MANAGING MY WORKSPACE

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LEARN ABOUT THE WORKSPACE

The workspace is a container for your documents.

The workspace is the main window of the application. You can open any number and combination of Flex and Content Explorer documents simultaneously allowing you to design a workspace that exactly meets your needs. Thomson Reuters Eikon provides a flexible environment allowing you to use Thomson Reuters information to its full potential. When you close and reopen the application it will display your workspace just as you left it in the last session.
Different workspace documents for different purposes

You can have a number and combination of documents open at any time, such as Content Explorer, Flex sheets, and books. You can also combine different Flex documents, country and asset class views, as well as calculators and models in order to create the perfect environment and use Thomson Reuters Eikon to its full potential.

CREATE YOUR FIRST DOCUMENT

Start from an existing Flex document

Creating a screen of your own has never been easier. You can open pre-built Flex documents and change them to suit your needs. This is often a lot easier than starting with a blank screen.

1. **Click File > New Flex Document.** The Flex Samples view opens.
2. **Choose an asset class.** The main page displays available pre-designed Flex documents suitable for that asset class and its content.
3. **Click the Flex document you want to use.** You can now change the content or layout of the selected Flex document to best suit your needs.

Open a blank Flex document

If none of the Flex document templates provided matches your needs you can always start from a blank page:

1. **Click File > New Flex Document.** The Flex Samples view opens.
2. **Choose Blank Flex.**

   ![Blank Flex Document](image)

   **You can create a blank Flex document by pressing Ctrl+N.**
Customize your Flex document by adding objects

Objects are self-contained modules that perform a specific function in the desktop environment.

1. Click Insert in the application toolbar.
2. Choose an object, such as a Quote List or Chart Object.

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You can also insert any real-time object that you opened in Content Explorer into your Flex document. Refer to Add quotes to your Flex document for more information.

Open several instances of Thomson Reuters Eikon

You can open several Flex documents and Content Explorer pages in Thomson Reuters Eikon. However, you may want to view several Flex documents and/or Content Explorer at the same time. To do this you can:

- Drag a Flex document/Content Explorer tab and drop it outside the current application window. A new application window opens with a duplicate of the selected Flex document/Content Explorer.
- Click Window > New Window to display the Home Page in a new application window.

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VIEW MORE INFORMATION IN YOUR WORKSPACE

View related information

Related options allow you to access objects, views, calculators that are relevant to the data you are currently looking at. The list of related options may vary according to the instrument you are viewing and the object from which you are opening the related information.

1. Click Related in the object title bar.
2. Alternatively, right-click an object and choose Related.
3. Choose the type of information you want to view.

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The follow-up tab is easily identified by its green border. You can drag and drop the follow-up tab outside the current application window to open it in a new window.
View more related information by linking objects

Objects are very easy to integrate and combine. While they can work alone, the real power and flexibility of the desktop comes from objects communicating with each other. You can link objects both within a Flex document and with pop-up windows so that they share data with each other.

Objects that communicate data to each other are said to be linked.

Try linking objects yourself

There is a simple way to link two objects within a Flex document or with a pop-up window. Select one of the objects you want to link; then right-click and select Link To > Default Link. Your two objects are now linked as seen in the example below.

Search for data in objects

You can also search for data and instruments in objects contained in your Flex document. For information on how to create a Flex document and insert objects, refer to Create Your First Document.

Click Search in the object toolbar to open the Search pop-up. You can click on an instrument in the search results to insert it directly in the object, such as a Quote Object for example.

Intuitive results for instrument codes

Another easy way to start a search in an object is to enter a keyword or an instrument in the object command line and press Enter. The single-match logic takes you directly to your result.

If there is no single match when you enter a keyword in the object command line, Did you mean? suggests alternatives to the keyword you entered. You can then either choose from the alternatives listed or modify your search keyword. Did you mean? is useful if you make a spelling mistake in the keyword.

Another interesting feature is Recently used. When you start typing in the object command line, Recently used displays recently used instruments that match the letters/keyword entered.
Alternative to instrument codes
You can use street tickers instead of instrument codes to search for instruments of a particular country. Street tickers enable you to find instrument codes without the exchange qualifiers.

1. You can use street tickers only if you have set your preferred country in the application.

When you type a street ticker in the object command line, the Recently used list first displays the instrument of the preferred country. For example, set Italy as the preferred country in the application. In the Quote Object command line, type F. The Recently used list displays Fiat.MI at the top and F.N at the bottom.

ORGANIZE & CUSTOMIZE YOUR WORKSPACE
Use less screen real estate by stacking objects
It is easy and convenient to stack objects in Flex frames.

Customize the toolbar for quick access to features you use most
You can customize the Flex document and/or object toolbars to show the features you use most frequently.

Click in the application or object toolbar and select Choose Toolbar Buttons.

Then you can activate or deactivate the required item in the menu.

Any change you make to an object toolbar will apply to all objects of the same type.

1. If your objective is to optimize screen real estate you can hide the toolbar completely.
Quickly find your most commonly used items by saving them as favorites.

You can add various types of items to your Favorites for easy retrieval later on. Your Favorites can include documents, templates, and objects such as charts or news. You can access Favorites by clicking to anchor the Favorites pane to your screen.

First, save your document or object to be able to add it to your Favorites.

• To add a document to the list of favorites, select the tab to view it and then click.

• To add an object to your list of favorites, right click it and select File > Favorites > Add to Favorites.

You can also simply drag and drop the object or document to the Favorites pane.

To open a document or object added to Favorites:

1 Click . Alternatively, choose Favorites in menu bar.

2 Choose a document or object in the list of Favorites then double-click it to open it. Alternatively, drag and drop the object or document to the main workspace.

Another easy way to open favorites is to add keyboard shortcuts to your favorites.

1 In the Favorites pane, right click a favorite (for example a Quote Object) and choose Keyboard Options.

2 In the Keyboard Shortcut text box, type a function key or any other combination of keys. For example, type Ctrl+E as a shortcut for the Quote Object.

3 Activate Use Active Symbol if required and then click OK.

If you activate Use Active Symbol, the favorite replaces the existing content and displays the details of the instrument visible in the status bar.

To insert a favorite object to your Flex document:

1 Click Insert > Favorites to retrieve your saved object.

2 Choose the object you want to insert.

Export/Import Favorites

You can share your favorites with others or vice versa:

• Export your favorites to enable others to use them.

• Import favorites to use those set up by others.

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Thomson Reuters Eikon Quick Start Guide version: November 2011