THOMSON REUTERS EIKON FOR WEALTH MANAGEMENT

LOGIN AND SESSION MANAGEMENT

Sample chapter written as end-user documentation for a web-based financial application.
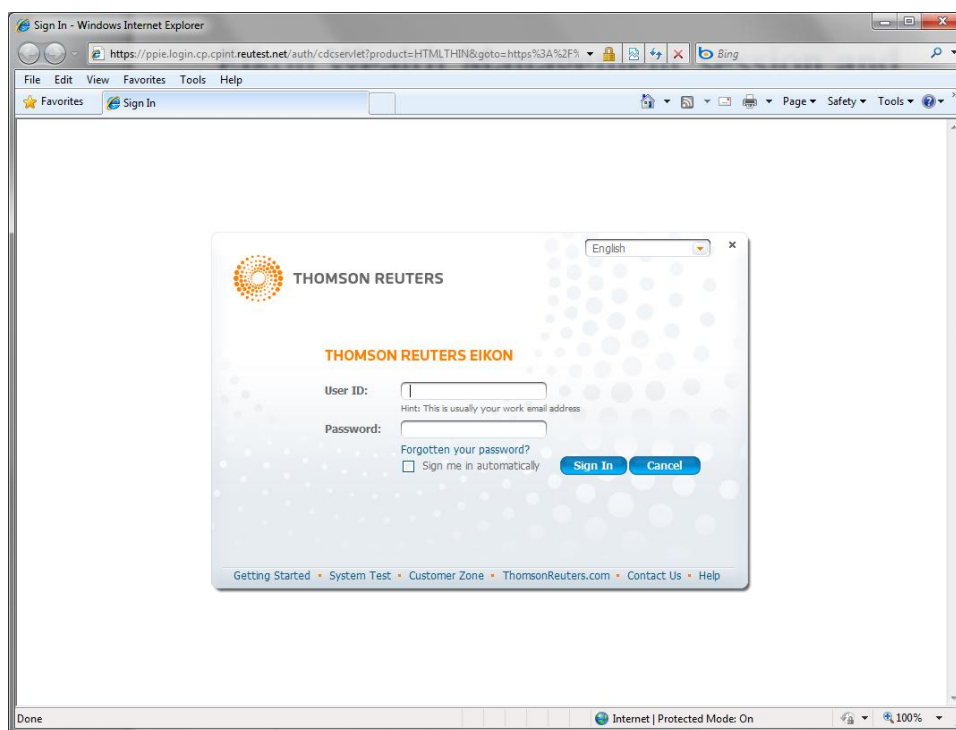
Issue: 1.0
Date of Issue: June 21, 2010

THOMSON REUTERS

CONTENTS

ABOUT USER SESSIONS

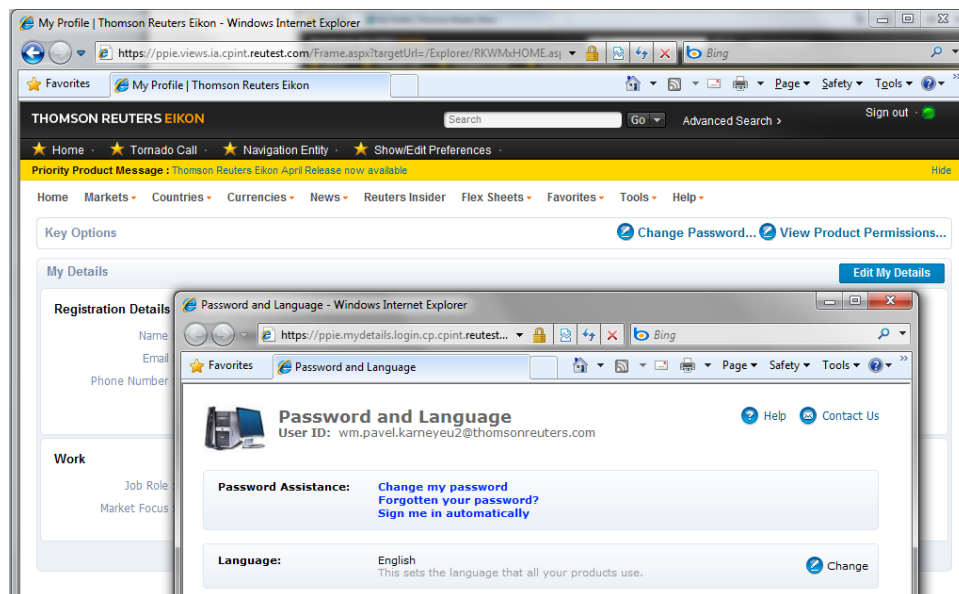## 1.1   LOGGING IN

1.1.1.   Basic login

When you navigate to the EIKON for Wealth Management site by clicking a link or entering the URL in the browser address bar, the browser displays a login page like the one below. You are required to enter a user ID and password before proceeding further.

1.1.2.   Automatic login

During login, you can optionally check the box marked "Sign me in automatically" to activate an automatic login feature. This feature allows you to be automatically logged in when accessing EIKON for Wealth Management (EWM) on that computer, bypassing the usual login screen. Once you have logged in with this option selected, auto-login is enabled for a period of eight weeks. After that period, you must manually log in again to verify the login credentials.

If desired, the automatic login option can be disabled by going to the *My Profile* option under the *Tools* menu, and selecting *Change Password*.
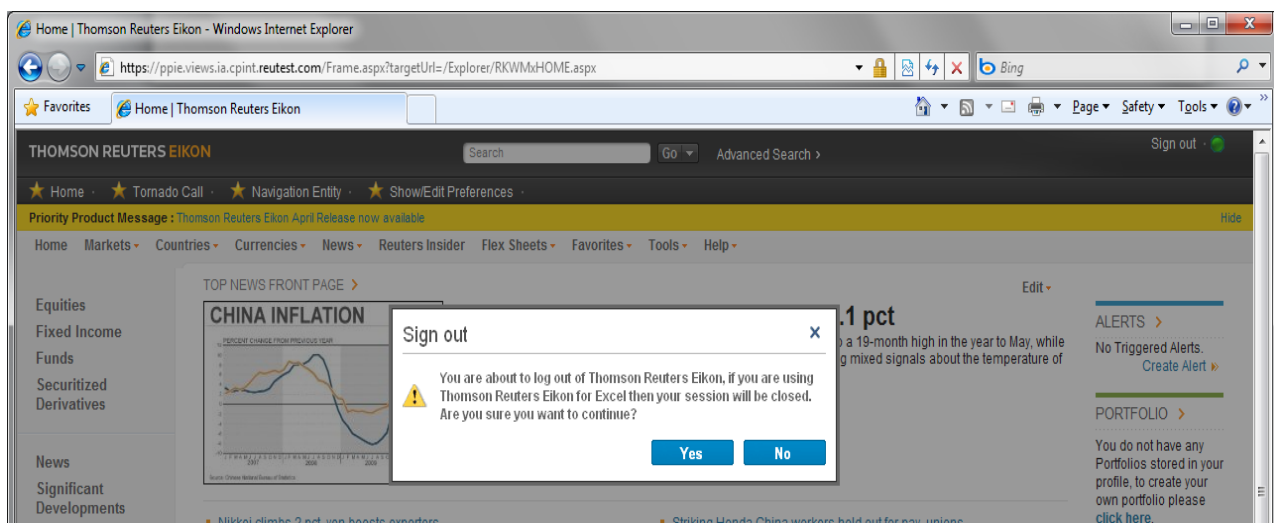
1.2   LOGGING OUT

The next four sections describe four ways in which a user may be logged out of EIKON for Wealth Management. They are:

- Clicking the sign-out link

- Closing the browser window(s)

- Navigating away in the browser window(s)

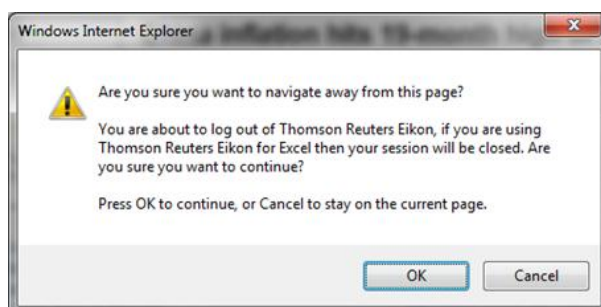- Network timeout error

1.2.1.   Clicking the Sign Out link

Clicking the "Sign out" link within the browser window brings up the dialog shown below, which prompts you to confirm the sign-out.
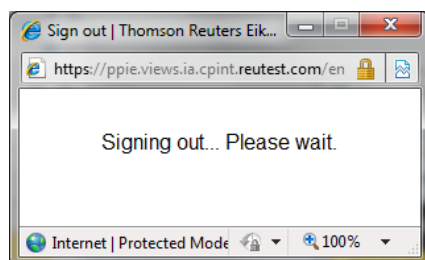
Note that child windows do not have a "Sign out" link. Signing out in a parent window automatically closes the child windows. If you have multiple instances of the browser running EWM, they all share the same login session, so logging out in one automatically logs you out in all of them.

1.2.2.   Close the browser window

You may also log out by closing the EIKON window in the browser. This pops up an alert message that prompts you to confirm the sign-out.

Selecting "OK" at this prompt causes the main window and all related popups and tabs to close. While this is in progress, a temporary window pops up and displays the message "Signing out… Please wait."

1.2.3.   Navigate away in the browser window

Navigating away from the EIKON for Wealth Management site in the main browser window (i.e., browsing to a different site) has the same effect as closing the window – that is, it pops up an alert to confirm the sign-out, then closes all popups and tabs.

1.2.4.   Network timeout

In the background, EIKON for Wealth Management checks your connection to the EWM site every five minutes. If it cannot reach the site (i.e., a network timeout error), then it closes all tabs and popups, and one of two things will happen:

1) If the automatic login feature is enabled, the main browser window attempts to return to the view that was displayed before the interruption.

2) If the automatic login feature is disabled, then the main browser window attempts to return to the login page. After a successful login, the user is taken back to the view that was displayed before the interruption.

1.3   MULTIPLE WINDOWS

You can have multiple browser windows running EIKON for Wealth Management at the same time. These can be multiple instances of the same version of Internet Explorer, or multiple independent tabs within one or more instances of Internet Explorer. Each of these can be a parent window that creates its own child windows.

When you are logged-in to EWM, and open additional instances of EWM on that computer (i.e., in a separate tab or browser window), those additional instances are considered to be part of the same login session. That is, they will bypass the usual login screen and take the user directly to the landing page, even if the automatic login feature is disabled.
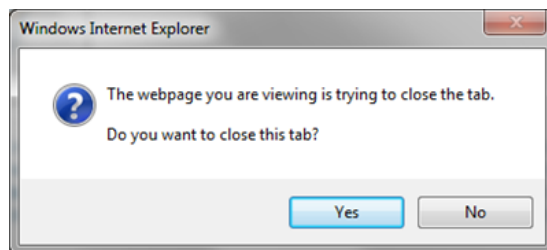
1.3.1.   Signing out in a window

Since multiple EWM windows are considered to all be part of the same login session, using the "Sign out" link to sign out in any window has the effect of signing the user out in all windows.

1.3.2.   Closing a window

As long as there are multiple windows logged into EWM at the same time, closing one of those windows (without logging out) leaves the other windows open and still logged-in.

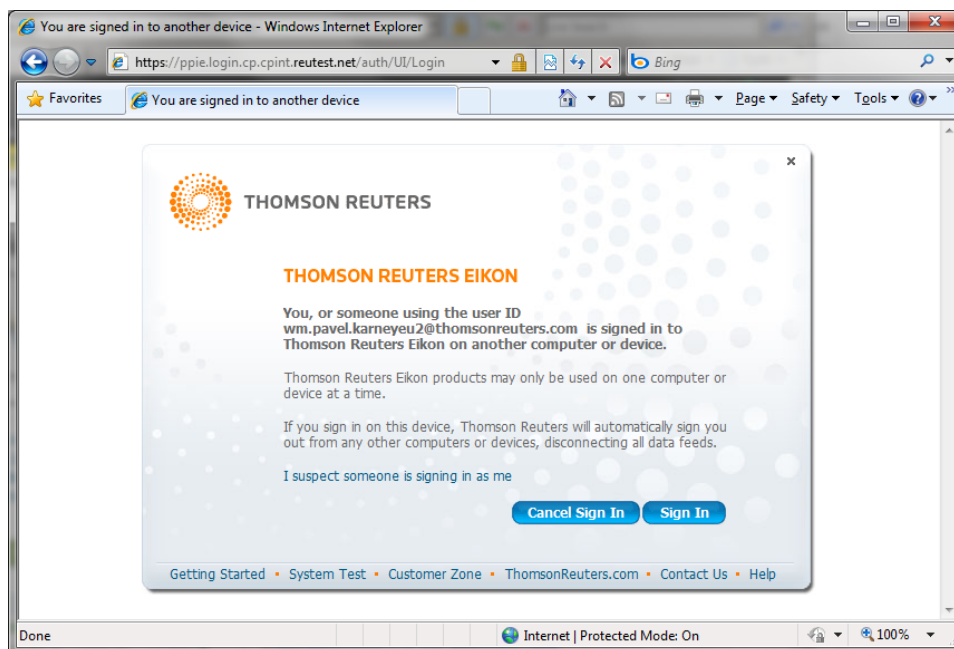### 1.3.3.   Dealing with multiple tabs

As mentioned earlier, whenever you close a parent window, then all related child tabs and popups are also closed. In the case of tabs, in the parent window an alert will display a standard Internet Explorer message, similar to the following: "The website you are viewing is trying to close the tab. Do you want to close this tab?".

If you click "No", pages will remain open and viewable in the child tabs, but you cannot navigate anywhere within them.
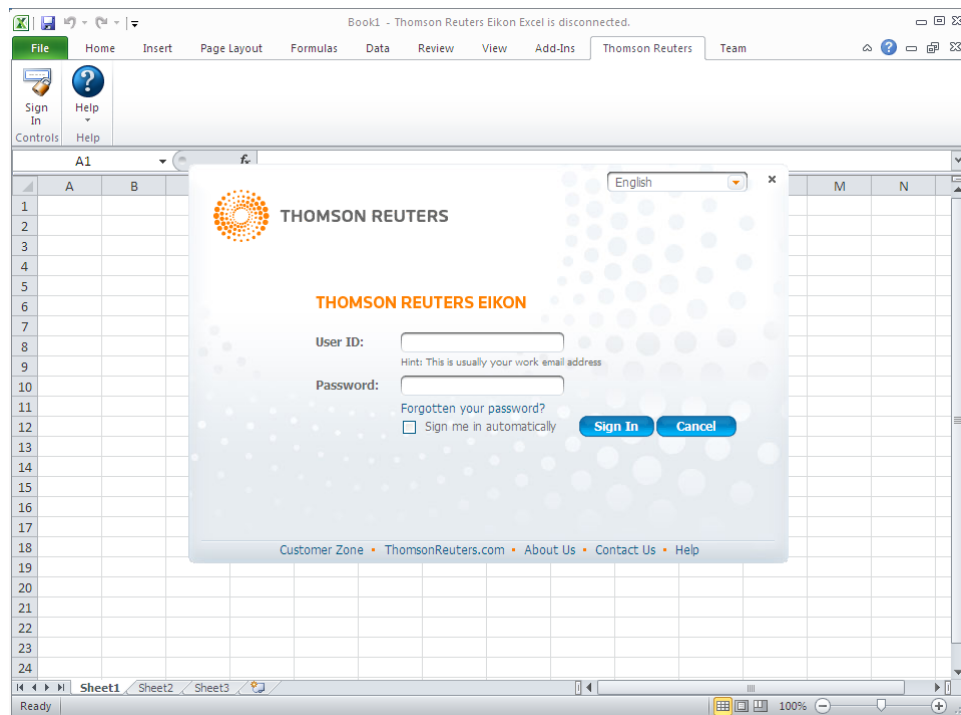
1.4   LOGGING IN ON MULTIPLE COMPUTERS

EWM is designed so that you can only be logged-in on one computer at a time. If you are logged in to EWM on one computer, and you attempt to log in to EWM on a second computer using the same user ID, a warning message will appear on the second computer. The message will offer you the choice of either canceling the new login attempt, or else proceeding with the new login on the second machine and terminating the session on the first machine.

If you proceed with the login on the second computer, it may not be immediately apparent on the first. A login screen will appear on the first machine after five minutes of inactivity, or as soon as you click a link in EWM on the first machine.

1.5   LAUNCHING EIKON EXCEL

You can launch EIKON Excel from within EIKON for Wealth Management, or separately. If you run EIKON Excel from within EWM, you will be signed in automatically. If you launch EIKON Excel separately, then you will have to sign in manually.

Both products are considered to be logged in under the same login session. Thus, signing out of EWM will also sign you out of EIKON Excel, which will display the following message: