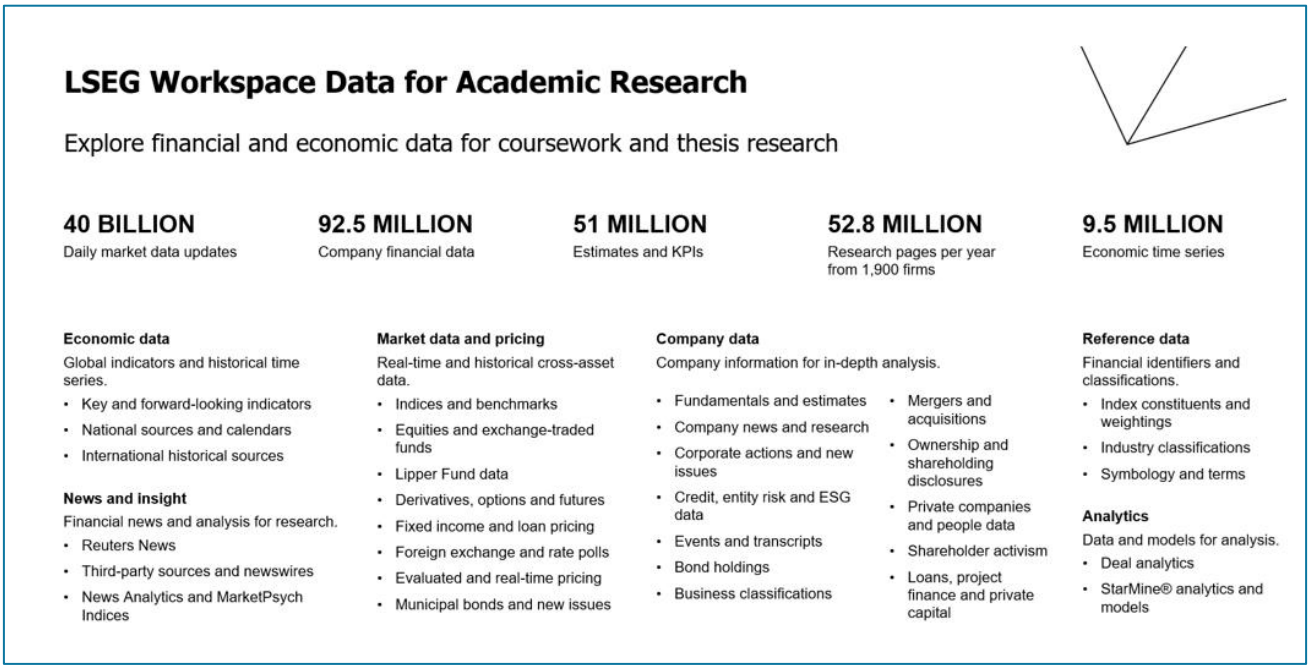
LSEG Workspace and DataStream

http://workspace.refinitiv.com/web

For Access: Write an Email to the Library. Access will be provided based on the Terminal's availability. REGISTRATION REQUIRED.



LSEG Workspace provides broad, cross-asset financial market coverage for teaching and academic research, including:

- Equities & indices – company fundamentals, estimates, corporate actions, ETFs, benchmarks, index constituents and market pricing
- Fixed income & rates – bonds, new issues, credit/CDS, loan pricing, bond holdings and interest-rate data
- Commodities, derivatives & FX – futures, options, foreign exchange and related market data
- Economics & Datastream – deep, consistent global macroeconomic and historical time-series coverage, including economic indicators, forecasts, Reuters Polls and central-bank data. Datastream is a leading resource for economics and macro research, accessible through Workspace desktop and the Excel add-in for analysis, charting and data extraction
- Deals & capital markets – M&A, equity and debt capital markets, syndicated loans, private equity/venture capital and deal analytics
- News, research & insights – Reuters News, third-party news sources, company news, investment research, events and transcripts
- Market data & pricing – real-time and historical cross-asset data, evaluated pricing and benchmarks
- Company, ownership & reference data – public and private company information, ownership, industry classifications and identifiers

LSEG Workspace is designed to provide a comprehensive platform for financial professionals, offering a connected experience that combines trusted data, market-moving news, powerful analytics, and AI-powered intelligence. It aims to help users discover opportunities, make informed decisions, and act with confidence. Workspace integrates with the Microsoft 365 ecosystem, allowing for seamless task flow across platforms and enhancing collaboration.

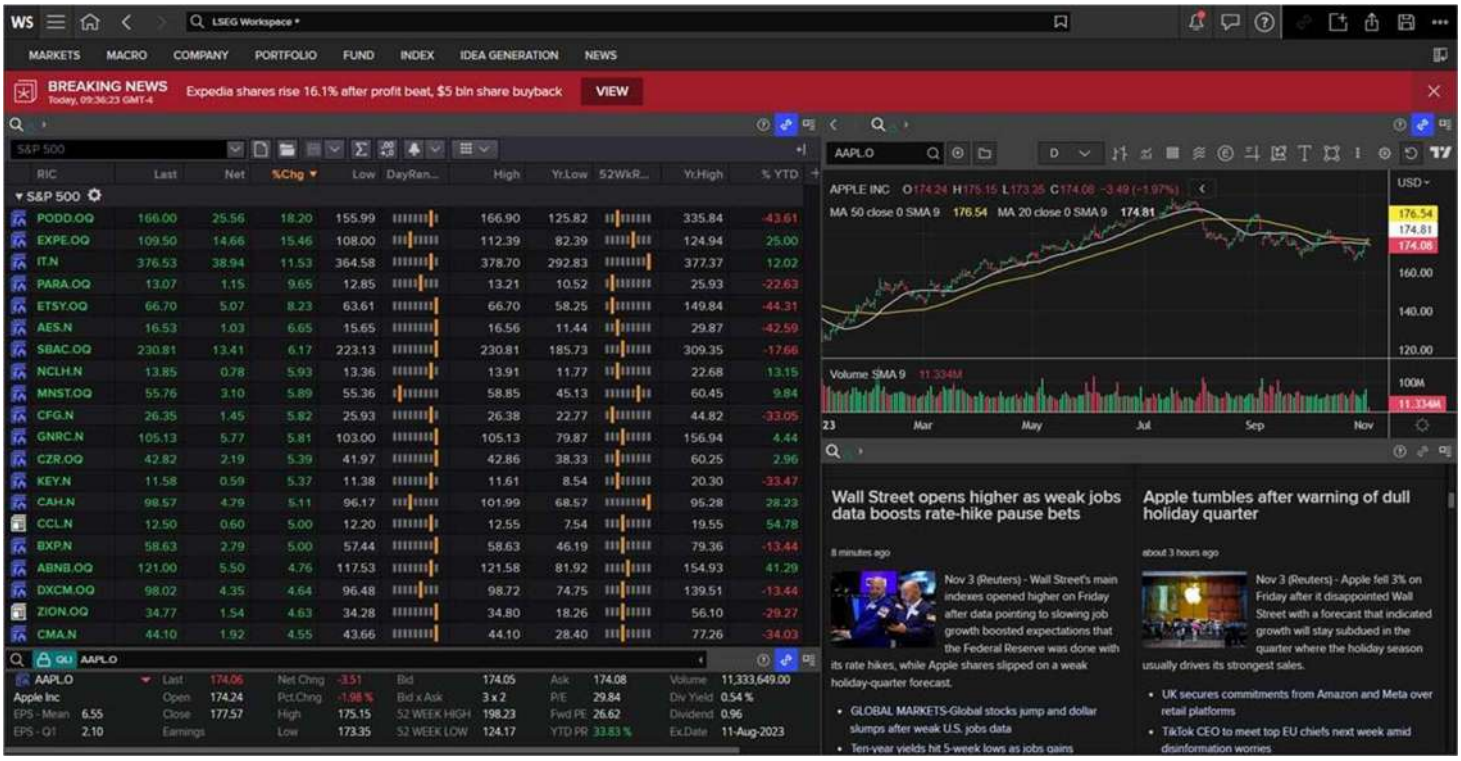
LSEG Datastream is a tool within Workspace that provides access to extensive historical financial and economic data across global markets. It is specifically designed for creating charts, exporting data in bulk, and analyzing data in Excel. Datastream supports informed decision-making for finance professionals, researchers, and students by offering insights grounded in accurate, governed data.

QUICK-START GUIDE

LSEG WORKSPACE

Introduction to Workspace

LSEG Workspace is a single window display created to meet your workflow needs, offering a simple interface for easy navigation.



If you use Workspace on multiple devices, you have access to the same layouts, templates, and monitor lists wherever you are. Note, however, that you can only be signed in on one device at a time.

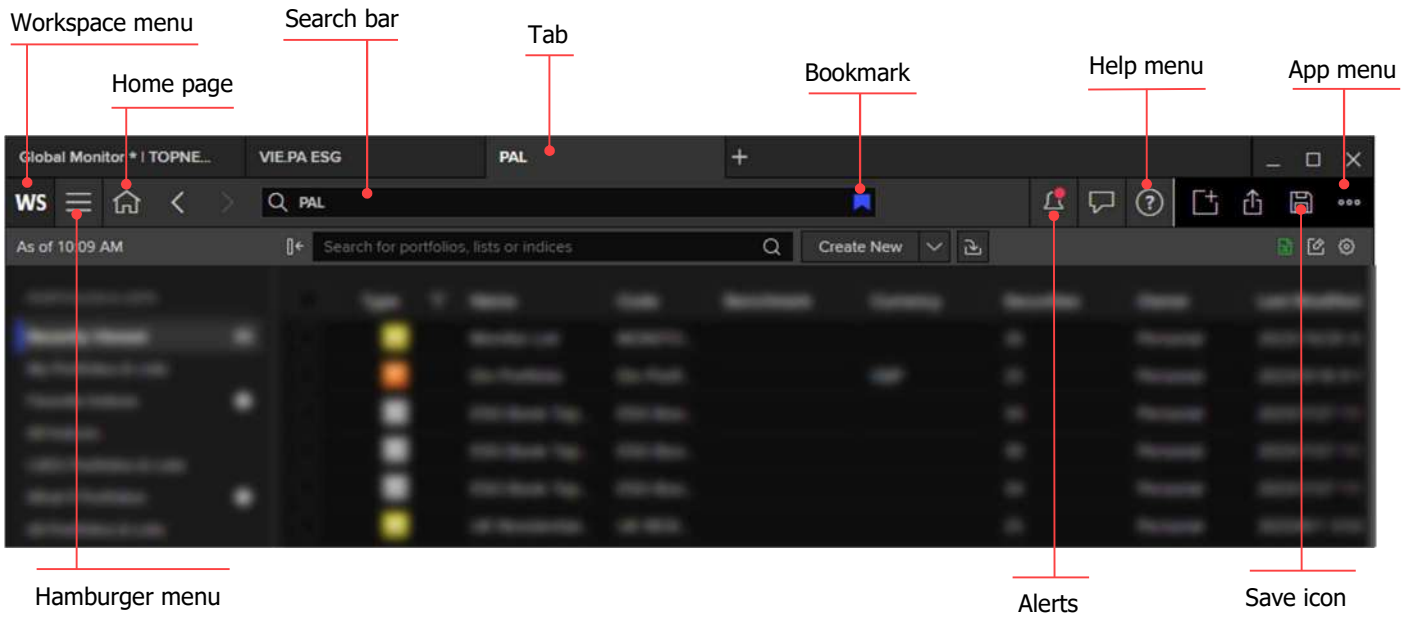
- For desktop access, go to your applications folder and select the blue LSEG Workspace icon.
- For web access, go to workspace.refinitiv.com/web for a streamlined web version of Workspace.
- For mobile access, go to the App Store or Google Play and download the LSEG Workspace app.

LSEG

Key interface elements

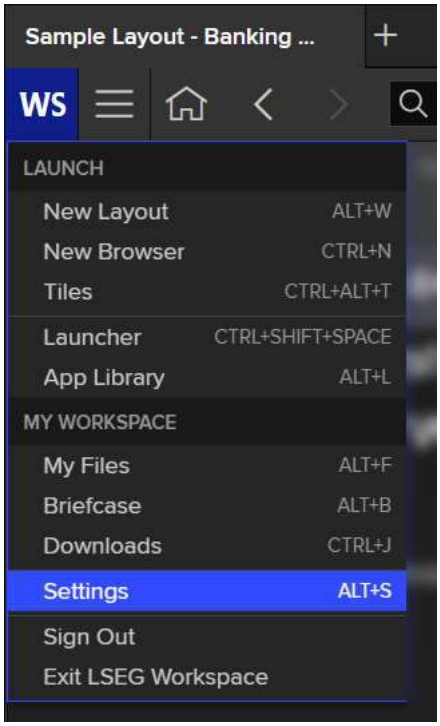
LSEG Workspace has the following key elements:

- Workspace menu
- Hamburger menu
- Home page
- Tabs
- Search bar
- Bookmarks
- Alerts
- Help menu
- Save icon
- App menu



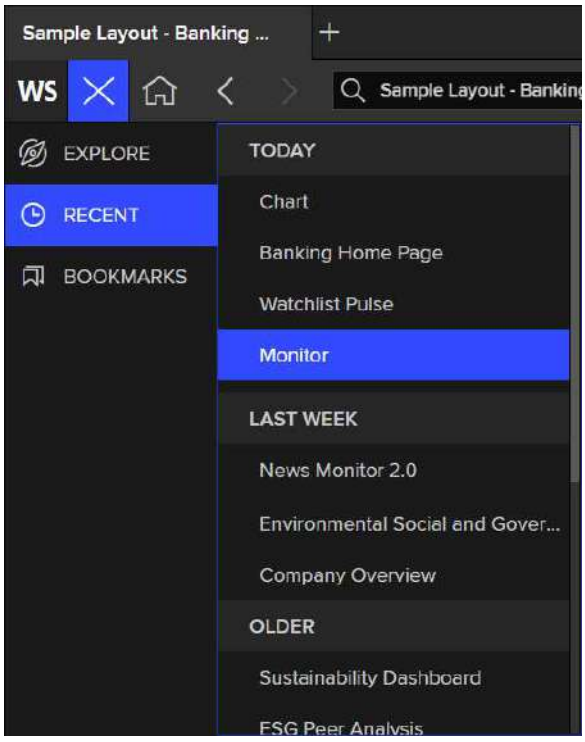
The Workspace Menu

The Workspace menu enables you to perform various actions, including creating a new layout, opening a new Workspace window, accessing the App Library, changing your Workspace settings, editing your profile, accessing your downloads and briefcase, and signing out from or quitting the application.



The Hamburger Menu

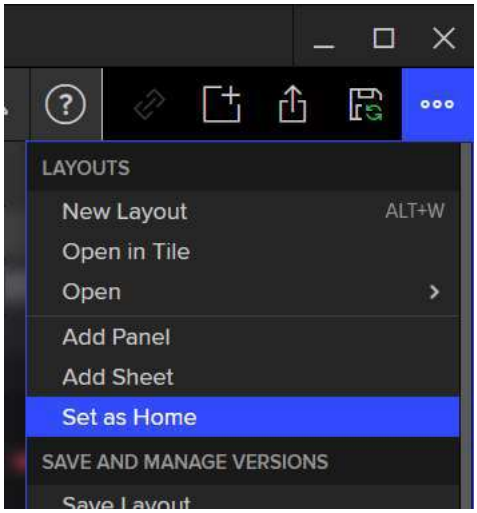
With the Hamburger menu, you can find your recently used apps and layouts, as well as your Explore and Bookmarks bars if you have hidden them. When active, the Hamburger menu icon (3 lines) changes to an **X.**



The Home Page

The home page is the screen you see when you launch LSEG Workspace. Your default home page is tailored to your job role. You can set your own home page – this could be a particular app or a new layout.

To set a new home page, go to the **App Menu** on the top right of the screen and select **Set as Home**.

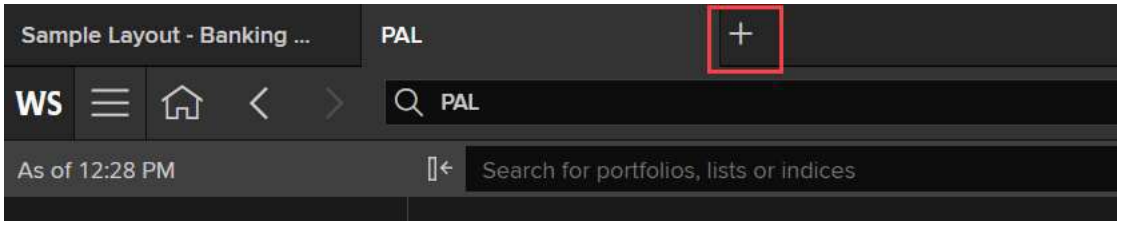


More details

- Launching apps from the Explore bar

Tabs

Add up to eight tabs in a window to explore content without losing your current work and to make window management easier. Open a new tab by clicking the plus button at the top or pressing **Ctrl+T** on your keyboard.



The Search bar

Here you can use natural language or codes to launch apps, access company information, or search for data.

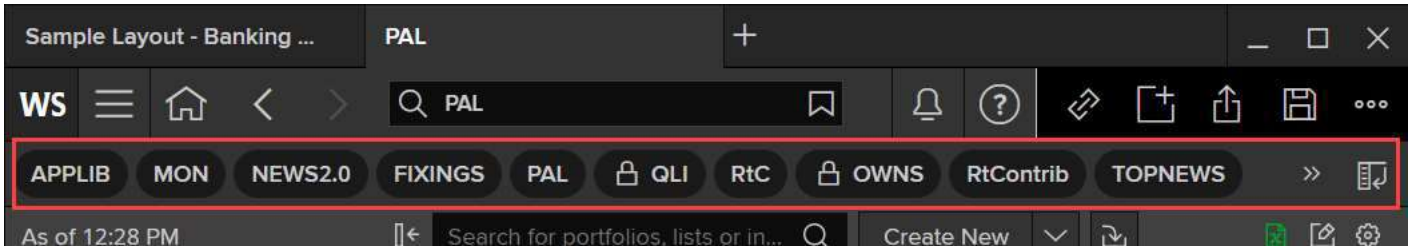
Look for information about securities, derivatives, deals and other financial markets content – or ask a question to find relevant help articles.

The Search bar includes the Star icon, which you can use to bookmark apps and layouts.

More details

- Search and navigation

Bookmarks

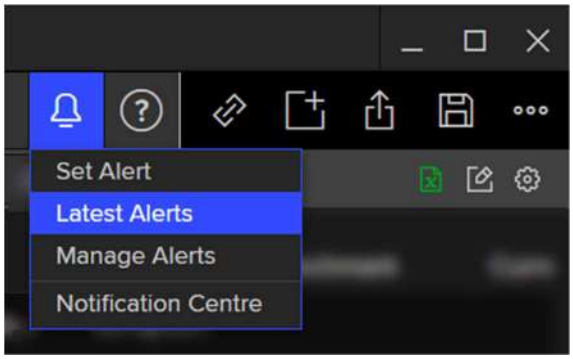


Bookmarks enable you to save a page with its active instrument and parameters for easy access in future. It is convenient to access the saved pages from the Bookmarks bar.

More details

- Bookmarking a page
- Where do I see the Bookmarks bar?
- Showing/hiding the Bookmarks bar
- Moving the Bookmarks bar in LSEG Workspace

Alerts



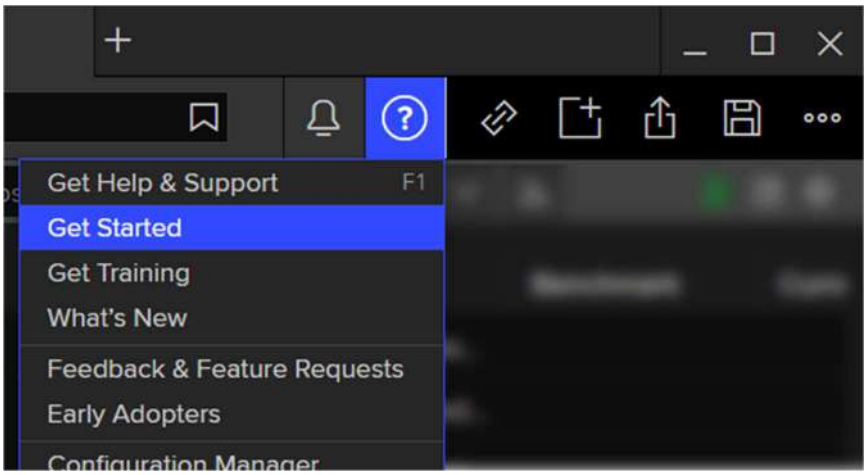
Alerts enables you to keep up to date with what is important to you. Alerts notify you if there are any issues with your data including price, news, research, and company events. You can get them directly via Workspace or as email notifications.

Accessing the Alerts Manager, you can modify your alert settings or view the latest alerts.

More details

- Creating alerts
- How does Alerts work?
- How do I find unread alerts?

Help



Click the Help menu icon or press **F1** on the keyboard to view help articles, get support, and find training materials.

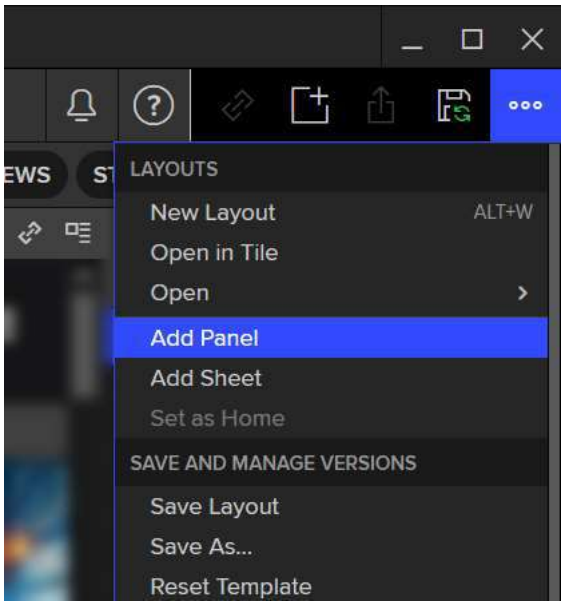
Click **Get Started** to take Workspace tours and submit feedback. The bottom line informs you about your current version of LSEG Workspace.

The Save Icon

You can save your work and layouts manually, or you can enable autosave via the App menu.

The App Menu

This enables you to create layouts or add panels and sheets to an existing layout. You can also manage layout versions, set your home page and print.

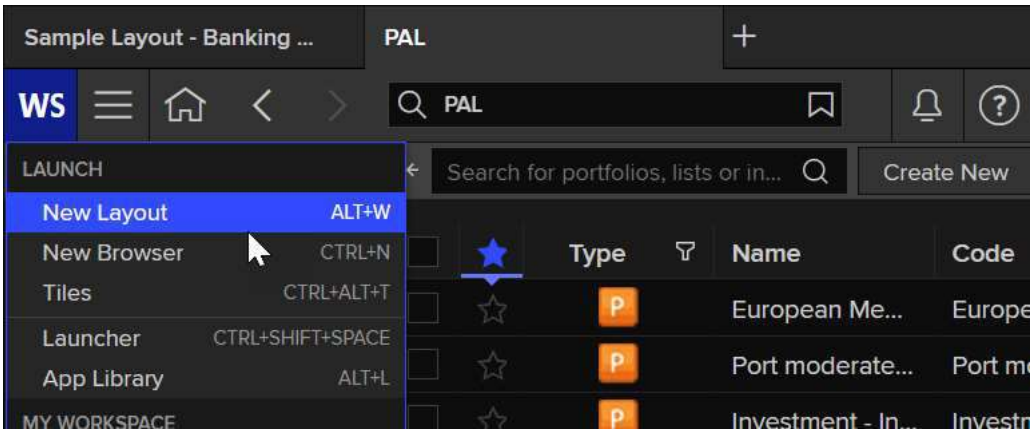


Layouts

A layout enables you to view multiple applications side by side in LSEG Workspace. This makes it easier for you to monitor what you're interested in.

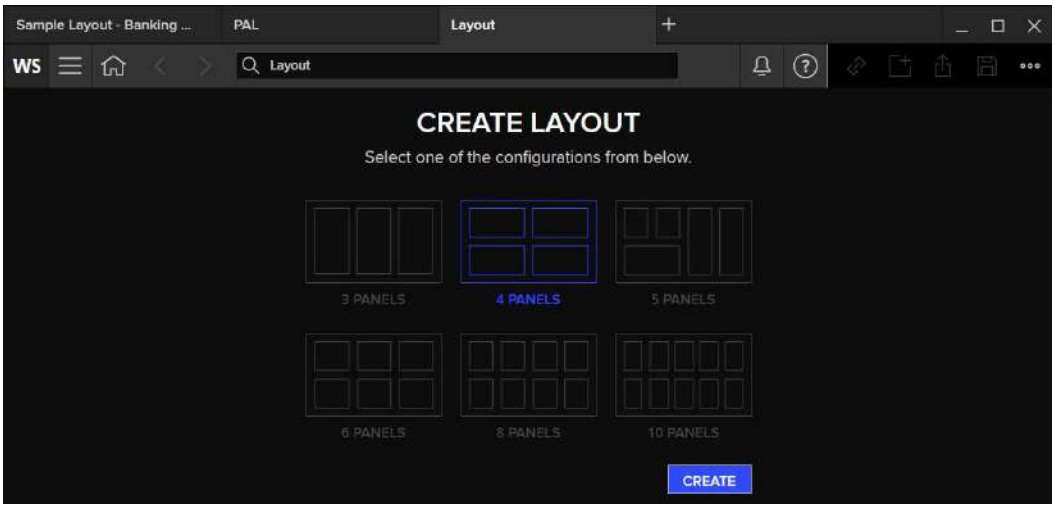
You can include in the layout any app that is available in LSEG Workspace.

You can create as many layouts as you need. However, the best practice is to create a single layout sheet, for example Portfolio Manager with one sheet per portfolio, or to create multiple sheets that are part of a specific workflow, such as Wealth Manager with one sheet for each of the top people it advises.

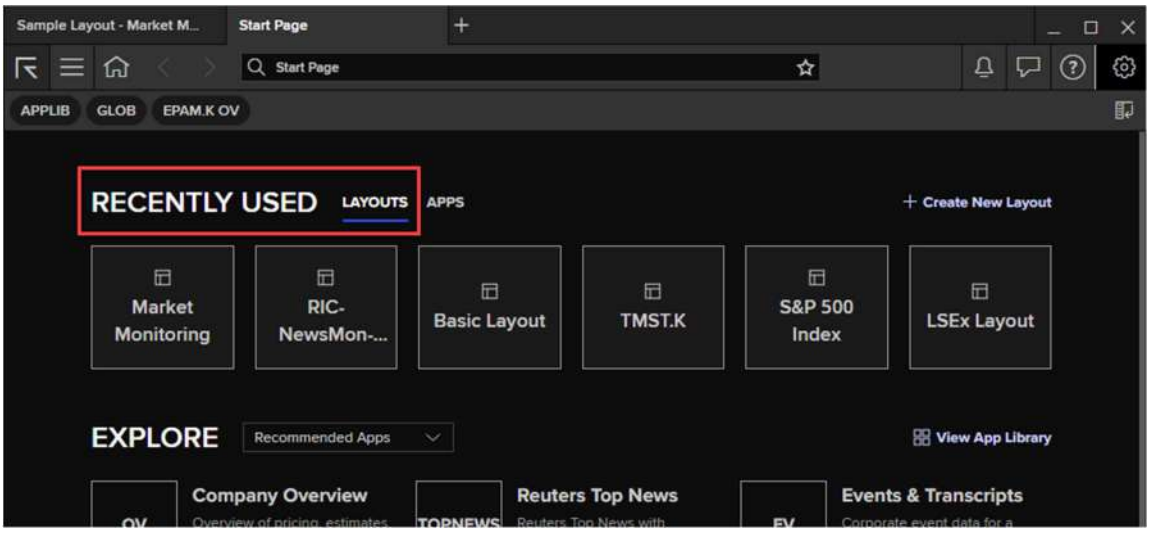


To create a new layout, click the **WS** icon in the top left corner and select **New Layout**. Alternatively, you can use the **Alt+W** keyboard shortcut.

Then you can select one of the preset layouts and begin adding the apps you want.



Your recently used layouts are always available when you create a new start page. Click the **+ (Plus)** tab to open the Start Page.



More details

- What are layouts?
- Creating a new layout
- Layout view modes
- Creating a layout using the Start page

Need more help?

To open the Help & Support app in Workspace, press **F1** or select the **Help** icon and select **Get Help & Support**. You can contact us directly through the Help & Support app via the **Contact Us** section. Find additional learning opportunities with the LSEG Academy.

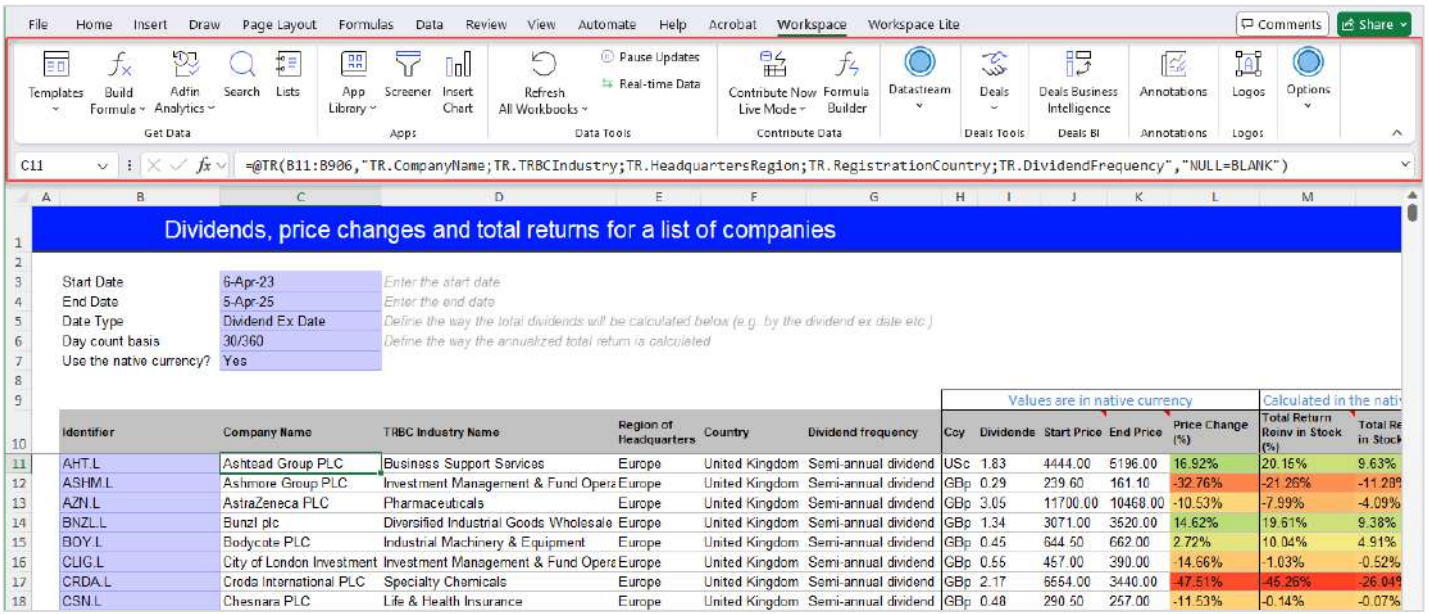
QUICK-START GUIDE

LSEG WORKSPACE

Workspace add-in for Excel

The Workspace add-in for Excel integrates LSEG's Workspace data and analytics directly into Microsoft Excel, enabling you to access and analyse financial data more efficiently within a spreadsheet environment. It provides real-time streaming, historical data, and customisable charts, with seamless data manipulation and visualisation.

For information about how to install the Workspace add-in, see the LSEG Workspace Add-in Installation Guide.



Signing in

To sign in to the Workspace add-in:

1. In Excel, click the **Workspace** tab and select **Sign in**.

   The Sign in window displays.

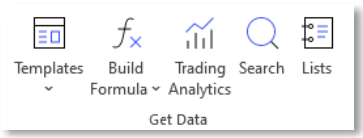
2. Enter your username (email address) and password and the click **Sign In**.

   The successful login notification displays and the add-in toolbars open.

Workspace add-in tools

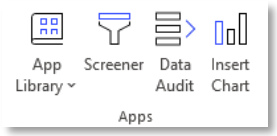
The Excel Workspace add-in menu bar comprises several sections, each with specific tools and options.

Get Data



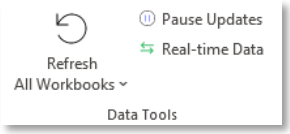
- **Templates:** The Template Library offers a variety of templates to build customised outputs for Workspace apps.
- **Build Formula:** Formula Builder allow you to pull data from the LSEG sources into your Excel workbook using the RDP.DATA function.
- **Search:** Opens the Office Search Widget, displaying the contents of the selected cell in the search field. You can search using natural language or codes, such as company identifiers, bonds, or any other instrument. The selected result replaces the selected cell.
- **Lists:** Opens the Portfolio & Lists Manager (PAL) app's Create Watchlist window on the selected cell.

Apps



- **App Library:** Opens the LSEG Workspace App Library, where you can access apps, including those you've selected as favourites in the desktop version of Workspace that are relevant in the Excel environment.
- **Screener:** Opens the Screener app. This allows you to create in-depth dynamic screening on public and private companies, and deals (M&A, ECM, DCM, Loans). You can also dynamically screen ownership, officers and directors, and private equity.
- **Data Audit:** Allows you to audit fundamental data items. It clearly displays how each item is calculated, level by level up to the source filing with the underlying figure, just like in the desktop.
- **Insert Chart:** Uses the Chart app to imbed a performance chart for the selected instruments in the spreadsheet.

Data Tools



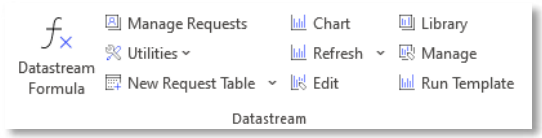
- **Refresh:** Refreshes the LSEG data update for all workbooks, a selected worksheet, or the current selection.
- **Pause Updates:** Pauses the LSEG data update.

Contribute Data



- **Contribute Now:** Gives you the choice of publishing contributions in either live mode, or manual mode.
- **Formula Builder:** Opens the Contribution Formula sidebar, where you can create a contributions formula and publish it locally or on the server.

Datastream (additional feature)



- **Datastream Formula:** Opens the Datastream Formula window, where you can build a Datastream formula and insert it into your document.
- **Manage Requests:** Opens the Datastream Request window.
- **Utilities:** Displays several Datastream utilities.
- **New Request Table:** Enables you to open a new UCTS_RT sheet or open the Conversion Wizard to upgrade or convert templates, tables, and formulas.

- **Chart:** Opens LSEG Office Chart window, allowing you to create charts and export them to a worksheet.
- **Refresh:** Refreshes either all charts or the selected chart.
- **Edit:** Enables editing of the selected chart.
- **Library:** Opens the LSEG Office Library window.
- **Manage:** Opens the Chart Manager window for the selected chart.

Deals BI (additional feature)

- Enables you to create drill through, tearsheet, wallet share, and aggregated reports to deliver strategic insight to the deal making community.

Annotations

- Opens in the sidebar and allows you to add company news, filtered by event type and date, into your worksheet, complete with numbered boxes to annotate visualisations.

Logos

- Offers a library of company logos that can be inserted into worksheets or documents. Selected shapes can be re-arranged into organised grids.

Options



- **Online/Offline:** Displays if you are online or offline. It allows you to shut down the Workspace add-in. After disconnecting, it displays as Offline and you must sign in again to open the add-in.
- **Help:** Offers a variety of Workspace help options. You can open the Workspace Help and Support app to search for help or give feedback, or you can open the About window. The latter provides system, services, and account details.
- **Settings:** Opens the Workspace Settings window, where you can alter your selections for Workspace settings.

Using the Formula Builder

With the Formula Builder, you can pull data into your Excel workbook using the RDP.DATA function.

To use the Formula Builder add-in:

1. Select the **Build Formula** icon on the Workspace tab. The Formula Builder window opens.
2. Select your instruments. To do this, type the instrument code (RIC) or company name. or search using the autosuggest. For example, type **AAPL.O** for Apple. Select the instrument to view its description.
3. Select either the **Real-Time & Fundamental** or **Time Series** buttons to view different data items.
4. Enter a keyword in the **Search Data Items** field to find a data item.
5. Select the data item by double-clicking it or clicking its **Add** icon.
6. Review added data items in the **Selected Items** field. You can click-and-drag them to reorder them.
7. Click **Edit Parameters & Quick Functions** to set the parameters to control the output data. Click the **Description** tab to see a summary of the data item.
8. Select the **Add data fields as cell references** check box and click **Layout** to set the layout of columns and rows.
9. Select **Insert** to load the data to Excel.



You can also get data by typing a custom function directly into the worksheet. Enter =RDP.DATA in a cell and possible parameters display. For example, to see the latest closing price for Google, enter =RDP.DATA("GOOGL.O,TR.PriceClose"). The cell connects with the task pane so you can easily add data items and set more parameters afterwards.

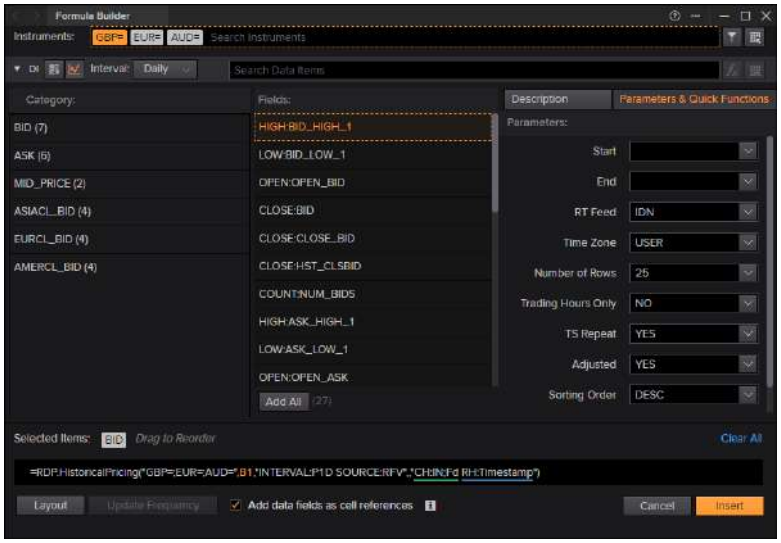
Key features

Using the add-in tools, you can perform key activities, such as finding historical data and using templates to create analyses.

Getting historical data

To find historical data:

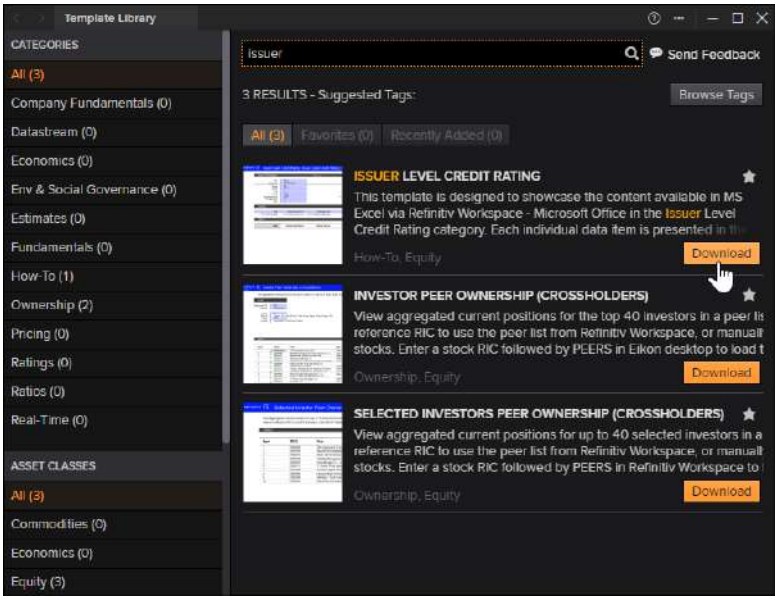
1. Select the **Workspace** tab.
2. Click **Build Formula**.
3. Enter the instrument code in the **Instruments** field or select the **Reference a cell** button.
4. Select **Time Series**.
5. Type keywords in the **Search Data Items** field to find data items.
6. Double-click a data item to add it as a selected item.
7. Click **Parameters & Quick Functions** to set criteria, such as the number of rows. Note that the availability of these criteria depends on each Excel field selected.
8. Select the **Add data fields as cell references** check box and then select **Layout** to add or remove column headers and select a destination cell.
9. Select **OK**.
10. Select **Insert**.



Using templates

To find and select templates:

1. Select the **Workspace** tab.
2. Select **Templates**. The Template Library window opens.
3. Type your keywords in the search box and select a template from the search results. You can also browse through the list of categories on the left panel.
4. Select **Download** for the template you want. The template opens in a new Excel window.



Getting help

From the Workspace add-in, you can search for help articles, find solutions, contact support, track support cases, and more.

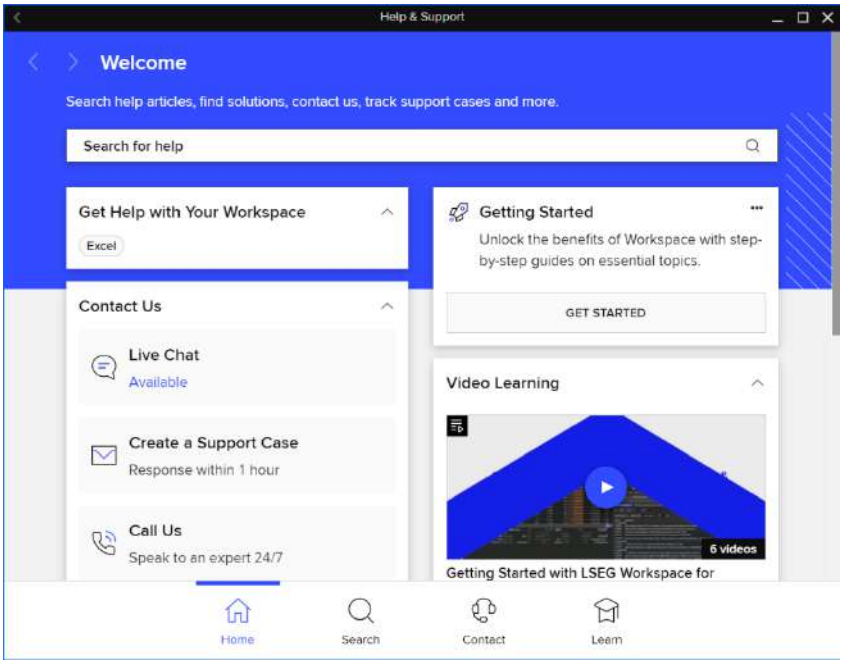
To get help:

1. On the **Workspace** tab select **Help** > **Workspace – Microsoft Office Help**.

   The Help & Support dialog opens.

2. Choose one of the following options:

   - **Search for Help:** In the **Search for help** field, start typing what you want to find and then select an article from the autosuggest list. Click the **All articles** or **Excel** filter pills to switch between all articles and Excel-specific articles.
   - **Get Help with Your Workspace:** Select the **Excel** pill to get support related to Excel issues. You can search for help articles, contact support, or watch video training.
   - **Contact Us:** Select an option of how you want to contact support. You can use live chat, create a support ticket, or talk to an expert.
   - **Getting Started:** Click the **Get Started** button to unlock the benefits of Workspace with step-by-step guides on essential topics. Select the topic from the autosuggest list.



Get more help

To open the Help & Support app in Workspace, press **F1** or select the **Help** icon and select **Get Help & Support**. You can contact us directly through the Help & Support app via the **Contact Us** section. Find additional learning opportunities with the LSEG Academy: Learning Catalogue | LSEG.

LSEG Datastream Navigator

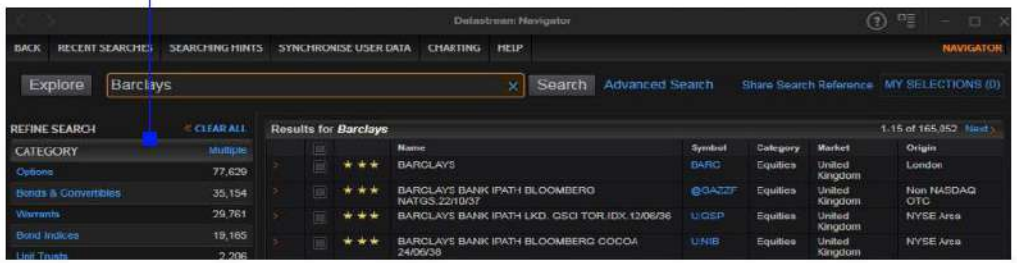
Quick Reference Card

V4.7



Free text search

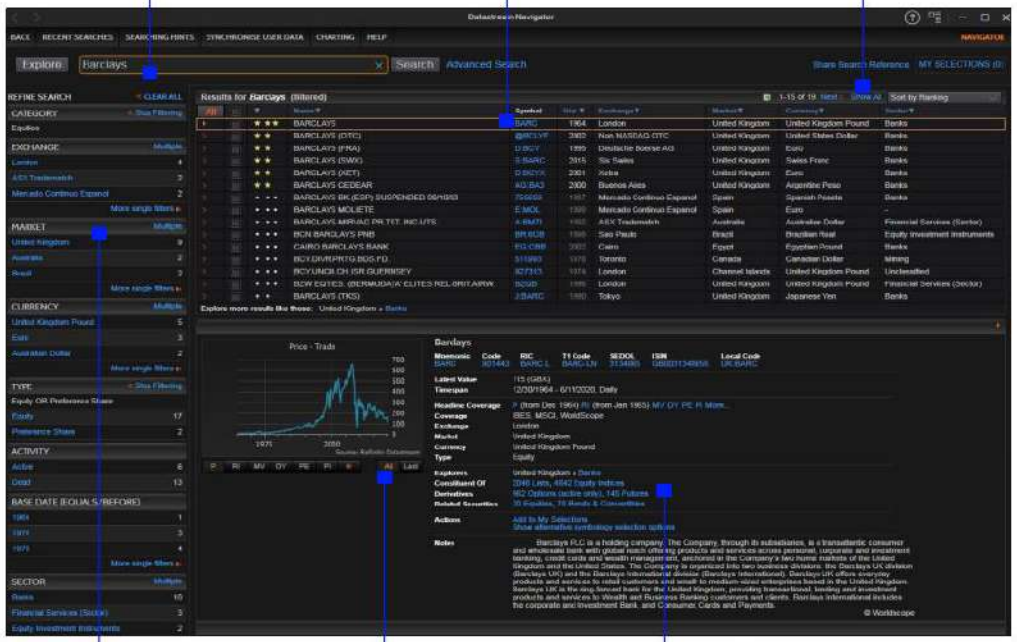
Narrow down your search by filtering to show only one data Category. For example, Equities



Use **x** to clear text or **Clear All** to clear all the filters

Series the search engine has ranked highest are displayed at the top

Show All displays all series, if there are less than 1,000 results



Narrow down your search by filtering on the Exchange, Market, Currency and so on

Preview pane shows chart and metadata for the series

See indices the equity is a constituent of

Series suggest

Type in the name of the series you are looking for

Click on the filter to display the full Navigator interface



Click on **FTSE 100** to select the code

Search for series with "ftse 100" in the Navigator interface

Datatype search



Click on the Hierarchy or the filters to narrow down the results

Enter text, results are ordered by the search engine

Click on the Datatype to see the definition

Explorer page



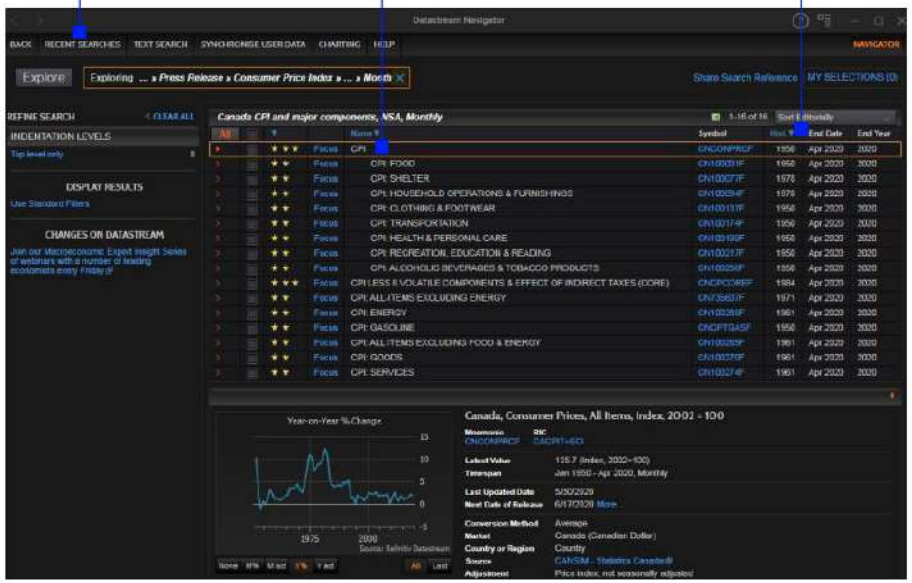
Click the **Explore** link to open Explorer option or use **shift** + **E** on the keyboard. Use the **Up**/**Down** and **Right**/**Left** keys

Results page

See previously reviewed explorers and searches

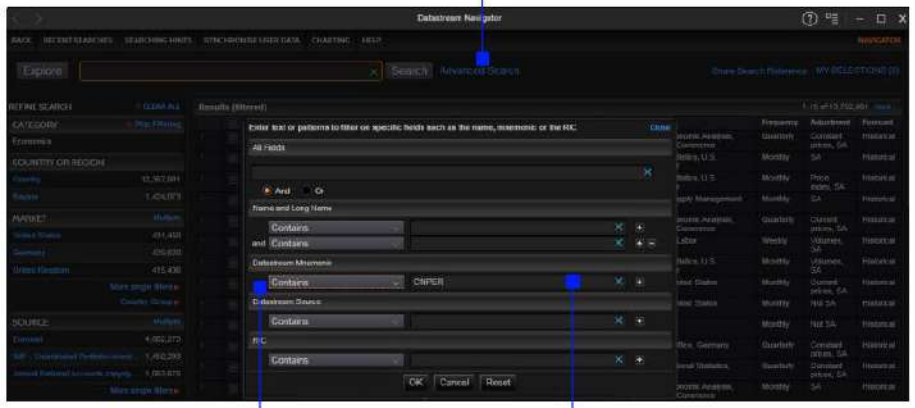
Click to display the preview pane

Reorder by start date, and so on



Advance search page

Select the **Advance Search** link



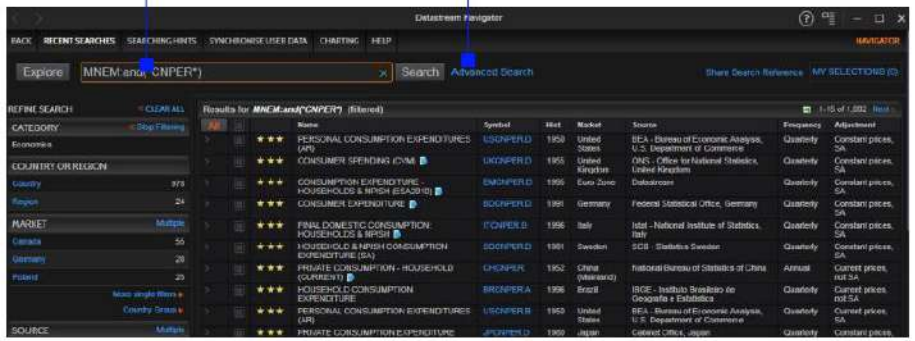
Select field (mnemonic) and the type of search. For example, Contains, Starts With, and so on

Enter the text to search for. Special characters such as $ and £ are only supported in the mnemonic and RIC fields

Results page

Seach text can be edited directly. For example, change to **CNPER.A**

Or click on **Advance Search** again to make further changes or use other fields



LSEG is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms, and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.