WORKING IN MICROSOFT EXCEL

WHAT DO YOU WANT TO DO?
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DISCOVER THOMSON REUTERS EIKON EXCEL

About Thomson Reuters Eikon Excel
Thomson Reuters Eikon Excel is a Microsoft Excel COM add-in. It provides an intuitive set of features in a seamless interface enabling you to retrieve real-time, fundamental, and Time Series data in Microsoft Excel worksheets for advanced analysis.

Starting Thomson Reuters Eikon Excel
Once Thomson Reuters Eikon is installed, the Thomson Reuters Eikon Excel add-in is designed to automatically load in Microsoft Excel. To use Thomson Reuters Eikon Excel, you must sign in to Thomson Reuters in order to connect to the data services. In the worksheet, click Thomson Reuters > Sign In and enter your Thomson Reuters Eikon credentials.

Additional functions in Microsoft Excel
Thomson Reuters Eikon adds the category and several functions to the Microsoft Excel Insert Function dialog box. An intuitive function wizard enables you to get comprehensive Thomson Reuters data suited to your specific requirements.

RETRIEVE THOMSON REUTERS DATA IN THE WORKSHEET

Use Insert Function to retrieve data rapidly
Thomson Reuters Eikon Excel provides assistance with accessing and retrieving data in the worksheet. The Insert Function wizard enables you to retrieve data quickly and easily without having to know any syntax, instrument codes, field names, or parameters.

The example here shows you how to retrieve real-time and fundamental data for a selection of equities.

1 Select a blank cell or select a range of cells.
2 Choose Thomson Reuters > Insert Function.
   • Add instruments (enter codes or search for instruments) and click Next.
   • Select fields and click Next.
   • Define parameters for your fields if prompted; otherwise accept the default values and click Next.
3 Click Finish.
   Thomson Reuters Eikon Excel displays the data in a tabular format.

Modify data with Insert Function
Use the function wizard’s Edit feature to modify the data in your worksheet. The Insert Function wizard enables you to modify all data, irrespective of whether it was retrieved by using the function wizard or by inserting functions directly.

1 Select the function cell and click Insert Function.
   Summary opens with Edit buttons for instruments, fields and parameters.
2 Click Edit to modify the query and then click Next.
3 Click Finish.
   The data retrieved by the modified function replaces the previous data.
Insert Function - a one-stop shop for real-time, time series, and fundamental data

Select cell B2 and click Insert Function.

Drag data from your Thomson Reuters Eikon Workspace

Drag and drop data from a Quote Object

1. Open a Quote Object.
2. In the Quote Object, click the blue separator line. This captures the entire data above the line.
3. Drag the data to the worksheet.
   You now have the Quote Object data in your worksheet.
Drag and drop data from a Quote List

1. Open a Quote List.
2. In the Quote List, select one or more rows.
3. Drag the rows to the worksheet.

You can drag and drop a Quote List Object that contains real-time and fundamental data to your worksheet.

Drag and drop Calculator values

1. Open a calculator and set it up to compute the results you need.
2. Save the calculator.
3. Drag the results to the worksheet.

The resulting data is inserted as an RCalc function; this is the only way to create such a function.
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FUNCTIONS FOR RETRIEVING THOMSON REUTERS DATA

The functions below retrieve streaming and snapshot data.

<table>
<thead>
<tr>
<th>TYPE OF DATA RETRIEVED</th>
<th>UPDATE FREQUENCY</th>
<th>FUNCTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundamental data for one or more instruments</td>
<td>• at regular intervals, or</td>
<td>RData</td>
</tr>
<tr>
<td></td>
<td>• is a copy of data at a moment in time in real time</td>
<td></td>
</tr>
<tr>
<td>Data for one or more instruments</td>
<td>• in real time, or</td>
<td>RSearch</td>
</tr>
<tr>
<td></td>
<td>• at regular intervals, or</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• is a copy of data at a moment in time</td>
<td></td>
</tr>
<tr>
<td>Instrument(s) based on your specific search criteria</td>
<td>• in real time, or</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• at regular intervals, or</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• is a copy of data at a moment in time</td>
<td></td>
</tr>
<tr>
<td>Data for a single field of a single instrument</td>
<td>in real time</td>
<td>RtGet</td>
</tr>
<tr>
<td>Time series or historical data for one or more instruments</td>
<td>• in real time, or</td>
<td>RHistory</td>
</tr>
<tr>
<td></td>
<td>• at regular intervals, or</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• is a copy of data at a moment in time</td>
<td></td>
</tr>
</tbody>
</table>

Share data with your peers by using RtContribute

Contribute a record at the network level to share it with your peers, or contribute locally to make it available within your worksheets.

You can set the contribution scope via Tools > Options > RtContribute, or add SCOPE: LOCAL or SERVER directly in the RtContribute function syntax.

MIGRATE FROM POWERPLUSPRO & RLMO TO THOMSON REUTERS EIKON EXCEL

About migrating workbooks

If you have workbooks containing Reuters PowerPlusPro and Reuters Link for Microsoft Office (RLMO) functions use the Excel Migration Tool to convert them to Thomson Reuters Eikon Excel. Click here for further details.

Migrate RLMO functions to Thomson Reuters Eikon Excel

1. Open the workbook containing the RLMO function(s).
2. Choose Thomson Reuters > Tools > Convert from PowerPlus Pro/RLMO.
3. Save the backup workbook with the name and location of your choosing.

The workbook is immediately converted to display data using Thomson Reuters Eikon Excel functions.

WANT TO LEARN MORE?

To find out more on how Thomson Reuters Eikon Excel can work for you, see the Thomson Reuters Eikon Excel online help.