

# REFINITIV WORKSPACE

SERVICE DESCRIPTION

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# About this document

## Intended readership

This document is available for current and prospective customers of Refinitiv Workspace®.

## In this guide

This document describes the service that customers of Refinitiv Workspace can expect, alongside the experiences and options designed within the service. It is not a legally binding document but is intended to give a reasonable expectation of the service you will receive as a customer of Refinitiv Workspace.

You should refer to this document for any information about the service included with Refinitiv Workspace, whether as a prospective or ongoing client. If you have any further questions, do not hesitate to contact your Account Team.

Use this section to describe the audience who will find the contents of this document useful.

## Privacy

Your privacy and trust are important to Refinitiv. See our [Refinitiv Privacy Statement](#) for more information.

# About Refinitiv Workspace

With Refinitiv Workspace, you can quickly uncover hidden opportunities using our comprehensive data and unique content.

Highly visual and intuitive to use, Refinitiv Workspace is the ultimate set of financial analysis tools. Integrate multiple workflows, co-create applications, and communicate with other financial professionals to make better decisions.

We do not operate on a one-size-fits-all model. Whether you are a start-up or a large corporate, we can help you find the relevant level of content and features that suits your needs.

Refinitiv Workspace is available on Microsoft® Windows® and Apple® macOS®, and in a browser.

## Refinitiv Workspace products

Different firms and different roles require different content, tools, and workflows. Refinitiv offers a range of products that have been created to suit the needs of specific users. For more information, speak to your Account Team.

## Scope and scale

Refinitiv Workspace is available for new wealth management and senior banker customers of Refinitiv located in select regions. For more information, speak to your Account Team.

# Discover

To find out more about how Refinitiv Workspace can help you, speak with your Account Team. You can also find more information about Refinitiv Workspace on [MyRefinitiv](#).

# Evaluate

## Trials

Free trials of all variants of Refinitiv Workspace are available to evaluate the content and features. Free trials can be set up with your Account Team, and last for a period of up to 30 days. Once a free trial period is over and a purchase is made, a user can continue using Refinitiv Workspace seamlessly. If no purchase is made, the user will lose access to Refinitiv Workspace when the trial concludes.

## Support during trials

Refinitiv offers the same level of support to those on trials as it does to licensed users. More information on support can be found later in this document.

## Trials of partner applications

Once you have started using Refinitiv Workspace, you can trial any partner application that allows for free trials.

# Purchase and renew

## Ordering Refinitiv Workspace

New customers should request a Refinitiv Workspace license through their Account Team. If you do not know your Account Team you can [Contact Us](#) and we will make sure you get to the right person. Thereafter, customer administrators can order additional applications using License Management tools in [MyRefinitiv](#). Training for customer administrators is available on our [Training Site](#). If a customer is not set up to order additional applications through [MyRefinitiv](#), they can request additional licenses through their Account Team.

License Management requests can be completed in three (3) hours. We aim to complete other order types within three (3) business days.

## Purchasing additional application

### Purchasing Refinitiv apps

Refinitiv applications are not available for purchase individually but are packaged into propositions based on user workflows. Refinitiv Workspace contains all the available Refinitiv applications. Your Account Team is available to discuss the best proposition to suit your individual needs. By purchasing a license for Refinitiv Workspace you can access Refinitiv Workspace through a desktop application, web portal, and mobile device. In this document, these are referred to as Refinitiv Workspace desktop access, Refinitiv Workspace web access, and Refinitiv Workspace mobile access, respectively.

### Purchasing partner apps

You can find partner applications in the App Studio section of the App Library. Partner applications can be purchased using the 'Purchase' button. Partner apps are any application created by a third party and sold and distributed through Refinitiv Workspace.

In most cases, you will get instant access to the partner application, and the cost of the app will be added to your Refinitiv bill. Where this is not the case, the partner will contact the user directly.

Questions relating to trials and purchase will be handled by the partner app owner. Apps include clear instructions for contacting partner support in the footer of the app, as well as in the App Studio section of the App Library.

### Free trials

Free trials are available for most partner applications. The availability of free trials with partner applications is denoted by the 'Free Trial' button that displays in the App Studio section of the App Library.

### Accessing applications

You can access core and purchased applications through the App Library and in the Refinitiv Workspace Menu.



## Purchasing additional content

You can purchase additional Refinitiv and partner content by requesting it from your Account Team. You can find a catalogue of content available for purchase in the Content Kiosk application in Refinitiv Workspace. The Content Kiosk app is available in the App Library or by searching 'Content Kiosk'.

If you are a client administrator, you can purchase additional content by using the License Management tool in MyRefinitiv. If a user already has a Product License, administrators can purchase all available add-ons for that product as well.

## Billing

You are billed according to the billing frequency specified for your account. Some partner services will bill you directly based on their own billing rules. For more details, you should contact your Account Team.

## Partner applications and content

In most cases, the cost of the partner app or content will be added to your Refinitiv bill. Where this is not the case the partner will contact you directly.

## User maintenance

There are various situations where changes need to be made to a license. The quickest method of completing these changes is by a client administrator using the License Management tools in [MyRefinitiv](#). Where this is not possible, you can also contact your Account team directly.

## Maintenance scenarios

Process	Self-service availability
Purchase (Product and Add-ons)	✓ (same product only)
User Swap	✓
Assign/Unassign licenses	✓
User detail changes	✓
Cancellation	✓
Relocation	✗ international ✓ same country

## Renewals and cancellations

For details on renewal and cancellation terms, you should contact your Account Team.

# Setup

## Deployment

Refinitiv offers customers different methods of deploying Refinitiv Workspace. Requirements vary by user communities, and the deployment Refinitiv Workspace can be tailored to meet those needs. Contact with your Account Team to discuss which deployment method is most suitable.

### Refinitiv hosted

All infrastructure sits with Refinitiv, and Refinitiv Workspace connects to real-time data and all other services through either the Internet or private lines.

### Customer managed

Infrastructure, such as datafeeds and a Market Data distribution service like Real-Time Distribution System (RTDS), sits on the customer site. Refinitiv Workspace connects to real-time data locally, and all other services through either the Internet or private lines.

## Installation and onboarding

### Windows and macOS desktop

Refinitiv Workspace is available using a simple [download](#) and installation. The basic Installation instructions are available [here](#). For more complex, multi-user installations, refer to the advanced guide, found [here](#).

Installation does not require administration rights on the user's computer when installed per user. It is possible that a client's security settings may be such that administration rights are required to install any applications, but the framework itself does not require them.

### System requirements

Refinitiv Workspace requires some specific [System Requirements](#). You should consider all requirements of any other applications that you plan to run alongside Refinitiv Workspace.

### Installation support

Refinitiv Workspace is a self-installed product, so the user is expected to install the product themselves with the help of the installation guide and/or their internal IT department. If either you or your IT department tries to perform the install and it fails, the Help Desk is available for support.

For failed installations, we will follow the processes mentioned in the [Support](#) section of this document.

Frontline support is available 24 / 7. Installation escalation teams are available 24 hours a day, Monday – Friday.

## Installation assistance

You also have the option of paying an additional charge to have Refinitiv fully manage the installation of Refinitiv Workspace so you can focus on other activities. You can request this service through your Account Team. We offer installation assistance remotely during local business hours Monday – Friday. We can also arrange to provide installation service outside of local business hours upon request.

On-site services and other extended support are available only through a professional service package: Value Added Solution Service (VASS).

To find out how to subscribe to VASS, contact your Account Team.

## Onboarding support

We offer an onboarding service to check individual installations to make sure they are successful. We will help with the system test, ensure successful login, and set up self-help tools. There is no charge for this service which is offered during normal business hours (8am – 6pm).

For more information, contact your Account Team.

## Refinitiv Workspace web access

Refinitiv Workspace Web Access requires no installation, but we must meet some basic [System Requirements](#).

## Refinitiv Workspace mobile access

Refinitiv Workspace Mobile Access requires the user to download the app from their supported official app stores, that being the iOS® App Store.

**Note:** The user must meet some basic hardware requirements. For further information, see the [System Requirements](#).

## Refinitiv Workspace for Microsoft Office

Refinitiv Workspace for Microsoft Office is an add-in available and compatible with Microsoft 365® (formerly Office 365®) products, including Excel, Word, and PowerPoint.

Refinitiv Workspace for Microsoft Office can be found in the Microsoft store or by clicking [here](#).

The product can be installed in two different ways, depending on availability of the Microsoft Store for the client's version of Microsoft 365:

- Clients with no restrictions to the Microsoft Store can set up the add-in by installing this directly from the Microsoft Store [here](#).
- Clients with restricted access to the Microsoft Store should follow the steps for deployment published [here](#).

## Single sign-on

For some combinations of Refinitiv Workspace Variant and Deployment Method we offer Single Sign-on (SSO) capabilities based on Security Assertion Markup Language (SAML) 2.0. This allows your IT administrator to set up SSO authentication between the

Identity Provider (IDP) and the Service Provider (SP) using the SSO Administration Console.

## Welcome emails

Either through a free trial (where available) or a purchase, users will receive a welcome email containing links to their login credentials and to the product download page. The links are unique to each user and will let the user set their password and download or access Refinitiv Workspace. Welcome emails are generated automatically while setting up a user, which is done either by the Refinitiv Account Team or the client's administrator using License Management in [MyRefinitiv](#).

Welcome emails can be delivered in the following languages:

- English
- Simplified Chinese
- Japanese

## Profile information

When you start Refinitiv Workspace for the first time, you will be welcomed with our essential onboarding flow. The aim of this flow is to ensure we have all the information we need to customize Refinitiv Workspace to your needs.

During essential onboarding, you will be asked to enter profile information. This includes job role, asset classes (if relevant to your role) and the selection of your primary asset class. Refinitiv will use this information to make it easier for you to find the features and functionality that are important to your workflows.

We will then ask you to check, and change if required, some basic settings. These settings include:

- Workspace language – Your preferred language for the Workspace interface. You can choose from three supported languages:
  - English,
  - Simplified Chinese, or
  - Japanese

If changed, these changes will take effect on next sign-in to Workspace

- Languages for Content – The languages in which content for news, research and more are delivered in Workspace. You may select more than one language.
- Location for Search – This provides a focus for search results, giving higher priority to local terms. For example, searching 'BP' with Italy selected as your preference may give a higher priority to Banco Populaire over British Petroleum.
- Color theme – Select from either a light or a dark theme.
- Instrument movement selection – This governs the color templates for instrument movement (for example, tracking up/down shifts within Monitor or Chart). You can select from four templates: American, European and Asian 1 & 2

Finally, we will ask you to set up an email address for receiving alerts in Workspace. You will need to verify this email (if setting up for the first time or changing it from an existing

email) within 48 hours to receive alerts to that address. We will not send you any alerts emails until you set up your first alerts within Workspace.

You may change any of these selections at any time in Workspace Settings or, for alerts emails, the Alerts application.

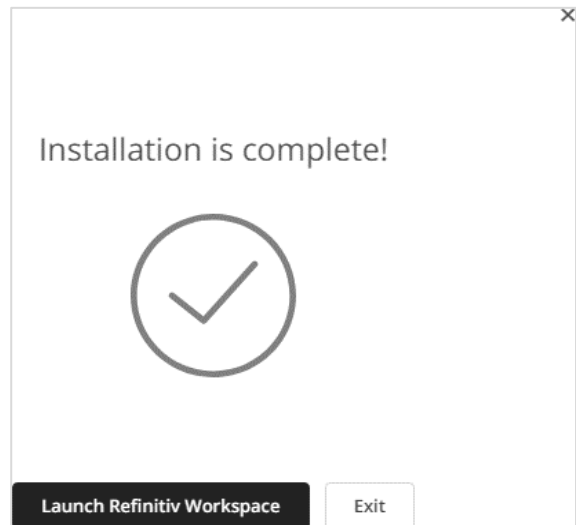
Only Refinitiv Workspace desktop access and Refinitiv Workspace web access support the first-time profile setup process. We recommended that you start with these platforms before logging into the mobile app.

## Installation hours of coverage

Self-service Installation is available 24 / 7 using the link provided in your welcome email.

## Successful installation

A successful installation has been completed after downloading, installing, and signing in to Refinitiv Workspace. After a successful installation, the following will display.



# Product usage

Refinitiv Workspace is an individual information service, meant to be installed on a user's device for the use of the licensed user only. Detailed information on allowed usage can be found in your contract. The usage of interactive services is covered in the [Code of Business Conduct & Ethics](#).

If you have additional questions, contact your Account Team.

## Product hours of availability

Refinitiv Workspace is available 24 / 7.

## Product languages

Refinitiv Workspace can be delivered in the following languages:

- English
- Chinese
- Japanese

You can change your preferred language on the sign-in screen, and through Settings.

## General security

As the world's largest financial information source, Refinitiv is serious about safeguarding the security and quality of all the proprietary and third-party information that flows through our systems. Therefore, we have taken steps to formalize and embed the information security management and quality management systems into the Information Technology Infrastructure Library (ITIL<sup>®</sup>) service management processes operated in our major data centers – including attaining certifications in two industry-proven global standards ISO 9001 (Quality Management) and the new ISO 27001 (Information Security Management).

More information can be found in our [Statement of Service](#).

## How personal data is used within Refinitiv Workspace

Refinitiv Workspace makes available a large number of finance-related external and Refinitiv data sources and products. Users search these sources and products and can save the results of these searches as shortcuts/preferences.

Refinitiv Workspace also uses data in word search terms entered by individual users and stores them to enable the product to suggest previous search terms to enhance user experience. Refinitiv Workspace collects and stores data relating to how and which users interact with the product (in other words, source/internal product hits, user job functions, locations, and asset classes), for the purposes of tailoring the discoverability of applications and menus, as well as for support purposes.

For more information, contact your Account Team.

## Business Continuity (BC) and Disaster Recovery (DR)

Refinitiv Business Continuity Management Office (BCMO) maintains a [business continuity policy](#). For further information, contact your Account Team.

There are no options for customers to select levels of services for Refinitiv Workspace. By nature, any Hosted Refinitiv Workspace product can be accessed using any Internet Connection. User profiles, favorites, workspaces, and preferences are all stored centrally so can be accessed from anywhere. Refinitiv provides data center redundancy and failover. It is the responsibility of the customer to obtain the correct level of service from their ISP to meet their own connectivity resiliency needs.

## Information security

Refinitiv is committed to its Information Security program, the mandate of which is approved by the Executive Committee. We have a Chief Information Security Officer and an extended team of security specialists, spread across the globe, dedicated to the security of Refinitiv Financial and Risk products and services.

Our commitment to security is achieved through the application of demonstrable security controls at an appropriate level to the service being offered. Furthermore, our security strategy ensures that appropriate security controls exist within service design and operation. This is to counter the threats to the confidentiality, integrity, and availability of customer information which we store, process, or transmit.

We have staff trained to identify issues and resolve them as quickly as possible with minimal impact on customers. Our involvement in industry and government security forums and groups further demonstrates our proactive approach to understanding and countering the threats we face.

## Legal and regulatory

Refinitiv global legal department will interpret the laws and regulations that apply in the countries where we operate and provide appropriate policies to enable us to comply with them. We operate a 24 / 7 [Business Compliance and Ethics Hotline](#) for guidance or to report ethical, legal or policy issues.

## Communications

External communications for release notes, new versions, product road maps, product maintenance schedules, alerts, content change notifications and documentation (training and user guides) updates are available through [MyRefinitiv](#) and, if necessary, through your Account Team.

## Security patches

Any security issue will be assessed immediately upon detection. A software patch will be made available as soon as a solution is identified and implemented. For any issue where Refinitiv is reliant on a third party for a solution, communication to clients will be delivered through [MyRefinitiv](#).

# Help and support

Finding answers to questions and getting technical support is easy with Refinitiv Workspace. Users can get help by:

- Typing 'Help' in the search field and selecting 'Help & Support'
- Clicking 'Contact us' from the Help menu, and selecting 'Get Help & Support'
- Selecting "Get Support" from any app menu

Customers and users can also contact Refinitiv directly from [MyRefinitiv](#).

## Training and documentation

Your Account Team will proactively contact new users for training. Training is available from [Refinitiv Training](#), and documentation is available on [MyRefinitiv](#). You can also request training by choosing 'Get Help & Support' from the Help menu in Refinitiv Workspace.

## Version support

As part of our commitment to ensure the optimal functioning and performance of Refinitiv Workspace, we have a rolling [Refinitiv Workspace Version Obsolescence Policy](#). This improves the functioning of the product on several levels, including functionality, fixes, technical changes, security, improved performance, and supportability.

## Languages and availability

### Live chat

Live chat is a real-time support channel that we offer to all Refinitiv Workspace users but is not available in Refinitiv Workspace Mobile. You can access this by choosing 'Get Help & Support' from the Help menu in Refinitiv Workspace. Live Chat is available in English on a 24 / 7 basis.

Local language support is available during local business hours in the following languages:

- Japanese
- Mandarin

### Customer support

Customer support delivered by phone and email is available in the Help & Support app in the product and will be delivered in English on a 24 / 7 basis.

Local language support is available during local business hours for the following languages:

- Arabic
- Cantonese
- French
- German
- Greek
- Indonesian Bahasa
- Italian
- Japanese
- Korean
- Malay
- Mandarin
- Polish

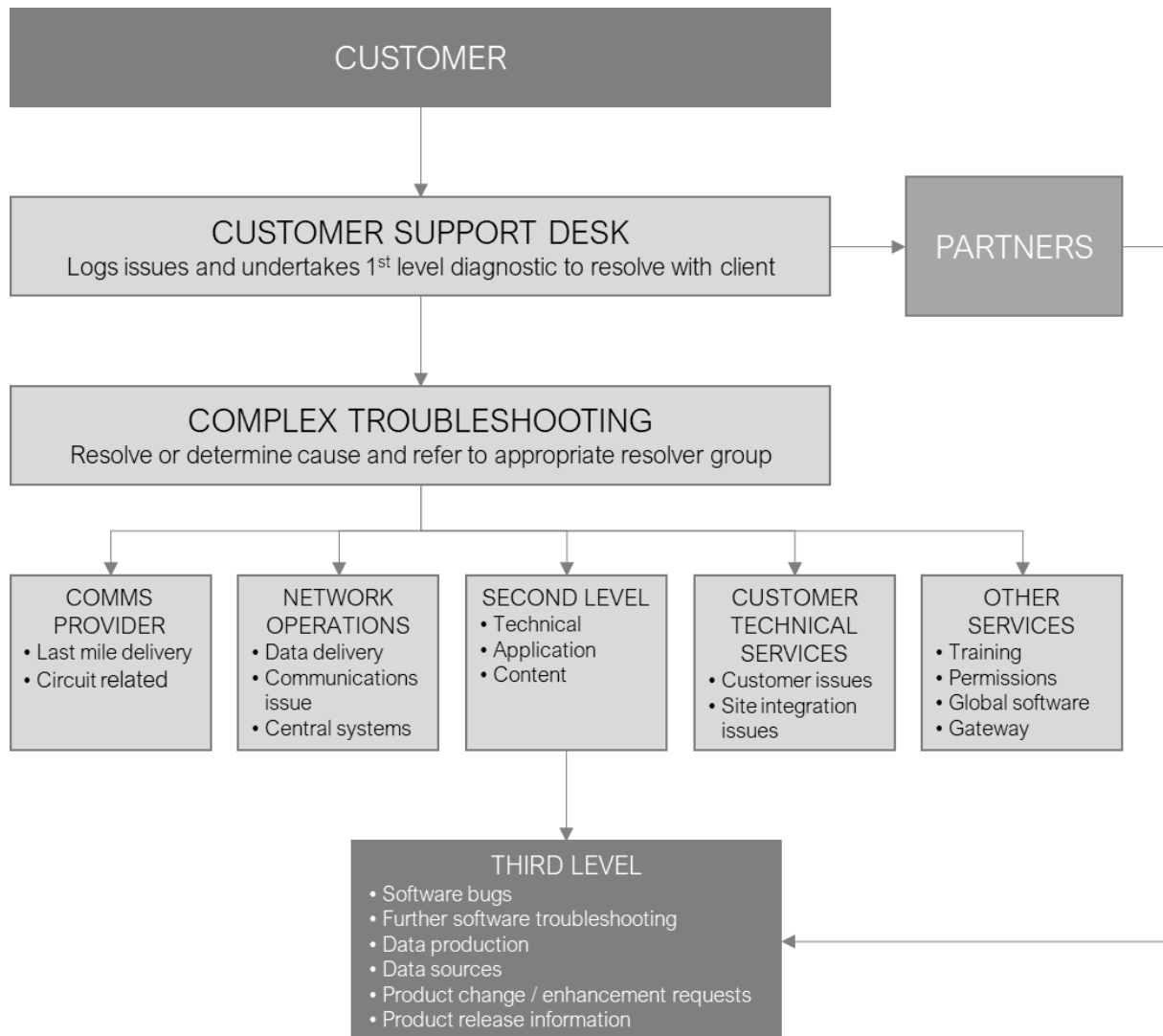


- Portuguese
- Spanish
- Turkish
- Russian
- Thai
- Vietnamese

## Resolver groups

Resolver groups are used when an issue needs escalation for further investigation. They will deliver support in English only.

## Support model



**Note:** Codebook and Workspace APIs support is not covered by this support model. For details, see the following section.

# CodeBook and Refinitiv Workspace APIs

CodeBook and Refinitiv Workspace APIs provide a powerful open environment for financial coders and developers wanting to leverage the full potential of Refinitiv Workspace programmatically. This section provides more details about the relevant capabilities and outlines the customized support model.

## What is CodeBook

CodeBook is a Refinitiv Workspace app that provides a ready to use, zero-footprint development environment hosted in the cloud. CodeBook is fully integrated into the Refinitiv ecosystem (Refinitiv Workspace, Refinitiv Data Platform, and so on). It includes productivity tools that help you when writing code, in terms of retrieving and using Refinitiv data. CodeBook is preloaded with popular APIs and software libraries including Refinitiv APIs.

## Refinitiv Workspace APIs

Refinitiv provides several APIs and software libraries that you can use to retrieve data from both Refinitiv Workspace and the Refinitiv Data platform. These “Refinitiv Data Platform Libraries” can be used to build applications running beside Refinitiv Workspace or within Refinitiv Workspace in CodeBook.

## Why is the support model for CodeBook and Workspace APIs different?

CodeBook is an open development environment that you can use to implement a variety of custom workflows. As a CodeBook user you may need help and support regarding a variety of different topics such as Refinitiv APIs, Refinitiv content, or even the CodeBook app itself.

Our dedicated CodeBook and Workspace APIs support model guarantees that you are quickly put in touch with subject matter experts who can help to resolve your issues.

## Support Model for CodeBook and Workspace APIs

There are two support channels for customers using CodeBook and Refinitiv Workspace APIs:

- The Refinitiv Developer Portal, <https://community.developers.refinitiv.com>
- Refinitiv Customer Support Desk

The following table outlines the features of both channels:

**Refinitiv Developer Portal**

Suitable for answering “How to” types of programming / coding questions.

Provides online resources like quick start guides, tutorials, documents, examples, and articles for Refinitiv APIs.

Gives you access to Q&A forums where a team of developer advocates and the larger Refinitiv developer community can provide answers to your questions about programming with Refinitiv APIs.

**Refinitiv Customer Support Desk**

Suitable for technical issues as well as functionality and content questions regarding CodeBook and Refinitiv Workspace APIs.

Support desk teams evaluate issues using Live Chat, email, over the phone, or through MyRefinitiv.

Once a first assessment is done, the support desk escalates the issue to the most appropriate resolver group within Refinitiv as needed.

Whichever support channel you choose, Refinitiv teams will ensure you are directed to the most suitable channel so that your question or issue is handled quickly and efficiently.

## Service level targets and descriptions

To ensure we are doing everything we can to meet or exceed our customers' expectations, we have set the below target response times for contacting Refinitiv Support.



Live Chat	Email back	Global contact numbers	MyRefinitiv
Response within one minute	Response within 60 minutes	Response within 20 seconds	Response within 60 minutes



Severity	Escalate to Team Lead	Escalate to Regional Manager	Escalate to Global Head	Initiate Technical Recovery Team
1 Complete loss of service for multiple users or Business critical	Immediate	Immediate	4 hours	Immediate
Customer status updates: Every hour				
2 Complete loss of service for a single user; Loss of resiliency	1 hour	1 hour	4 hours	1 hour
Customer status updates: Daily				
3 Non-service affecting	24 hours			
Customer status updates: Daily or as agreed				

**Notes:**

- A customer site issue is a service-impacting event related to Refinitiv hardware or software that is located at the customer premises. Issues related to Hosted Products, where Refinitiv hardware and software is located on Refinitiv premises, follow the same restoration targets.
- Service level targets do not apply to posts made on Q&A forums on the Refinitiv Developer Portal. The format of a Q&A forum is appropriate only for “How to” types of questions related to Refinitiv APIs. As a result, any issues or problems with Refinitiv products or services should be raised to Refinitiv Support, rather than reported through Q&A forums on the Refinitiv Developer Portal.

## Severity descriptions

We endeavor to respond to all customer concerns promptly. To match the response time against the level of urgency, Refinitiv Customer Support assigns a priority level based on the severity of the problem.

<b>Severity 1</b>	<p>An emergency in which both primary and any standby systems produce materially incorrect results, fail catastrophically, or are otherwise rendered inoperable, and in which all or multiple end users (two or more) are simultaneously experiencing the same failure.</p> <p>① This excludes non-resilient communication line failures as well as single key station sites.</p> <p>Severity 1 also covers the situation where key content is either not available or is not updating. Examples of key content are “Premium Category” exchanges, futures rollovers, G24 FX and money, G24 government benchmarks, real-time indices, and missing historical data for a whole market.</p>
<b>Severity 2</b>	<p>Some elements of the Refinitiv service are affecting multiple end users (two or more) simultaneously, is inoperative which results in loss of content, functionality, or degraded performance, but where a temporary workaround is available.</p> <p>Additionally, any loss or compromise of a standby part of a solution not directly impacting the customer, but through which the risk of incurring a Severity 1 situation is greatly increased, would be included.</p> <p>Severity 2 also covers an emergency situation, whereby a single user workstation or single communication line delivered site has failed catastrophically or is otherwise rendered completely inoperable, and the situation where real-time content is suspect in accuracy or is missing.</p>
<b>Severity 3</b>	<p>Non-real-time content is suspect in accuracy or is missing, and all other customer service impacting problems.</p>
<b>Severity 4</b>	<p>All non-service impacting requests such as product enhancements.</p>

## Dispatching field engineers

If a Refinitiv Customer Support Center specialist cannot resolve your technical issue remotely, a field engineer may be dispatched to your location, provided the issue is Refinitiv-related or you subscribe to a premium dispatch service. If the root cause of the incident is within the customer’s environment this may result in service charges on a time/materials basis. Field engineers can be dispatched during local business hours of each country, keeping in mind local holidays and daylight savings times. The field engineer will make all reasonable efforts to get to your location as soon as possible. In the event of a delay, the field engineer or the specialist from the dispatch team will inform you of the estimated time of arrival.

**Important:** We reserve the right to charge a fee, at our nominal time and materials rate, for service issues that require on-site field engineering assistance which are the direct result of certain customer induced problems or outside of normal hours.

## Partner support

Partners will provide direct support for their apps. Apps include clear instructions for contacting partner support in the footer of the app as well as in the App Library.

## Feedback and continuous improvement

Refinitiv is committed to continuously improving its products and support. After interacting with a product or an employee of Refinitiv, customers may receive an opportunity to give their feedback or learn more, either in-product or by email.

Users of Refinitiv Workspace can also give feedback at any time from the Feedback app available within both the Desktop and Web access versions.

Users can access the Feedback app by:

- Typing 'Feedback' in the search field, or
- Clicking 'Contact us' in the Help menu and selecting 'Feedback & Feature Requests'

# Evolution

## Updates

Customers who have deployed the Refinitiv Workspace software have the choice whether to enable automatic updates to Refinitiv Workspace. Note that customers who are accessing Refinitiv Workspace in a web browser will always be running on the most recent version.

If a customer is...	Then...
<b>Enabled for automatic updates</b>	<p>General updates for Workspace will happen automatically. These do not require any installation or other action from users or from market data/client administrators.</p> <p>Refinitiv Workspace has an update mechanism to allow clients using Refinitiv Workspace to update their current version to the latest version. This is in the form of an integrated software update feature that does not require any user action.</p>
<b>Not enabled for automatic updates</b>	<p>The customer should update manually and ensure they are running a supported version of the Refinitiv Workspace Software which is one of the 3 most recent versions.</p> <p>Customers can download the latest version of the Refinitiv Workspace software on <a href="#">MyRefinitiv</a> where they can also register for <a href="#">Product Change Notifications</a> and be alerted when new version of the Refinitiv Workspace software was released. The latest version of Refinitiv Workspace can be found on:</p> <ul style="list-style-type: none"> <li>– The <a href="#">Refinitiv Workspace page</a> on MyRefinitiv, or</li> <li>– The Refinitiv Workspace <a href="#">download page</a>.</li> </ul>

## Upgrades

Workspace is updated on a periodic basis. These releases incorporate fixes for reported issues and enhancements to the product's capabilities. Each release is assigned a version number, which is used to indicate the relative impact of the release. While you can choose whether to upgrade to the latest supported release of Workspace desktop access, you are always presented with the very latest version of both web and mobile access.

For further information, see:

- [Refinitiv Workspace Obsolescence Policy](#)
- [Refinitiv Workspace Release Notes](#), which, contains information about the current and supported versions of Refinitiv Workspace

## Refinitiv Workspace desktop access

Major releases are indicated by the first delimited figure and contain significant changes and new features. They are assigned a major version number, such as 1.x, 2.x, 3.x, and so on.

Minor releases are indicated by the second delimited figure, and contain platform enhancements, fixes, and technical changes. They are assigned a minor version number, such as x.1, x.2, x.3, and so on.

Refinitiv currently operates on a cycle of:

- A *maximum* of one (1) major release per year, and
- A *maximum* of four (4) minor releases per year

**Note:** Refinitiv does not commit to any minimum number of annual releases, so a typical year may well see fewer releases than this.

Clients using Refinitiv Workspace acknowledge that this release schedule is subject to change at the discretion of Refinitiv. Refinitiv will notify customers of technical changes using Product Change Notifications (PCN) and in cases where required their Account Team. We recommend using the latest version of Refinitiv Workspace using automatic updates. Contact your Account Team to discuss upgrade needs.

Client administrators can see which versions their users are using through [MyRefinitiv](#). Users can see the same by hovering over the Refinitiv Workspace icon in the System Tray.

The Refinitiv Customer Implementation and Professional Services Team will not install any versions of Refinitiv Workspace older than the previous two.

## Refinitiv Workspace web access

You will always be presented with the most current version of Refinitiv Workspace web access each time you sign in.

## Refinitiv Workspace mobile access

You will always be able to download the latest version of each mobile product from the official iOS App Store at your discretion, or through automated app updates turned on from your mobile device.

New versions of each app will be released on an ad hoc basis, so there will not be a set release schedule. We recommend you check the app stores regularly or enable auto updates on your device to ensure you have the latest, fully featured version installed.

For help on Refinitiv Workspace mobile, go to your Profile and:

- Select **Submit an Issue** to raise a ticket in MyRefinitiv, or
- Select **Call Helpdesk**, which will display a list of global contact numbers

## Refinitiv Messenger

Refinitiv Messenger is a free, secure, and compliant instant messaging solution that gives you access to the world's largest verified directory of financial market participants across an open messaging network. Because compliance underpins the global messaging community, Refinitiv Messenger is the trusted provider for external communications.

Refinitiv Messenger is integrated within our distinct Eikon and Workspace services and is also offered as a Standalone service for financial market participants. Refinitiv messaging offers compliance services to abide with regulatory obligations concerning the keeping of electronic communication records.

Refinitiv Workspace has an update mechanism allowing users of Refinitiv Messenger to update their current version to the latest one. This is an integrated software update

feature that does not require any user action. To install updates manually, Market Data IT Administrators can use the link provided by their Account Team or MyRefinitiv.

Although Refinitiv Messenger is free, it may not come by default with your variant of Refinitiv Workspace. This allows corporations the flexibility to manage their business messaging compliance and requirements. We recommend using the latest version of Refinitiv Workspace using automatic updates to access the latest version of Refinitiv Messenger. Contact your Account Team to discuss your upgrade needs.

## Migration

We offer migration assistance to existing customers of Refinitiv products (strategic migration) as well as to new customers migrating from other financial market data products (competitive migration).

Customers will be notified of any mandatory strategic migrations through their Account Team. Refinitiv offers a range of services to assist with migrations. Your Account Team will work with you on your migration plans.



# Appendix 1: Refinitiv Workspace Access to After Market Research

The following table contains variations to the service description in the rest of this document that apply to Access to After Market Research only:

Chapter	Variations
About Refinitiv Workspace	<p>Refinitiv Workspace Access to After Market Research is targeted at Investment Banking users who require access to After Market Research only and would like a solution at a reasonable price. It is important for specific client groups with requirements for distinct specific content sets or functionality, which are not serviced by our existing product and solutions offering. This variant extends the ability of customers to support workflow, and to communicate and share information consistently across all user types within a company.</p> <p><b>SCOPE AND SCALE</b></p> <p>Refinitiv Workspace Access to After Market Research is available for existing Investment Banking customers and Thomson One Banking users requiring access to After Market Research.</p> <p>This variant contains limited content and capabilities and does not include the following premium features:</p> <ul style="list-style-type: none"> <li>– Fundamentals</li> <li>– Estimates</li> <li>– Deals</li> <li>– Codebook and APIs</li> </ul> <p>For more information, speak to your Account Team.</p>
Discover	No variation
Evaluate	<p><b>SUPPORTED CONTENT</b></p> <p>The offering in Refinitiv Workspace - Access to After Market Research will consist of After Market Research (AMR) through the Advanced Research Search application.</p>
Purchase and Review	Aftermarket Research Free Trial – Permitted to download a maximum of 10 Aftermarket Research documents.
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

## Appendix 2: Refinitiv Workspace for Investment Bankers

The following table contains variations to the service description in the rest of this document that apply to Investment Bankers only:

Chapter	Variations
About Refinitiv Workspace	<p>Refinitiv Workspace for Investment Bankers provides a customised solution for customer segments within investment banking and capital markets, typically covering M&amp;A and coverage bankers, private equity and venture capital, corporate strategy, financial planning and treasury/analysis, and BIS functions.</p> <p><b>SCOPE AND SCALE</b></p> <p>Refinitiv Workspace is available for existing Investment Banking customers of Refinitiv.</p> <p>For more information, speak to your Account Team.</p>
Discover	No variation
Evaluate	<p><b>SUPPORTED CONTENT</b></p> <p>Refinitiv Workspace for Investment Bankers is cross-asset class and provides content and functionality central to investment banking and advisory workflows, including:</p> <ul style="list-style-type: none"> <li>– Messenger (Optional)</li> <li>– Aftermarket Research (add on)</li> <li>– Capital Markets (add on)</li> <li>– Reuters News</li> <li>– Company Events</li> <li>– Company Views (including deals, estimates, fundamentals, and ownership)</li> <li>– Charts</li> <li>– Mobile apps</li> <li>– Full screening capabilities</li> <li>– Premium Deals with full history</li> <li>– Microsoft Office add-in</li> <li>– StarMine content</li> <li>– Datastream content</li> <li>– Conflated data</li> </ul> <p>Refinitiv Workspace for Investment Bankers does not include real time data or trading workflows.</p>
Purchase and Review	<p>Aftermarket Research Free Trial – Permitted to download a maximum of 10 Aftermarket Research documents.</p> <p>Capital Markets add on – This add on provides capital markets origination bankers (equity capital markets, debt capital markets, leverage and acquisition finance, project finance and loans) and syndicate desks with the appropriate tools, apps, and datasets. It features real time data sets; fixed income, equities, and commodities pricing calculators, indices and monitor / analytical apps, and is backed by the existing datasets and features of Workspace for Investment Banking. The add on will empower professionals to perform many of their necessary tasks, from origination to structuring, execution or pricing.</p>
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

# Appendix 3: Refinitiv Workspace for Investment Bankers – Consultant Edition

The following table contains variations to the service description in the rest of this document that apply to Investment Bankers – Consultant Edition only:

Chapter	Variations
About Refinitiv Workspace	<p>Refinitiv Workspace for Investment Bankers – Consultant Edition provides a customized solution for consulting firms.</p> <p><b>SCOPE AND SCALE</b></p> <p>Refinitiv Workspace for Investment Bankers – Consultant Edition is available for existing consulting firms of Refinitiv.</p> <p>For more information, speak to your Account Team.</p>
Discover	No variation
Evaluate	<p><b>SUPPORTED CONTENT</b></p> <p>Workspace for Investment Bankers – Consultant Edition is cross-asset class and provides content and functionality central to consulting firm workflows, including:</p> <ul style="list-style-type: none"> <li>– Messenger (Optional)</li> <li>– Aftermarket Research (Add on)</li> <li>– Datastream (Add on)</li> <li>– Capital Markets (Add on)</li> <li>– Reuters News</li> <li>– Company Events</li> <li>– Company Views (including ESG, estimates, fundamentals, and ownership)</li> <li>– Charts</li> <li>– Full screening capabilities</li> <li>– Premium Deals with full history</li> <li>– Microsoft Office add-in</li> <li>– StarMine content</li> <li>– Conflated data</li> </ul> <p>Workspace for Investment Bankers – Consultant Edition does not include real time data or trading workflows.</p>
Purchase and Review	<p>Capital Markets add on – This add on provides capital markets origination bankers (equity capital markets, debt capital markets, leverage and acquisition finance, project finance and loans) and syndicate desks with the appropriate tools, apps, and datasets. It features real time data sets; fixed income, equities, and commodities pricing calculators, indices, and monitor / analytical apps, and is backed by the existing datasets and features of Workspace for Investment Banking. The add on will empower professionals to perform many of their necessary tasks, from origination to structuring, execution or pricing.</p>
Setup	No variation
Product Usage	No variation
Support	For assistance with Self Registration API, resources are available in the Developer Community.
Evolution	No variation

# Appendix 4: Refinitiv Workspace for Students

The following table contains variations to the service description in the rest of this document that apply to students only:

Chapter	Variations
About Refinitiv Workspace	<p>Refinitiv Workspace for Students provides a customized solution for under and post graduate students in business schools and universities. Professors, PHD students and staff in academic institutions will use Refinitiv Workspace.</p> <p>Refinitiv Workspace for Students will provide users with named individual licenses, which includes capabilities, such as preferences/workspace customization, saving searches, personal portfolio/watchlists, and access to Refinitiv Workspace Web from any PC.</p> <p>Each user will have his/her own named ID and IDs will no longer be generic or shared.</p> <p>For more information speak to your Account Team.</p>
Discover	No variation
Evaluate	<p><b>SUPPORTED CONTENT</b></p> <p>Refinitiv Workspace for Students is available for new and existing academic customers of Refinitiv.</p> <p><b>WORKSPACE FOR STUDENTS EXCLUSIONS</b></p> <ul style="list-style-type: none"> <li>– Messenger</li> <li>– Healthcare Intelligence App (HCARE)</li> <li>– Directory App (PROFILE)</li> <li>– Public Information Book App (PIB)</li> <li>– Get Support (HELP) app</li> <li>– App Studio apps – Will not be exposed, unless requested</li> <li>– Court Wire App (COURT)</li> <li>– Datastream is an add-on</li> </ul>
Purchase and Review	<p><b>PURCHASING PARTNER APPS</b></p> <p>Partner apps are not exposed in Workspace for Students but can be exposed and ordered if requested. Speak to your Account Team for more information.</p> <p><b>USER MAINTENANCE</b></p> <p><b>License Management Tool</b></p> <p>Refinitiv has self service capabilities of managing trial accounts, ordering more licenses, allocating licenses, and so on across Workspace clients.</p> <p>The following capabilities are available to manage a large number of licenses.</p> <ul style="list-style-type: none"> <li>– csv file upload capability <ul style="list-style-type: none"> <li>The capability enables an administrator to upload multiple users' details at once by uploading a csv file. It has an option to grant a license to each uploaded user at the same time or grant a license to all or selected users later. Removing a license from multiple users at once is also possible.</li> <li>The tool will include a capability to assign a group identifier to each user and to remove licenses by selecting a group. This provides the administrator with the ability to easily remove licenses from users within a particular team or a project.</li> </ul> </li> <li>– Self-registration capability <ul style="list-style-type: none"> <li>Each end user can request a license online with little or no intervention from the administrator.</li> </ul> </li> </ul>
Setup	No variation

Chapter	Variations													
Product Usage	<p>To better service academic staff, new add-ons are required to ensure they have access to Workspace for Students while replicating the degree of service they had access to under T1 and Eikon for professors which also provided higher usage levels at a differentiated price point.</p> <p>The following table summarises the product usage limits:</p> <table border="1"> <thead> <tr> <th></th> <th></th> <th>Students</th> <th>Professor/Researcher</th> </tr> </thead> <tbody> <tr> <td>DataStream</td> <td>Ceiling</td> <td>10m data points per month</td> <td>Unlimited</td> </tr> <tr> <td rowspan="2">AMR</td> <td rowspan="2">Ceiling</td> <td>\$2k retail value</td> <td rowspan="2">\$60k retail value, with no limit on pages per day</td> </tr> <tr> <td>150 pages per day</td> </tr> </tbody> </table>			Students	Professor/Researcher	DataStream	Ceiling	10m data points per month	Unlimited	AMR	Ceiling	\$2k retail value	\$60k retail value, with no limit on pages per day	150 pages per day
		Students	Professor/Researcher											
DataStream	Ceiling	10m data points per month	Unlimited											
AMR	Ceiling	\$2k retail value	\$60k retail value, with no limit on pages per day											
		150 pages per day												
Support	<p>Guidelines for handling cases raised by students and university employees:</p> <ul style="list-style-type: none"> <li>– Only users with an Academic Staff add on are entitled to Customer Support including use of the Developer Portal.</li> <li>– The exceptions are university students who are using Thomson Reuters Eikon Premium, who should receive BAU support.</li> </ul> <p>Learning is available from Refinitiv Academy:  <a href="https://solutions.refinitiv.com/academy">https://solutions.refinitiv.com/academy</a></p>													
Evolution	No variation													

# Appendix 5: Refinitiv Workspace for Wealth Advisors

The following table contains variations to the service description in the rest of this document that apply to wealth advisors only:

Chapter	Variations
About Refinitiv Workspace	<p>Refinitiv Workspace for Wealth Advisors provides a tailored product for the wealth management community. It is a portfolio-centric tool that allows both advisory teams and relationship managers to work effectively with the product, while ensuring a high level of governance throughout.</p> <p>For more information speak to your Account Team.</p>
Discover	No variation
Evaluate	No variation
Purchase and Review	<p><b>PURCHASING ADDITIONAL APPLICATIONS</b></p> <p>Purchasing Refinitiv Apps</p> <p>Generic Refinitiv applications are not available for purchase individually but are packaged into propositions based on the workflows of users. Refinitiv Workspace contains all the available Refinitiv applications. However, certain add-ons fees may be applied to the individual applications if they require a significant amount of onboarding.</p> <p>This primarily refers to the workflow applications in Refinitiv Workspace for Wealth Advisors, such as House Views and Market Insights (HVMI). For HVMI's service description, see the relevant document on MyRefinitiv. You can also obtain administrator functionalities for Portfolio Analytics, ESG and Stock Reports Plus in standard Refinitiv Workspace for Wealth Advisors. Both the Portfolio Administrator and HVMI are free of charge add-ons although HVMI has an onboarding cost. Stock Reports Plus and ESG are both fee liable add-ons. Within the Advanced version the only add-on needed would be for HVMI and any portfolio integration costs.</p> <p>Your Account Team is available to discuss the best proposition to suit your individual needs.</p> <p>Purchasing Partner Apps – No variation</p> <p>Free Trials – No variation</p> <p>Accessing Applications – No variation</p> <p><b>PURCHASING ADDITIONAL CONTENT</b></p> <p>You can purchase additional Refinitiv and partner content by requesting it from your Account Team. You can find a catalogue of content available for purchase in the Content Kiosk application in Refinitiv Workspace. The Content Kiosk app is available in the App Library or by searching "Content Kiosk". Within Refinitiv Workspace for Wealth Advisors you can also purchase advanced ESG content and Stock Reports Plus data as add-ons for minimal monthly fees.</p> <p><b>BILLING – No variation</b></p> <p><b>PARTNER APPLICATIONS AND CONTENT – No variation</b></p> <p><b>USER MAINTENANCE – No variation</b></p> <p><b>RENEWALS AND CANCELLATIONS – No variation</b></p>
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

# Appendix 6: Refinitiv Workspace for Analysts and Portfolio Managers

The following table contains variations to the service description in the rest of this document that apply to analysts and portfolio managers only:

Chapter	Variations
About Refinitiv Workspace	Refinitiv Workspace for Analysts and Portfolio Managers is a tailored solution addressing the needs of asset managers, hedge funds, banks, endowments, sovereign funds, and private equity firms. It is a workflow centric tool focused on market monitoring, idea generation, valuation analysis, and portfolio management. Refinitiv Workspace for Analysts and Portfolio Managers is designed to adjust to users' habits and includes customizable functionality, resulting in the product quickly providing relevant content in an intuitive design. For more information speak to your Account Team.
Discover	No variation
Evaluate	SUPPORTED CONTENT Refinitiv Workspace for Analysts and Portfolio Managers is cross-asset class and provides content and functionality central to the analyst and portfolio management workflows, including: <ul style="list-style-type: none"> <li>– Reuters News</li> <li>– Sell-Side and Independent Company, Industry, and Market Research</li> <li>– Company Events (Including Transcripts and Briefs)</li> <li>– Company Views (including Estimates, Fundamentals, and Ownership)</li> <li>– Portfolio Management Tools</li> <li>– Charts</li> <li>– Mobile apps</li> <li>– Screening</li> <li>– StarMine Analytics</li> <li>– Datastream</li> <li>– Pricing Data</li> <li>– Microsoft Office Add-in</li> <li>– Fixed Income Calculators</li> </ul>
Purchase and Review	No variation
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

# Appendix 7: Refinitiv Workspace for FX Trading

The following table contains variations to the service description in the rest of this document that apply to Foreign Exchange and Money Markets Trading workflows only:

Chapter	Variations
About Refinitiv Workspace	Refinitiv Workspace for FX Trading is a tailored solution addressing the needs of FX and Money Market Traders across the FX ecosystem including primary dealers, agency banks, brokers, and active buy-side traders. It is a workflow-centric tool focused on market monitoring, idea generation, trading risk management and valuation of spot FX, forwards, NDFs, FX options and short term interest rate products. Refinitiv Workspace for FX Trading is designed to adjust to users' habits and includes customizable functionality, resulting in the product quickly providing relevant content in an intuitive design.
Discover	No variation
Evaluate	<p><b>SUPPORTED CONTENT</b></p> <p>Refinitiv Workspace for FX Trading is global, cross-asset class, and provides content and functionality central to FX and Money Market Trading workflows, including:</p> <ul style="list-style-type: none"> <li>– Exclusive market price discovery content from LSEG venues, including Matching and FXall spot and forward rates. Availability of broker rates for all FX and rate derivatives. In terms of FX content for emerging markets, Refinitiv Workspace for FX Trading is best in class.</li> <li>– Reuters News, as well as over 10,500 additional sources and exclusive technical market commentary from FX Buzz.</li> <li>– Full suite of FX and Money Market calculators, including FX forwards, NDFs, deposit analysis, FX options with support for client contributed curves, and surfaces to drive analytics.</li> <li>– Unique insights and views derived from Refinitiv's exclusive content. This includes Reuters Polls, Matching Liquidity Heatmap, FX Performance Tracker, SDRV Regulatory Reported trades, as well as cross-asset/global-macro insight to support FX trading activities. Curve Builder will provide FX and IR term structures for scenario analysis and ingestion via the calculators.</li> <li>– MARVAL, which provides position revaluation and risk metrics across Spot FX, Forwards, FX Swaps, NDFs, FX Options and Term Deposits. It will also support rates and derivatives including fixed income cash and derivatives.</li> <li>– Datastream and Charting / technical analysis covering 50 million+ time series, 70+ years of data across 175+ countries. Also includes Time and Sales with trades for matching FX data.</li> <li>– Mobile apps</li> <li>– Microsoft Office Add-in</li> <li>– Codebook</li> </ul> <p>For more information, see the FXT Service Description at this location:  <a href="https://www.refinitiv.com/en/products/fx-trading/">https://www.refinitiv.com/en/products/fx-trading/</a></p>
Purchase and Review	No variation
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation



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