

REFINITIV EIKON

BASIC INSTALLATION GUIDE

Eikon 4.0.53

Version history

Software version	Document version	Summary of Changes
4.0.53	1.0	Initial rebranded version of the Refinitiv Eikon Basic Installation Guide (formerly Eikon User-Managed Installation Guide)

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About this document

In this section

- Intended readership
- Target audience
- Prerequisite knowledge
- Conventions used in this guide

Intended readership

This document is intended for Refinitiv Eikon users who are installing the application themselves. Users are presumed to have a basic level of computer knowledge.

Target audience

Follow the procedures in this chapter if you are:

- a user installing Eikon at home or in a small office
- an IT specialist installing Eikon on a small number of PCs

Prerequisite knowledge

You are required to have a basic level of computer knowledge to successfully install Eikon.

Windows operating system

- Use Windows Explorer to navigate to any specified folder on any fixed or removable drive on your system
- Perform file management tasks such as creating and deleting folders, and copying, moving, and deleting files
- Close or disable all applications running in the background
- Use the **Help** menu or **F1** key within an application to find a solution to a problem and learn how to use functions and features
- Install and uninstall software

Internet

- Download and save files from the Internet to your computer
- Send attachments by email and save attachments received in email messages
- Open web pages in new browser tabs or windows

Conventions used in this guide

Text formats

Different text formats are used to indicate commands, menu items, and so on.

Convention	Explanation
Ctrl + a, Apply	Menu names and items, command buttons, and key combinations

Convention	Explanation
Hyperlink	Cross references and external links
<code>courier font</code>	User input, directories, file names, and so on, that you must enter exactly as shown
<code><courier_italics></code>	Site or user-specific variables or parameters
File > New	Sequence of menu items to choose
<i>Refinitiv Eikon User Guide</i>	Document titles

Terminology

Different terms indicate user actions.

Term	What You Do
Select	Place the cursor over the item and click to make a choice in a radio/check box.
Choose	Make a choice from two or more available menu items.
Click	Quickly press and release the mouse button while the cursor is over the item.
Double click	Quickly press and release the mouse button twice in succession while the cursor is over the item.
Drag and drop	Press and hold the mouse button while the cursor is over the item, then move the cursor to the required position, and then release the mouse button.
Enter	Type in data.
Highlight	Place the cursor over a row in a table (or a cell in a matrix) and quickly press and release the mouse button while the pointer is over the item.
Press	Press a key on your keyboard.

Installation and software updates

In this section

- Installing and updating Eikon
- Getting assistance with installations and updates

Installing and updating Eikon

Verifying hardware and software requirements

Before installing Eikon, ensure that your hardware and software meet requirements. For more information, see:

- *Refinitiv Eikon PC Requirements*¹
- *Refinitiv Eikon System Test Guide*²
 - ① Alternatively, click the question mark icon next to each test result to view the steps you must take to resolve the issue.

Installing from email

Follow these steps to access installation from the Welcome Email message.

1. Locate your Welcome Email.
 - ① To quickly find the message in your email application, search for `customerzone@refinitiv.com` in the sender field and/or `Welcome to Refinitiv Eikon` in the subject line.
2. Follow the instructions in the Welcome Email to access Eikon, then go to `How do I complete the installation?`.

Installing from the website

If the Welcome Email message is not available, follow these steps to access installation from the Internet.

1. Go to the Eikon website:
 - `https://eikon.refinitiv.com/` or
 - For private network users only, `http://eikon.extranet.refinitiv.biz/`
2. Click **Sign in & Download**, then go to `How do I complete the installation?`.

Completing the installation

Follow these steps to complete installation.

1. Follow the instructions in your web browser to:
 - a. accept the licensing agreement
 - b. choose the country where you are usually located
 - c. set your password
 - d. create your profile

¹ <https://my.refinitiv.com/content/dam/myrefinitiv/products/9622/en/Technical/613695.pdf>

² <https://my.refinitiv.com/content/dam/myrefinitiv/products/9622/en/Technical/555409.pdf>

- e. download the `Installer.exe` file
2. Run `EikonInstaller.<REGION>.exe`, where `<REGION>` is APAC1, EMEA1, AMERS1 or AMERS2.
3. Install the software in the default folder.

Locating installation files

The default location of the software depends on whether you installed the software when logged in as administrator.

Rights	Path	
Administrator	64-bit OS	%programfiles(x86)%\Thomson Reuters\Eikon
	32-bit OS	%programfiles%\Thomson Reuters\Eikon
Non-Administrator	%userprofile%\Thomson Reuters\Eikon	

Installing add-ons

Once the software is running, you may want to install additional components - known as add-ons - that enhance the rich set of features already available in Eikon. Follow these steps to install add-ons.

1. Click the orange Eikon symbol (opposite), then choose the **Help > About Refinitiv Eikon** option.
2. In the **About** window that opens, click **ADD-ONS**.
3. Select the add-ons for which you have permission and click **Install Selected**.



Automatic update process

Eikon automatically installs updates in the background. These updates take effect when you close Eikon Desktop and Microsoft Office, then restart them.

To make sure that all updates are applied, reboot your PC frequently, for example, once a week.

Uninstalling Eikon

In the **Start > All Programs** menu, choose **Refinitiv > Tools > Uninstall Product**.

Getting assistance with installations and updates

If you have verified that you meet all the requirements before installation and it is still not successful, this section explains how to gather all the information you may need to provide to a support agent.

Saving the results of the requirements test

Eikon tests your hardware and software at installation automatically. However, if installation fails, you can run the tests again and save the results, which you can then forward to Support. To save the results of the tests, follow the steps below:

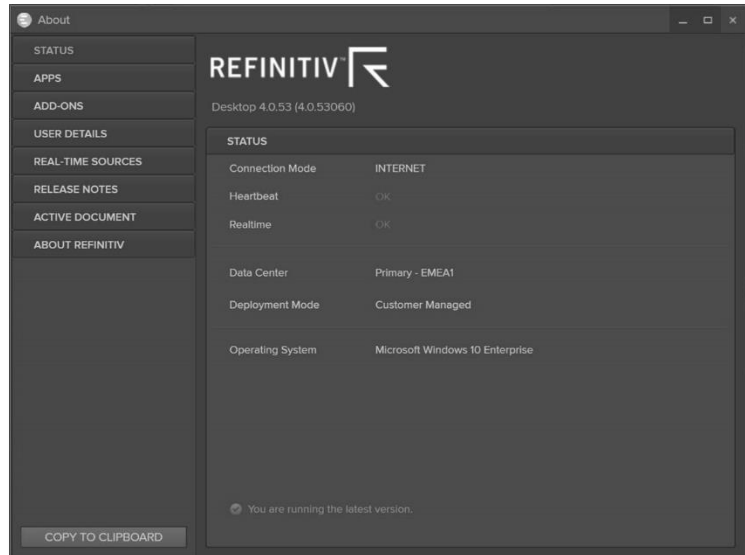
1. Go to the Eikon website:
 - o <https://eikon.refinitiv.com/> or
 - o For private network users only, <http://eikon.extranet.refinitiv.biz/>
2. Make sure that your hardware and software meet the requirements to run Eikon.
 - a. Click **System and Network Test**.
 - b. Save the results of the test.

Generating log files

Eikon can record its activities in a file, known as a log file. A Support Agent may ask you to send a log file to identify and correct any difficulties you are experiencing.

To generate and save log files, follow the steps below:

1. In the **Start > All Programs** menu, choose **Refinitiv > Configuration Manager**.
2. Go to the **Logs** tab.
3. Following the Support Agent's instructions:
 - a. select trace and logging level options
 - b. choose directory where the log file is to be stored
4. Click the **Configure** button.
 - ① Logs will only be saved after you restart Eikon.



Viewing additional information about my installation

When you request assistance, the support agent may ask you for information about your installation. Follow this procedure to retrieve those details.

1. Click the orange Eikon symbol (opposite), then choose the **Help > About Refinitiv Eikon** option.
2. Click **Copy to Clipboard**, then paste the content into a text file or word processing document.
3. Save the file to send it to support.



Requesting more assistance

Follow these steps to get assistance from the Eikon support team.

1. Click the **Contact Us** link on the Eikon website.
2. Attach these files with your request for assistance:
 - a. the results of the test you ran in *Saving the results of the requirements test*.
 - b. the log files you generated in *Generating log files*.
 - c. the text from the **About** window you saved in *Viewing additional information about my installation*.

Appendix A: Datastream apps in Eikon for Microsoft Office

Installing Datastream apps

The Datastream apps in Eikon for Microsoft Office are optional add-ins, available to Eikon users who have Datastream included in their subscriptions. The apps install the latest versions of Datastream For Office (DFO) and Datastream Charting.

The key benefits of these apps revolve around improved deployment and integration with Eikon.

Minimum requirements

To install and run Datastream apps in Eikon for Microsoft Office, you must meet these minimum requirements:

- You must have a valid Eikon subscription which includes Datastream. Your Eikon user ID also needs to have been mapped on our servers to the associated Datastream ID to control data permissions and access to saved lists, shared charts and expressions, and so on.
 - If your package does not currently include Datastream, please contact your Account Manager or Support.
- Administrator rights are not required for the DFO and Datastream Charting Apps. However, administrator rights are required if previous versions of the DFO and Datastream Charting add-ins are already installed for the uninstall process to be fully completed.
 - Visual Studio Tools for Office (VSTO) and .Net 4.0 full profile (rather than client profile) are not required.

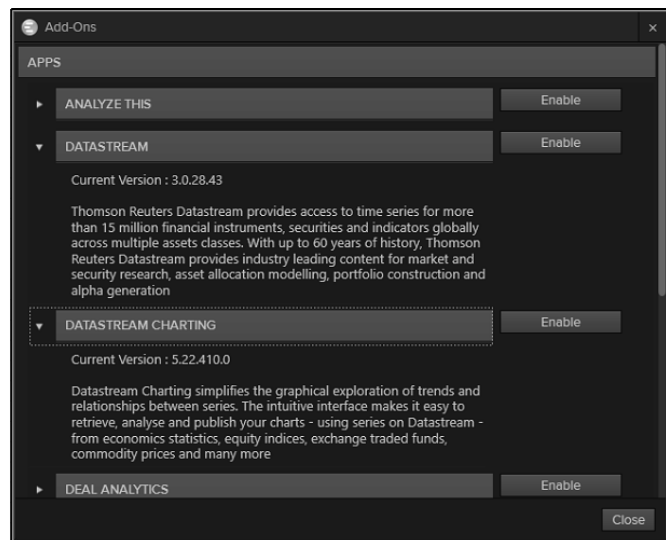
Enabling the Datastream Apps

The first stage is to enable the Datastream Apps in the **Refinitiv Eikon for Microsoft Office Options** dialog window. To do this, follow these steps:

- Open Microsoft Excel.
- Click the **Refinitiv Eikon** ribbon, then click **Sign-in** and sign into Refinitiv Eikon for Microsoft Office.
- Click **Add-Ons** on the **Refinitiv Eikon** ribbon.

The **Options** dialog box appears.
- Click the **Enable** buttons for the Datastream (DFO) and Datastream Charting items.
- When prompted, close and restart Microsoft Excel, PowerPoint, and Word.

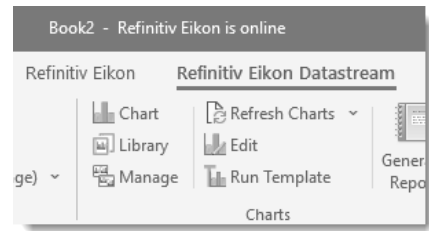
- Once Datastream Apps have been installed, you can uninstall them by clicking **Disable** in the Options dialog window.



Datastream ribbons

When the Datastream Apps are enabled:

- In Microsoft Excel, a **Refinitiv Eikon Datastream** ribbon appears next to the **Refinitiv Eikon** ribbon.
- In Microsoft Word and PowerPoint, a **Refinitiv** ribbon appears.
 - ① If the **Refinitiv** ribbon does not appear in Word and PowerPoint, see Troubleshooting the Refinitiv ribbon.



Troubleshooting the Refinitiv ribbon

If the Refinitiv ribbon does not appear in Microsoft Word and PowerPoint, follow these steps:

1. In Microsoft Excel, go to the **Refinitiv** ribbon and click **Settings**.
2. In the **Settings** dialog window, open the **Sign in** tab.
3. Make sure that the **Disable Refinitiv Eikon - Microsoft Office in Microsoft Word and Microsoft PowerPoint** check box is not selected.

Checking Datastream apps are working correctly in Excel

Follow these steps to download Datastream data in Microsoft Excel:

1. In Excel, to login or connect, go to the **Refinitiv** ribbon and click the **Online** button.
2. On the **Refinitiv Eikon Datastream** ribbon, make sure that the buttons on the ribbon are all active.
 - ① When the Refinitiv ribbon is offline/logged out, the left-hand side of the **Refinitiv Eikon Datastream** ribbon appears dimmed.
3. On the **Refinitiv Eikon Datastream** ribbon, click **Static Request**.
4. Type Microsoft in the **Series/List** field.
5. Click **Submit** to confirm that the request successfully returns a value.

Checking Datastream Apps are working correctly in PowerPoint

Follow these steps to export a Datastream Chart to Microsoft PowerPoint:

1. In PowerPoint, open a new presentation and go to the **Refinitiv** ribbon.
2. Click **Library**.
3. Go to the folder **Datastream > Charts from Lipper Alpha Insights > Chart Of The Week**, then select the checkbox in the rightmost column to select a chart of your choice.
4. Click the **PowerPoint** icon on the toolbar (directly above the list of charts) to open the **Export Settings** window.
5. Click the **Export Chart** button at the bottom of the window to export to the current slide.
6. Once the chart has been exported, click the **Refresh Charts** button on the **Refinitiv** ribbon to refresh it.

Note: Repeat the above steps in Word to make sure that it is working correctly,

Appendix B: Troubleshooting

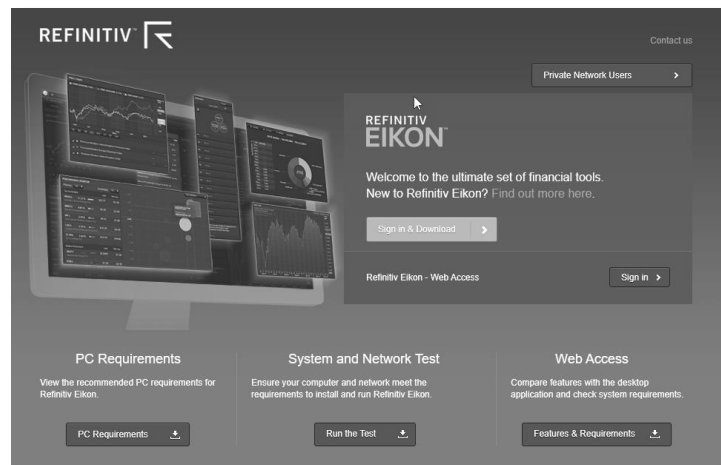
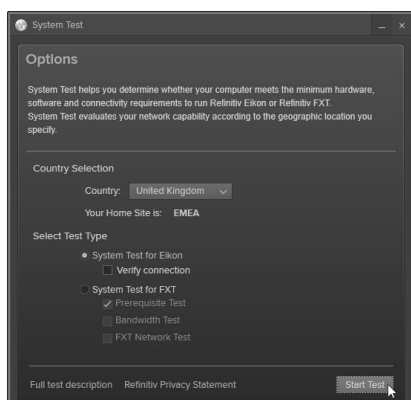
In this section

- How can I ensure my PC is ready to install Eikon?
- What can I do if I receive alert messages?
- What can I do if I receive failed messages and the installation stops?
- What are the required settings for Internet Explorer?
- What is the download policy for Refinitiv files?
- Which authentication proxies can I use with Eikon?
- How do I contact Refinitiv?
- What does the support team need to know?
- How do I activate log files?
- Where can I find the log files?
- How do I increase the level of detail in my log files?

How can I ensure my PC is ready to install Eikon?

To verify the system requirements before installing Eikon you can run System Test from the Product pages.

1. Open a browser and in the address bar enter:
 - <https://eikon.refinitiv.com/> or
 - For private network users only, <https://eikon.extranet.refinitiv.biz/>
2. In the section System and Network Test, click **Run the Test**.



EikonSystemTest.exe is downloaded to your local drive.

3. Click **Run** or **Open**.
4. System Test opens.
5. Choose your Country, then select the test type options, and click **Start Test**.

System Test runs the prerequisites tests and displays the summary of passed, failed or warning results.

What can I do if I receive alert messages?

If you receive alert messages during the System Test, filter the results by clicking **Alert** and copy the results to your clipboard. Or you can click the question mark icon and it will redirect to Eikon Help page.



What can I do if I receive failed messages and the installation stops?

To prevent additional problems, when certain prerequisites are not met, the installation stops. You must correct these issues and then restart the installation.

When any of the following System Tests fail, they block the installation:

- Browser Version
- Browser JavaScript
- Color Depth
- Free Disk Space
- HTTPS Connection Check
- Legacy Thomson Reuters Products
- Microsoft Excel Version
- MSXML 3.0 Version
- Operating System
- Service Pack
- Visual Basic for Applications
- .NET Framework 4

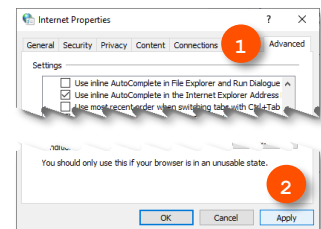
You can find information about how to solve these issues by clicking and it redirects you to the [Eikon Help page](#).

What are the required settings for Internet Explorer?

To prevent performance problems in Eikon, certain settings should be applied in Internet Explorer. This section covers all settings required:

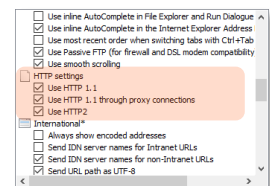
To access Internet settings:

1. Open **Control Panel > Network and Internet > Internet Options**.
2. Select the **Advanced** tab **1** and modify the settings.
3. Click **Apply** **2** to accept your changes, then **OK** to close the window.



HTTP 1.1 settings

- Enable **Use HTTP 1.1**
- Enable **Use HTTP 1.1 through proxy connections**

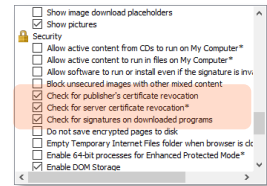


Security settings

- Clear **Do not save encrypted pages to disk**
- Clear **Use SSL 3.0**
- Enable **Use TLS 1.0**
- Enable **Use TLS 1.1**
- Enable **Use TLS 1.2**

Certificate revocation settings

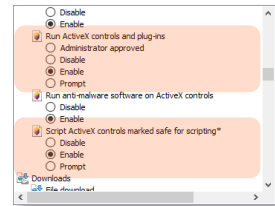
- Disable **Check for publisher’s certificate revocation**
- Disable for **Check for server certificate revocation**
- Disable for **Check for signatures on downloaded programs**



ActiveX settings

Open Control Panel and navigate to **Network and Internet > Internet Options > Security tab > Internet > Custom level**

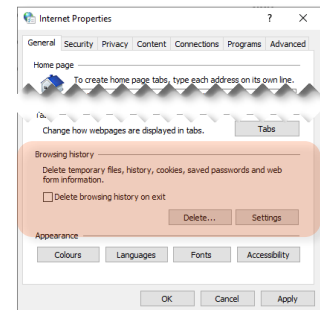
- Enable **Run ActiveX controls and plug-ins**
- Enable **Script ActiveX controls marked safe for scripting**



Temporary Internet files settings

Open Control Panel and navigate to **Network and Internet > Internet Options > General tab**. In the Browsing History section:

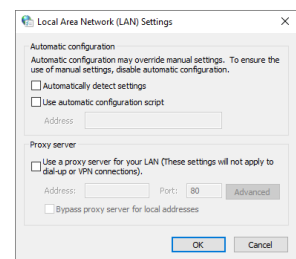
- Click **Settings**
- Set **Disk space to use** to 250MB (minimum) and click **OK**
- Under the **Advanced** tab, clear **Empty Temporary Internet Files folder when browser is closed**.
- Clear **Delete browsing history on exit**.



WPAD settings

Open Control Panel and navigate to **Network and Internet > Internet Options > Connections tab**

- Click **LAN Settings**.
- In the Local Area Network (LAN) Settings dialog box, ensure that **Automatically detect settings** is not enabled.



Note: Even though Eikon supports WPAD, it is still recommended that **Automatically detect settings** is disabled.

What is the download policy for Refinitiv files?

The Eikon installation packages are .exe and .eik (7zip) file format. These files are virus-checked and signed by Refinitiv before they are published to the Update Service. Your site (or workstation) firewall must be set up to allow the download of these packages.

List of servers and files to allow

Your firewall must allow the following servers to download .exe and .eik files through the HTTP protocol:

Domain	Download
https://eikon.refinitiv.com/ or for private network users only, https://eikon.extranet.refinitiv.biz/	For installation bootstrap, System Test standalone over Internet

Domain	Download
*.download.cp.thomsonreuters.net ³	For Eikon packages on Update Service and Eikon Apps (.kpak)
*.download.cp.thomsonreuters.com	
*.download.cp.extranet.thomsonreuters.biz	

Which authentication proxies can I use with Eikon?

Thomson Reuters Eikon is qualified with the following authentication proxies:

Proxy	Authentication Method
Apache	Basic
Squid	Basic
Microsoft ISA	Integrated (NTLM/Kerberos)
Microsoft Fore Front	Integrated (NTLM/Kerberos)

How do I contact Refinitiv?

You can contact Refinitiv at any time. Here are several ways to do it:

If	Contact
Eikon is not installed	<ul style="list-style-type: none"> Eikon Account Manager https://eikon.refinitiv.com/ or http://eikon.extranet.refinitiv.biz/ and click Contact Us
You cannot sign in to Eikon	<ul style="list-style-type: none"> Click Contact Us in the Sign in dialog box Fill out the Contact Us page, and click Submit
You encounter problems when you running Eikon	<ul style="list-style-type: none"> Help > Contact Us Press F1 and click Contact Us From the Help window, choose Contact Us. Choose the method of contact, for example, online or phone, fill in the details, and click Send.

What does the support team need to know?

When you call the support team, they may ask you certain questions about your Eikon configuration and your machine set-up.

Identifying the delivery method

In Eikon, choose **Helios > Help > About Refinitiv Eikon** to identify your delivery method.

Remote access

The support teams often use Bomgar to access machines running Eikon. It is useful to let them know whether this is possible on your machine.

³ These domains are to be rebranded to cdn.refinitiv.net, cdn.refinitiv.com, and cdn.extranet.refinitiv.biz. For further information regarding domain rebranding, see [Product Change Notification 11803 – Refinitiv domains](#).

Local IT team details

If you have a local IT team at your site, you should have the name of your contact available.

How do I activate log files?

The support team may ask you to send log files to enable them to investigate your problem more easily. You can activate logging by doing the following:

- Navigate to **Configuration Manager > Logs**
- Activate **Configure Logs on the Workstation**. The log options are now active and you can select further tracing or logging options.
- In **Logs Path**, enter the path to save the log files. If you do not enter a path or browse for one, the logs are stored in the default location.

Where can I find the log files?

If you did not modify the path in **Configuration Manager > Logs Path**, the default path is used. The default path depends on the user security group.

For administrators (per machine)	%AllUsersProfile%\Thomson Reuters\Eikon Data\Logs
For standard users (per user)	%UserProfile%\AppData\Local\Thomson Reuters\Logs

How do I increase the level of detail in my log files?

You can choose the level of logging you require in **Configuration Manager > Logs**, then select **Configure Logs on the Workstation**. If you are experiencing issues with Eikon, it is useful to temporarily log more details.

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