

Instructions for accessing Refinitiv Workspace CodeBook

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Introduction

This document details the steps needed to login and access Refinitiv Workspace (formerly Eikon). The last section pertains to the course Financial Risk Management I and may be skipped by those unconcerned,

Step 1: Getting login credentials.

Before accessing Workspace, you will need to get your login credentials. Note that because of the limited number of licenses you may need to wait before getting login credentials for Workspace.

Instructions

1. Go to [Accessing Refinitiv Workspace - Finance Databases - Aalto University Wiki](#).
2. Click the registration link in the box [Request access to Workspace?](#)
3. Fill in the registration form using your Aalto email address.
4. After a few hours you will receive login credentials to your Aalto inbox.
5. The email has a clickable link which takes to the registration page.
Remember to use your Aalto email as the username. Register.

Once you have a username (email address) and password associated with a Workspace license you can go ahead to the next section. If you have not used Workspace or a while, it becomes inactive. Then you must reactivate it from Request access link.

Step 2: Accessing the Workspace application

There are three ways of accessing the Workspace desktop application. For those running Windows on their personal computers the recommended method is to install Workspace locally. There are versions for MacOS and mobile platforms, but some of the functionalities have not been implemented. If you are running a different operating system or are unable to install software, you can also remotely access Aalto machines with Workspace preinstalled. In addition,

Method A: Installing Workspace locally

1. Go to <https://workspace.refinitiv.com/>
2. Click one of the download buttons (there are also mobile version and a web access version)
3. Fill in the username and password gotten in the previous step.
4. If you are presented with a prompt informing you that the account is already signed in, confirm that nobody else (that you know) has unsaved progress. Then click *Sign In*.
5. Read and accept the software license agreement by ticking the box "*I accept.*"
and clicking the button "*Accept.*"
6. Choose your location and click *Download*.
7. Save and run the installer.
8. Proceed through the installer, filling in the same username and password when prompted.
9. Run Workspace from your chosen installation directory.
10. Login using the same credentials as before.

Method B: Using remote access

1. Go to vdi.aalto.fi/
2. Choose either HTML access or the native client if you have it installed.
3. Login using your standard Aalto credentials.
4. Choose *.Win*. NOTE: not all machines have Workspace installed so it is important that you choose the machine name starting with *.Win* (*notice the period in the beginning*).
5. Run Workspace by opening the Start Menu (windows icon in the lower left) and scrolling down to the folder *Refinitiv* and run the application *Refinitiv Workspace*.
6. Login using the credentials gotten in the earlier step.
7. If you are presented with a prompt informing you that the account is already signed in, confirm that nobody else (that you know) has unsaved progress. Then click *Sign In*.

Method C: Use Workspace (this feels a little slow)

1. Go to [Download LSEG Workspace | Refinitiv](#)
2. Click on *Sign in to Workspace access*.
3. Fill in your information and continue to the site.

Step 3: Accessing CodeBook

After launching Eikon you should see a toolbar appear at the top of the screen. In some cases, CodeBook will launch by itself but if it does not you can follow the instructions below.

Instructions

1. Click the search area in the top part of the toolbar.
2. Write Codebook, and click on CODEBK, when it is produced.
3. This produces a Jupyter Notebook-type environment.

Step 4: Uploading the provided material

After launching CodeBook, you are presented a view with a file browser to the left and a launcher (or previously open notebooks) to the right. In the upper part of the file browser you should see four buttons, the third of which has an upward pointing arrow icon. Clicking this icon will allow you to upload files to the CodeBook environment. For the course Financial Risk Management I, this consists of the provided notebook and python-sourcefile. After the upload, the files will appear in the listing to the left. Double-click the notebook-file and continue according to its contents.