

# Eikon to Workspace Migration

## Quick Start Guide

This guide aims to help users who migrate from Eikon to Workspace. It outlines activities to perform, including managing your Eikon layouts and checking the compatibility of your Excel formulas.

## Upgrading to Workspace

Perform the following steps to migrate to Workspace:

1. Download LSEG Workspace and run the installation file. Alternatively, sign in [on the web](#). If you choose to install Workspace, you can get guidance from the LSEG Workspace | Desktop [Basic Installation Guide](#).
2. Open Workspace and sign in with your Eikon user ID and password.
3. Provide some information about yourself, such as your role and language.
4. Watch the onboarding video and start the tour while your layouts and Eikon files are converted.
5. Click **Getting Started** or press **F1** to access the Help & Support app. Here, you can explore introductory videos, view Workspace's enhancements, access tutorials, find help articles, and contact support.
6. You will be notified when your Eikon file conversion is complete.
7. Go to **My Files** (press **ALT+F**) to access and manage your Layouts.
8. Open Excel and check the compatibility of the formulas in your Excel files.

## Managing layouts

Layouts must adhere to Workspace's limits on the number of sheets, panels, and tabs. The requirements are:

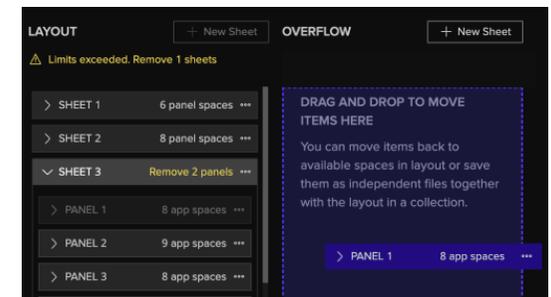
- Ten sheets per layout
- Ten panels per sheet
- Ten tabs per panel

After migration, if your layouts exceed these limits, you will be redirected automatically to the Layout Manager. Here, you can fix the layouts by managing the sheets, panels, and tabs by:

- Deleting any items you don't need
- Reorganising them into other sheets or panels where there is available space
- Moving them into the overflow, which will be saved in a collection in My Files, together with the layout from which they are removed

To resolve the limits on layouts:

1. Remove sheets, panels, or apps by selecting them and then select Delete from the ellipsis menu (three horizontal dots icon). Alternatively, you can drag a tab, panel, or tab component into the Overflow section to remove it from the layout but save it within a collection.



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- When you have resolved the errors in the layout section and if you have moved items into the Overflow section, click the **Review** button. If you have not moved items into the Overflow section, click **Finish**.
- When you review items, give the collection a unique name.
- When you have finished reviewing, click the **Finish** button.
- To view your layouts and overflow items, click the **WS** icon and select **My Files**.

If you saved a collection, scroll down to My Collections to access it. For items saved in the overflow as layouts, they are listed in the All Layouts or My Layouts section and in the Collection section. If you saved stand-alone apps, and sheets or panels with only one app, they are listed in the Apps section and in the collection.

## Preparing Excel files

Use the Workspace Excel Upgrade Readiness

Template macro to check the compatibility of your Excel files. Files that are highlighted in green are

ready to use, while files highlighted in yellow or red require conversion. Send them to the Financial Modelling and Conversion (FMC) team, who can amend the formulas to be compatible with Workspace.

To run the readiness check macro:

- Copy your Excel files to a dedicated folder.
- Open Excel and click the **Workspace** tab on the ribbon.
- Sign in to Workspace.
- Click **Templates**.
- Search for Workspace Excel Upgrade Readiness Template and click **Open**.
- Click **Select Folder** and navigate to the folder with your Excel files.

## Get more help

To open the Help & Support app in Workspace, press **F1** or select the **Help** icon and select **Get Help & Support**. You can contact us directly through the Help & Support app via the **Contact Us** section. Find additional learning opportunities with the [LSEG Academy: Learning Catalogue | LSEG](#).

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**LSEG** DATA & ANALYTICS

- Click **Get Files**.
- Click **Run Report**.

If required, you can go to the FMC team's website at [fmc.refinitiv.com](https://fmc.refinitiv.com) and create a request to have your Eikon formulas converted for Workspace. They will confirm receipt of your request by email and then get back to you with your compatible files.

## Resources

- Upgrade resources online - [Upgrading from Eikon to LSEG Workspace | LSEG](#)
- Basic Installation Guide - [LSEG Workspace | Desktop](#)
- Advanced Installation & Configuration Guide - [LSEG Workspace | Desktop - Installation and Configuration Guide](#)
- System requirements - [LSEG Workspace - System Requirements](#)
- FMC Portal - [fmc.refinitiv.com](https://fmc.refinitiv.com)
- API support - [Workspace upgrade | Devportal](#)