

# THOMSON REUTERS SPREADSHEET LINK FOR CORPORATE BUSINESS INTELLIGENCE

## INSTALLATION GUIDE FOR VERSION 2.2

Thomson Reuters Spreadsheet Link delivers an extensive Thomson Reuters global database of information through a user-friendly Microsoft Excel® interface. It allows you to combine historical and real-time data with your own watchlist/portfolio holdings information, target and assess comparable companies, spot trends, create sophisticated financial models, and streamline your workflows directly in Excel.

With Thomson Reuters Spreadsheet Link, you can:

- Create a report with customized equity tables, ownership data, Reuters As Reported financial data, and charts.
- Identify potential investment opportunities by screening for companies.
- Create a ranking for companies, using multiple data items or expressions as factors.
- Incorporate custom expressions into your analytical models and reports.
- View Thomson Reuters Spreadsheet Link's templates or create and upload your own.
- Manage your templates, custom watch lists, portfolios, expressions, screens, and aggregates.
- View the constituents of custom portfolios, watch lists, and benchmark indexes.
- Build custom aggregates to track groups of securities over time and compare individual securities to custom peer group averages.
- Look up tickers and other company identifiers, indexes, exchange rates, and data items, including real-time, fundamental, estimate, and pricing data.
- Click Reuters financials or Worldscope data item values to open and view their original source documents so that you can validate or audit the items.
- Set refresh options, user options, and global defaults.

## System Requirements

### Minimum Hardware Requirements

- 1GB available hard disk space
- 100MB of disk space in the Temporary Internet Files folder
- Pentium 4, 2.8 GHz
- 1 GB RAM

Thomson Reuters recommends dual-core processors and additional memory to optimize performance.

### Software

- Operating System: Windows 7 x32 or x64, Windows Vista, Windows Vista x64 with update KB967190, Windows Server 2008, Server 2008 x64 with update KB967190, Windows Server 2003, or Windows XP
- Microsoft Excel 2010, 2007, 2003 with Office 2003 Update KB907417, or Microsoft Excel 2002/XP
- Internet Explorer version 6.0 or higher with Javascript enabled
- MSXML 4.0 or higher and MSXML 6.0

### Software for XP Users Only

- Microsoft .NET Framework 3.5, Service Pack 1 with update KB959209
  - To uninstall Microsoft .NET Framework
    - a Click **Start**, point to **Settings**, and click **Control Panel**.
    - b Double-click **Add or Remove Programs**.
    - c Scroll down the alphabetical list to **Microsoft .NET Framework 3.1 SP1**, click **Change/Remove**, and follow the prompts.
    - d Scroll down the alphabetical list to **Microsoft .NET Framework 3.0 SP2**, click **Change/Remove**, and follow the prompts.



- e Scroll down the alphabetical list to **Microsoft .NET Framework 2.0 SP2**, click **Change/Remove**, and follow the prompts.
- To download or reinstall Microsoft .NET Framework with Service Pack 1
  - a Go to <http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en>.
  - b Click **Download**, and follow the prompts.
- To download update KB959209
  - a Go to <http://support.microsoft.com/kb/959209>.
  - b Click **Download**, and follow the prompts.
- To confirm that Microsoft .NET is installed
  - a Click **Start**, point to **Settings**, and click **Control Panel**.
  - b Double-click **Add or Remove Programs**.
  - c Scroll down the alphabetical list to see **Microsoft .NET Framework 3.5 SP1**. If it is not on the list, follow the installation instructions above.
  - d Close the **Add or Remove Programs** dialog.

## Verify Connectivity

Before you install Thomson Reuters Spreadsheet Link, you must verify that you have the necessary connectivity. If you do not have the necessary connectivity, see the installation assistance information in the Support section of this guide.

1. To verify connectivity for Thomson Reuters Spreadsheet Link, go to <http://t1excel.tqa.thomsonone.com/WebQAService/WQASession.aspx>, and confirm that you link to the WQASession page. Close the page.
2. To verify connectivity for Click Thru for Worldscope content, go to <http://financials.services.thomsonone.com/Fundamentals.WebServices/FundamentalsClickThru.aspx>, and confirm that you link to the FundamentalsClickThru page.
3. To verify connectivity for Click Thru for Reuters Financials content, go to <http://thomsonone.knowledge.reuters.com>, and confirm that you link to a logon page. Close the page without typing a username or password.
4. To verify connectivity for SECAPI, go to <http://sec.api.thomsonib.com/servlets/RetrieveFiling?VE> [RSION=4.0](https://security.services.thomsonone.com/STS/2010-01-01/SamlTokenIssuer.ashx), and confirm that you link to a login prompt. Close the prompt without typing a user name or password.

5. To verify your security token service, go to <https://security.services.thomsonone.com/STS/2010-01-01/SamlTokenIssuer.ashx>. Confirm that you see the XML code, and close the browser window.
6. To verify your system's access to the certificate server, go to <http://crl.geotrust.com/crls/secureca.crl>. If prompted, click **Open**. Confirm that you see the Certificate Revocation List dialog, and close the dialog.
7. To verify real-time capability if the machine on which you are installing Thomson Reuters Spreadsheet Link does not have the Thomson ONE desktop application, go to <https://streaming.thomsonone.com>. Confirm that you see the test page, and close the browser window.

## Click Thru Compatibility

Thomson Reuters Spreadsheet Link Click Thru provides greater access to the type of content you rely on to make key investment decisions and recommendations. Click Thru delivers greater transparency by allowing you to examine the underlying calculations and view specific data in original, company-created source documents.

Thomson Reuters Spreadsheet Link offers more than 55,000 US and non-US Click Thru-enabled reports via Worldscope, including:

- 10-K Reports
- ARS Reports
- 10-Q Reports
- Interim Reports
- Prospectuses
- 8-K Reports
- 20-F Filings

Click Thru also provides company specified details on all standardized and as reported, including derived, data items for Reuters Financials.

Depending on your versions of Internet Explorer and Adobe Reader, the Click Thru might link directly to the underlying page instead of displaying the highlight within the source document.

The following combinations of Adobe Reader and Internet Explorer do not display the highlight and link directly to the underlying page.

Version of Adobe Reader	Version of Internet Explorer
5	6 or 7
7.x	6
7.x	7, other than 7.0.5730.11 or 7.0.9

Later versions of Adobe Reader and later versions of Internet Explorer have no known issues with Click Thru.

## Install

1. Go to <http://trsl.thomsonreuters.com/>.
2. Type the *login name* and *password* provided by Thomson Reuters for accessing Thomson Reuters Spreadsheet Link, and click **Log In**.
3. Click **Download Now**.
4. To install Thomson Reuters Spreadsheet Link on Windows XP, click **Run**, and follow the prompts.
5. To install Thomson Reuters Spreadsheet Link on Windows Vista or Windows 7, click **Save**, save the TRSL.exe link to your preferred location, right-click the saved link, click **Run as Administrator**, and follow the prompts.

## Set Up your Account

1. Open Microsoft Excel.
2. On the **Thomson Reuters** menu, click **Spreadsheet Link Options**.
3. Type your *user name* and *password*.
4. In the Server box, type **Tlexcel.tqa.thomsonone.com**.
5. Click **OK**.

## Upgrade

You can receive automatic upgrade notifications and upgrade Thomson Reuters Spreadsheet Link when you receive them.

1. To receive automatic upgrade notifications, open Excel.
2. From the **Thomson Reuters** menu, click **Spreadsheet Link Options**.
3. In the left panel, click **Updates**.
4. Under **Updates pertaining to Version**, select **Notify if an upgrade is available**. When an update is available, an upgrade notification appears when you access Thomson Reuters Spreadsheet Link.

5. When you access Thomson Reuters Spreadsheet Link and an upgrade notification appears, click **Upgrade Now**, and follow the prompts.

## Uninstall

1. From **My Computer**, click **Control Panel** and then **Add or Remove Programs**.
2. Select **Thomson Reuters Spreadsheet Link**, and click **Remove**.
3. Select **Thomson Dataworks Enterprise HTTP Streaming Client**, and click **Remove**.

## Thomson Reuters Spreadsheet Link Consulting Services and Support

As a Thomson Reuters Spreadsheet Link subscriber, you have access to the Thomson Reuters Business Services Consulting team. Consultants can help you create unique, high-end proprietary models designed specifically for your investment approach. Additionally, consultants can provide you with comprehensive on-site training and superior ongoing support.

For support issues, contact the Business Services Consulting team at [trconsulting@thomsonreuters.com](mailto:trconsulting@thomsonreuters.com), or use the following phone numbers:

Americas +1 (646) 822-2840, option 1

Europe, Middle East, and Africa +44 870 458 1052, option 5

Asia +1 (646) 822-2840, option 1