

The Routines App

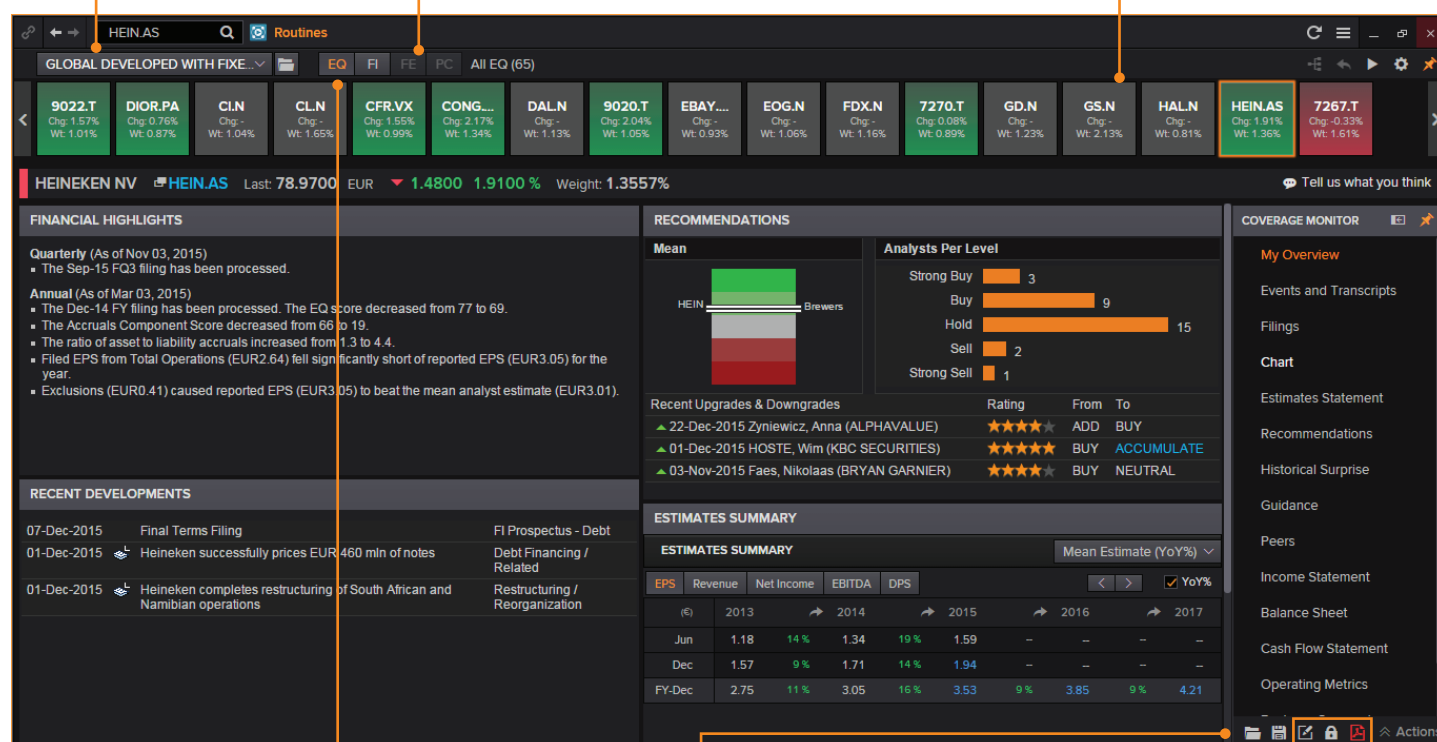
WHY SHOULD I USE THE APP?

The Routines App in Thomson Reuters Eikon enables you to quickly and easily navigate to critical pages and tools that will streamline your daily workflow and increase productivity. It's simple to value securities in your equity, fixed income, fund and ETF portfolios.

Choose Portfolios/Lists from the upper left drop down/file folder

Tabs to right highlight the types of asset held. Here the portfolio is constructed of equity and fixed income securities.

Slideshow



Click on the relevant tab to view associated securities in the slideshow, eg: EQ or FI in the case of the Global Developed with Fixed Income Portfolio

Click on the folder tab to select from a library of pre-set routines, or build your own dashboard to monitor/ analyze a portfolio, index or list Choose Portfolios/Lists from the upper left drop down/file folder

Choose Portfolios/Lists

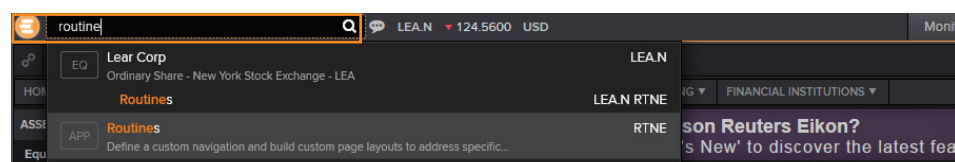
- Create Your own template
- Unlock/lock template for editing
- Generate PDF's and save to desktop from the upper left drop down/file folder

KEY FACTS

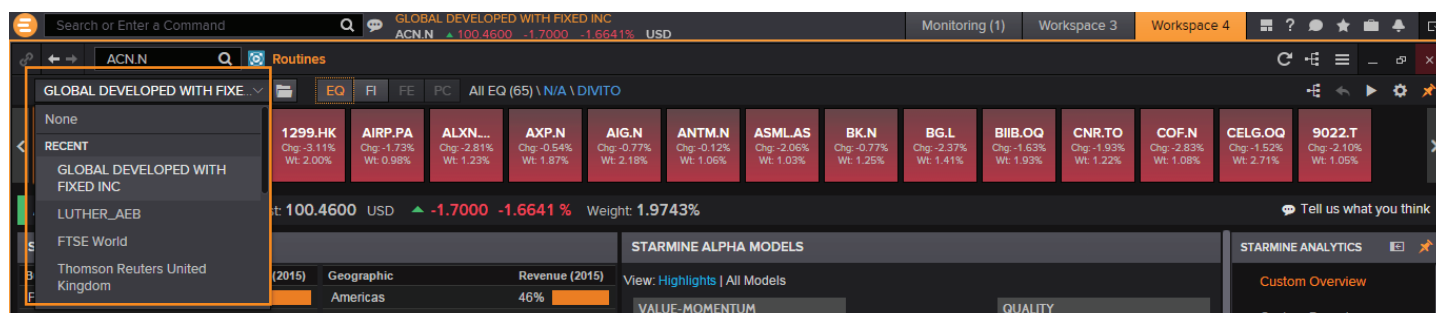
- Use the Routines App to build and streamline your daily workflow and increase productivity. Then share the workflows with colleagues.
- Each Asset Type has specific content and a specific set of Routine templates to get you started.
- Alternatively build your own from scratch for an unparalleled level of tailoring to your workflow – only include the data that works for you.
- Simple to share key information with colleagues and clients through the generation of PDF's directly from the Routines App.
- The Routines App operates across the following four asset types: Equities, Fixed Income, Funds/ETFs and Private Companies.

TOP TIPS ON HOW TO USE THE APP

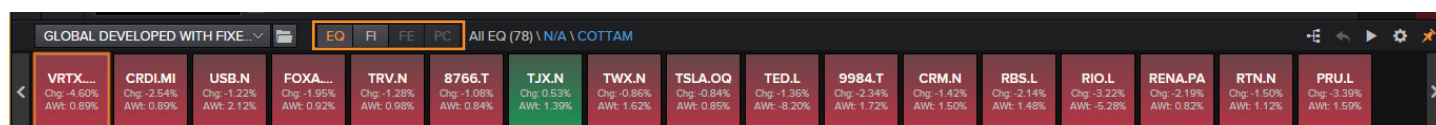
- To access the Routines App, enter **"Routines"** in the Eikon search box and select from the list of search results.



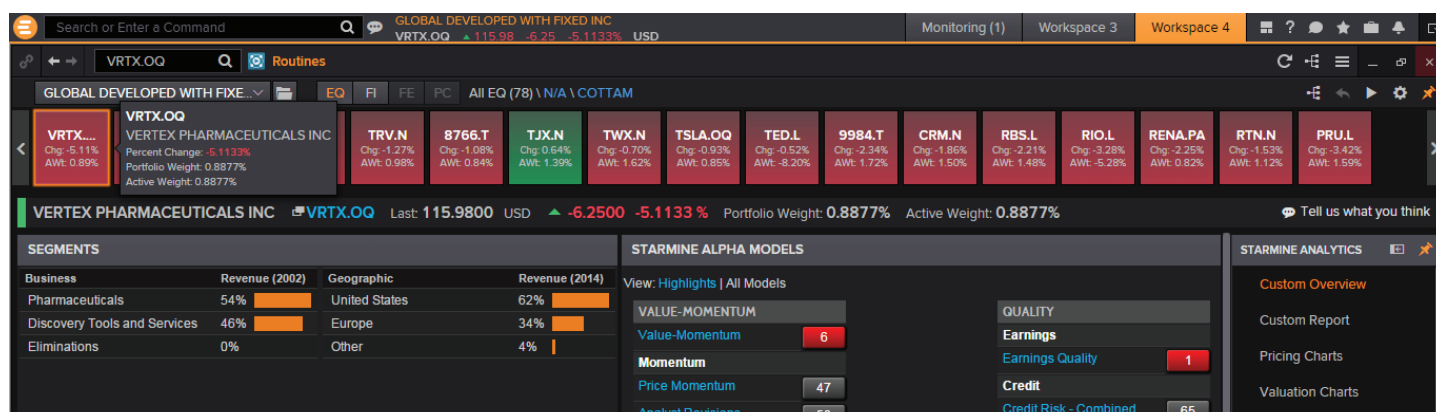
- Choose Portfolio, List or Index from the upper left drop down. Assets included will be displayed in the slide show.



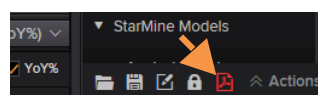
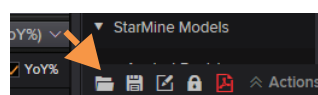
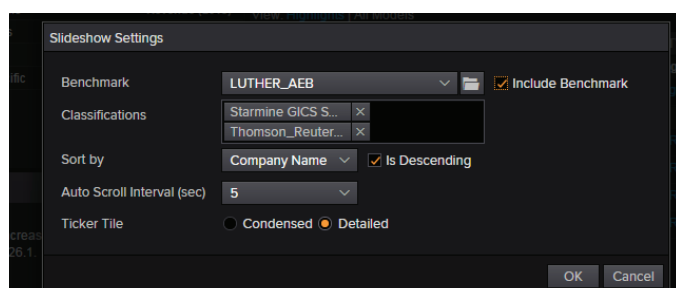
- Our selected Portfolio includes Equities and Fixed Income assets. As a result the relevant asset tabs are highlighted. Click on the Asset type by which you would like to filter the slideshow, then define and show the respective widgets and templates



- Click on an asset to place it into context and begin your analysis



- Click on the gear icon (top right) to customize the slideshow, such as inclusion of benchmark, classification, sort by – company name, RIC or weight and much more.
- Click on the folder tab to select from a library of pre-set routines, or build your own dashboard to monitor/ analyze a portfolio, index or list



- Click folder icon (bottom right) to access the Routines Library. Choose from a set of pre-set sample routines, your own personally created routines and firm level shared routines.
- Simple to Generate a PDF by merging data into one document that can quickly and easily be shared with colleagues and clients. This option enables the creation of a single security PDF output in order to avoid corporate email size limitations.

NEED HELP?

You can contact us directly through Messenger using the Customer Support contact.

To learn more about the Routines App:

training.thomsonreuters.com/video/v.php?v=1392&pmf=2mf

You can access our entire blended learning offer on the Training site:

training.thomsonreuters.com/

