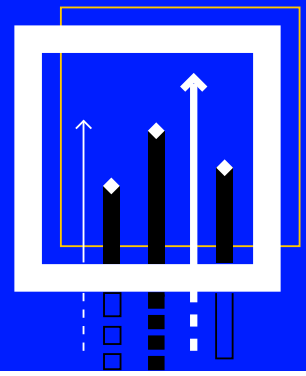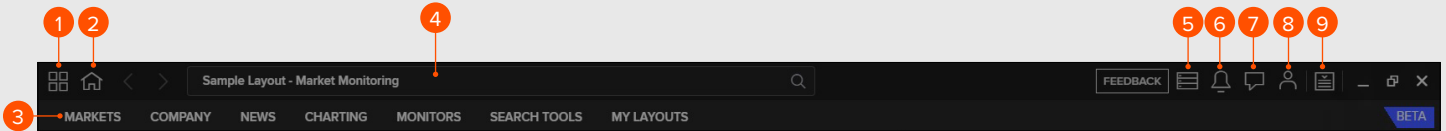# Refinitiv Workspace for Wealth Advisors

Select the Refinitiv Workspace for Wealth Advisors icon on your desktop.
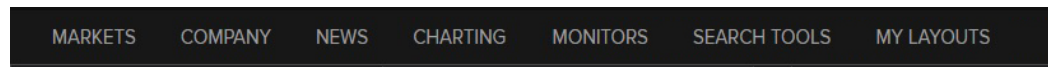
Browser

Refinitiv uses a single browser window to help organize your workflows.

1. App Library
2. Home Page
3. Navigation Bar

4. Search Bar
5. Notification Center
6. Alerts

7. Messenger
8. User Menu
9. App Menu

Menus

The Navigation Bar shows the key apps relevant for your job role.

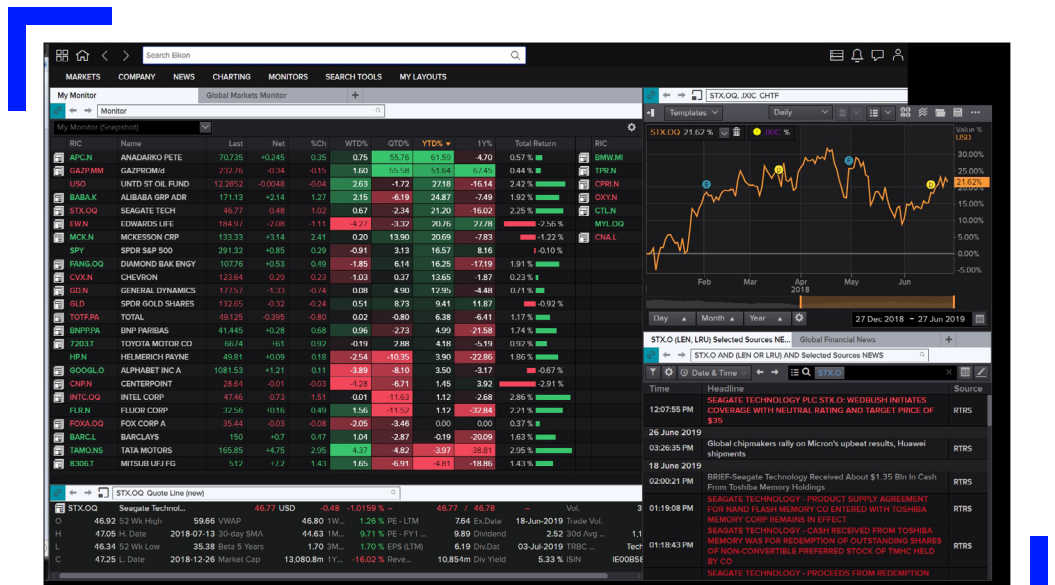**Tip:** If you don't see these apps you need to change your job role in the User Menu.

Home Page

To customize your home page you can use the controls found in the apps and the App Library to do the following:

- Add or remove apps
- Add or remove instruments in the Monitor app
- Change the location and size of each app panel

Tip: You can save any page or layout you are viewing as your home page.

1. Go to your chosen app
2. From the user menu select **Set as Home**

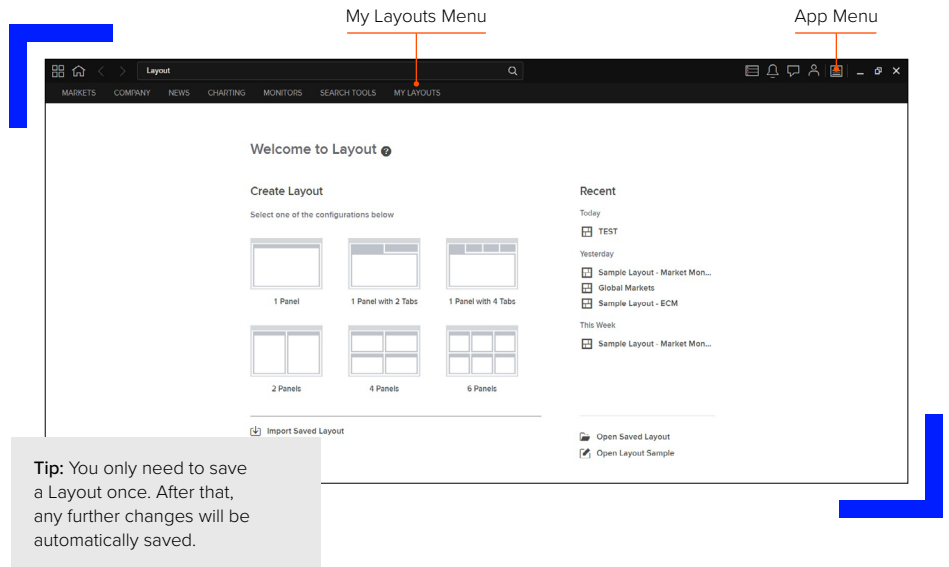**REFINITIV**™

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Layouts

You can access existing and pre-defined Layouts from the **My Layouts** menu to monitor the different markets you are interested in.

Select **New Layout** to create a new Layout, or select **Open Saved Layout** to access your existing Layouts.

To **Save** a Layout:

1. Go to the **App Menu**
2. Choose **Save Layout As**
3. Give your Layout a name

My Layouts Menu   App Menu

Tip: You only need to save a Layout once. After that, any further changes will be automatically saved.

Searching

You can use search to find data or apps from the main **Search Bar** or the **Launcher** tool by pressing **CTRL - Shift - Space**.
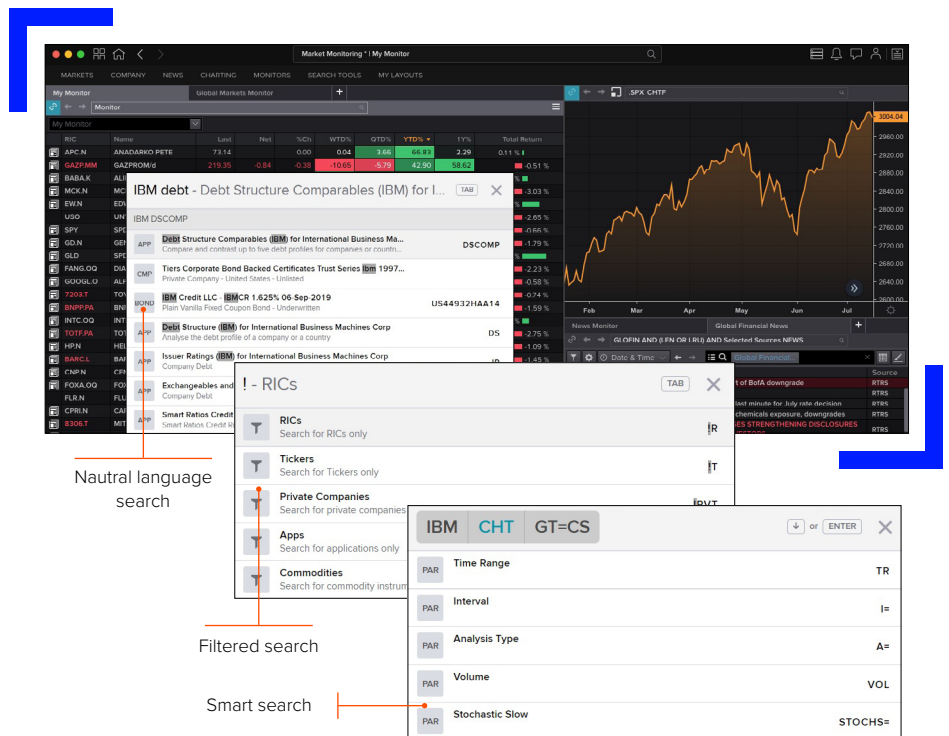
Use natural language:

• Type in the entity you want to view

• Optionally add the specific data or apps

Filter for specific data:

• Use "**!**" to select a content type

• Find apps or data within that content type

Smart search:

• Type in an entity and a set of parameters will appear. Click on one to select

• Then press **Tab** to move onto the next parameter, once complete it will instantly perform the command

Nautral language search

Filtered search

Smart search

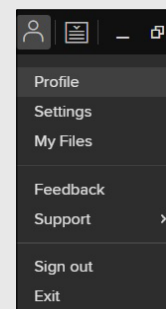## Support and Feedback

To get support:

You can find support by using the User Menu and selecting the **Get Support** option.

There can find:

• Live chat

• A Contact Us form

• A Call Back form

To provide feedback:

1. Click on the **Feedback** option in the User Menu, or the Feedback button in the Browser toolbar.

2. Use the form to tell us how we can improve your experience

Visit **refinitiv.com**

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