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About This Document

Intended Readership

This document is intended for users of Thomson ONE on the Smart Client Platform.

In This Document

This document contains information on using Thomson ONE on the Smart Client Platform including setting up and navigating among services and settings. For detailed information on Thomson ONE services that are available within the application, access Help by pressing the F1 key.

Feedback

For help with Thomson ONE on the Smart Client Platform, visit Thomson Reuters Customer Zone at https://customers.thomsonreuters.com. You must register to use this site. Customer Zone is the online entry point to Thomson Reuters support and service functions, which include the following:

- Contact Us: A list of contact numbers and an electronic form to request support. Customer Zone sends an on-screen confirmation number and responds to your service request within 15 minutes. https://customers.reuters.com/crmcontactus/support.asp.
- Alerts and Notifications: Product change notifications and service alerts.
- Community: Archive of Thomson Reuters newsletters and customer events.

If your product is not in the Product drop-down when you go to Contact Us in Customer Zone, select Product not Found...Search More, type the product name, and then enter the remaining items.
Chapter 1  Navigation Options

Thomson ONE on the Smart Client Platform delivers a broad and deep range of financial content, all within a workspace that fits your needs and workflow. It is the next-generation Thomson ONE desktop solution based on Microsoft’s Smart Client technology. The term Smart Client refers to a combination of the benefits of thin client software (ease of deployment and automatic updates) and thick client software (high performance, high productivity, rich user interface). Thomson ONE on the Smart Client Platform bridges the gap between the Thomson ONE thin and thick client applications, capturing the best of both worlds.

Note that the application is not a thin or web application. It can be installed and launched from a web browser, but the application files reside on your desktop PC, similar to a traditional installed application. This ensures high performance, functionality and flexibility. Unlike a traditional application though, the initial installation is much more streamlined, and future updates can happen automatically without any user intervention. For more information on the benefits of Smart Client and how it works, see “Smart Client and Thomson ONE” on page 10.

The workspace is fully customizable and includes a common set of navigational elements. The workspace consists of groups, pages and services. Once a group or page has been created, you can add a service to the workspace. Selecting a group or page in the side navigation will display the service(s) in the workspace area. You can add, delete, move, rename, and/or edit groups and workspaces. The main window contains a Quick Access Toolbar, side or top navigation, Quick Nav, Tools and Preferences Menus, and a status bar.

Navigation Options

You can customize your workspace with a variety of navigational elements and tools that allow you to easily access the services and pages you need.

Access Groups and Pages Using Top Navigation or Side Navigation

Depending on the configuration that has been chosen for your account or company, you can navigate the groups, pages and services within Thomson ONE using either a Side Navigation pane or Top Navigation toolbars.

Top Navigation

Top Navigation comprises two toolbars. Groups are displayed on the bar at the top of your screen. Pages within the active group are displayed on a smaller bar below it.
**Side Navigation**

The Side Navigation pane is divided into two sections. The lower section contains a tab for each of your groups, and the upper section contains the sub-groups and pages within the currently selected group. The pane is resizable and can be dragged and docked to any side of your screen.

**Find a Service Within Your Workspace**

1. Press **Ctrl+G**.
   - The **Thomson ONE Services** dialog opens with the name of each service in your workspace and the page that contains it.
2. If you do not immediately see the name of the service, begin to type its name and matching services are listed.
3. To access a service, double-click its name.

**Use the Quick Nav**

The Quick Nav is a customizable toolbar that offers easy access to your favorite pages and groups.

**Customize Your Quick Nav**

You can set up your Quick Nav with the pages and groups you use most. When you add a group, its associated sub-groups and pages are also added.

**To customize your Quick Nav**

1. To add a page or group to the Quick Nav, right-click it in the side-navigation pane and click **Add to Quick Nav**.
2. To add a Quick Nav group (drop-down), click ![Group Icon] at the left side of the quick nav, type a name for the group, and then press Enter.
3. To rearrange Quick Nav items, drag and drop them to their new locations on the toolbar.
4. To delete an item, right-click it and choose **Delete**.
To hide Quick Nav icons added by the seed account

1. Click 🔄 and then click Preferences.
2. In the left pane, click Framework.
3. Clear the Show Seed User’s Quick Nav Items check box.

**Create and Use Favorites**

Favorites let you display your most frequently used services for easy access.

**To create a favorite**

- Right click in the service and choose Add to Favorites.

  You can also click 🔄 and select Add to Favorites.

**To access a favorite service**

- Right click in a service and choose the favorite service you want to access or click 🔄 and choose the favorite service.

**To organize favorites**

1. Click 🔄 and select Organize Favorites.
2. To create a folder, select Create Folder.
3. To remove a favorite, select the favorite and click Remove.
4. To rename a favorite, select the favorite and click Rename.
5. To move a favorite, select and right-click the favorite, and then select either Move Up or Move Down.

**Hotkeys**

Hotkeys are keyboard shortcuts that allow you to assign Function Keys and other keyboard shortcuts to access a particular service quickly.

**To configure a hotkey**

1. Click 🔄 on the Quick Access Toolbar and select Hotkey Configuration.
2. From the HotKeys menu, select a hot key.
3. From the Services menu, search for a service or navigate within groups to find a service. Click the service name to select it.
4. Click Assign, and then click OK.
5. Verify that the function key displays the assigned service.

**Access Reuters Messaging**

With Reuters Messaging in Thomson ONE, you can securely communicate with your colleagues and clients.

Features of Reuters Messaging include:
• Real-time instant messaging for single or multi-party conversations
• An online, searchable directory of the financial community
• Customizable user access features to control who can see your online presence and who can contact you

To access Reuters Messaging in Thomson ONE

1. Hover your mouse over
2. Click Reuters Messaging.
Chapter 2  
Set Up Your Services

Your workspace is customizable, allowing you to create separate pages containing multiple services that work in different ways, depending on your needs and personal preferences: standard services, docked services, and pop-up services.

Standard Services are those that you set up on pages. Docked Services remain in a fixed position outside of the page, regardless of which page is active, so that they are always visible and ready to use. Pop-up Services appear on top of the workspace as a separate window that you can place anywhere on your screen. They can be set to launch with a given page, or on demand.

Right-click in a service to choose from several actions such as editing drilldown links to other services, adding to your favorites, editing properties, or editing service layouts, depending on the selected service.

Add a Group

1. Click and select Customize Workspace.
2. To add a top-level group, from the left Workspace menu, select the first item in the list, which contains all existing groups, and then click . Type a name for the new group and then press Enter.
3. To add a second- or third-level group, from the left Workspace menu, select the group that will contain your new group and then click . Type a name for the new group and then press Enter.

Add a Service to a New or Existing Page

You can create a new page with a particular standard service or add a service to an existing page.

To add a service to a new or existing page

1. Click and select Customize Workspace.
2. From the Choose or Search for Service section, you can select a service from any of three tabs: All Services, Service Categories, or Workspace, which offers a list of services already present in your workspace.
   To filter the list before making a selection, you can type all or part of the service name.
3. To create a new page based on the selected service, click the group in which you want to add the new page, and then click .
4. To add the selected service to an existing page, select the page, and then click .
5. When your changes are complete, click Close.

Add a Pop-up Service

You can create a pop-up service that appears when you activate a particular group or page, or one that loads with Thomson ONE and is also accessible on demand from the Pop-up Services menu.

To add a pop-up service that will be available on-demand from the Quick Access Toolbar

1. Click and select Customize Workspace, or on the Pop-Up Services menu, click Add Pop-Up Service.
2. From the left side of the Customize Workspace dialog, select the top-most group.

3. From the right side of the dialog, click the service that you want to add, and then click Close.

4. Click Close.

To add a pop-up service that appears each time you load a particular group or page

1. In the drop-down below the Second-level Navigation, select a group or page, and then click Close.

2. Click Close.

**Change the Size of a Service**

To resize a service window to occupy a different portion of a page

- Click a splitter bar that separates the service from an adjacent service and drag it in either direction.

To set a service to temporarily occupy the size of the entire page

- In the title bar of the service, click the Maximize icon.

To restore a maximized service to its original size and position

- Click the Restore icon.

**Move a Service**

To move a service on a page

1. With your mouse, click the title bar of the service you want to move and drag it until you see this image appear in the workspace:

2. While continuing to hold down the mouse button, mouse-over any side of this image to choose the position for the service and then release the mouse button.
Chapter 3  Manage Additional Windows

In addition to your main Thomson ONE workspace window, you can create and access additional windows, each with its own left navigation pane and its own groups and pages.

The ability to add and access additional windows is controlled by the seed account. If disabled by the seed, the Window icon is not shown on the Quick Access Toolbar at the top of Thomson ONE. For more information on seed accounts, see “Smart Client and Thomson ONE” on page 10.

To create a new window

- Click 💻 and then select Add Window.

To customize the window

1. To edit Window settings, click 📚, and then click Organize Windows.
2. Next to the window you want to edit, click 📚.
3. Once you select an icon for the window, it is added to your toolbar in all windows so that you can click to easily access this window.
4. Edit groups, pages, and services for the window using the Customize Workspace dialog (see “Set up Your Services” on page 6).
Chapter 4  Preferences and Market Data Settings

Set Market Data Preferences

From the Market Data Settings dialog, you can set regional settings, news settings, display rules, identifier and price preferences, and DDE Display Rules.

To configure market data settings

1. Click and then click Market Data Settings.
2. Click the appropriate tab to view and edit applicable settings.
3. Make your selections, and then click OK.

Set Headers or Footers for Print Jobs

You can choose to add custom text as a header and footer on pages that you print.

To set a print header or footer

1. Click and then select Print Setting.
2. Enter Printer Header Text and Print Footer Text.
3. Click OK.
Chapter 5  Technical Settings and Support

When you click the question mark icon, menu options appear that allow you to modify Remote Data Client (RDC) connection settings for the application, restart the application, or contact Customer Support.

To access help content on a service
1. Click the background of the service to ensure that it is the active service.
2. Click , and then click Help.

To make RDC connection changes
3. Click , and then click RDC Setup.
4. Select the applicable option to enable pre-set or custom settings.
   - You can choose to use default settings for your account's Home server, use a server through the Internet that is housed by Thomson Reuters, use a Thick (Thomson ONE 4.x) server at your site, or use Custom Settings provided to you by Thomson Reuters.
5. If you choose Custom Settings, you can then either click New Settings or, if previously saved settings are also listed, you can enable them by clicking their name.

To restart the application
- Click , and then click Restart.

To contact Customer Support
- Click , and then click Customer Support.

Smart Client and Thomson ONE

Rapid Deployment
Smart Client applications like Thomson ONE on the Smart Client Platform are built on top of Microsoft’s .NET Framework, which is intended to be used by most new applications created for the Windows platform. It is Microsoft’s platform for building applications that have visually stunning user experiences and offer rapid software deployment.

Thomson ONE on the Smart Client Platform is based on Microsoft’s .NET 3.5 Framework, and uses ClickOnce deployment technology that allows users to install applications with minimal interaction. With ClickOnce deployment, updates can be provided automatically and only those parts of the application that have changed are downloaded. Thomson ONE on the Smart Client Platform is self-updating; depending on your company’s settings, it can automatically check for new software versions as they become available, and automatically upgrade to the latest version.

Administrative Rights
One of the big advantages of ClickOnce technology is that it does not require Administrative rights on the user’s PC. This significantly eases the installation and client sites where user’s desktop PC’s are locked down.

Rich User Interface
With Thomson ONE on the Smart Client Platform, new services can be developed that utilize the Windows Presentation Foundation (WPF). WPF is a graphical subsystem in .NET 3.5 Framework enables rich control, design, and development of the visual aspects of Windows programs, and allows the development of services with enhanced user interfaces and data visualization capabilities.
Centralized Workspace

Previous Thomson ONE desktop software stores workspace configuration and layout information on the user’s local PC. With Thomson ONE on the Smart Client Platform, workspaces and preferences are stored and retrieved centrally using the Thomson Reuters User Data Warehouse (UDW). Storing the workspaces centrally enhances your mobility, standardization, flexibility, and management.

Thomson ONE on the Smart Client Platform has two types of user accounts: seed and non-seed. A seed account has access rights to create and update a master workspace. Users are usually linked with the seed account and inherit the workspace of the seed, allowing for standardization across a segment, client or group of users. Non-seed users also have the ability to create and customize workspace, and these changes are merged in with the seed workspace. This allows for standardization of certain elements, while still giving the user flexibility to configure their workspace to suit their needs.