# Version history

<table>
<thead>
<tr>
<th>Software version</th>
<th>Document version</th>
<th>Summary of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.0.53</td>
<td>1.0</td>
<td>Rebranded version of the Refinitiv Eikon IT-Managed Installation Guide</td>
</tr>
</tbody>
</table>
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Refinitiv Eikon IT-Managed Installation Guide
Document Version 1.0
About this guide

In this guide
The Refinitiv Eikon IT-Managed Installation Guide is intended for IT departments who are installing Eikon for a number of PCs.

Target audience
This guide covers information required for IT specialists who are responsible for installing Eikon on many PCs.

Related documents
- Refinitiv Eikon Obsolescence Policy
- Eikon Version 4 Updates
Conventions used in this guide

Text formats

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

<table>
<thead>
<tr>
<th>Convention</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl+A</td>
<td>Menu names and items, command buttons and key combinations</td>
</tr>
<tr>
<td>Cross-ref</td>
<td>Cross-references</td>
</tr>
<tr>
<td>Consolas font</td>
<td>User input, directories, file names, etc. that you must enter exactly as shown</td>
</tr>
<tr>
<td>Consolas italics</td>
<td>Site or user-specific variables or parameters</td>
</tr>
<tr>
<td>File &gt; New</td>
<td>Sequence of menu items to choose.</td>
</tr>
<tr>
<td>Eikon User Guide</td>
<td>Document titles</td>
</tr>
</tbody>
</table>

Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Place the cursor over the item and click to make a choice in a radio/check box.</td>
</tr>
<tr>
<td>Choose</td>
<td>Make a choice from two or more available menu items.</td>
</tr>
<tr>
<td>Click</td>
<td>Quickly press and release the mouse button while the cursor is over the item.</td>
</tr>
<tr>
<td>Double-click</td>
<td>Quickly press and release the mouse button twice in succession while the cursor is over the item.</td>
</tr>
<tr>
<td>Drag and drop</td>
<td>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.</td>
</tr>
<tr>
<td>Enter</td>
<td>Type in data.</td>
</tr>
<tr>
<td>Highlight</td>
<td>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.</td>
</tr>
<tr>
<td>Press</td>
<td>Press a key on your keyboard.</td>
</tr>
</tbody>
</table>
IT-managed installations, updates, and upgrades

In this section
- Installing Eikon
- Updating Eikon

Installing Eikon

Verifying hardware and software requirements
Before installing Eikon, ensure that your hardware and software meet certain requirements. For more information, see:
- Eikon 4.0 PC Requirements
- Eikon System Test Guide

You can also click the question mark icon next to each test result to view the steps you must take to resolve the issue.

Downloading the installation package from MyRefinitiv
Follow these steps to retrieve the installation and add-on package.
2. Follow the on-screen instructions to download the direct installation package. The package is a ZIP file.
3. Uncompress the package.

Contents of the installation package
The package contains a Setup folder and these files:
- DirectWorkflow.xml
- EikonInstaller.exe
- export.txt
- Readme.txt
- VBA71-32bit_CommonControl-32bit_x86.exe

The Setup folder contains these files:
- Eikon_Core_4_0_xxxxx.eik
- EikonDM_4_0_xxxxx.eik

The Add-on folder contains all Eikon add-on packages.
Configuring Eikon before installing the package

If you want to configure the application before installing, you must extract the core package and run Configuration Manager.

1. Extract the core package Eikon_Core_4_0_xxxxx.eik, by running this command:
   ```
   EikonInstaller.exe /EXTRACT="<path>\Eikon_Core_4_xxxxxxxxx.eik" /D="<target_dir>"
   ``
2. Open Configuration Manager, by running this command:
   ```
   Setup\Eikon_Core_4_0_xxxxx\Files\Bin\EikonDM.exe sso=0
   ```
3. When Configuration Manager opens, go to Preparing configuration files for information on how to configure Eikon.

Installing the package on a test PC

Follow these steps to install the package for testing and configuration.

1. Run the EikonInstaller.exe file.
2. If the application notifies you that your hardware and/or software must be updated, click Exit, update accordingly, then run EikonInstaller.exe again.
3. Once the installation is complete, click Exit.

Locating files and folders for a per-machine installation

When you carry out a per-machine installation, files are created under these folders by default:

<table>
<thead>
<tr>
<th>Type of OS</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>64-bit</td>
<td>%programfiles(x86)\Thomson Reuters\Eikon\</td>
</tr>
<tr>
<td>32-bit</td>
<td>%programfiles\Thomson Reuters\Eikon\</td>
</tr>
</tbody>
</table>

Application information files and folders

Files containing logs, configuration, and other information about Eikon are stored under:

%programdata%\Thomson Reuters\Eikon Data\%

Note: End-users with restricted rights must have full permissions for the %programdata%\Thomson Reuters\ path.

Next steps

After installing the package, follow these procedures to complete deployment.

- Preparing configuration files
- Running a mass deployment

Updating Eikon

About updates

Currently, Refinitiv issues a minor update on a quarterly basis. However, for further information, refer to the Eikon Version Obsolescence Policy on MyRefinitiv.
Automatic installation of updates

Eikon automatically installs updates in the background when the user closes Eikon Desktop and Microsoft Office, then restarts each product.

To make sure that all updates are installed, we recommend that you schedule weekly reboots of PCs.

Eikon Update Service

By default, the per-machine installation includes the Eikon Update Service. The application uses this service to automatically install updates.

![Eikon Update Service](image)

**Note:** To view the service you can go to Control Panel > Administrative Tools > Services.

Manual installation of updates

IT administrators may manually install updates. This entails:

- Retrieving a software package (for further information, see Downloading the installation package from MyRefinitiv)
- Installing updates (for further information, see Running a mass deployment)

**Note:** To switch to manual installation of updates, see Product Change Notification 7139.

Related documents

For the most up-to-date information regarding update frequency and policies, refer to:

- Refinitiv Eikon Obsolescence Policy
- Eikon Version 4 Updates
Preparing configuration files

In this section

- About configuration
- Customizing installation options
- Basic configuration using local files
- Basic configuration using configuration proxy or hosted files

About configuration

Configuration options for each type of user account

There are three types of user accounts. While the installation process is the same for all accounts, the configuration options available vary for each type of account.

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Managed</td>
<td>Large sites with an on-site real-time infrastructure (Refinitiv Data Management Solutions) and Time Series Proxy</td>
<td>Customizing installation options&lt;br&gt;Basic configuration using local files&lt;br&gt;Basic configuration using configuration proxy or hosted files</td>
</tr>
<tr>
<td>Refinitiv Managed</td>
<td>Medium sites with Streaming Proxy and Time Series Proxy distribution devices on site and managed by Refinitiv.</td>
<td>Customizing installation options</td>
</tr>
<tr>
<td>Refinitiv Hosted</td>
<td>Small sites which retrieve all data from Refinitiv Platform.</td>
<td></td>
</tr>
</tbody>
</table>

Customizing installation options

Who can customize these options?

All three types of accounts can customize installation options.

What can I customize?

You can customize installations by defining:

- An installation path
- A location for temporary application files

How do I customize the installation?

Follow these steps to customize the installation.

1. From the Start menu, choose **Refinitiv > Configuration Manager**.
2. Go to the **Install Options** tab and choose the folder locations.
3. Click **Save to file**, choose a location, and use **EikonInstallConfig.xml** as the file name.
Basic configuration using local files

About local configuration files
Customer-Managed accounts can use local configuration files. These files are stored on the local drive of the PC where Eikon is installed. You may choose to use this type of configuration if the sites where you install Eikon meet these conditions:

- configuration never changes
- different sites and/or groups of users do not require specific configurations

Creating local configuration files
Follow these steps to setup local configuration files.
1. From the Start menu, choose Refinitiv > Configuration Manager.
2. Choose Customer Managed (Local Configuration Files) from the menu.
3. Enter settings on these tabs:
   - Real-Time: Configuring real-time data access
   - Permission: Configuring permissions
   - Feeds: Configuring feeds
   - DBU: Configuring a local DBU
   - Network: Configuring the network
   - Logs: Configuring logs
4. Click Save to file, choose a location, and use EikonInstallConfig.xml as the file name.

Configuring real-time data access
On the Real-Time tab, you can configure connections to retrieve real-time data from your Refinitiv Real-Time Distribution System\(^1\).

For Refinitiv Real-Time Advanced Distribution Server\(^2\) connections, you must separate the server names by adding a blank space in the Distributors field.

Configuring permissions
On the Permissions tab, you ensure that users are correctly permissioned to receive real-time data.
1. First, configure the Permission Mode. This defines how Eikon retrieves the user permissions on the Refinitiv Real-Time Distribution System in order to synchronize them with the Refinitiv Platform.
   - This synchronization is mandatory to retrieve time series, news stories, and views data.
2. Second, define the DACS User Name and Position.

This table describes the available settings on the Permissions tab.

---

\(^1\) Formerly TREP
\(^2\) Formerly ADS
### Configuration

<table>
<thead>
<tr>
<th>Configuration</th>
<th>Available Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permission Mode</td>
<td>Permission Proxy</td>
<td>Use with ADS server(s) when the end-user PC is on a different network from the DACS server(s).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The Port setting is used to retrieve permissions through an HTTP request sent over the DACS Sink Daemon of the ADS server(s).</td>
</tr>
<tr>
<td>Permission Service</td>
<td></td>
<td>Use with ADS server(s) when the end-user PC is on the same network as the DACS server(s).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Services List is a list of hostname(s) or IP address(es) for the DACS server(s).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The Port setting is used for the HTTP request.</td>
</tr>
<tr>
<td>DACS Identification</td>
<td>User Name</td>
<td>DACS user name defined on the DACS server(s). If empty, the Windows user login is used.</td>
</tr>
<tr>
<td></td>
<td>Position</td>
<td>DACS position defined on the DACS server(s). If empty, the PC name and IP address are used.</td>
</tr>
</tbody>
</table>

For each permission mode, parameters for DACS Identification are usually left blank so that DACS uses:

- the user’s Windows login name
- the host name and IP address

### Configuring feeds

For deployment with your own Refinitiv Real-Time Distribution System\(^3\), configure the feeds as appropriate for your site(s). Be sure to delete any feeds that are not available on your site(s).

### Configuring a local DBU

When you click **Allow DBU Configuration** on the **DBU** tab, you can define these settings:

- Primary Server
- Failover Server
- Service Name or Port Number
  - When you use a service name, you must declare the corresponding port number in your services file.
- Client ID
  - Enter the user ID supplied to the DBU. This ID is not used for permissioning.
- Number of Sources to Merge
- Initial Source ID

### Configuring the network

If the web proxy requires authentication, you must provide this information:

- The web proxy URL for your site
- The login and password that the proxy allows to send and receive requests

---

\(^3\) Formerly TREP
Client SSO (Optional)

Add your Single Sign On (SSO) URL.

Configuring logs

Under the Logs tab, you can create the log files to record application activity. These records are especially useful for troubleshooting. By default, logging is not activated.

To activate logging, follow these steps:

1. Select Configure Logs on the Workstation. The log options are now active.
2. Choose the Trace Level for the desktop.
3. 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:
   \%ProgramData\Thomson Reuters\Eikon Data\Logs

Basic configuration using configuration proxy or hosted files

About the Configuration Proxy

Customer Managed accounts can use the Configuration Proxy for configuration. These files are placed on an internal web server or a shared network drive, referred to as the Configuration Proxy. The Configuration Proxy serves as a centralized repository for configuration files. You may choose to use this type of configuration, if the sites where you install Eikon meet the following conditions:

- Configurations change from time to time
- Different sites and/or groups of users require specific configurations

About hosted configuration files

Customer Managed accounts can use hosted files for configuration. These files are uploaded to the Refinitiv Platform by your Refinitiv account manager. You may choose to use this type of configuration if the sites where you install Eikon meet these conditions:

- Configurations rarely or never change
- Different sites and/or groups of users require specific configurations
- Do not need or wish to maintain a Configuration Proxy

Creating files used on Configuration Proxy or hosted on Refinitiv Platform

Follow these steps to create and save files.

1. Create local configuration files, described in Basic configuration using local files.
2. Go to the <installation_path>\X\Config folder.
3. Open RFA.RFA-configuration-file and check the real-time server list.
4. Take RFA.RFA-configuration-file, OverrideConfiguration.xml, and any other real-time files, and do one the following:
   a. Place them on the shared drive or web server you are using as Configuration Proxy (see Who can customize these options?)
   b. Send them to your Refinitiv account manager (see What are hosted configuration files?)
5. Use Notepad or an XML editor to make the following modifications to OverrideConfiguration.xml:
   a. Change the value of the following setting to indicate the location of RFA.RFA-configuration-file:
      
      `<Setting name="COMMON_PIXL_CUSTOMERMANAGED_DEFAULT_RFA_CONFIGURATIONFILES_MAINFILE">%RDE_INSTALL_PATH_CONFIG\rfa.rfa-Configuration-File</Setting>`
   b. Specify the path to other real-time files, if any
6. From the Start menu, choose Refinitiv > Configuration Manager.
7. Depending on where you move the files in Step 4, from the menu, do one of the following:

<table>
<thead>
<tr>
<th>If you...</th>
<th>Choose...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placed the configuration files on a shared drive or web server</td>
<td>Customer Managed (Using Configuration Proxy)</td>
</tr>
<tr>
<td>Sent the configuration files to a Refinitiv account manager</td>
<td>Customer Managed (Hosted Configuration)</td>
</tr>
</tbody>
</table>
8. Under the URL tab, enter the path to OverrideConfiguration.xml.
9. Click Save to file, choose a location, and use EikonInstallConfig.xml as the file name.

**Note:** Overwrite the previous version of EikonInstallConfig.xml, if any.
Running a mass deployment

In this section

- About mass deployment
- Preparing installation files
- Preparing the installation command line
- Using your mass deployment tool

About mass deployment

You can deploy Eikon with your own mass deployment tool. To do so, follow the steps below:

1. Make sure the installation files are in a shared location, that is, one that is accessible to all end-user PCs.
2. Prepare the command line that is used to install the software.
3. Execute the command line with your mass deployment tool.

Preparing installation files

About the <shared_location> parameter for installation files

Installation files must be accessible to all end-user PCs. Where you see the <shared_location> parameter, replace it with one of the following:

- UNC path with the IP address or hostname
- mapped drive
- HTTP server URL

Moving files to a shared location

You must move the following installation files and folder to a shared drive, as shown in the illustration:

- DirectWorkflow.xml
- Setup\EikonDM_4_0_xxxxx.eik
- Setup\Eikon_Core_4_0_xxxxx.eik
- Any add-on files (found in the Setup folder)
- EikonInstallConfig.xml, that is, the file created during configuration (see Preparing configuration files)

About the direct workflow file

The DirectWorkflow.xml file indicates the location of EikonDM.eik, and provides the installation order and location of the core package and add-on files.
EikonDM.eik must appear at the top of the list, followed by the core package, then any add-ons. This example includes the InsertLink add-on.

```xml
<install version="1.0">
  <check filename="Setup\EikonDM_4_x_xxxxx.eik"/>
  <run filename="Setup\Eikon_Core_4_x_xxxxx.eik"/>
  <run filename="Setup\Add-on\Eikon_InsertlinkAdd-On_x_x_xxxx.eik"/>
</install>
```

Preparing the installation command line

About the installation command line

To perform a mass deployment, you must prepare an installation command line. The command line depends on whether you used Configuration Proxy to host your configuration files.

The following sections give example command lines for each configuration type.

Example installation command when using Configuration Proxy

This example command line applies only if you are using Configuration Proxy. Replace `<config_proxy>` with one of the following:

- UNC path with the IP address or hostname
- HTTP server URL

```
EikonInstaller.exe /SILENT /COMMAND=_execute=INSTALL _installWorkflow="<Shared_Location>\DirectInstall\DirectWorkflow.xml" _configProxyURL="<config_proxy>\OverrideConfiguration.xml"
```

Example installation command for local/hosted configurations without Configuration Proxy

This example command line applies to both local and hosted configurations, but only if you are not using Configuration Proxy.

```
EikonInstaller.exe /SILENT /COMMAND=_execute=INSTALL _installWorkflow="<shared_Location>\DirectInstall\DirectWorkflow.xml" _configFileName="<shared_Location>\EikonInstallConfig.xml"
```

For more information

For a complete list and description of the parameters and supported values, see Appendix A: Command line parameters, examples and processes.

Using your mass deployment tool

Installing Eikon

After preparing your installation files and command line, you are ready to run your mass deployment tool using the installation command line.
Uninstalling Eikon

If you want to uninstall Eikon, run this command line.

```
<installation_path>\Eikon.exe -uninstallsilent
```

Restoring the previous version of Eikon

If you want to restore the previous version of Eikon, run this command line.

```
<installation_path>\Eikon.exe -rollbacksilent
```
Appendix A: Command line parameters, examples and processes

In this appendix
- Command line parameters
- Example installation commands
- Example configuration commands
- Examples of other commands

Command line parameters

Parameters used for installation only

The table lists parameters and supported values for installation. These parameters are used in conjunction with EikonInstaller.exe.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/COMMAND</td>
<td>Indicate command line parameters supported by Configuration Manager. This parameter is required.</td>
</tr>
<tr>
<td>/SILENT</td>
<td>Install Eikon in silent mode. This parameter is required.</td>
</tr>
</tbody>
</table>

Parameters used for installation and configuration

The table lists parameters and supported values for configuration. You can use these parameters in conjunction with either of these commands:
- EikonInstaller.exe /SILENT /COMMAND
- EikonDM.exe

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/?</td>
<td>Open the help page.</td>
</tr>
<tr>
<td>_configFileName</td>
<td>Give the full path to the EikonInstallConfig.xml file. You use this file as a source of the settings for installation or configuration.</td>
</tr>
<tr>
<td>_configProxyURL</td>
<td>Give the full path to the OverrideConfiguration.xml file hosted on Configuration Proxy. Eikon reads the settings at the indicated URL every time the user starts the application.</td>
</tr>
<tr>
<td>_execute</td>
<td>Give the list of actions to perform. This parameter only works in silent mode. Supported values:</td>
</tr>
<tr>
<td></td>
<td>INSTALL to install the applications listed in the InstallWorkflow.xml file</td>
</tr>
<tr>
<td></td>
<td>CONFIG to reconfigure the application</td>
</tr>
<tr>
<td></td>
<td>UNINSTALL to remove the application</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| _fallbackFilePath         | Specify the path to the FallbackIntranetOverrideConfiguration.xml file, used when Eikon is unable to connect to the Configuration Proxy. Supported values:  
- Enter the path of your choice or click **Browse** to locate the path where you want to store the FallbackIntranetOverrideConfiguration.xml file.  
- By default, the fallback override configuration file is saved in %USERPROFILE%\AppData\Local\Thomson Reuters\Eikon User\Cache\<UUID>\FallbackIntranetOverrideConfiguration.xml. |
| _forceInstall             | Set the conditions under which installation can take place. By default, installation only starts when all prerequisites are met. This parameter allows you to ignore the prerequisites and force installation to proceed.  
- 0 to start installation only if prerequisites are met (default)  
- 1 to start installation even when prerequisites are not met |
| INSTALLDIR                | Define a custom installation directory only for Eikon.                       |
| _installWorkflow          | Specify the location of DirectWorkflow.xml for the direct installation method. |
| USERCONFIG_FOLDER         | Define the location of temporary application files.                         |
| _logFileName              | Define a name for the installation log file.  
The default name is EikonDM_%COMPUTERNAME%_YYYYMMDD_HHMMSS_Log.xml |
| _logFilePath              | Specify the location of the installation log files.  
The location must be a valid path. The default path depends on the user security group and the operating system used. |
| _logLevel                 | Set the level of log messages to store. Supported values:  
- 0 for no logs  
- 1 to log error messages  
- 2 to log warning messages  
- 3 to log information messages  
- 4 to log debug data  
- 5 to log verbose debug data (default) |
| RDE_LOG_PATH              | Define the location of a log path for all Eikon components.                  |
| _silentMode               | Set the Deployment Manager installation and/or configuration mode. Supported values:  
- 0 for interactive mode (default); this parameter starts the Configuration Manager application.  
- 1 for silent mode; you must use this setting _silentMode=1 to reconfigure using the command line |
| SSO_CONNECTIONMODE        | Set Single Sign-On (SSO) connection mode. Setting this parameter is equivalent to choosing the connection mode with the **Choose Connection** program from Start > Programs > Thomson Reuters  
Supported values:  
- **AUTO** to automatically choose the SSO connection mode between the private network and the Internet  
- **INTERNET** to force connection through the Internet, even when the private network is available  
- **MPLS** to establish the connection through a private network. |
Example installation commands

Description of the command line syntax

- `EikonInstaller.exe /SILENT /COMMAND=` must be used in this order.
- Place installation and configuration parameters after `/COMMAND`.

```
EikonInstaller.exe /SILENT /COMMAND=parameter1=value1 parameter2=value2
```

Description of .ini file syntax

Instead of including the parameters in the command line, you can place them in an .ini file. This is especially useful if you have a long list of parameters.

- The command line syntax is:
  ```
  EikonInstaller.exe /SILENT /COMMAND=@<file_path>/<filename>.ini
  ```
- Place the parameters and values in the .ini file as shown.
  ```
  parameter1=value1
  parameter2=value2
  parameter3=value3
  ```

Basic installation without any configuration

The parameters used in this example are:

- `/SILENT`
- `/COMMAND`
- `_execute`

```
EikonInstaller.exe /SILENT /COMMAND=_execute=INSTALL
```

Installation and configuration using local files

The parameters used in this example are:

- `/SILENT`
- `/COMMAND`
- `_execute`
- `_configFileName`

```
EikonInstaller.exe /SILENT /COMMAND=_execute=INSTALL _configFileName="C:\Config\EikonInstallConfig.xml"
```
Installation and configuration using Configuration Proxy

The parameters used in this example are:

- /SILENT
- /COMMAND
- _execute
- _configFileName
- _configProxyURL

```
EikonInstaller.exe /SILENT /COMMAND=_execute=INSTALL _configFileName="C:\Config\EikonInstallConfig.xml" _configProxyURL="http://tr-config-proxy/config/OverrideConfiguration.xml"
```

Advanced installation with customized file locations

In this example, the following locations are customized:

- installation folder
- application temporary files folder
- application and installation log files

The parameters used in this example are:

- /SILENT
- /COMMAND
- _execute
- INSTALLDIR
- USERCONFIGFOLDER
- RDE_LOG_PATH
- _configFileName
- _logFileName
- _logFilePath

```
EikonInstaller.exe /SILENT /COMMAND=_execute=INSTALL INSTALLDIR="C:\Eikon 4\" USERCONFIGFOLDER="%APPDATA%\Eikon\Cache\" RDE_LOG_PATH="%APPDATA%\Eikon\Logs\"
_configFileName="C:\Config\EikonInstallConfig.xml" _logFilePath="C:\EikonInstallLog\"
_logFileName="EIKON_INSTALL_%COMPUTERNAME%_Log.xml"
```
Example configuration commands

Description of the syntax

When you have already installed Eikon, you can reconfigure the application with the EikonDM.exe command.

Reconfiguration to use local configuration files

The parameters used in this example are:

- \_silentMode
- \_execute
- \_configFileName

EikonDM.exe \_silentMode=1 \_execute=CONFIG \_configFileName="C:\Config\EikonInstallConfig.xml"

Reconfiguration to use Configuration Proxy

The parameters used in this example are:

- \_silentMode
- \_execute
- \_configProxyURL

EikonDM.exe \_silentMode=1 \_execute=CONFIG \_configProxyURL="http://eikon-config-proxy/tr_config_files/OverrideConfiguration.xml"

Examples of other commands

About the examples

The examples show the default path %programfiles(x86)%. If you customized the location of the installation, adapt the examples accordingly.
Uninstall the application

\texttt{<installation\_path>\Eikon.exe -uninstallsilent}

Rollback

This command reverts to the previously used version of Eikon.

\texttt{<installation\_path>\Eikon.exe -rollbacksilent}

Remove backup

This command enables you to remove the backup version of Eikon.

\texttt{<installation\_path>\Eikon.exe -removebackup}
Appendix B: Customizing display templates

In this appendix
- Location of custom display templates
- Location of other files

Location of custom display templates

About using custom display templates
If your site uses custom display templates, you must install the templates and data dictionary in a custom folder and not in the default Eikon program folder.

Setting the location of the templates
Configuring the custom display templates folder requires setting these parameters in the OverrideConfiguration.xml file (locally or on the configuration proxy). In the example, the folder is C:\Custom DT\RealTime.

```
<Setting name="COMMON.PIXL.CUSTOMERMANAGED.DEFAULT.DATADICTIONARIES.APPENDIX_A" C:\Custom DT\RealTime\appendix_a</Setting>
<Setting name="COMMON.PIXL.CUSTOMERMANAGED.DEFAULT.DATADICTIONARIES.ENUMTYPEDEF" C:\Custom DT\RealTime\Display Templates\enumtype.def</Setting>
<Setting name="COMMON.REALTIME.DISPLAYTEMPLATE.PATH" C:\Custom DT\RealTime</Setting>
```

Eikon retrieves display templates and data dictionary files from the custom folder. When files are not found, the application falls back to the Hosted Display Templates service. The workflow is slightly different for data dictionary and display templates files. For data dictionary files the fall back from custom display templates folder to Hosted Display Templates service is automatic.

Location of other files

RDM Field Data Dictionary
If the site uses an RDM Field Data Dictionary file for an RSSL connection, then you must:
- Download the data dictionary from Refinitiv Real-Time Distribution System
- Configure the RDM Field Data Dictionary location in OverrideConfiguration.xml file as illustrated

```
<Setting name="COMMON.PIXL.CUSTOMERMANAGED.DEFAULT.DATADICTIONARIES.RDMFIELDDICTIONARY" C:\Custom DT\RealTime\RDMFieldDictionary</Setting>
```

Mapping between the display template number and file
A file named custom_dt.list must be placed in the custom display templates folder. This file defines the mapping between the display template number and the display template file.

The display template number depends on instruments and its value is defined in the PREF_DISP (FID 1080) field.

---

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When a mapping is defined in custom_dt.list for the display template number, Eikon loads the display template file from the custom display template folder.

When no mapping is defined for the display template number, Eikon retrieves the display template file directly from the Hosted Display Templates service.

Example mapping file

Here is an example of a custom_dt.list file.

```
!Custom_dt file
!Version 1.0
!
10 nz_trl1_chn_nt.chn
11 nz_trlindex_chn_nt.chn
12 page_ifrm7_nt.qte
13 page_ifrm8_nt.qte
```
Appendix C: Datastream apps in Eikon for Microsoft Office

In this appendix
- About Datastream apps
- Enabling the Datastream apps
- Troubleshooting Datastream in Microsoft Office

About 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 latest versions of Datastream For Office (DFO) and Datastream Charting are installed.

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, 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.

Note: For further information, refer to PC Requirements on MyRefinitiv.

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:

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

   The Options dialog box appears.
4. Click the Enable buttons for the Datastream (DFO) and Datastream Charting items.
5. 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.
  ○ 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.

Troubleshooting Datastream in Microsoft Office

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.
   ○ 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.