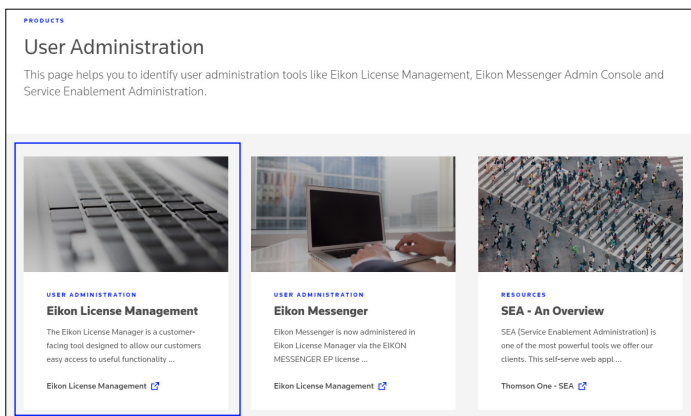


# LICENSE MANAGEMENT

## Quick reference guide

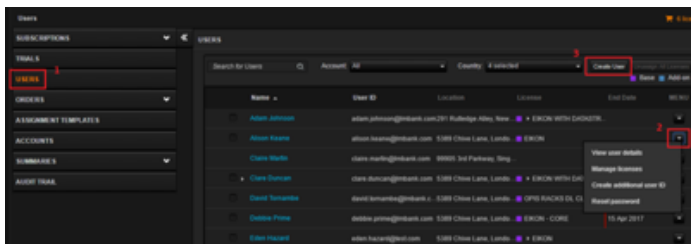
License Management allows customers to manage their own users and products via [MyRefinitiv](#). Features include the ability to: create users; maintain user details; order new licenses for products and exchanges; allocate licenses to users; swap licenses between users; move licenses and users to different location accounts; unsubscribe licenses.

These capabilities can be accessed by clicking on the **Eikon License Management** tab on the **MyRefinitiv** home screen.

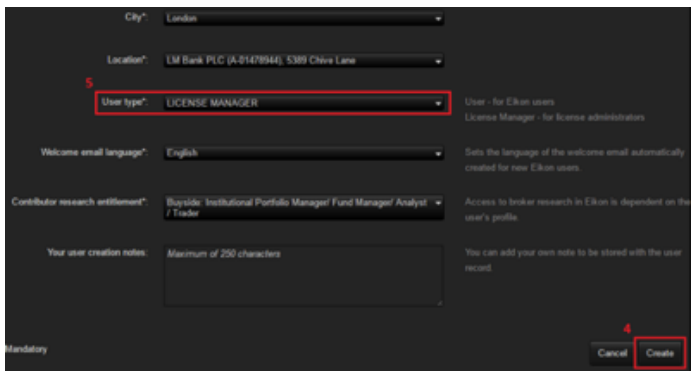


### Creating a user [\(click for training video\)](#)

1. Navigate to the **Users** screen from the main menu.
2. Access options for managing existing users by clicking on the drop-down menus on the right of the user details.
3. Or click the **Create User** button to add a new one.



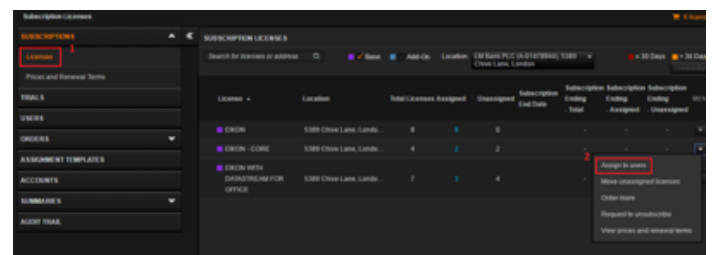
4. Complete all fields marked with \* and click the **Create** button (some fields will auto-populate based on the information you provide).
5. To create a user with a License Manager role, select **License Manager** from the **User Type** drop-down.



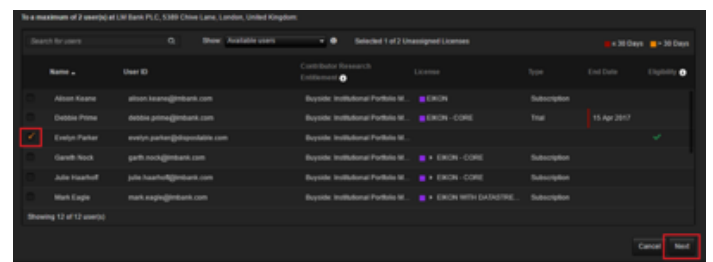
### Assigning a license [\(click for training video\)](#)

Following these steps will assign a single license to one or more users.

1. Navigate to the **Subscriptions>Licenses** screen from the main menu.
2. Choose the license you want to assign and select the **Assign to users** option from the drop-down menu on the right of the screen.



3. Select the users you want to assign the license to and click the **Next** button.

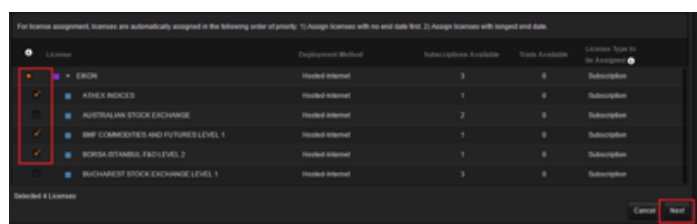


4. Edit the welcome email recipients if necessary and click the **Confirm** button to finalize the license assignment.

## Assigning multiple licenses (click for training video)

Following these steps will assign multiple licenses to a single user.

1. From the **Users** screen, select the user you want to assign licenses to, and then click to open the drop-down menu on the right of the screen and select **Manage Licenses**.
2. Choose the base license you want to assign and any eligible add-ons (only add-on licenses that are compatible with the selected base license are shown) then click the **Next** button.



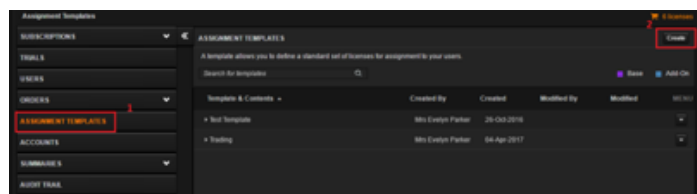
3. Edit the welcome email recipients if necessary and click the **Confirm** button to finalize the license assignment.

## Assignment Templates

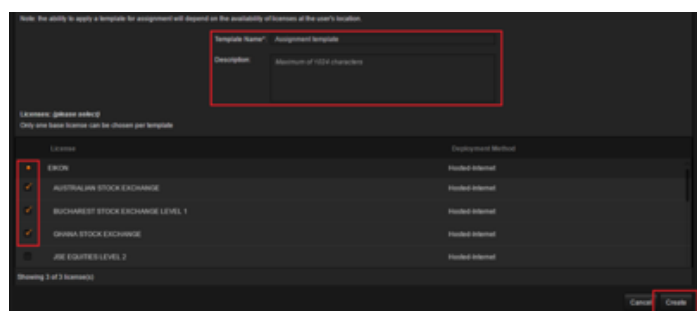
Assignment Templates can be used to assign a base license and a predefined set of add-on licenses to one or more users in a single action.

## Creating an Assignment Template (click for training video)

1. Navigate to the **Assignment Templates** screen from the main menu.
2. From this screen, you can view and manage your existing templates or click the **Create** button to add a new one.

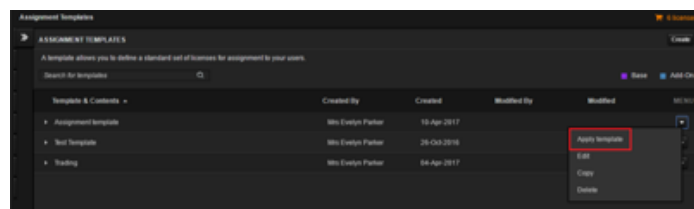


3. Give the template a name and a description (description is optional) and choose a base license from the options available. Once a base license has been chosen, the screen will expand to display a list of compatible add-ons. Select the required add-ons then click the **Create** button.

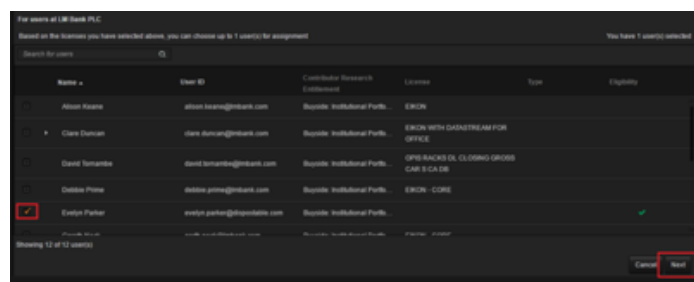


## Applying an Assignment Template (click for training video)

1. From the **Assignment Templates** screen, select the template you want to apply, click to open the drop-down menu on the right of the screen and select **Apply template**.



2. In the pop-up window, select the location of the users you want to apply the template to.
3. Select the users you want to apply the template to and click the **Next** button.

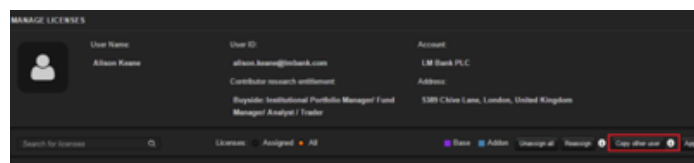


4. Edit the welcome email recipients if necessary and click the **Confirm** button to finalize the license assignment.

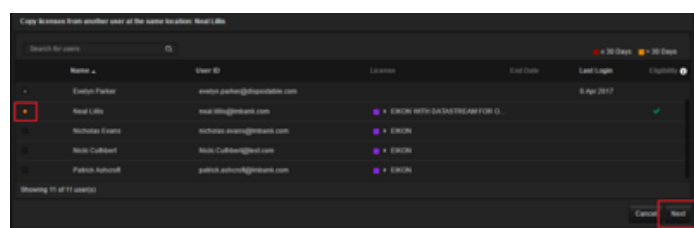
## Copying a user (click for training video)

Following these steps will copy the base license and selected add-ons to another user. The original user will keep their current license assignment. If insufficient licenses are available, these will need to be ordered.

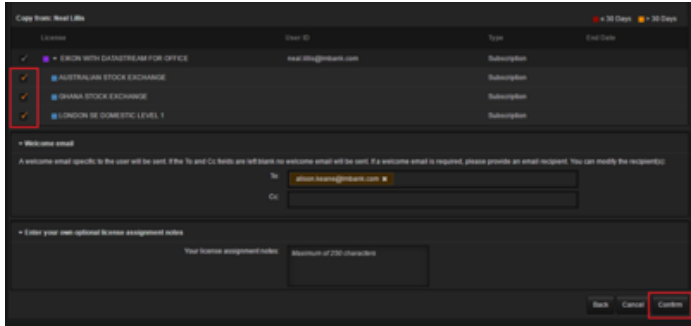
1. From the **Users** screen, select the user you want to assign licenses to, click to open the drop-down menu on the right of the screen and select **Manage Licenses**.
2. Click the **Copy other user** button.



3. Select the user you want to copy licenses from (only users at the same location will be displayed) and click the **Next** button.



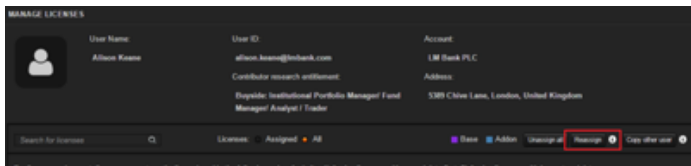
- Confirm the add-ons you want to copy (default is all), edit the welcome email recipients if necessary and click the **Confirm** button to finalize the license assignment.



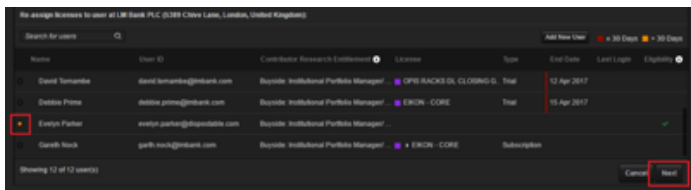
### Reassigning a license (user swap) [\(click for training video\)](#)

Following these steps will reassign all licenses including add-ons. Licenses can only be reassigned to users in the same location.

- From the **Users** screen, select the user you want to reassign licenses from, click to open the drop-down menu on the right of the screen and select **Manage Licenses**.
- Click the **Reassign** button.



- Select the user you want to reassign the license to (only users at the same location will be displayed) and click the **Next** button.

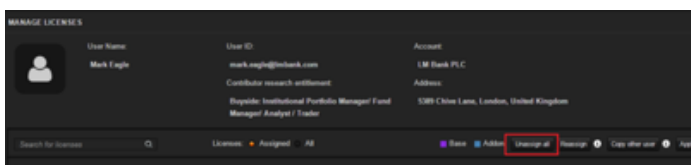


- Edit the welcome email recipients if necessary and click the **Confirm** button to finalize the license reassignment.

### Unassigning a license

Following these steps will unassign all licenses including add-ons. If you only want to remove an add-on license, follow the steps to unsubscribe.

- From the **Users** screen, select the users you want to unassign licenses from and click the **Unassign All Licenses** button.



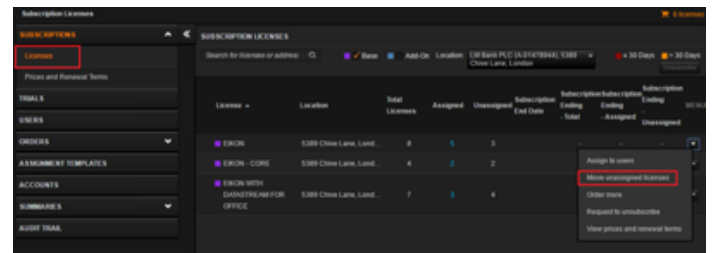
- Click the **Confirm** button on the following screen to finalize the unassignment.

### Moving a license to another location

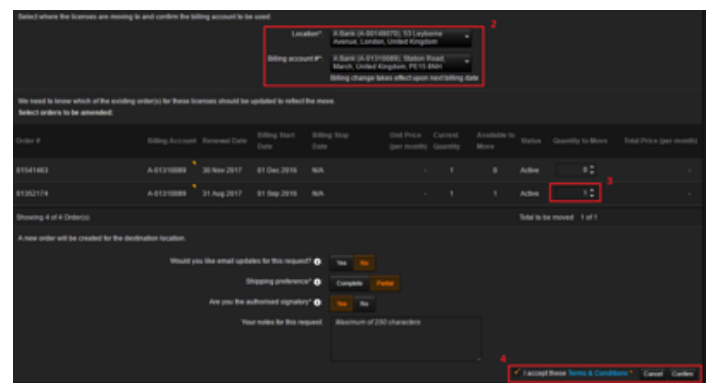
[\(click for training video\)](#)

Following these steps will move a license to a different location while keeping the same renewal terms. Only unassigned licenses can be relocated and the target account must be in the same country.

- From the **Subscriptions>Licenses** screen, click to open the drop-down menu on the right of the screen and select **Move unassigned licenses**.



- Choose the new location account and billing account from the options available.
- Choose the order you want to move the license from (prices and renewal dates can differ from order to order and these will be migrated to the new account).
- Set your order preferences, accept the Terms & Conditions and click the **Confirm** button.



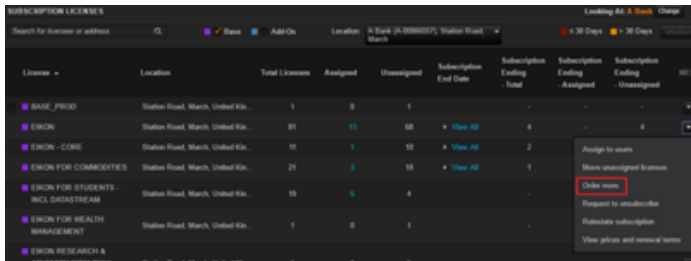
- An order will be created for this transaction. The status of this can be tracked in the **Orders>History** screen in the main menu.

### Ordering a license [\(click for training video\)](#)

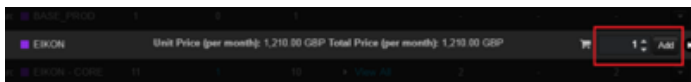
Following these steps will order new licenses for your account. Only base licenses that have previously been ordered at a location can be self-ordered via the License Management application; all add-on licenses can be self-ordered.

#### Ordering more licenses

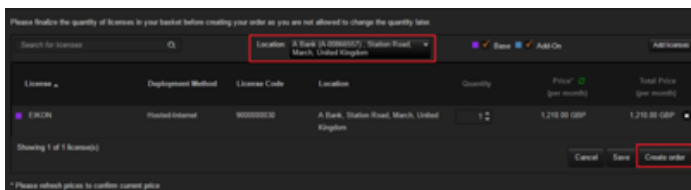
- Navigate to the **Subscriptions>Licenses** screen from the main menu.
- Choose the license you want to order more of and select the **Order more** option from the drop-down menu on the right of the screen.



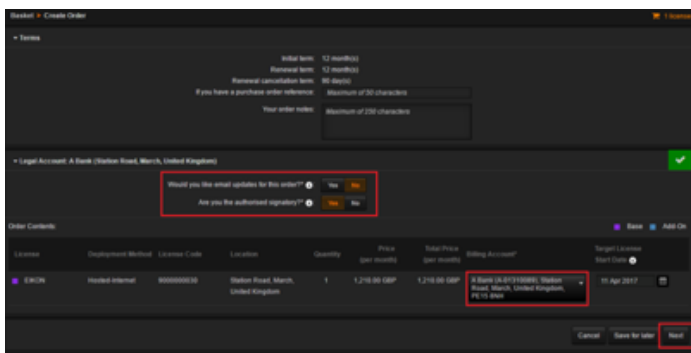
- Update the quantity if required and click the **Add** button to add the license to your shopping basket.



- Click on the **Shopping Basket** icon in the top-right corner of the screen.
- Select the account the license is to be ordered for (it is still possible to update the quantity at this stage) and click the **Create order** button.



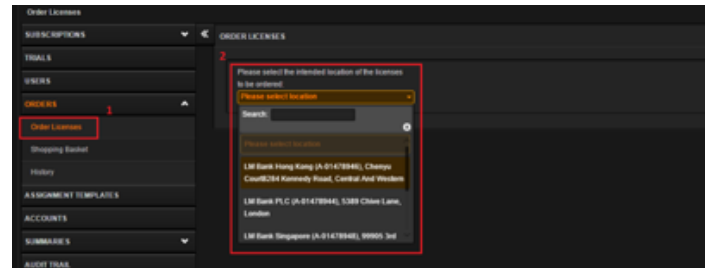
- Set your email preferences and confirm whether you are the authorized signatory, then select the billing account you want the license to bill from and click the **Next** button (it is also possible to add purchase order numbers and a delayed target license start date on this screen).



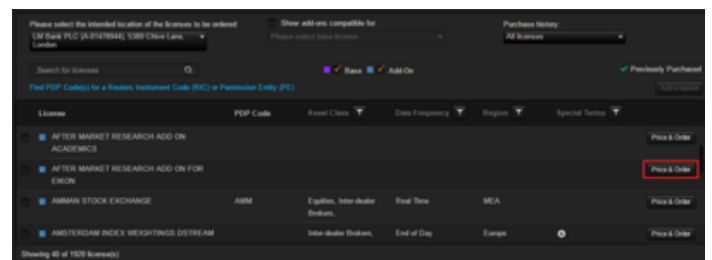
- Accept the Terms & Conditions and click the **Submit** button.
- An option to preassign the license to a user will appear; click **Yes** to choose a user or click **No** to save assignment for later.
- An order will be created for this transaction. The status of this can be tracked in the **Orders>History** screen.

### Ordering new licenses

- Navigate to the **Orders>Order Licenses** screen from the main menu.
- Select the location you want to order licenses for from the drop-down list.



- Choose the license you want to order (various filtering options are available) and click the **Price & Order** button on that line.

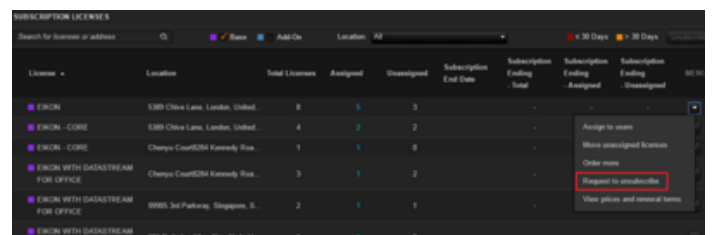


- Follow steps 3 to 8 from the **Ordering more licenses** process to finalize the order.

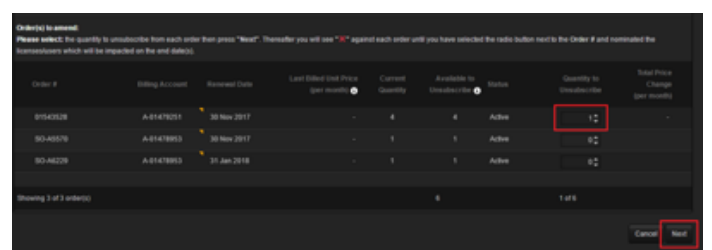
### Unsubscribing a license [\(click for training video\)](#)

Following these steps will cancel a license from your account. Licenses can be unsubscribed at any time. Base licenses will be held to term and the unsubscription will take effect on the renewal date of the license; for add-on licenses, the unsubscription will take effect at the end of the calendar month.

- Navigate to the **Subscriptions>Licenses** screen from the main menu.
- Choose the license you want to unsubscribe and select the **Request to unsubscribe** option from the drop-down menu on the right of the screen.



- Choose the order you want to unsubscribe the license from (prices and renewal dates can differ from order to order) and click the **Next** button.



- Decide whether to unsubscribe an assigned or an unassigned license and either update the quantity in the Unassigned section or select a User from the Assigned section, then click the **Next** button.

- Choose a reason for unsubscribing from the drop-down menu and set your email preferences. Then accept the Terms & Conditions and click the **Submit** button.
- An order will be created for this transaction. The status of this can be tracked in the **Orders>History** screen.

### Changing a billing account [\(click for training video\)](#)

Following these steps will change the account that a license is billed to.

- Navigate to the **Subscriptions>Prices and Renewal Terms** screen from the main menu.
- Choose the license pool you want to change the billing account for (it is possible to select multiple licenses at once).

- Click the **Change Billing Account** button.

- Set the quantity of licenses you want to change the billing account for.
- Pick the new billing account from the drop-down menu.
- Set your email preferences then accept the Terms & Conditions and click the **Submit** button.

Detailed training videos on how to perform License Management tasks can be accessed [here](#).

Refinitiv is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms, and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.

Visit [refinitiv.com](https://refinitiv.com)



**REFINITIV®**  
DATA IS JUST  
THE BEGINNING®