change the theme from dark to light; change it back if you prefer.
- Review the shortcuts in the 'Keyboard Shortcuts' setting. Modify any you would like to change.



Feedback

Your feedback is very important to us and will help to shape Refinitiv Workspace over the coming months.

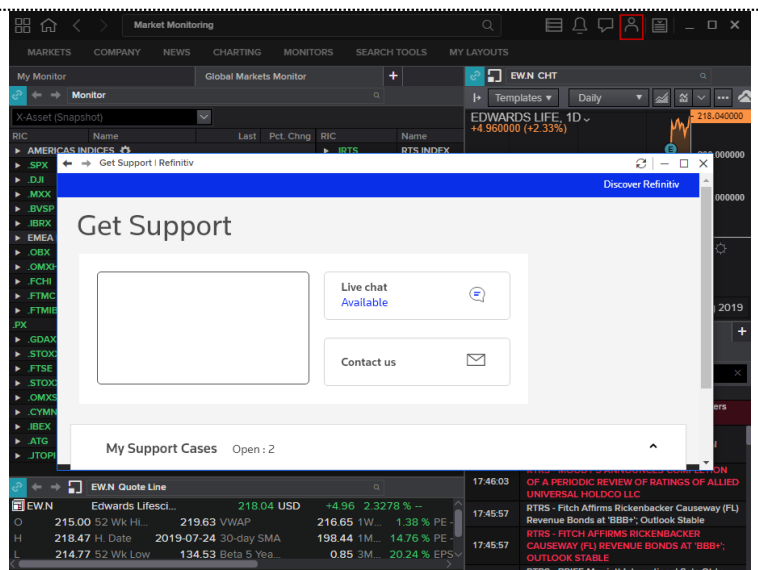
- Use the app to submit feedback at any time.



Support

You can contact our Support team here. You can also get information about the software, and use the 'Config Manager' to choose how Refinitiv Workspace connects to Refinitiv.

To create a support ticket, type your query in the box on the left, then click on either Live Chat or Contact Us to receive support.

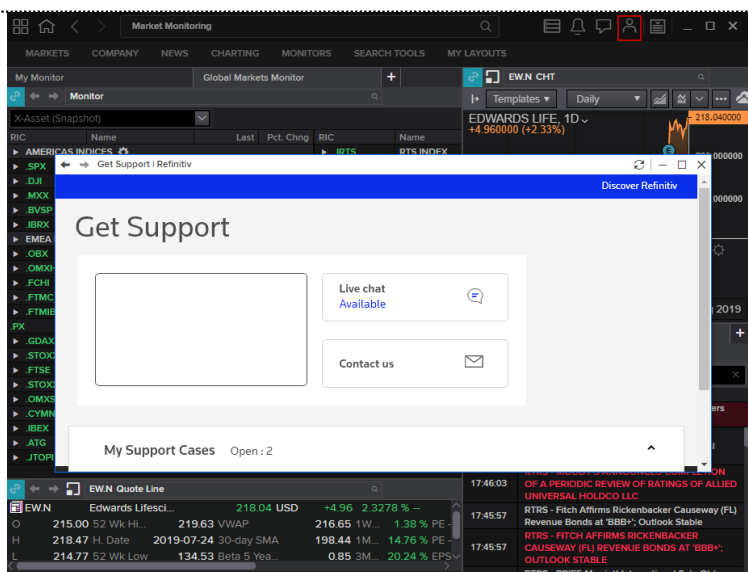


Sign out and Exit

To sign out of Refinitiv Workspace, select 'Sign Out' from the Profile menu. Doing this will prompt the user to sign in again.

To exit Refinitiv Workspace, select 'Exit' from the Profile menu. Doing this will close Refinitiv Workspace completely. If you have chosen to automatically sign-in, you will not have to re-enter your sign-in details next time you start Refinitiv Workspace.

If you close Refinitiv Workspace without signing out, it will remain operating on your computer in the background.



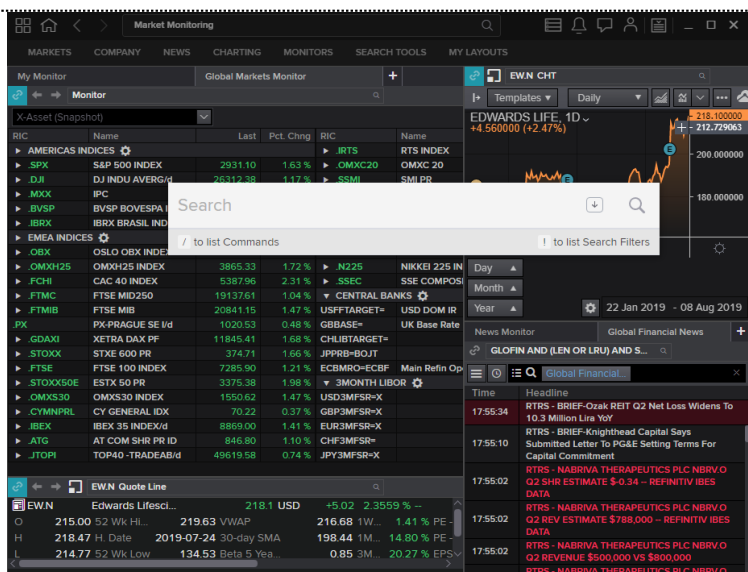
Search

You can search for content, apps and more in Refinitiv Workspace using Launcher and the Browser search.

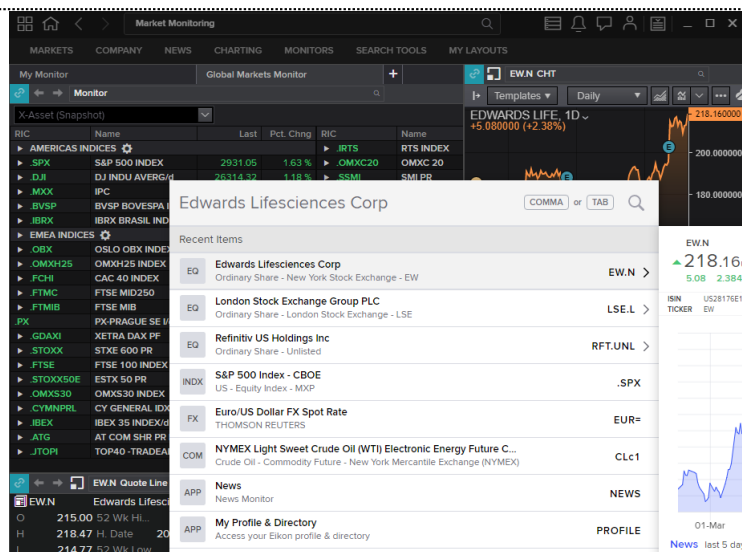
LAUNCHER

The new Launcher gives you instant access to search and is hidden until you need it. It can be accessed even if you are not working in Refinitiv Workspace.

- Use Ctrl + Shift + Space (Cmd + Shift + Space on Mac) to open launcher.
- Type in an instrument you would like to search for and click on the relevant result. The instrument overview will appear in a new browser window.

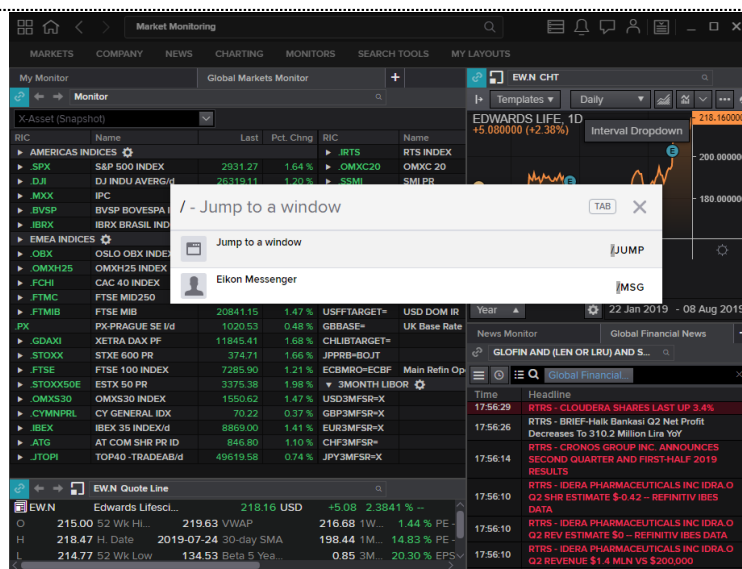


- Open launcher again using Ctrl + Shift + Space (Cmd + Shift + Space on Mac)
- Click on the search input box to see previous searches.



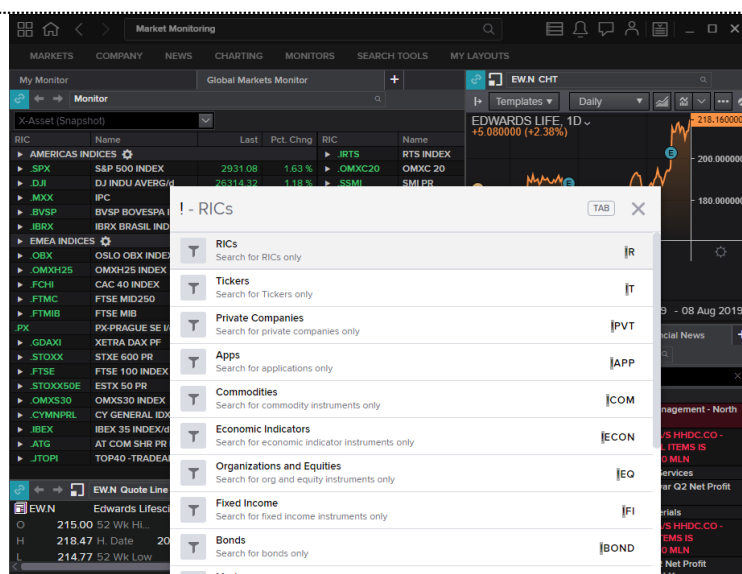
Commands allow you to initiate an action from Launcher.

- Type "/" to see the list of commands.
- Type "/Jump" to see all of your open browser windows and navigate to a specific window
- Type "/MSG" to bring Messenger to the front.



Filters let you narrow down your search instead of searching all of Refinitiv's content and apps.

- Use Ctrl + Shift + Space (Cmd + Shift + Space on Mac) to open launcher.
- Type "!" to see the list of filters. For example, !PVT will allow you to search just private companies, and !T will allow you to search only tickers.



BROWSER SEARCH

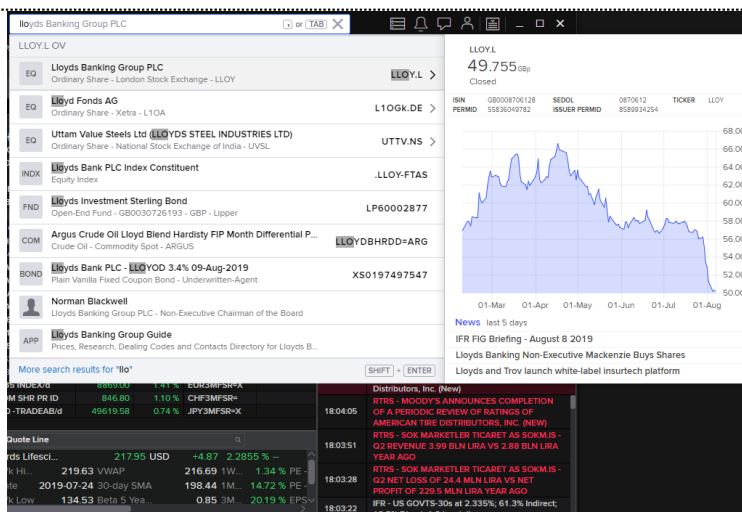
Preview

The search bar has the same functionality as launcher, but is always visible in a browser window.

Type a company name into search (example: "Lloyds" or "LLOY.L"). You will now see relevant information to that company. (only works with equities now, but will expand to others).

The Preview information gives you instant insight without having to navigate to an app. It is also part of the navigation.

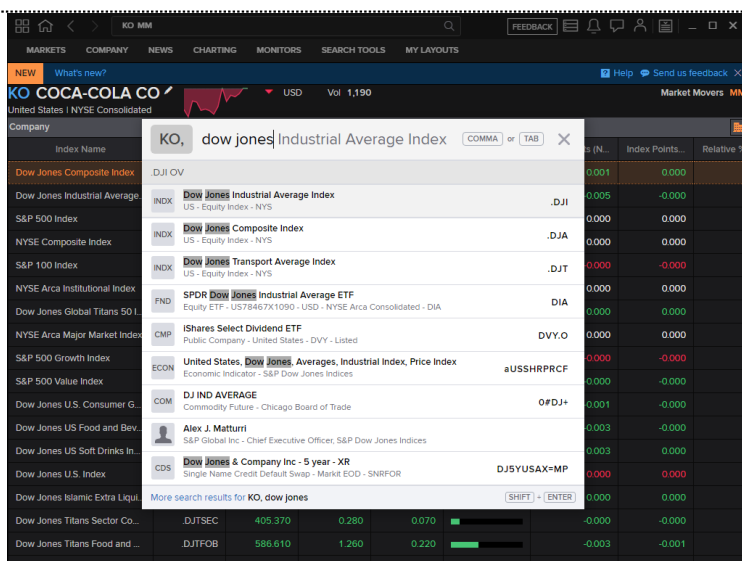
- Click the chart or news to navigate to Company Overview, the Chart preview to navigate to full charting features and News to navigate to the News app.



Smart Search

Smart search allows you to configure an app before navigating to the app. It also allows you to enter multiple instruments for quick analysis and comparison.

- Type any instrument into search (Example: KO)
- Hover over (or navigate to) that instrument
- Type a comma "," and then the index where the instrument trades (Example: "Dow Jones")
- Press 'Tab' to see a view of the apps you can use to access content on your chosen instrument
- Choose Chart from the list of apps
- Press 'Tab' again to see the available parameters.
- Using the keys (or hovering the mouse), choose 'Analysis Type'
- Press 'Tab' again and choose 'Rebasing'
- When you are ready hit enter or click the mouse. This will open up the chart, configured with the parameters you have set.



You can configure the News app using Smart Search as well.

- Search for an instrument (example: Coke)
- Choose News from the list of apps
- Press 'Tab' to see the available parameters.
- Choose a parameter, such as Time Range, and choose a specific range of news to retrieve.

The screenshot shows the Refinitiv Workspace interface. The top navigation bar includes 'MARKETS', 'COMPANY', 'NEWS', 'CHARTING', 'MONITORS', 'SEARCH TOOLS', and 'MY LAYOUTS'. The main content area displays the 'COCA-COLA CO' (KO) stock page. A 'Rebasing' dialog box is open, showing parameters for 'Absolute Price', 'Rebasing', 'Relative Performance', and 'Total Return'. Below the dialog, a table lists various market indices with their current values and changes.

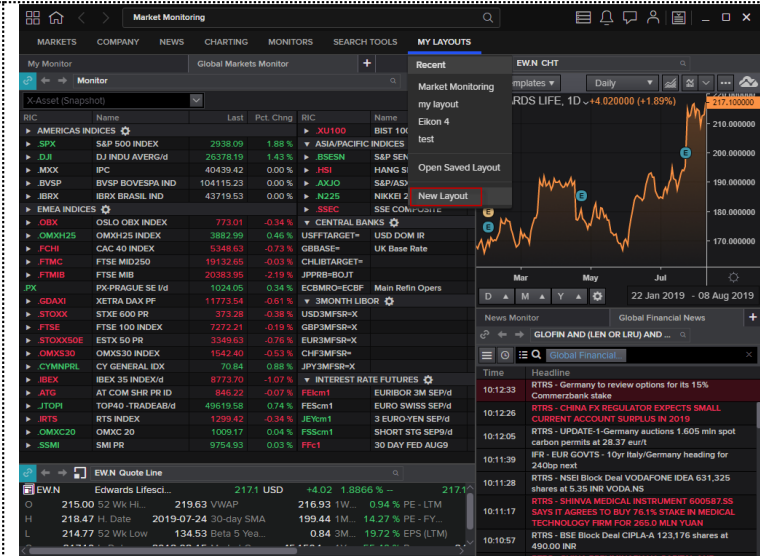
Index Name	Value	Change	Relative %	
Dow Jones Composite Index	21,001	0.000	0.000	
Dow Jones Industrial Average	21,005	-0.000	0.000	
S&P 500 Index	2,000	0.000	0.000	
NYSE Composite Index	2,000	0.000	0.000	
S&P 100 Index	1,000	-0.000	-0.000	
NYSE Arca Institutional Index	2,000	0.000	0.000	
Dow Jones Global Titans 50 L...	395.930	1.050	0.270	
NYSE Arca Major Market Index	XMI	0.000	0.000	
S&P 500 Growth Index	IGX	1,804.058	-3.124	-0.173
S&P 500 Value Index	IVX	1,135.389	1.064	0.094
Dow Jones U.S. Consumer G...	DJUSNC	622.430	2.350	0.380
Dow Jones US Food and Bev...	DJUSFB	636.890	3.620	0.570
Dow Jones US Soft Drinks In...	DJUSSD	744.350	2.760	0.370
Dow Jones U.S. Index	DJUS	726.180	-0.360	-0.050
Dow Jones Islamic Extra Liqui...	JMXL	4,459.900	4.450	0.100
Dow Jones Titans Sector Co...	DJTSEC	405.430	0.340	0.090
Dow Jones Titans Food and ...	DJTFCB	586.720	1.370	0.230

The News app configuration dialog is also visible, showing parameters for 'Language', 'Time Range', 'Repository', 'Sort By', and 'Keyword'. The News Monitor section displays a list of news headlines with timestamps.

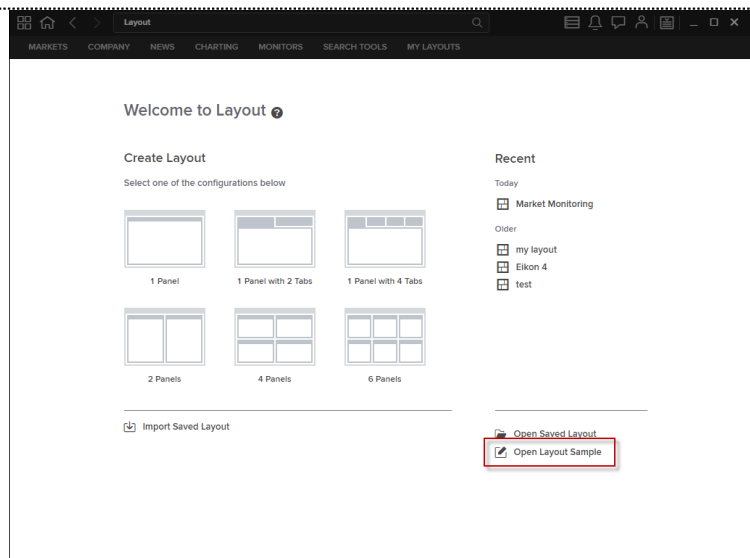
LAYOUTS

Layouts let you see multiple apps in one browser window. You can also link apps together so that when you click on an instrument or update one app, all of the other linked apps update as well.

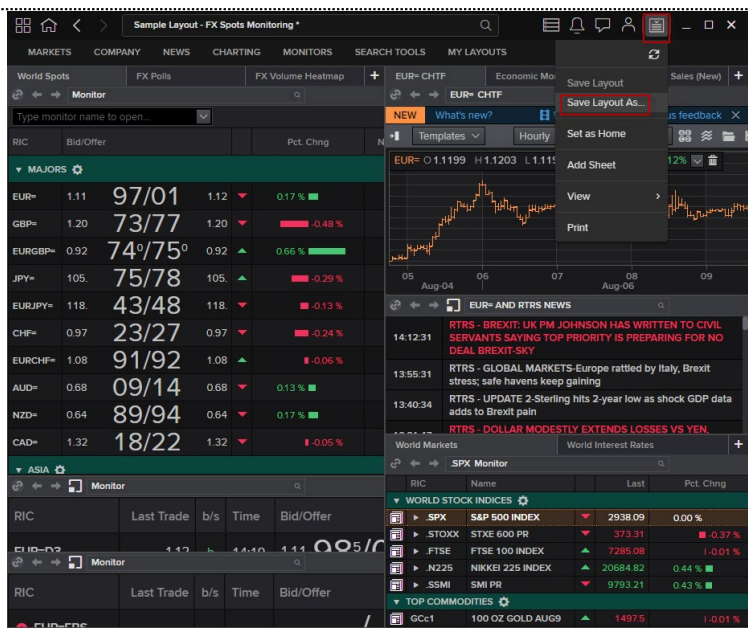
- Click on 'Home' to go back to the default Layout.
- Click on 'My Layouts'. Recently opened Layouts will show up here.
- Click on 'New Layout'.



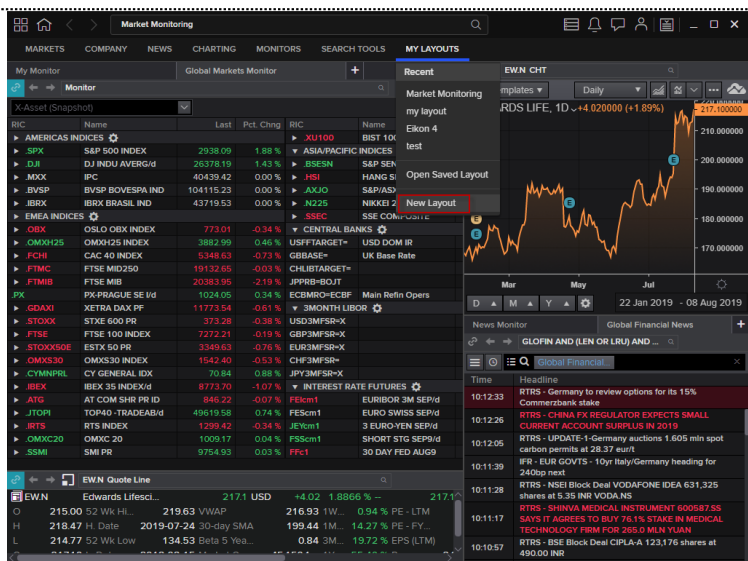
- At the bottom right of the window, choose 'Open Sample Layout'.
- Select a Layout from the list provided.



- Go to the top right of the browser, and click on the 'Context Menu'.
- Save As a new file name.

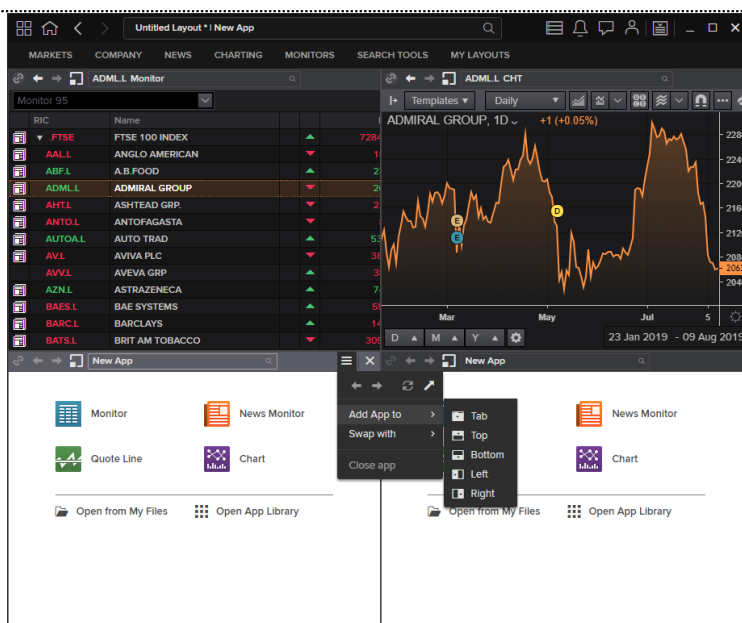


- Go back to "My Layouts" and again click on "New Layout".
- Create a Layout with any configuration you choose.



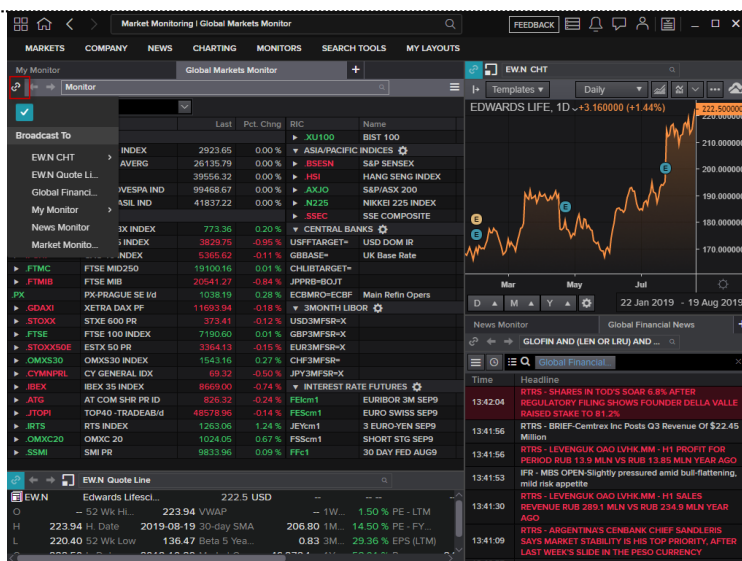
You can add apps from search, the App Library and My Files.

- Fill in the layout with a Monitor, Chart, news and any other apps you normally use.



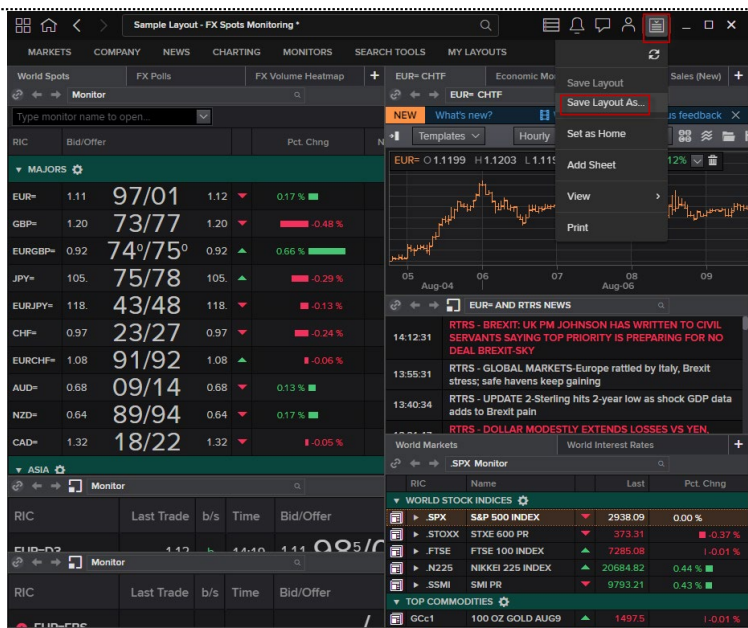
Linking apps together allows you to update multiple apps simultaneously.

- Link the apps together by clicking on the Link icon in the top left of an app.
- Broadcast from that app to another app in the Layout.



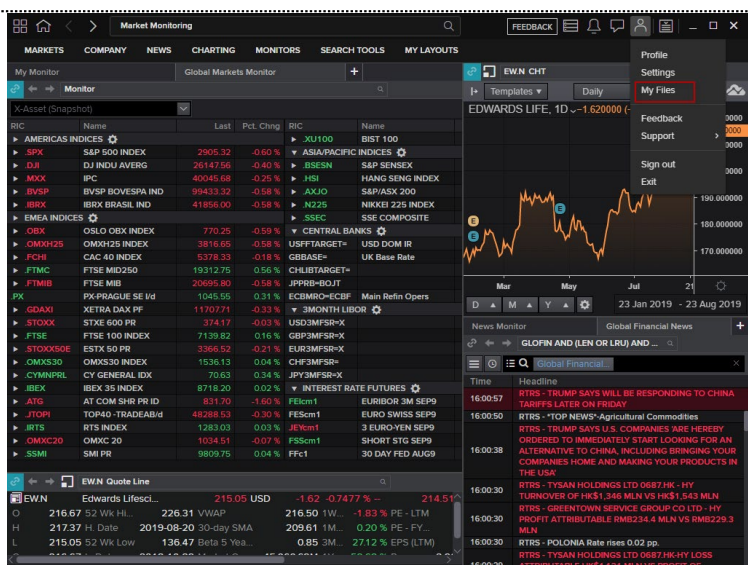
You can choose to set this Layout (or any other app) as your home page.

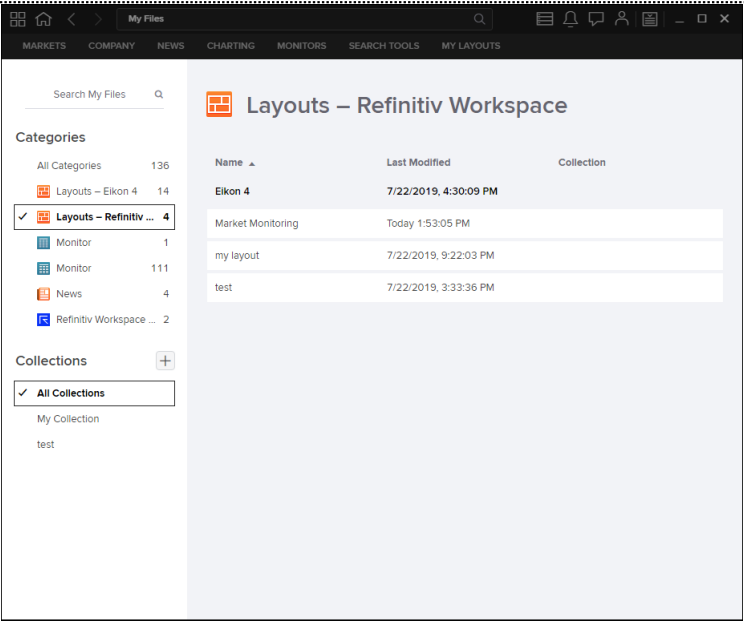
- Go to the top right of the application, and click on the 'Context Menu'.
- Use "Save As" to name your layout. Now click on "Set as Home" to make this layout your new home page.



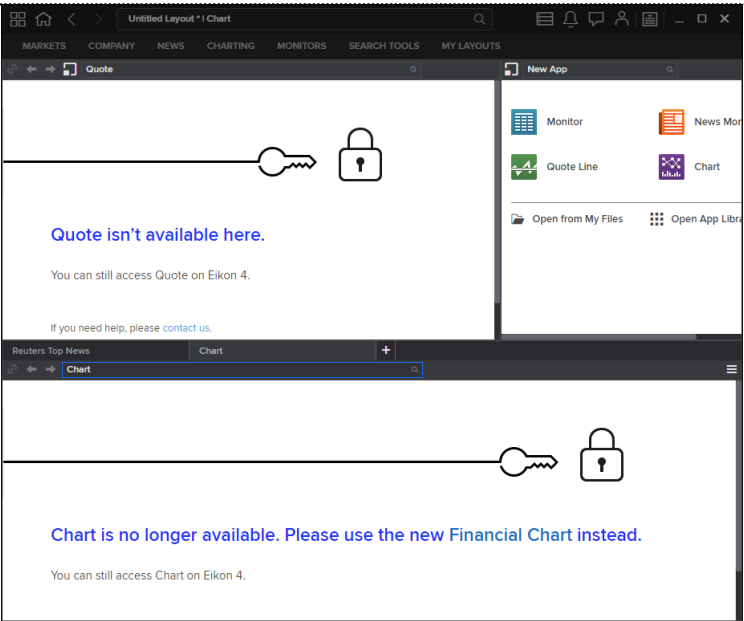
Eikon and Refinitiv Workspace layouts are saved separately, but both can be accessed in My Files.

- Click on the 'Profile Menu' and select 'My Files'.
- Click on an Eikon layout and open it.





Note: Some Eikon apps do not work in Refinitiv Workspace. You'll receive a message when this happens.



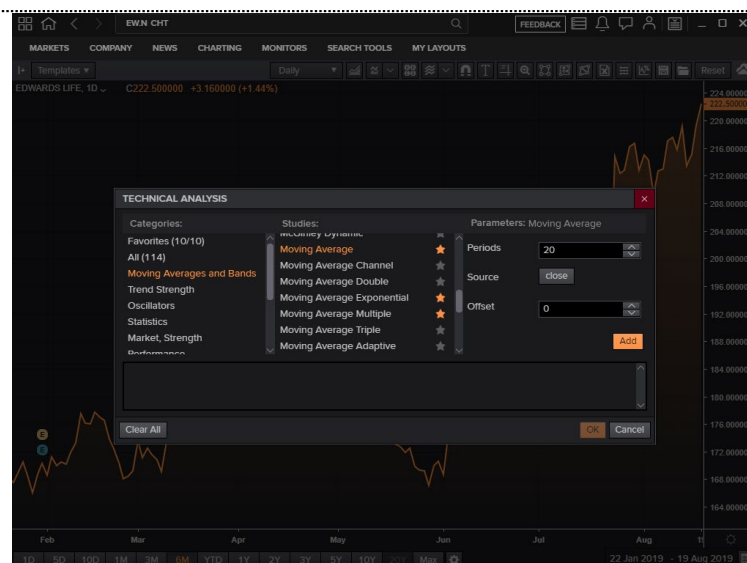
Charting

Our new charting tool includes a new range of analysis and drawing tools in an intuitive package.

- Select 'Charting' in the navigation bar, and click on 'Financial Chart'.
- Add or change the instrument (example: Polaris or PII)
- Change the range by clicking on one of the range buttons at the bottom.
- From the app toolbar:
 - Change the interval from daily to hourly.
 - Add a Trendline, like Info Line, using the Trendline tool
 - Add an annotation on the chart



- Add an analysis, like Moving Average (MA), using the Analysis builder

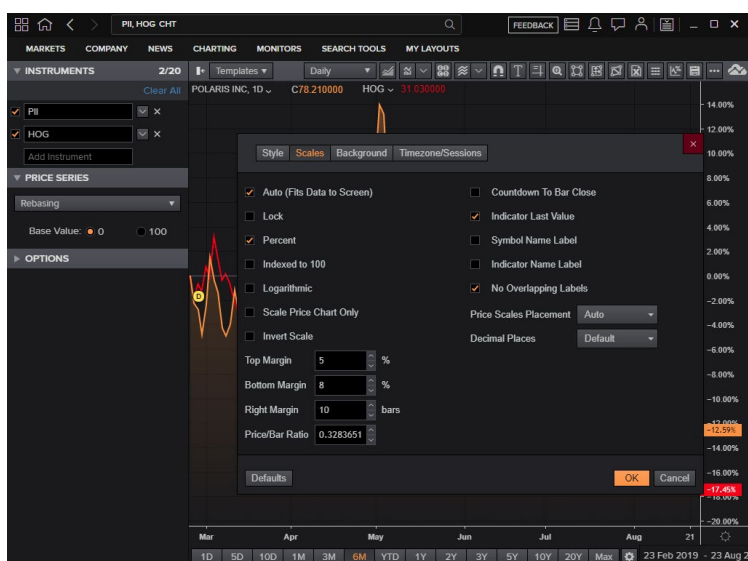


- Using the left side toolbar, add another instrument (example: HOG) and change from Absolute Price to a Rebasing chart.



- Right click on the Y-axis, click on 'Settings' and change the background color of the chart.

He Y-axis, click on 'Settings' and change the background color of the chart.



Notes: