November 2025 update

LSEG Workspace | Desktop

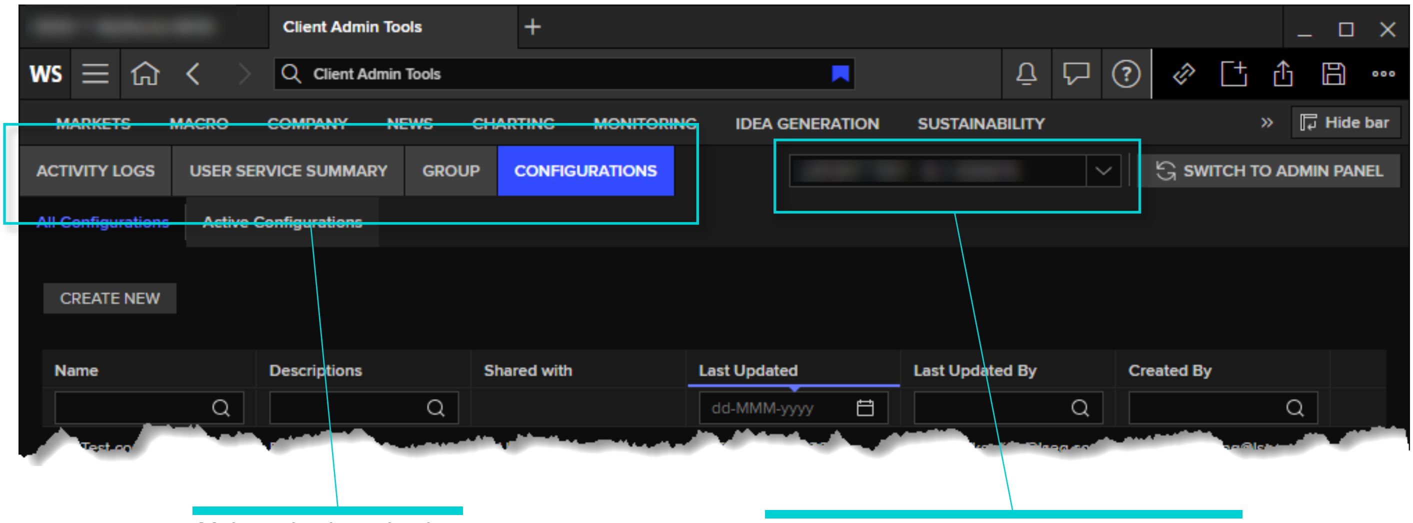
Administration Tools Configuration Guide

LSEG DATA & ANALYTICS

Contents

About Workspace Admin Tools

In LSEG Workspace, the Client Admin (Administration) Tools app is an enhanced version of Administration Panel, allowing you to manage the market configuration for users within your company. The current features of the Administration Panel will be migrated gradually to Admin Tools.



Main and sub navigation

Dropdown showing your permission scope. That is, all entities, locations, and so on for which you have administrative permissions.

Intended readership

A user who is granted access to Admin Tools is considered to be a client administrator. Client administrators are assigned the privileges they require to access the capabilities provided by Admin Tools. They can also assign configurations to groups of users, depending on their assigned privileges.

For further information, see the Becoming an administrator section.

In this document

For the November 2025 release of Client Admin Tools, the following changes have been made to this document:

- New Acknowledging the administrator agreement section
- New Managing app administration section
- Minor update to the Viewing user statistics section

Further information

Additional resources can be accessed through our Support channels, including the following:

- Request product assistance, contact Support.
- Access other LSEG Workspace technical content, see the Workspace technical documentation site.
- Provide feedback on Workspace technical content, contact DocFeedback@lseg.com.

Becoming an administrator

Your organization can request that LSEG grants Workspace administrator permissions to one or more individuals. However, as a pre-requisite, each administrator requires an LSEG Workspace account.

You can also:

- Have one or more administrators within your organization, or
- Request that LSEG perform this role on your behalf.

If you do not currently have access to Workspace or require further information, contact your LSEG account team. Once your account team have provided access, you are able to add further client administrators though the **Administrators** tab. For further information, see the Administration management section.

Roles and groups matrix

The table below lists the capabilities of Admin Tools that are made available to administrators at LSEG or customer sites.

Function	Customer	LSEG
Administration - Administration management		
Search and display summary of Admin Services for a user for troubleshooting	●	●
Provisioning users as Administrators (ULT, NLE, LOC) and application permissions	●	●
Managing permissions for the following capabilities • Group • Configuration		●
Group - Group management		
Create, edit, delete group	●	●
Add member(s) - user or location accounts (LOCs, NLEs) - to group(s)	●	●
Download group members in CSV	●	●
Configuration - Workspace configuration management		
Create, edit, delete admin configuration files	●	●
Assign configuration file to users, LOCs, NLEs, ULT, and group of users	●	●
SCIM Integration		
Generate SCIM integration details required for registering Workspace to your Entra tenant	●	●
Activity Logs		
Review the maintenance activities that were performed on the Ultimate Parent account by client administrators via Admin Tools	●	●

Accessing Admin Tools

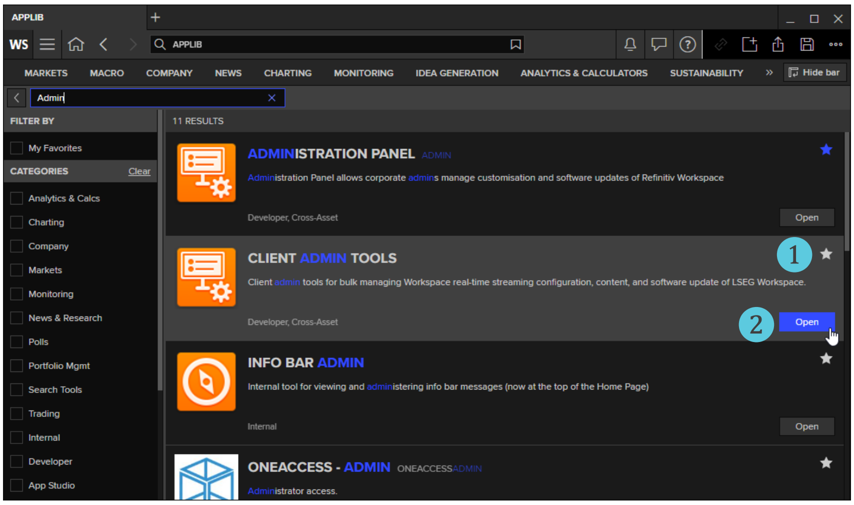
You can access Admin Tools from Workspace Desktop or directly through the Web.

Client admins who can already access the Administration Panel app can access Admin Tools without needing to request access.

Accessing through Workspace Desktop

The Admin Tools app can be accessed through Workspace Desktop in the following ways:

- Through the App Library
- Using a CPURL



Accessing through the App Library

To access Admin Tools through the App Library:

1. Login to Workspace
2. Select WS > App Library (or Alt+L)
3. To filter the app list, in the Search box, type Admin
4. [Optional] To add the Admin Tools app to your favourites, click the ★ icon 1
5. To open the app, click the **Open** button 2

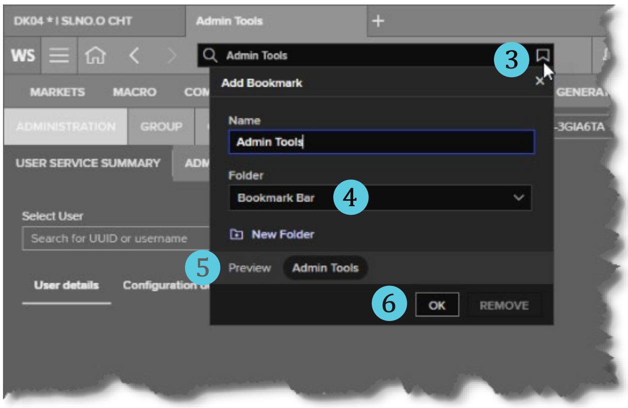
Accessing using a CPURL

To access Admin Tools from Workspace desktop:

1. Login to Workspace
2. Paste the following URL into the search bar and press **Enter**:

   `cpurl://cdn./rap/admin-tools`

   The Admin Tools app panel is loaded.
3. [optional] It is recommended that you bookmark the app. To do so:
4. At the end of the search field, select the 🔖 icon 3.
5. [Optional] From the **Folder** dropdown 4, choose the location where you want to save the Admin Tools bookmark – either the bookmark bar or a sub-folder[1].
6. Click the **OK** button 6 to save the bookmark.



Accessing through the Web

To access Admin Tools through the Web:

- Click the URL, below:

  https://workspace.refinitiv.com/web/rap/admin-tools/index.html/

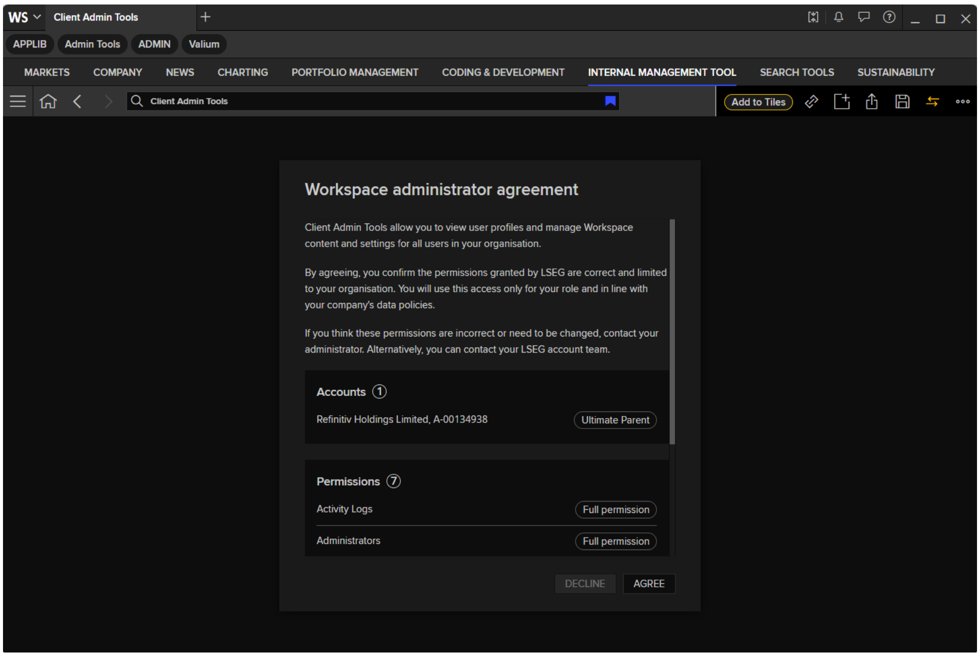
[1] You can create sub-folders under the bookmark bar by using the **New Folder** function 5.

Acknowledging the administrator agreement

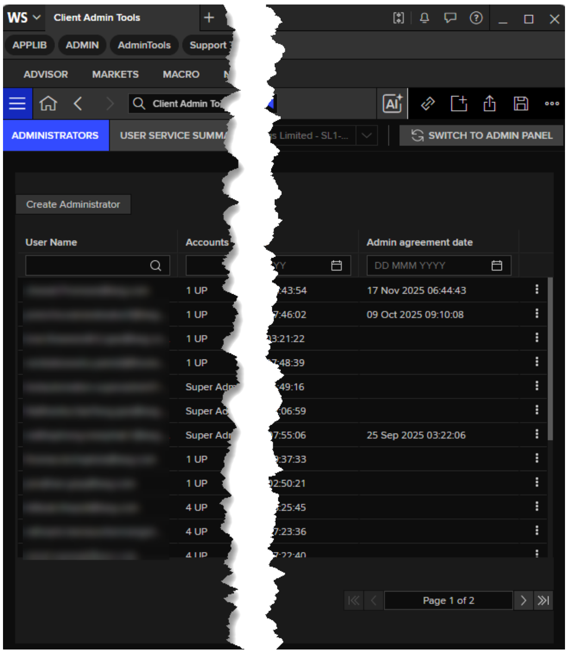
When first logging into Client Admin Tools to gain access to its features, you must acknowledge the Workspace administrator agreement. In doing so, you acknowledge and accept your assigned account(s) and permissions[2], ensuring accountability and compliance with organizational policies.

To access the tool:

1. Check that the details provided are as expected.
2. Click the **AGREE** button.



Administrators are also prompted to acknowledge this agreement annually. These renewal dates can be found in the **Administrators** tab, listed under the **Admin agreement date** column.



[2] If the assigned accounts and permissions are incorrect, contact your LSEG account team who can amend these settings.

Managing app administration

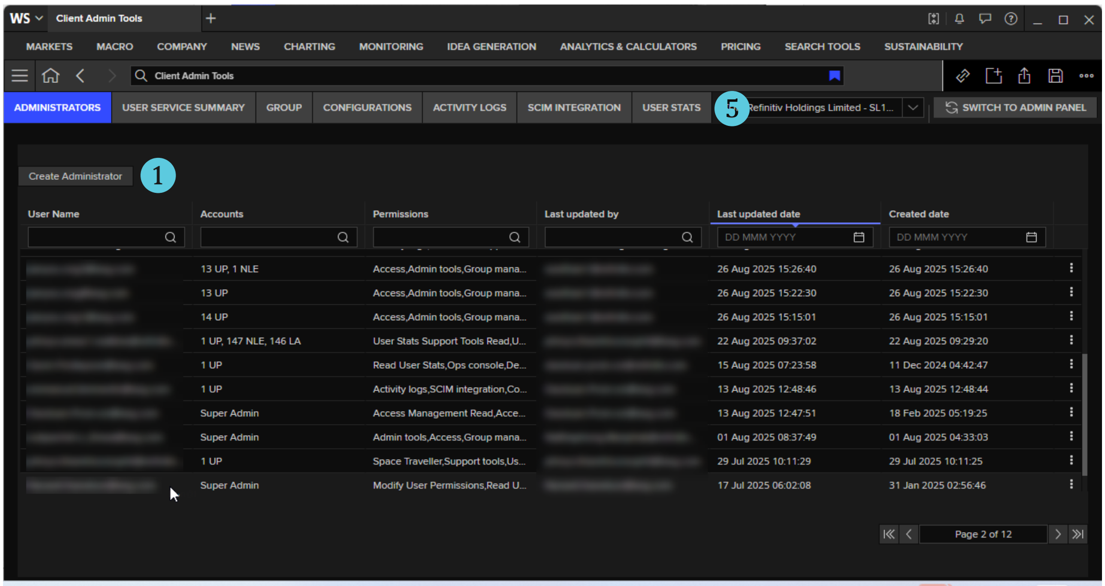
In Client Admin Tools, the **Administrators** tab provides management tools for LSEG and customer administrators, allowing them to:

- Manage user and application permissions
- Provide activity logs
- Query the assigned administration services of a user, for troubleshooting purposes

Managing user and application permissions

The Administrators tab allows administrators in your company to create additional administrators to manage the Workspace experience for users within your company.

Super administrators have the capability of customising the permissions of your other Workspace administrators in your company.



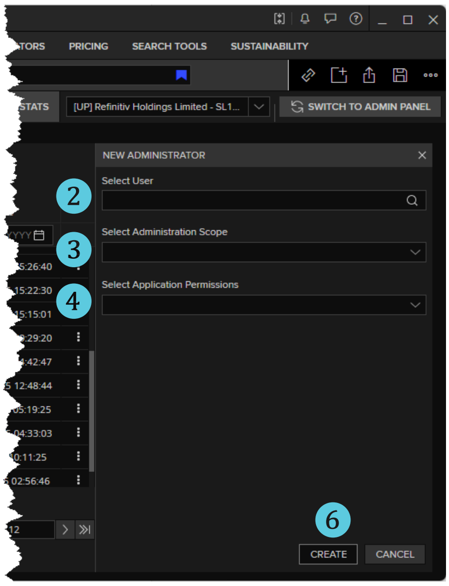
Adding an administrator

To add an administrator and define their permissions:

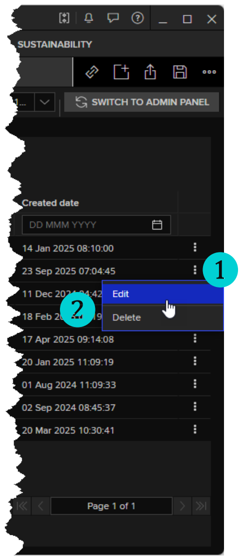
1. Click the Create Administrator button 1.

   The New Administrator panel is displayed.

2. In the **Select User** field 2, begin typing the name of the user you want to permission as an administrator. As you type, a list[3] of matching usernames appears.
3. Under the **Select Administration Scope** dropdown list 3, click the checkbox(es) next to the legal entities to which you want to assign the administrator.
4. Under the **Select Application Permissions** dropdown list 4, select the capabilities you want to assign to the user. These capabilities correspond to the names of the tabs 5 in the Client Admin Tools menu bar and provide access to all capabilities within the selected tabs.
5. Click the **CREATE** button 6.



[3] The threshold for the list to first appear is three (3) characters.



Editing administrator permissions and assignments

To edit the permissions and assignments of an administrator:

1. Click the ⁝ context menu 1 adjacent to the administrator you want to edit.
2. From the menu 2, select **Edit**.

   The Edit Administrator panel is displayed, showing:

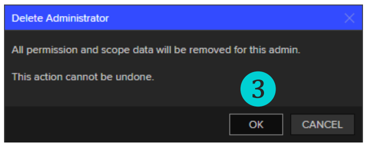
   - The legal entities to which the administrator was assigned.
   - The Client Admin Tools tabs that the administrator can access.
   - Whether the administrator can create or amend information under these tabs.
3. Amend the permissions and entity assignments as required.
4. Click the **SAVE** button.

Deleting an administrator

To delete an administrator from the Administrators panel:

1. Click the ⁝ context menu 1 adjacent to the administrator you want to edit.
2. From the menu 2, select **Delete**.

   The Delete Administrator confirmation dialog is displayed.
3. To delete the selected administrator, In the dialog, click the **OK** button 3.



Viewing user information and permissions

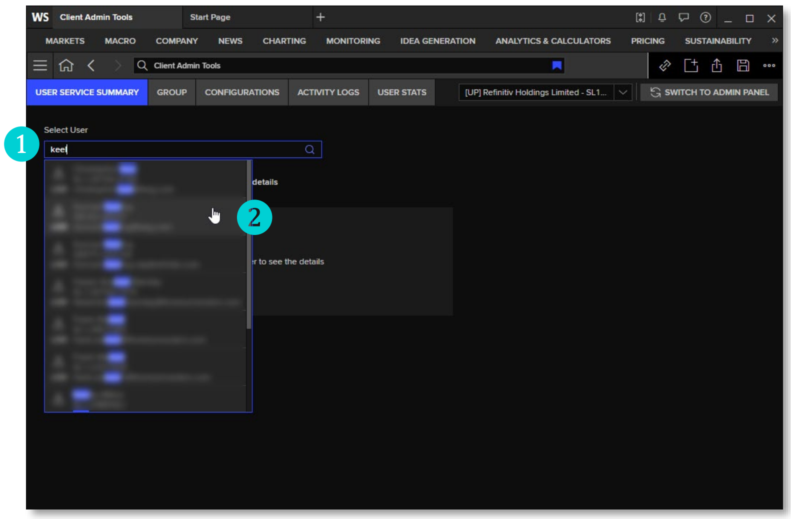
The **User Service Summary** option allows administrators in your company to view user information and the configuration(s) assigned to them.

As a customer administrator, this allows you to investigate whether users are assigned the correct configuration. For example, new joiners being assigned the same configuration as their colleagues in the same role.

To do so:

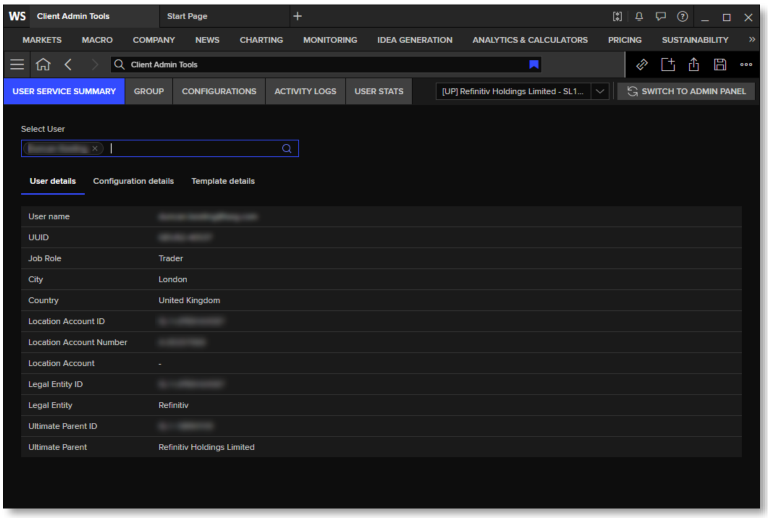
1. In the **Select User** field 1, start typing the username or UUID of the user, whose details you want to view.

   As you type, up to 10 matching values are shown in a panel below the **Select User** field.
2. Either type the full username or UUID or, if visible, select 2 the user from the matching panel.

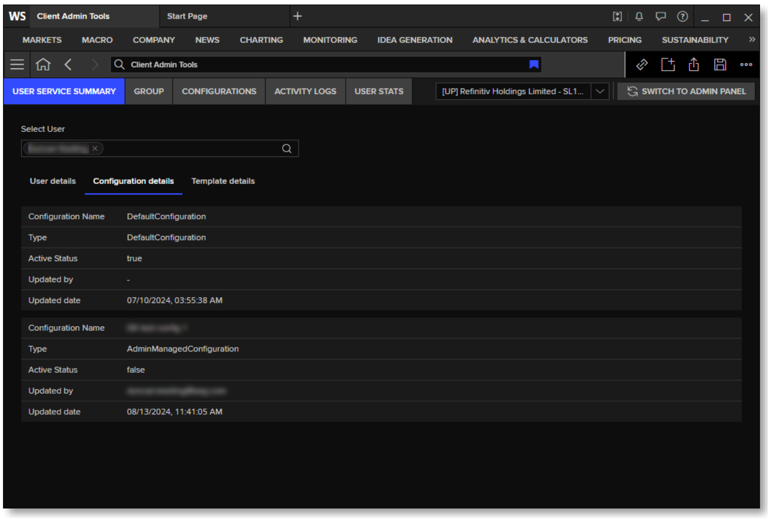


Information for the selected user is divided over three tabs:

- **User details**: This contains the username, ID, role, location, location account information, company information, and so on.



- **Configuration details**: For the default configuration[4] and each configuration assigned[5] to the user, this contains:
  - The configuration name and type.
  - Whether it is their active configuration[6]. That is, the configuration that is applied to the user when launching LSEG Workspace.
  - When it was last updated and by whom.



- **Template details**: For the selected user, this contains their assigned homepage, layouts, and tile sets that were assigned by the customer administrator using the Administration Panel app.

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[4] The default configuration is applied only if a custom configuration has not been assigned to the user. For additional information, see the Workspace | OpenFin – Installation and Configuration Guide.

[5] Configurations are assigned to the user by the user themselves, customer administrators in the same scope, and/or LSEG Workspace platform and administration services. For information regarding assignment priority, refer to Appendix A: User permissions hierarchy.

[6] If users have an additional configuration assigned by an administrator, this will become the active configuration.

Managing groups

This section describes the group management features in Admin Tools. As a customer administrator, this allows you to create, edit, and delete groups containing the following:

- Users
- Location accounts (LOCs)
- Nearest legal entities (NLEs)

You can also use this facility to assign configurations or content to groups. Assigned configurations and content are resolved in accordance with the user permission hierarchy described in Appendix A.

Creating a new group

The following rules and limitations apply to group creation using this facility:

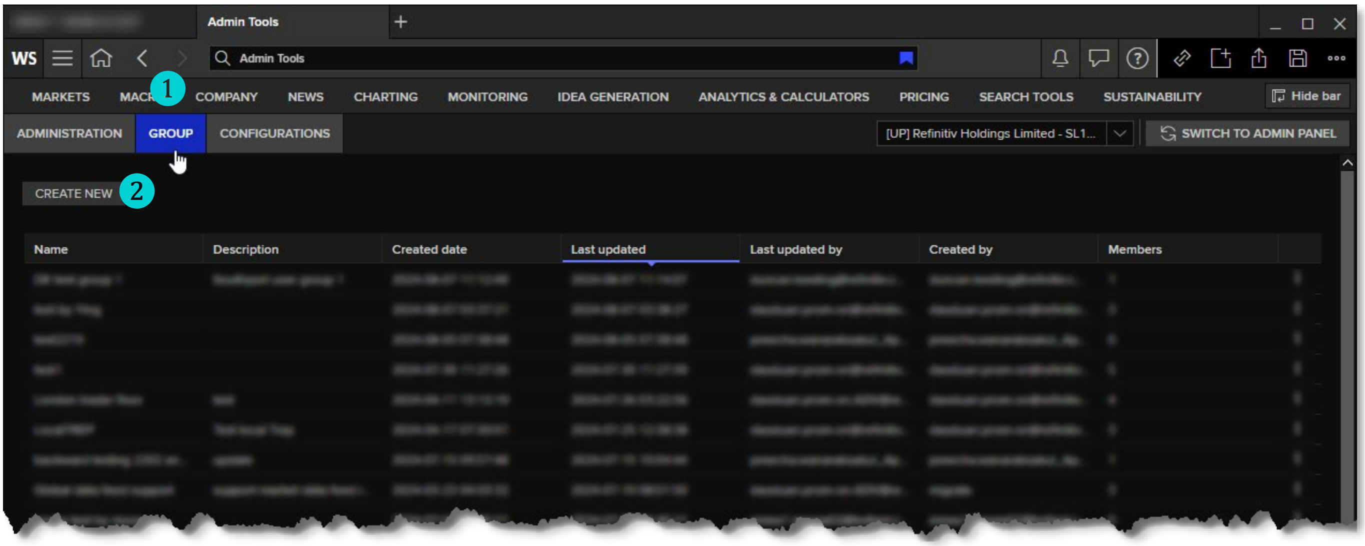
- A user or a location account can be added to multiple groups.
- When adding a location account, all users under that location receive the configuration and content that is assigned to that location account.
- You cannot add your Ultimate Parent (ULT) to a group. This is to prevent a single change impacting all users in a company.
- Groups that are created under a specific scope are not available in another scope.

  For example, any groups created under ULT Company A cannot be seen by an administrator of LOC Company A, New York and, inversely, groups created at LOC level are not seen at ULT level.
- Administrators cannot find or add users or account entities that are not under their scope.

To create a new group, do the following:

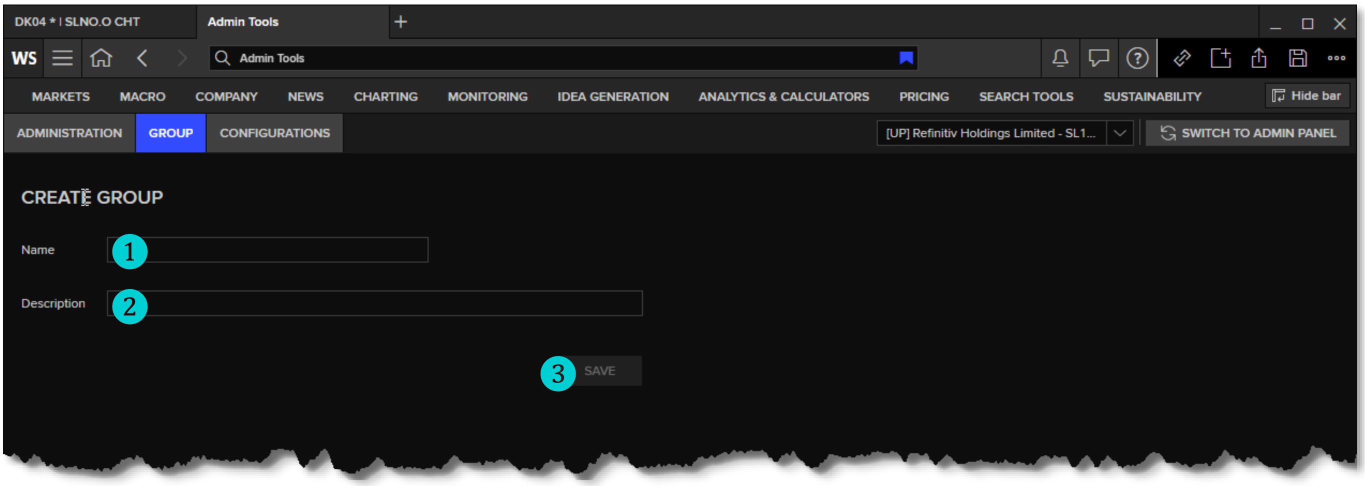
1. Click the **Group** menu option 1.

   The Group page is displayed:



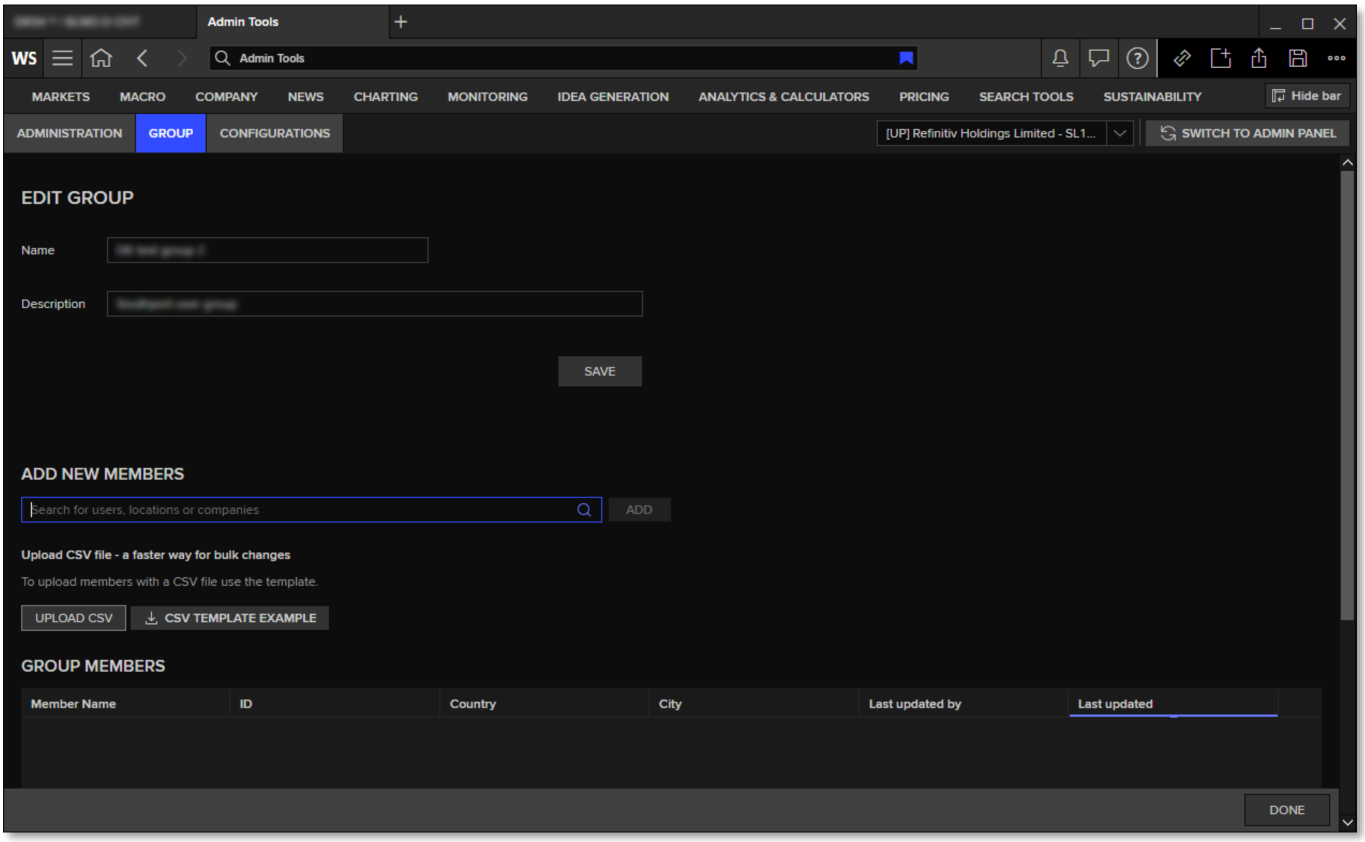
2. Click the **Create New** button 2.

The Create Group panel is displayed:



3. Enter a unique group **Name** 1 and a short **Description** 2, then click **Save** 3.

   The Add New Members section is displayed:



Here, you can add members by using:

- The search facility, to find specific users, locations, and legal entities, or
- A CSV file, containing list of UUIDs or account IDs.

For further information, see Adding group members.

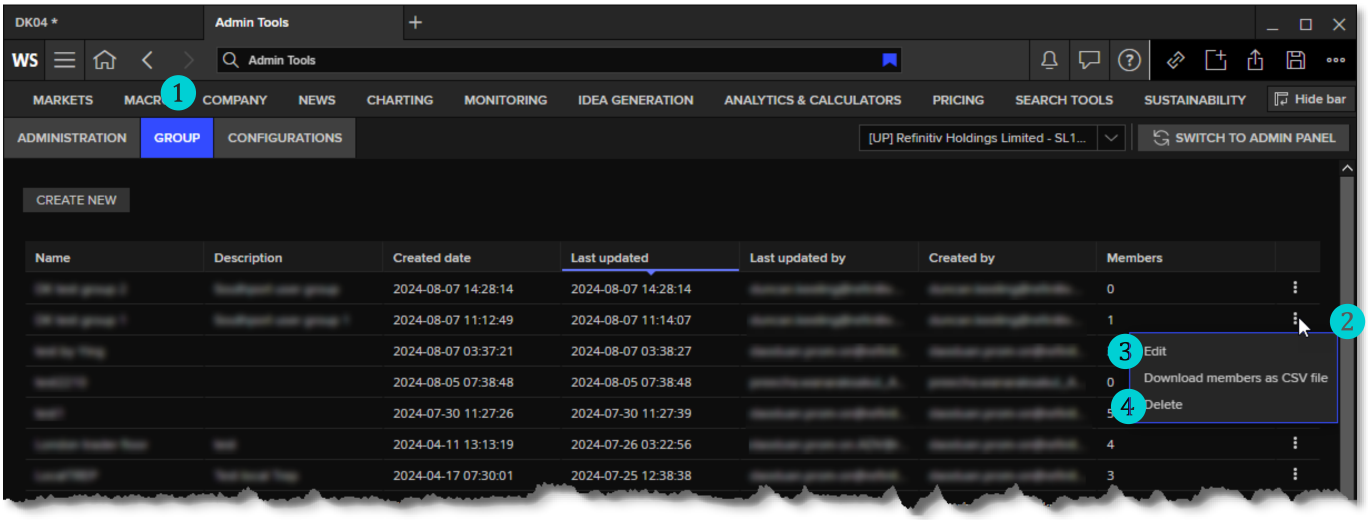
Editing and deleting groups

Existing groups can be edited or deleted through options in the ⋮ menu, found at the end of each group row.

To edit or delete a group, do the following:

1. Select the **Group** option 1.

   All groups that have been created under your entity are listed:



2. Scroll through the list of defined groups to find the group you want to edit or delete. You can also sort the list by clicking any of the headings – Name, Description, Created date, and so on.

3. Once you find the group, click the ⋮ symbol 2 at the end of the group row to open the context menu (as shown in the illustration above).

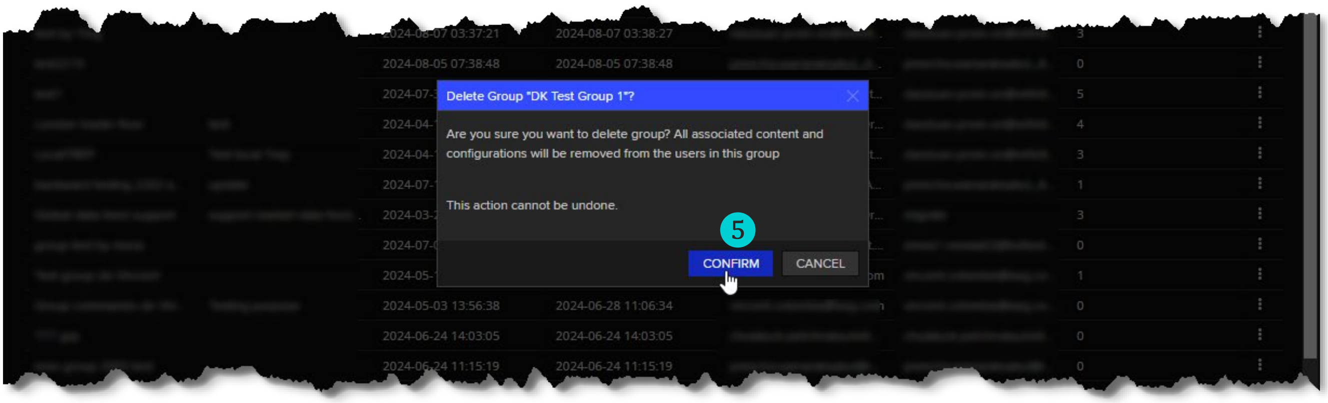
   - To edit the group, select **Edit** 3.

     This opens the Edit Group panel. See step 3 in the [Creating a new group](#) section.

     Or

   - To delete a group, select **Delete** 4.

     A confirmation dialog is displayed:



4. Click **Confirm** 5.

When a group is deleted, any configurations assigned to members of that group are removed. These users will then receive a notification requesting that they restart Workspace to apply the default platform configuration.

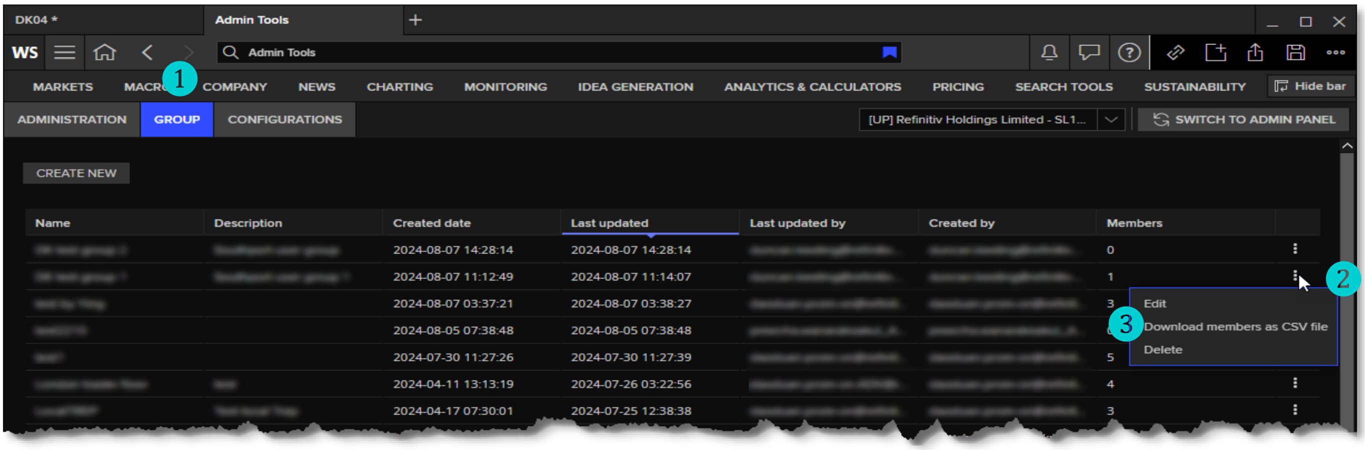
Downloading group members in CSV format

Using the **Download group members in CSV** context menu option provides administrators with a transferable audit list of all members in a group. For instance, before deleting a group, if you intend to move its members into another group, you can use this option to generate the CSV file - which can be edited to add more members, for example - and upload it to a new group.

To create a CSV file containing all members of a group, do the following:

1. Select the **Group** option 1.

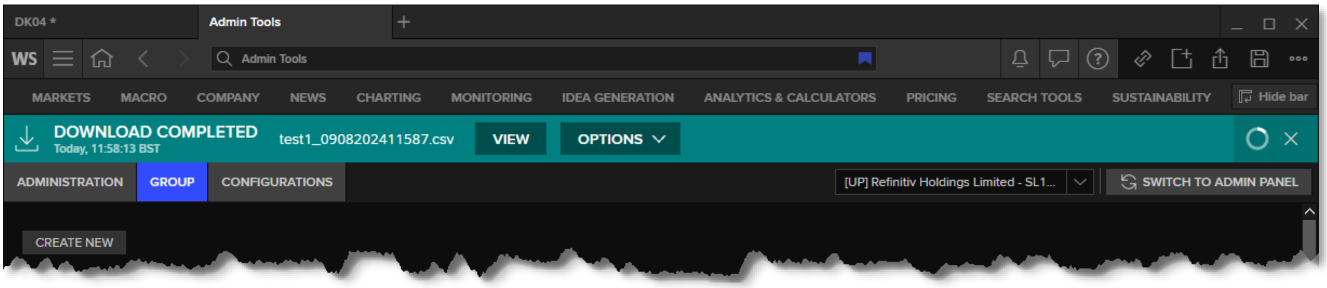
   All groups that have been created under your entity are listed:



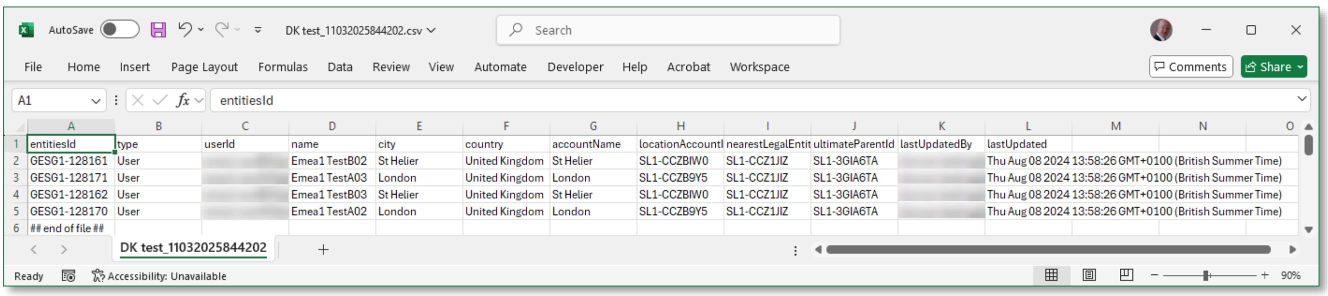
2. Scroll through the list of defined groups to find the group whose member list you want to download. You can also sort the list by clicking any of the headings – Name, Description, Created date, and so on.
3. Once you find the group, click the **⋮** symbol 2 at the end of the group row to open the context menu (as shown in the illustration above).
4. Select the Download members as CSV file option 3.
   - A CSV file is created with the following naming convention:

     `<group name>_<download-date-time>.csv`

   - Once the file has been downloaded, a banner message appears:



   - The file is then opened in Excel, in the foreground:



Adding group members

You can add members to groups by using the search facility or by uploading a CSV file.

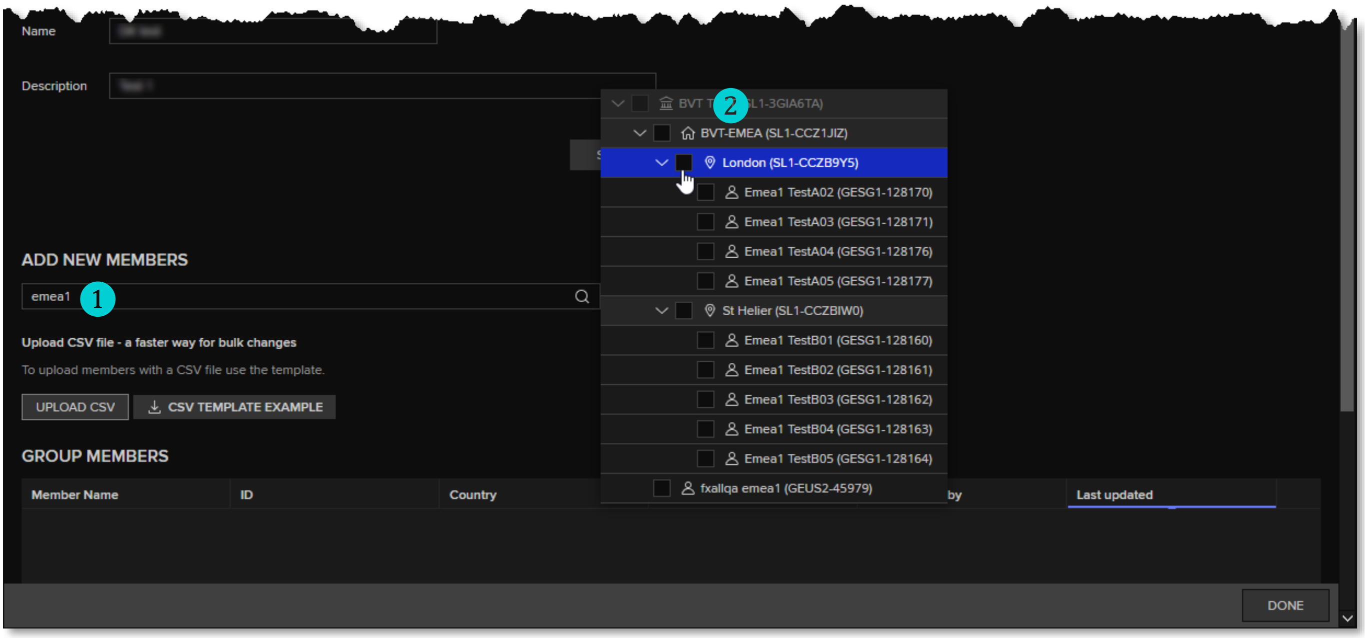
When you add a new member to a group that has an assigned configuration, within one (1) minute, the member will receive a notification advising them to restart Workspace to apply the new configuration. However, the restart is not mandatory, and the configuration can be applied when they next log in to Workspace.

Using the search facility

You can user the search facility to add one or more users[7] as members of the selected group. To do so:

1. In the search 1 field, enter three or more characters.

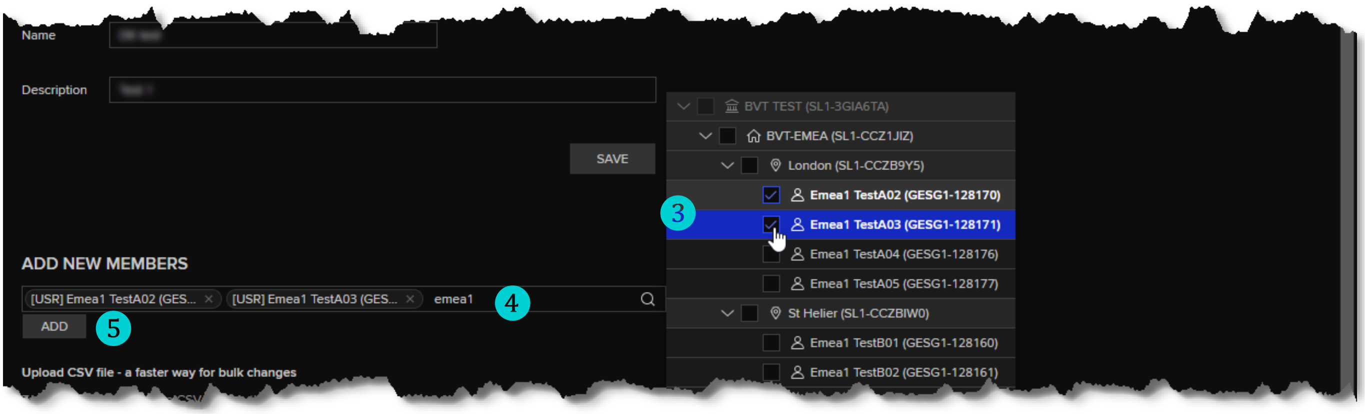
   The results popup 2 appears, listing all entries that match your search criteria:



2. Select the users 3 that you want to add as member of the group.

   Selected entries appear in the search field 4.

3. To add the selected users[8] to the group, click the **Add** button 5, found immediately below the search field.



[7] While groups can currently contain locations and legal entities, this capability will be removed from in a Q3 2024 release, as it makes determining the number of users in a group challenging.

[8] The **Add** button is displayed only once you have selected two or more entries.

For information about removing or deselecting members, see Deselecting and deleting members.

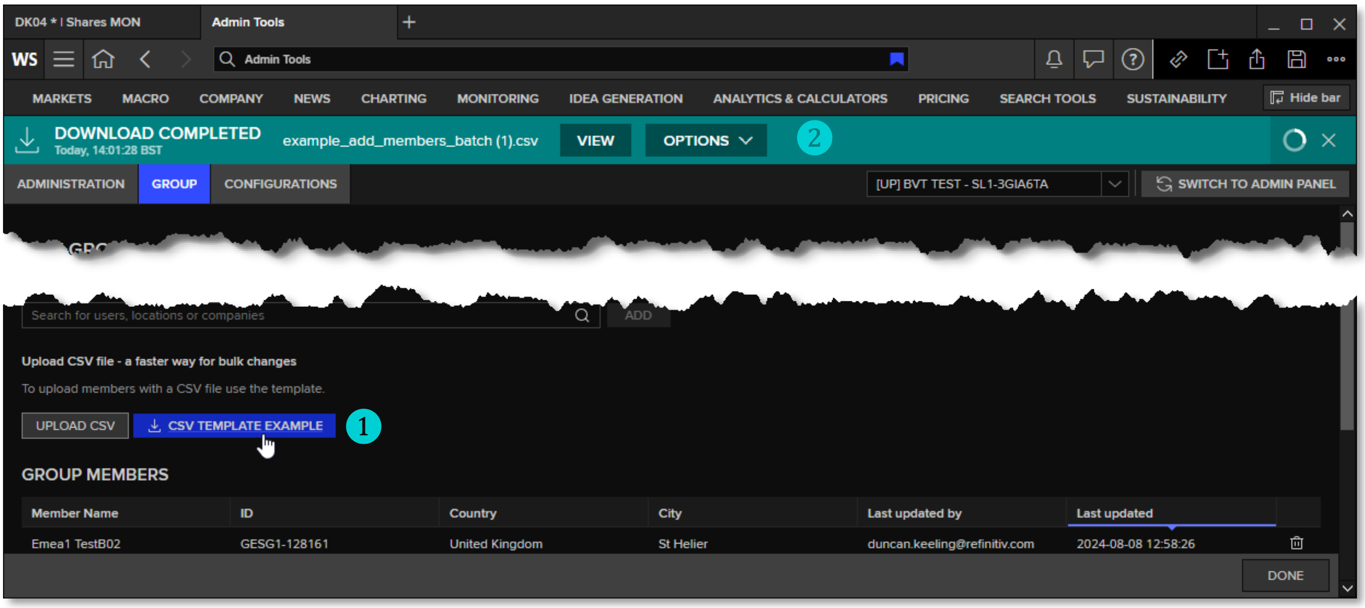
Using CSV upload

You can use the CSV template and upload options to create a CSV file and, using UUIDs, bulk upload users as members of a selected group.

To do so:

1. [Optional] If required, to download the example Excel file, click the **CSV Template Example** button 1.

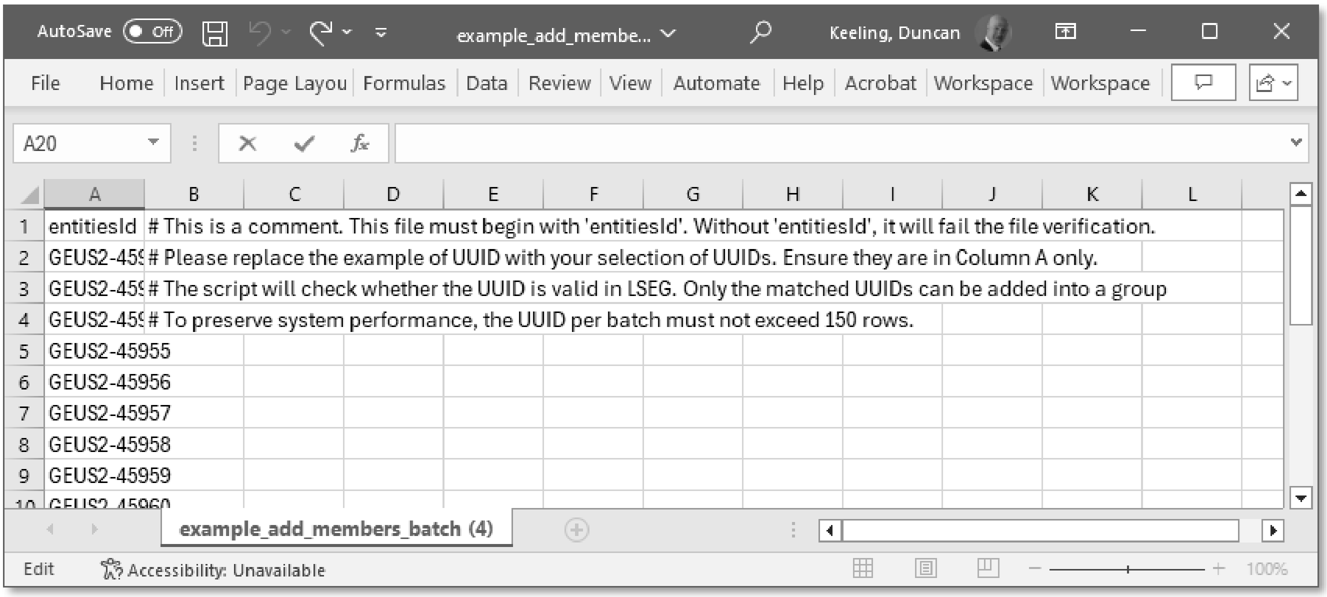
   When the file has finished downloading, a banner message 2 is displayed, and the file is opened in the foreground.



2. Once the Excel file has opened:

   i. Clear[9] the example UUIDs from rows 2-6, and

   ii. In column A, from cell A2 onwards, enter the UUIDs of the users, locations, and entities you want to add as members of a group.

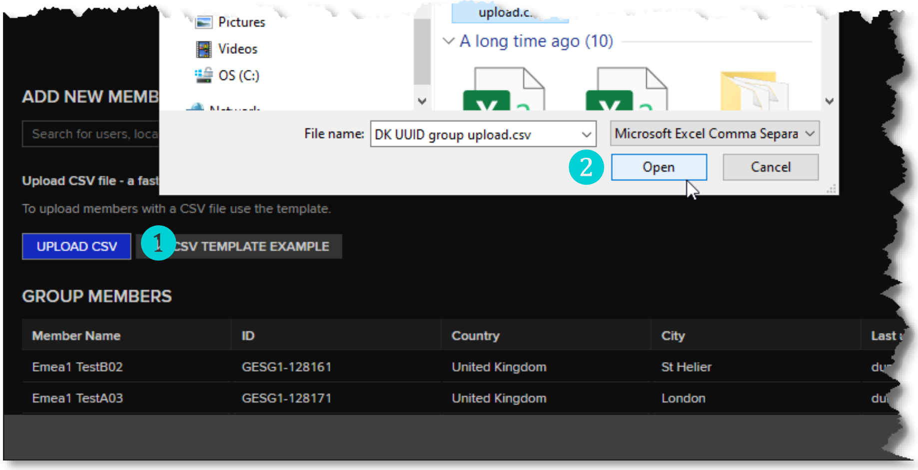


[9] Ensure that cell A1 contains **entitiesID**, as shown in the file example.

iii. Save the file.

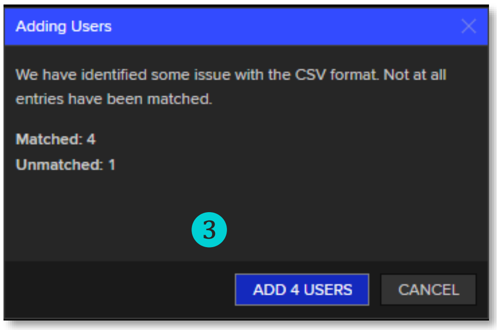
3. If not open already, in the Admin Tools app, under the **Group** facility, open the group in which you want to bulk upload members.
4. Click the **Upload CSV** 1 button.
5. In the Open dialog, locate and select the CSV file, and click the **Open** button 2.

   The entries in the CSV file are verified and a summary of the upload process is displayed. For more information, see [UUID verification](), below.

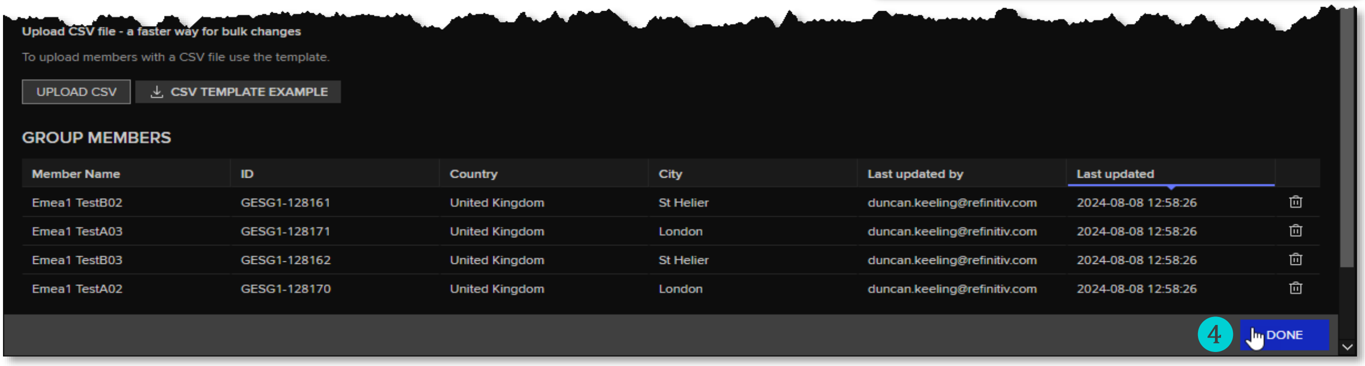


6. To add details of the verified members to the group, click the **Add *X* Users** button 3.

   Successfully added members will appear in the Group Members table.



7. To leave the Edit Group page and go back to the main Group panel, click



   Done 4.

UUID verification

The following checks are performed when loading members using a CSV file:

- UUID validity in LSEG Workspace system. Only UUIDs found under your permission scope will be added to a group.
- Duplicate UUIDs are allowed in the file but only the first UUID will be added. The other duplicated entries will not be added to a group.
- The CSV file must not exceed 150 rows of UUIDs. Exceeding this limit results in file validation failure.

Deleting members from a group

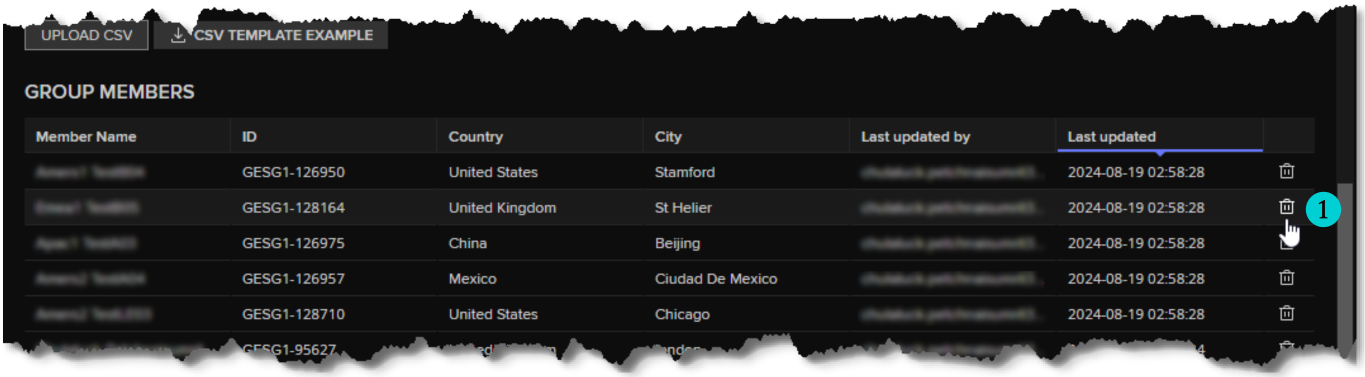
To edit or delete members from a group, do the following:

1. Select the **Group** option.
2. Scroll through the list of defined groups to find the group containing the member(s) you want to remove. You can also sort the list by clicking any of the headings – Name, Description, Created date, and so on.

3. Once you find the group, click the **⋮** symbol at the end of the group row, and choose **Edit** from the context menu.

   The Edit Group panel is displayed.

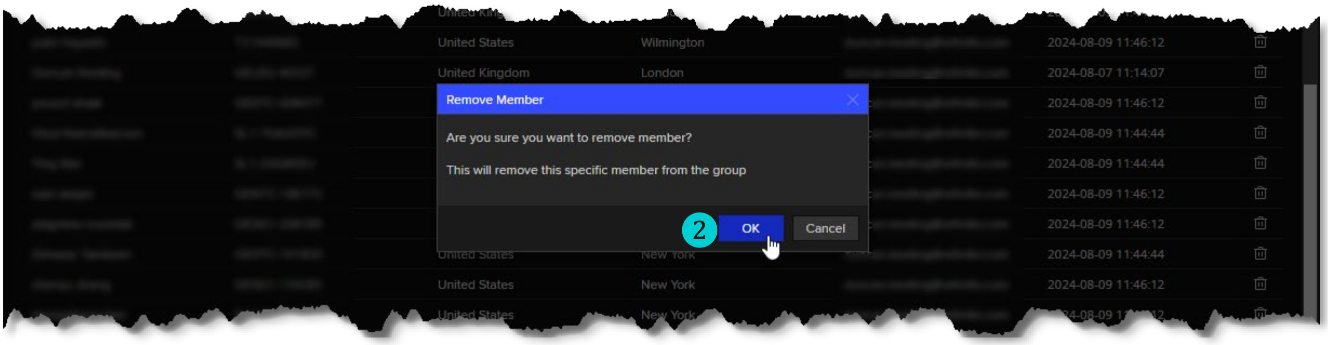
4. Scroll down to the Group Members list, as shown in the example below:



5. For each member you want to delete:

   i. Click the 🗑 icon ① at the end of the member row.

   ii. A confirmation dialog is displayed:



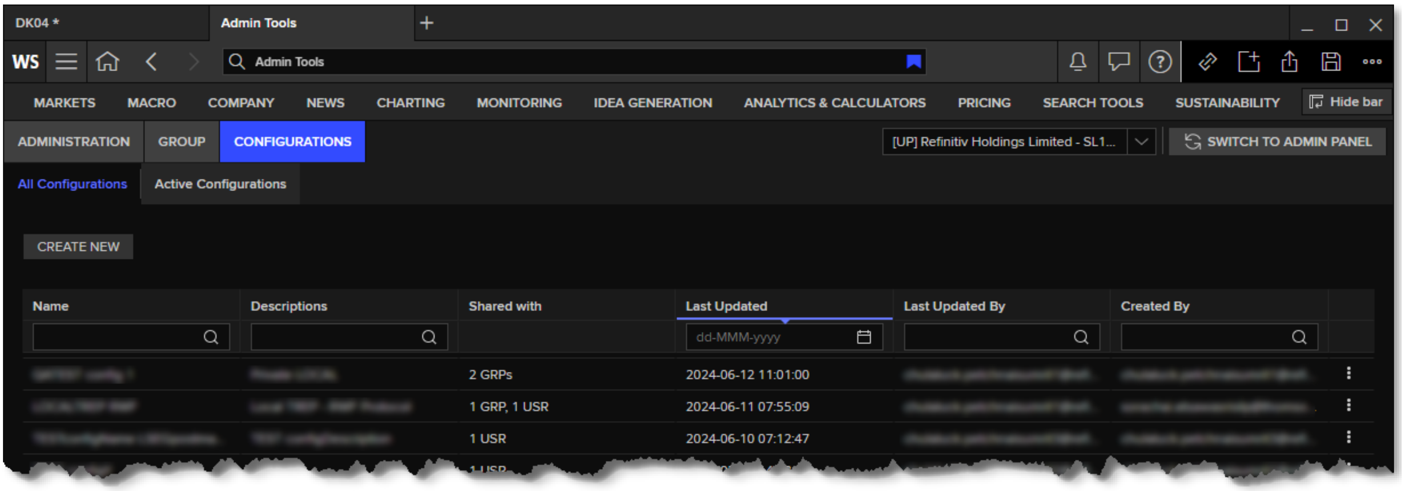
   iii. To delete the selected member, click **OK** ②.

📌 When you delete a member from a group that has an assigned configuration, within one (1) minute, the member will receive a notification advising them to restart Workspace to apply the default Workspace configuration. However, the restart is not mandatory and the configuration can be applied when they next log in to Workspace.

Managing configurations

Configuration and group management functions have moved from the Administration Panel app to Admin Tools and have undergone notable improvements. Customer administrators who have the necessary permissions to access Administration Panel can now access Admin Tools providing an enhanced view of the same content.

Using the configuration management capabilities of Admin Tools, you can do the following:



- Preview content changes.
- Import and export configuration files.
- Assign a selected configuration to multiple account entities and groups.
- Apply configurations to desktops using Workspace for OpenFin.

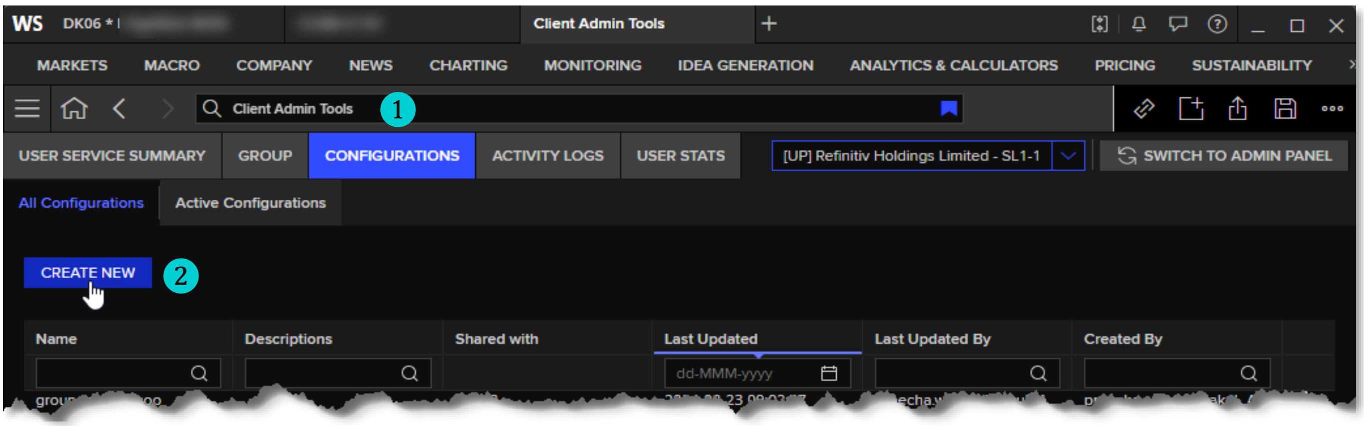
Creating a new configuration

You can create new Workspace configurations either:

- Directly, using the Admin Tools app, or
- In LSEG Workspace, using Configuration Manager. For detailed information about using Configuration Manager, see the **Configuring Workspace** section of the Workspace Installation and configuration guide.

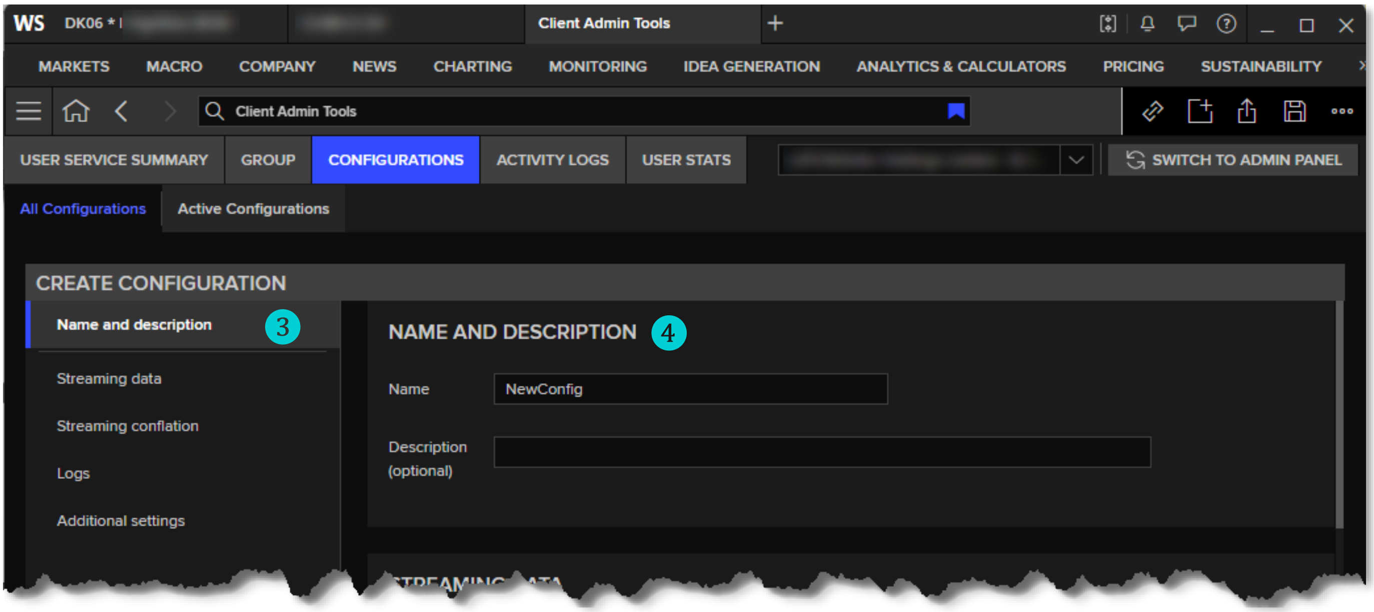
To create a configuration in Admin Tools, do the following:

1. Select the **Configurations** option 1.
2. Click the **Create New** button 2.



3. The **Create Configuration** panel is displayed, which is divided into five sections:

- Name and description
- Streaming data
- Streaming conflation
- Logs
- Additional settings



You can move between sections by:

- selecting the section name from the menu 3, or
- simply by using standard scroll controls, for instance, the wheel button on your mouse.

Alternatively, once you have selected the first entry field, you can move between them using the **TAB** or **Shift+TAB**.

Name and description

4. In the Name and description section 4:

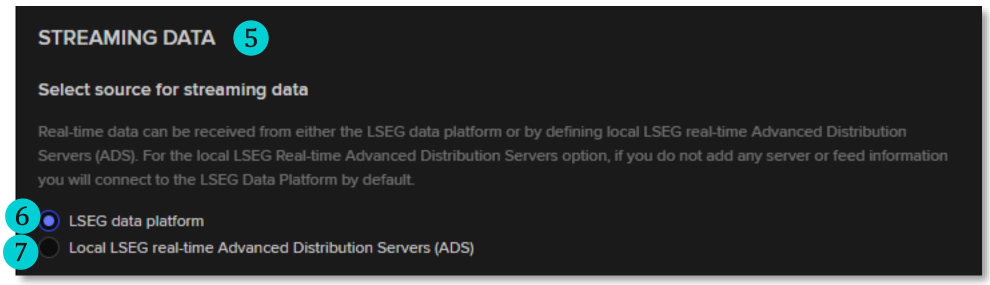
i. type the **Name** you want to give to the configuration, without spaces, and

ii. a brief **Description** of its purpose.

Streaming data

5. In the **Streaming data** section 5, select the source of the streaming data for this configuration. This can be either:

- an LSEG-hosted server 6, or
- your local Real-Time Advanced Distribution Server 7.



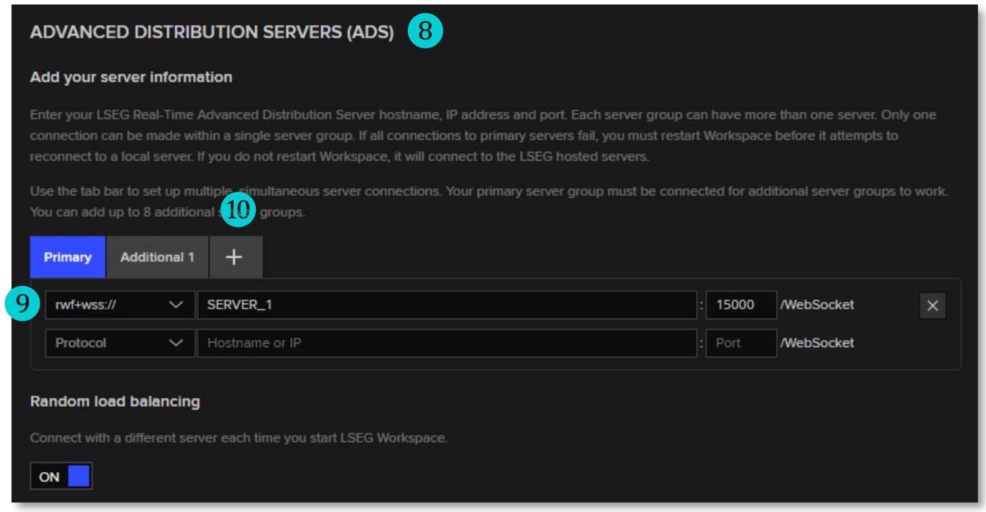
If a local server is selected, three additional sections are shown below **Streaming data**:

- Advanced Distribution Servers (ADS)
- Feeds
- Data Access Control System (DACS)

For details, see [Configuring local servers](), below.

Advanced Distribution Servers (ADS)

6. In the **Advanced Distribution Servers** section 8, shown opposite, enter the LSEG Real-Time Advanced Distribution Server IP address or hostname, together with the port. You can also select the WebSocket protocol[10] from a dropdown list 9, used to enable encrypted or unencrypted connections to the Workspace platform for streaming services.

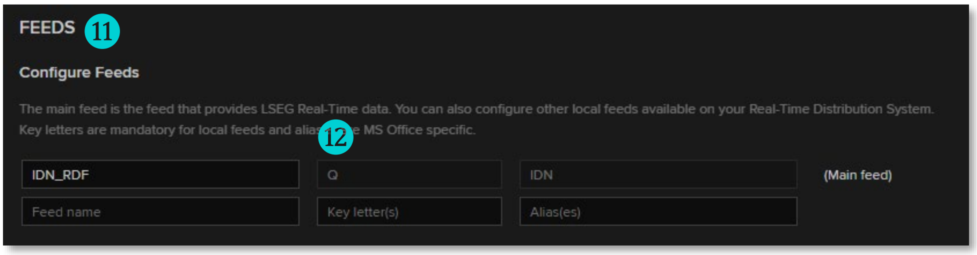


7. Click **+** 10 to add additional servers to which connections are made simultaneously. These are used if you have data feeds from different servers.

   For fallback configuration, you need to add server entries in the same tab (**Additional 1**, and so on) as the **Primary** server to be supported.

Feeds

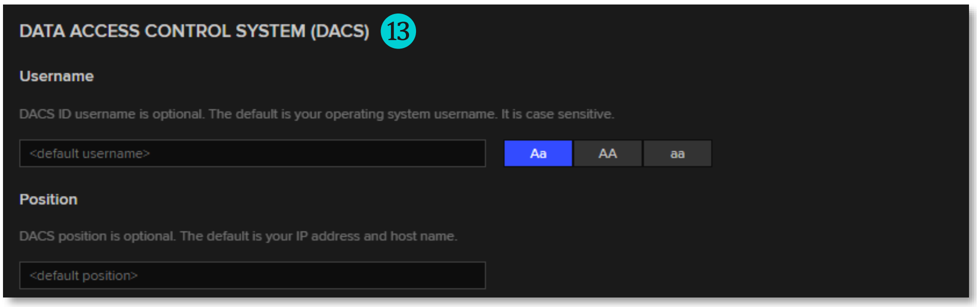
8. In the **Feeds** section 11, shown opposite, configure feeds provided by your local LSEG Real-Time Advanced Distribution Server. In Workspace, key letters[11] can be used as single-character shortcuts to identify different real-time feeds. Aliases, which perform a similar function for Office add-ins, can be up to 32 characters.



   While you can assign any of the supported letters or digits to your feeds, the **Q** key letter 12 must be used to identify a feed that provides trade-safe Elektron Real-Time data.

Data Access Control System (DACS)

9. In the **Data Access Control System (DACS)** section 13, enter the LSEG Real-Time Data Access Control System[12] username and position.



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[10] The WebSocket(ws) protocol provides full-duplex communication channels over a single TCP connection. For further information, see [RFC 6455: The WebSocket Protocol (rfc-editor.org)](https://www.rfc-editor.org).
For further information on WebSocket and Refinitiv Wire Format (RWF), refer to the Streaming protocols section of the [Workspace Installation and Configuration Guide](#).

[11] For key letters and aliases, Workspace supports only a subset of ASCII printable characters. That is, the values a-to-z, A-to-Z, and 0-to-9.

[12] For further information about configuring Real-Time data, refer to the Configuring Real-Time Data products appendix of the [Workspace Installation and Configuration Guide](#).

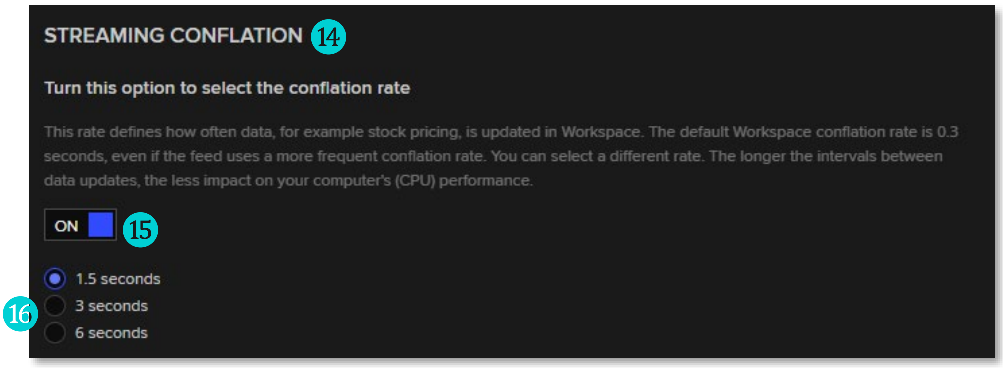
Streaming conflation

10. The **Streaming conflation** section ⑭ allows you to control whether you use the default conflation rate for Workspace data or choose your own.

    By default, the slider switch ⑮ is set to **OFF**. This indicates that the default conflation rate of 300 milliseconds (0.3 seconds) is applied.
    To choose the conflation rate:

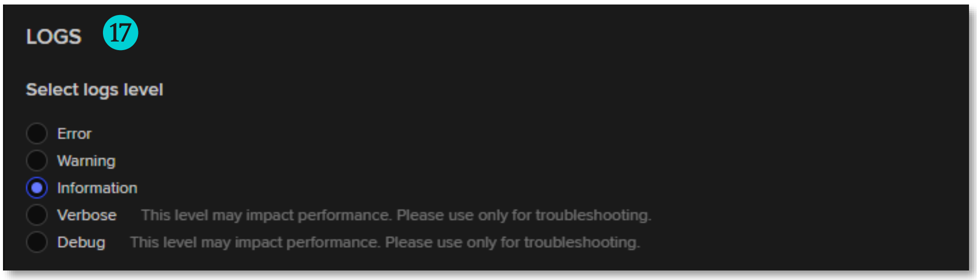
    i. Click the slider switch ⑮ to toggle the setting to **ON**.

    ii. Select the radio button ⑯ that is adjacent to the conflation rate you require.



Logs

11. In the **Logs** section ⑰, select the level of granularity required in your Workspace log files.



Additional settings

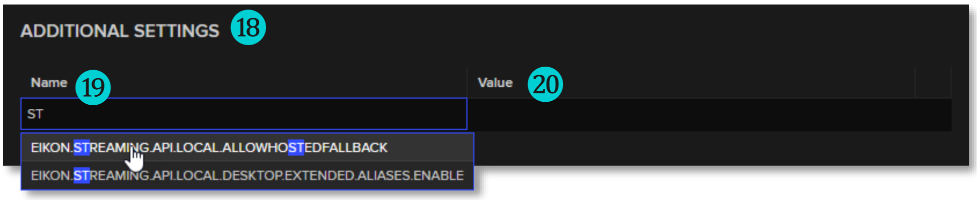
12. In the **Additional settings** section ⑱, shown opposite, you can add further statements to your configuration.

    To do so:

    - Select the **Name** field ⑲ and either select a statement from the list or filter the list by typing.

      The default value for the statement is added to the **Value** field ⑳. However, this can be amended by selecting the **Value** field.

    Once you have added all the entries you require, click the **Save** button.



The created configuration can now be applied to groups.

Working with existing configurations

Currently, Client Admin Tools provides a mechanism for importing a configuration file that was created using Configuration Manager in Workspace. This process is covered in the following section.

However, in the latter half of Q4 2025, we will be introducing the following capabilities:

- Override the default Workspace configurations with a URL link to a configuration file.
- Duplicate existing configuration files for faster editing.

For further information regarding these new features, see the New configuration management features section.

Importing a configuration file

Client Admin Tools provides a mechanism for importing a configuration file that was created using Configuration Manager in Workspace.

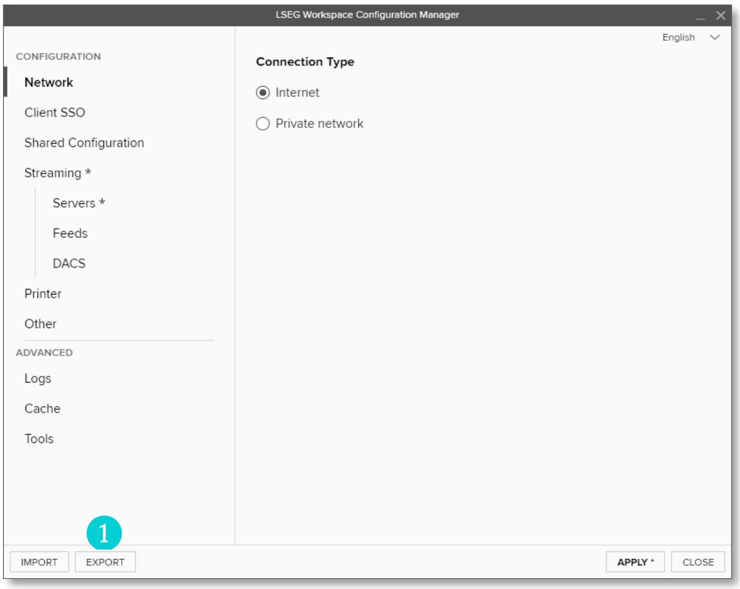
Creating a file using Configuration Manager

Creating a configuration in LSEG Workspace, using Configuration Manager, is covered in extensive detail in the Workspace Installation and Configuration Guide. For details, refer to the Configuring Workspace section of the document.

However, as a high-level overview, to create a configuration and save the JSON file so that it can be imported into Admin Tools, do the following:

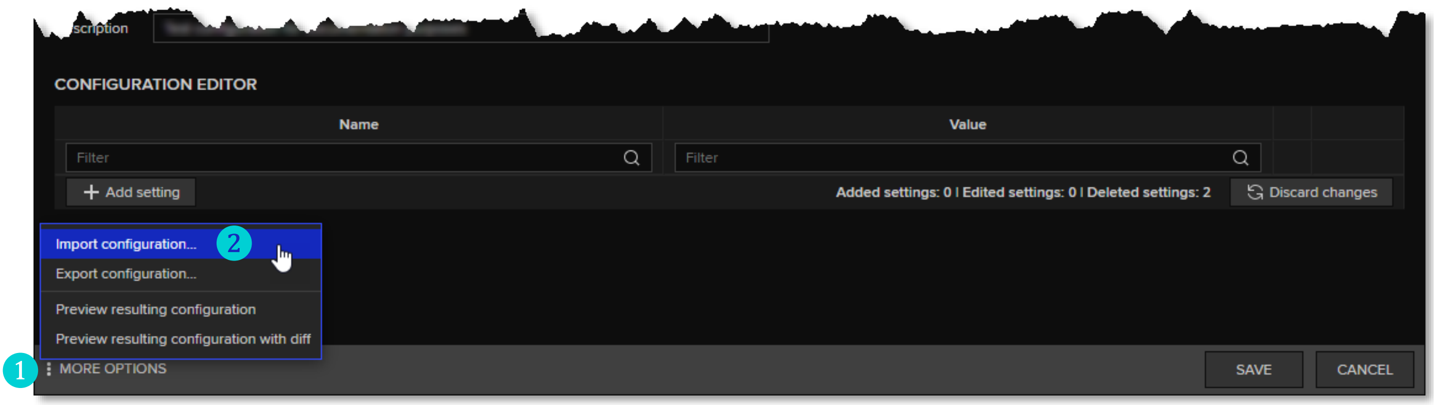
1. In LSEG Workspace, select ⓘ **(Help) > Configuration Manager**.
2. Choose the configuration settings you require.
3. Click the **Export** button 1, at the bottom left of the dialog, and save your configuration settings to a JSON file.

   The JSON file can be imported into Admin tools using the Import facility, described below.



Importing the JSON file

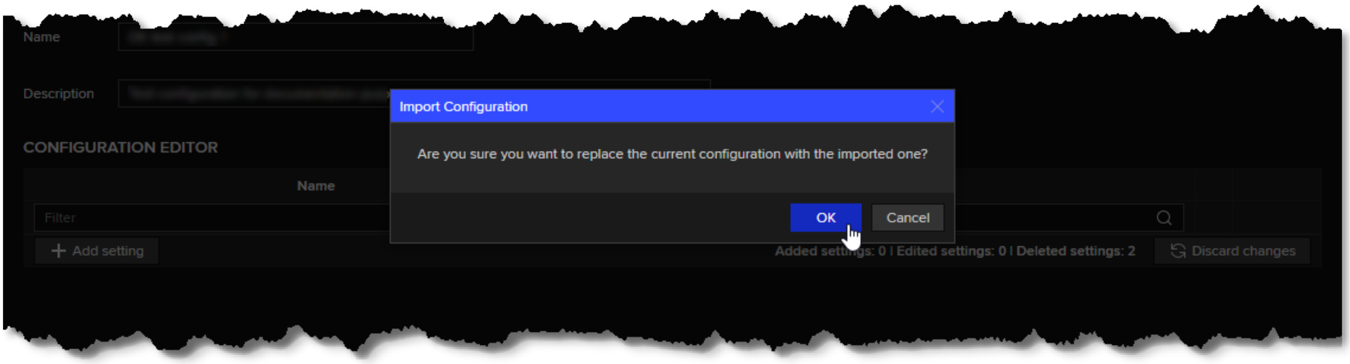
Configuration files that were created using Configuration Manager in LSEG Workspace can be imported into Admin Tools using the Import feature.



To import a JSON configuration file, do the following:

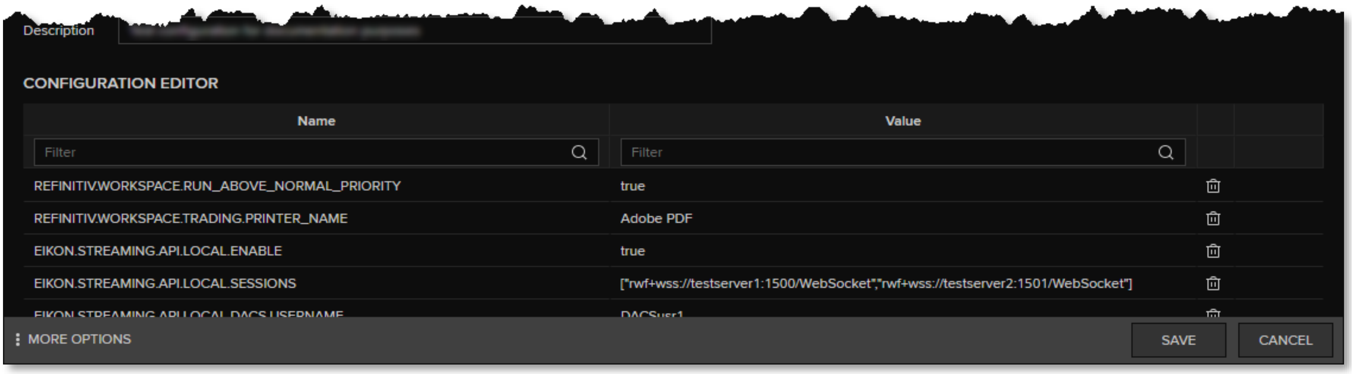
1. At the bottom left of the Edit Configuration panel, click the ⋮ (More Options) button 1.
2. From the menu, select **Import configuration…** 2.
3. In the Windows Open dialog, navigate to the folder containing the exported JSON configuration file, select the file, and click the **Open** button.

4. The following confirmation dialog is displayed:



5. To add the JSON configuration file statements to the selected configuration, click **OK**.

   The entries in the JSON file are added to the configuration, replacing any entries that already exist.



   Once imported, entries can be edited or deleted, as required.

New configuration management features

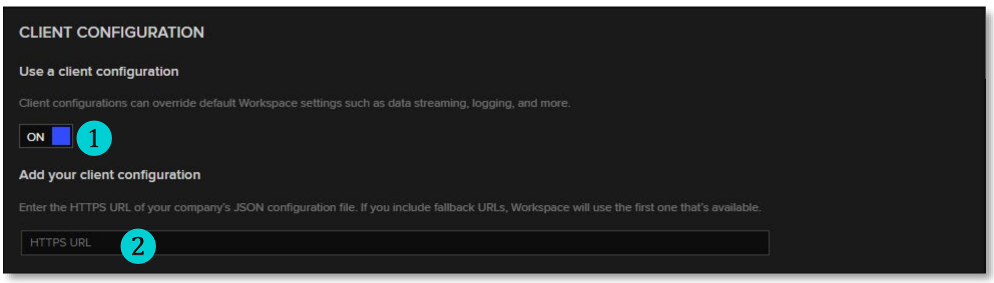
In the latter half of Q4 2025, we are planning to introduce the following capabilities:

- Override the default Workspace configurations with a URL link to a configuration file.
- Duplicate existing configuration files for faster editing.

These new features are illustrated in the sections that follow.

Overriding a configuration

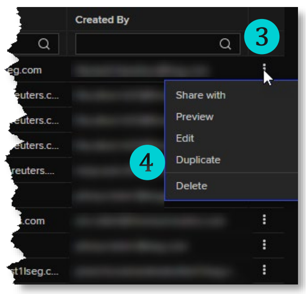
When editing your default Workspace configuration, you will have the option to activate an additional Client Configuration panel, shown opposite.



Once this capability is activated by clicking the slider switch 1, you can add the URL path 2 to a JSON configuration file. This will override the selected configuration.

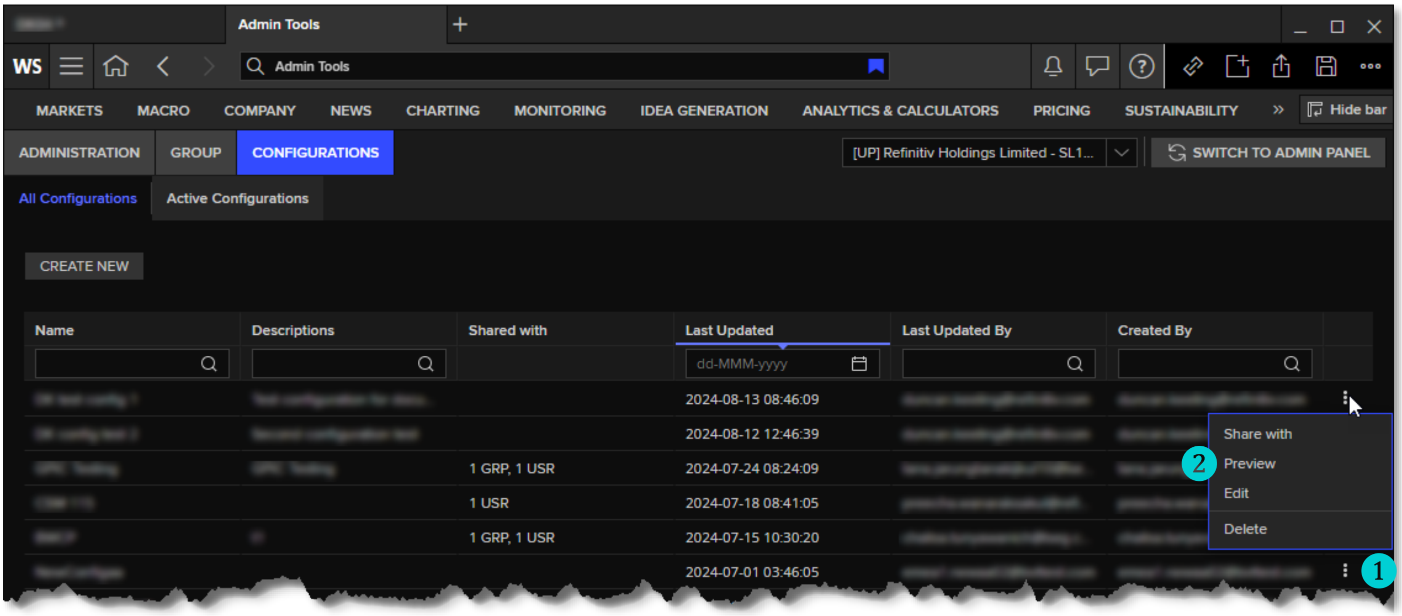
Duplicating a configuration

A further option will be added under the configuration ⋮ menus 3 in the Configurations > All configurations panel, allowing you to duplicate the selected configuration. Once you select the **Duplicate** option 4, a copy of the selected configuration with open in edit mode.



Configuration context functions

Using the configuration ⋮ context menu, you can share, preview, edit, or delete a selected configuration.



Sharing configurations

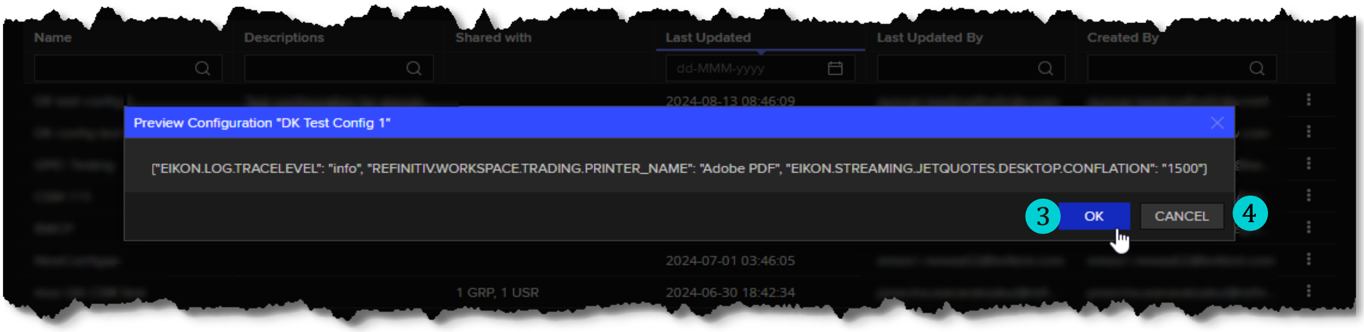
For information regarding sharing and assigning configurations, refer to the following section, [Assigning configurations].

Previewing configurations

You can preview the configuring statements that are defined under a configuration. To do so, do the following:

1. Under the Configurations panel, at the end of the configuration row you want to preview, select the ⋮ context menu 1.
2. Choose the **Preview** option 2.

   The Preview Configuration <Configuration> dialog is displayed:



3. To return to the Configurations panel, click the **OK** 3 or **Cancel** button 4.

Editing configurations

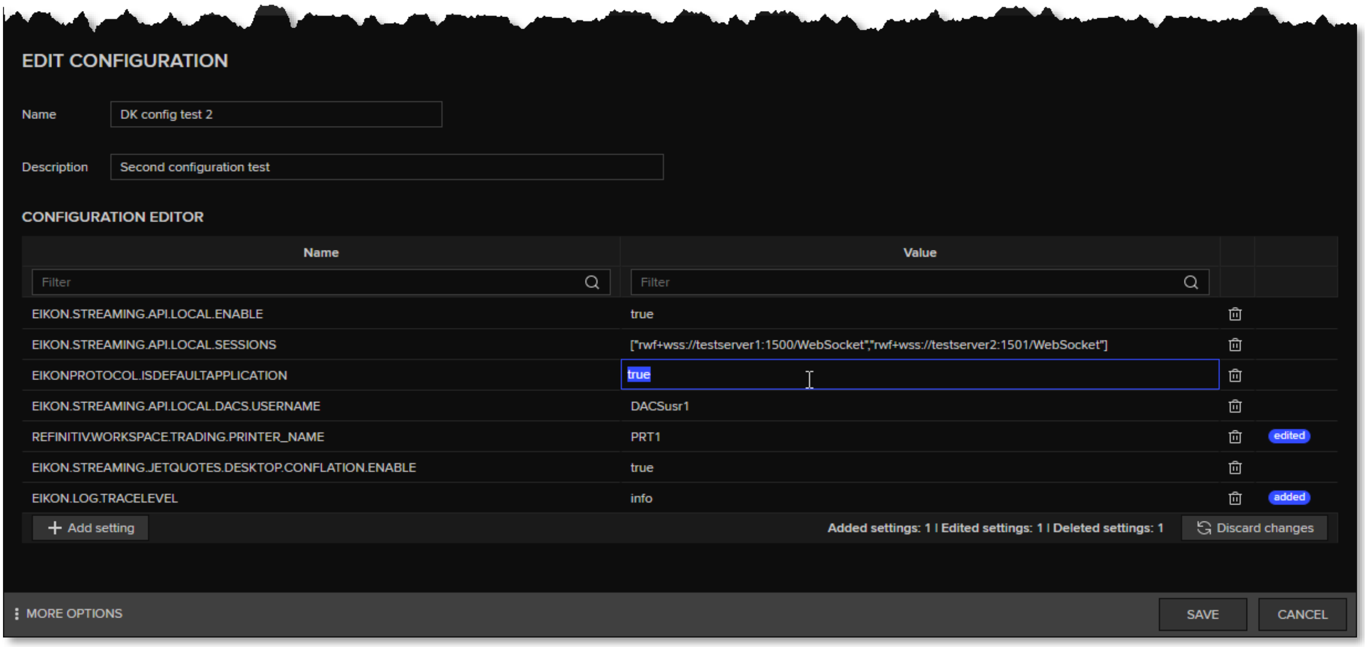
You can review, amend, and edit the configuration statements in a configuration. To do so, do the following:

1. Under the Configurations panel, at the end of the configuration row you want to edit, select the ⋮ context menu.
2. Choose the **Edit** option.

The Edit Configuration panel is displayed, giving you access to the same add and import functions outlined earlier. You can also:

- Select and edit any field, including the configuration Name, Description, and setting value.
- Delete individual settings, using the 🗑 function.

Any changes made are labelled and enumerated.



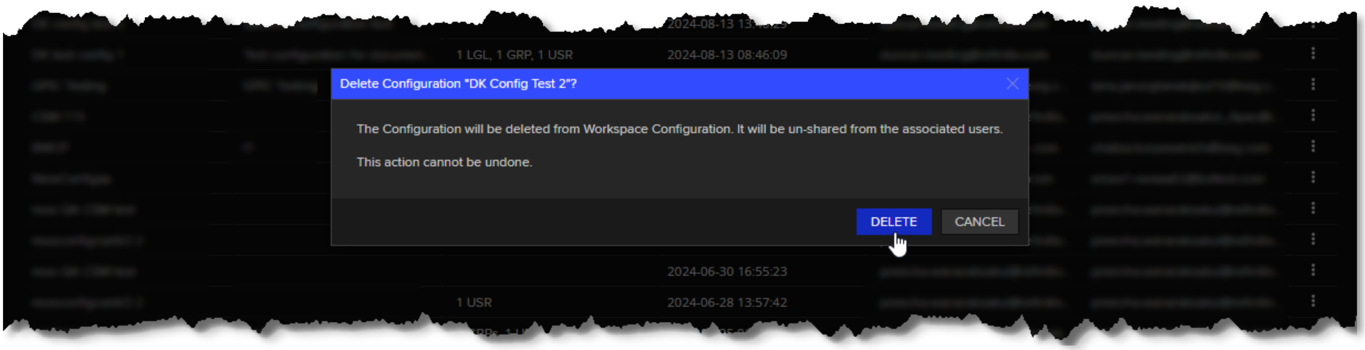
3. Once you have made your amendments, click **Save** to retain your changes and return to the main Configurations panel.

Deleting configurations

Through the Configurations panel, you can delete individual configurations. To do so, do the following:

1. Under the Configurations panel, at the end of the configuration row you want to delete, select the ⋮ context menu.
2. Choose the **Delete** option.

   A confirmation dialog is displayed:



3. To delete the configuration, click the **Delete** button, or click **Cancel** to return to the Configurations panel without deleting the configuration.

⚠ Deleted configurations cannot be retrieved.

Assigning configurations

You can create groups of users, legal entities and/or locations using the capabilities outlined in the Managing groups section. Configurations can then be assigned to these groups using the Share with capability.

For easier to maintain organization, it is recommended that you assign one group to a configuration. Where there is a need to assign that configuration to more users, you can simply add these users into the group to which that configuration is assigned.

Under the Configurations option, you can:

- Share a configuration with a single or multiple users or groups, or
- Search for a user or group and assign a configuration to them

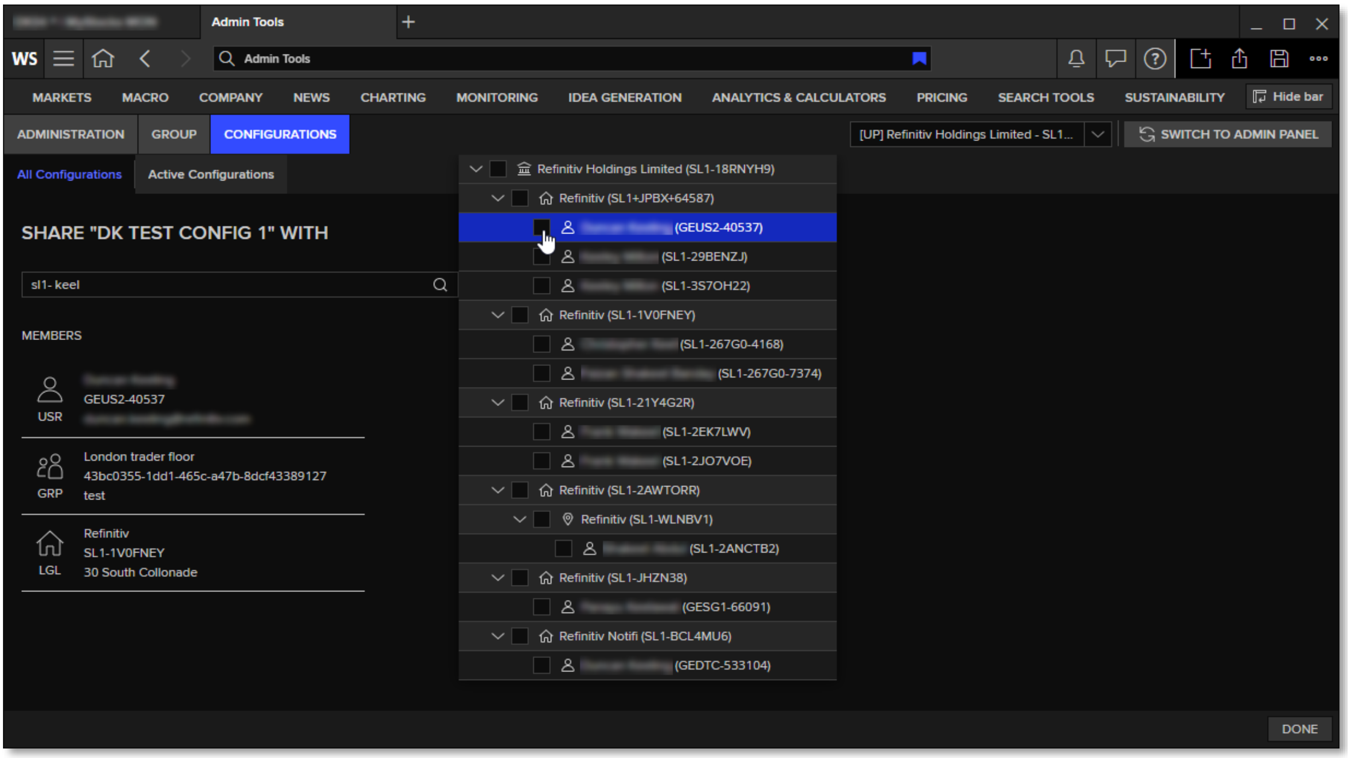
Users who receive administrator-assigned configurations on Workspace Desktop also receive the same configuration on Workspace for OpenFin. However, not all settings may be applicable due to compatibility[13].

Sharing a configuration

To share a configuration with pre-defined groups, entities, or users, do the following:

1. On the Admin Tools menu bar, click the **Configurations** option.
2. Under the **All configurations** tab, at the end of the configuration row you want to share with users or groups, select the ⋮ context menu.
3. Choose the **Share with** option.

   The Share <Configuration> With panel is displayed:



4. Using the search facility, add groups and individual users, as required.
5. Click the **Done** button to save your selections and share the configuration.

---

[13] For further information regarding setting compatibility, refer to the Appendix G: Shared configuration **Settings** section of the LSEG Workspace Installation and Configuration Guide.

Assigning configurations

To assign a configuration to a particular user or group:

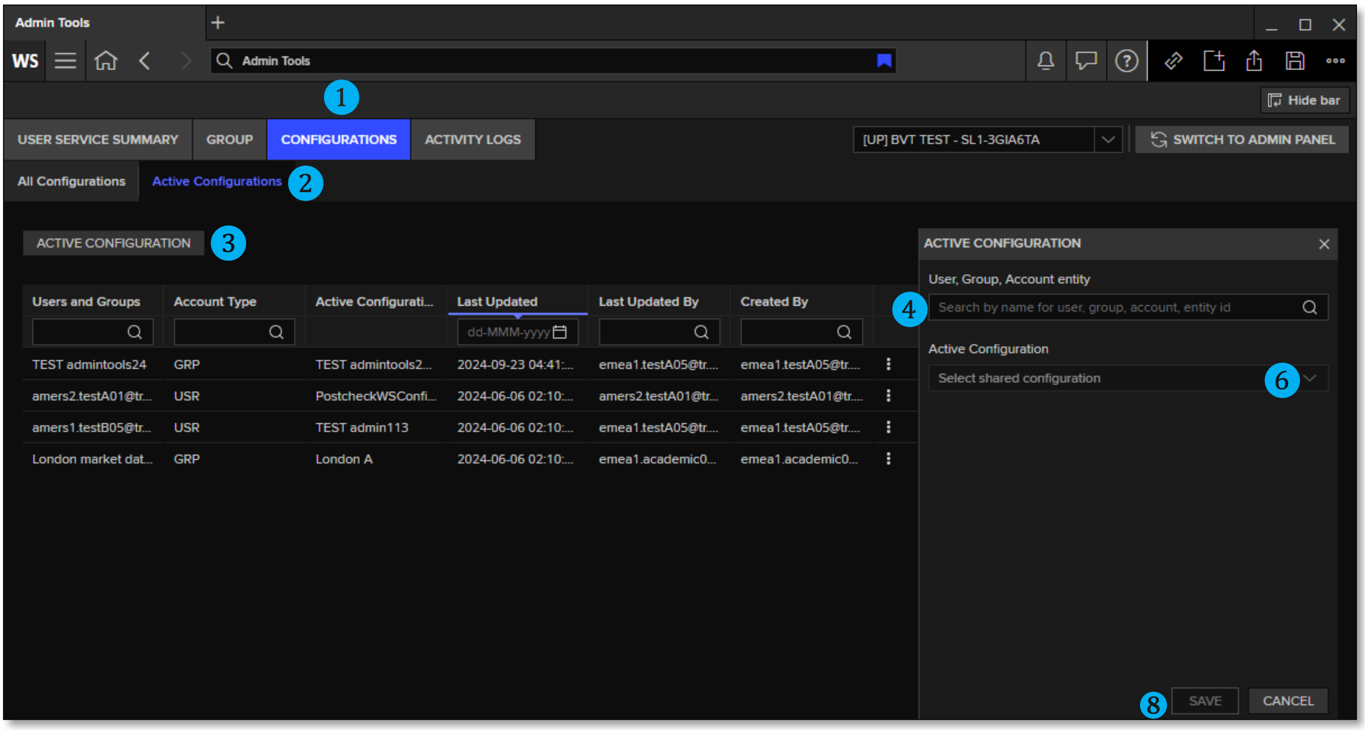
1. On the Admin Tools menu bar, click the **Configurations** option 1.

   The **All Configurations** panel is displayed.

2. Click the **Active Configurations** tab 2, which lists the configurations that have been assigned to individual users and groups.

3. Click the **Active Configuration** button 3.

   The Active Configuration panel is shown:



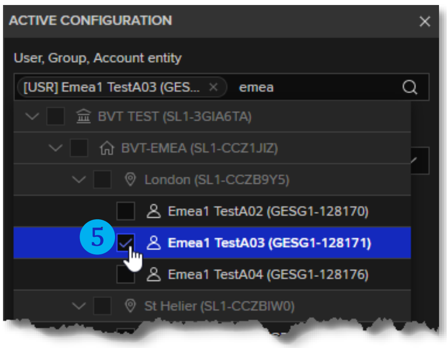
4. Select the **User, Group, Account entity** field 4 and start typing the name of the user or group to which you want to assign a configuration.

   As you type, a list of matching names is shown.

5. Click the checkbox 5 next to the name you want to assign a configuration.

6. Once you have selected a name, to return to the Active Configuration panel, click anywhere outside of the list of matching names.

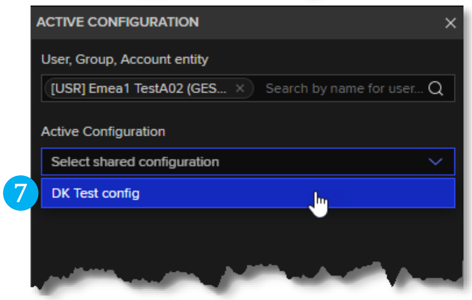
7. Click the **Active Configuration** dropdown list 6.



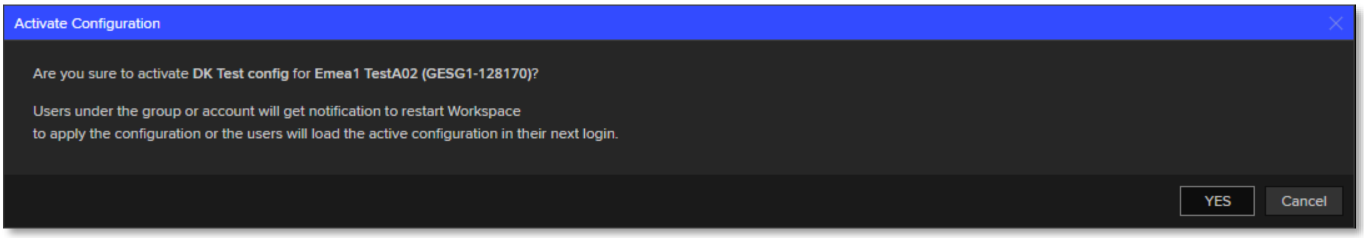
   All configurations that have been shared with the selected name are listed.

8. From the dropdown list, select the configuration 7 you want to assign to the chosen user, group, or account entity.

9. Click **Save** 8.

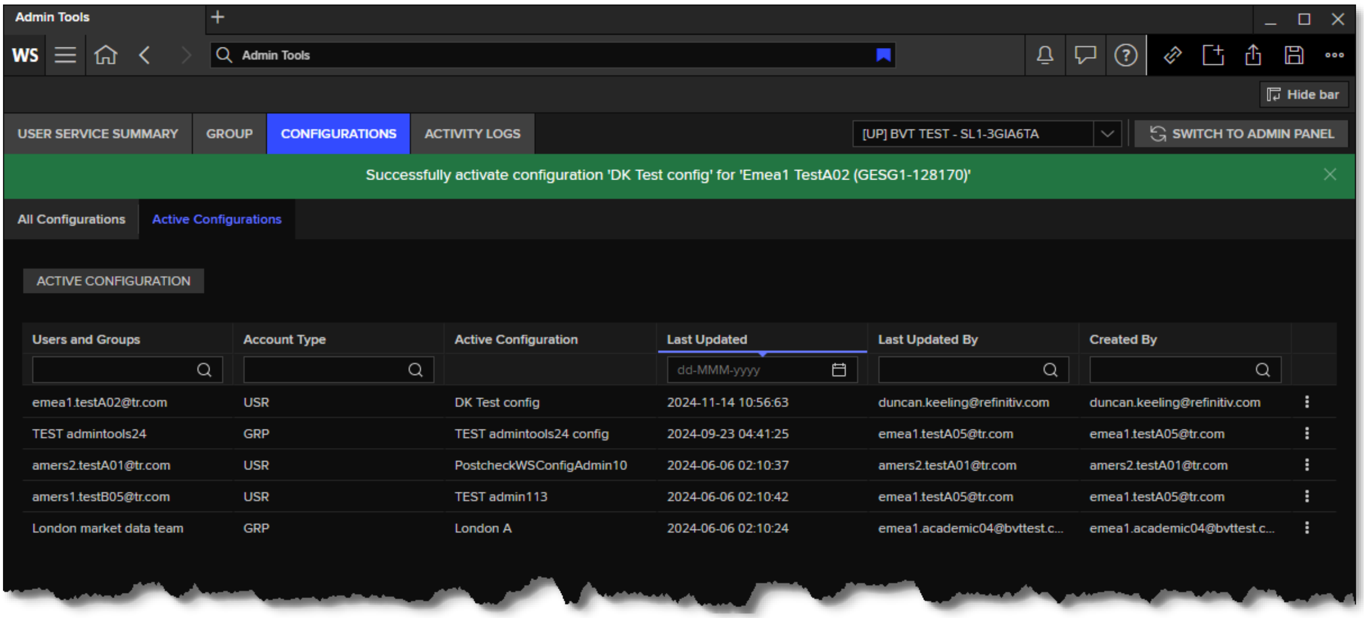


A message is displayed, requiring you to confirm the configuration assignment.



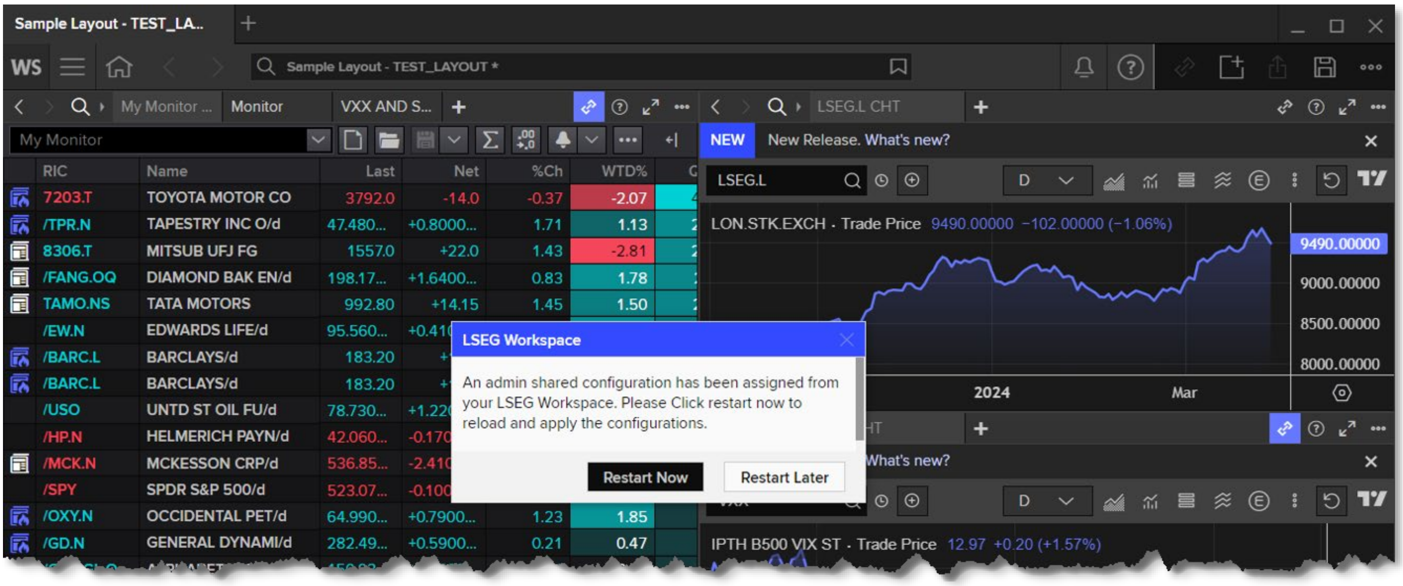
10. To assign the configuration and return to the Active configurations panel, click **Yes**.

    The Active configurations panel is shown, which is updated to include your assigned configuration, and a banner message is displayed confirming the assignment.



Applying the configuration

Within one (1) minute of a configuration being assigned through Admin Tools, users of Workspace Desktop receive a notification to restart Workspace and apply the configuration. They also have the option of restarting later to apply the configuration when they next log in.



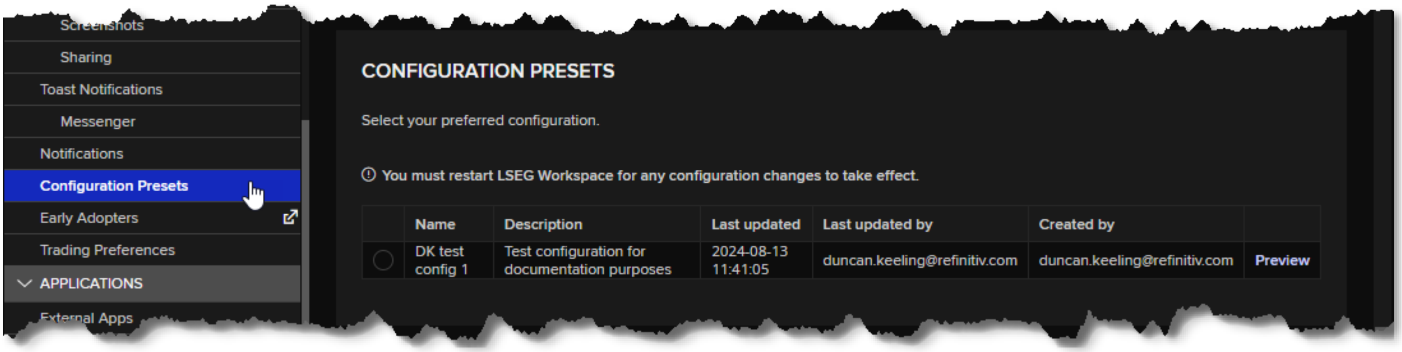
The restart Workspace notification is triggered once the `admin-managed-settings.json`, located in `%AppData%\Refinitiv\Refinitiv Workspace\Cache\Config`, has been updated on the user's device. If the file has not been received within one (1) minutes, it is recommended that affected users sign out and back into Workspace. This will clear their cache and download the file to their device.

Viewing shared and assigned configurations

Administrators can check which configuration users should receive and when it was assigned to the user using the Administration facility in Admin Tools.

For further information on the Administration option, refer to the Administration management section.

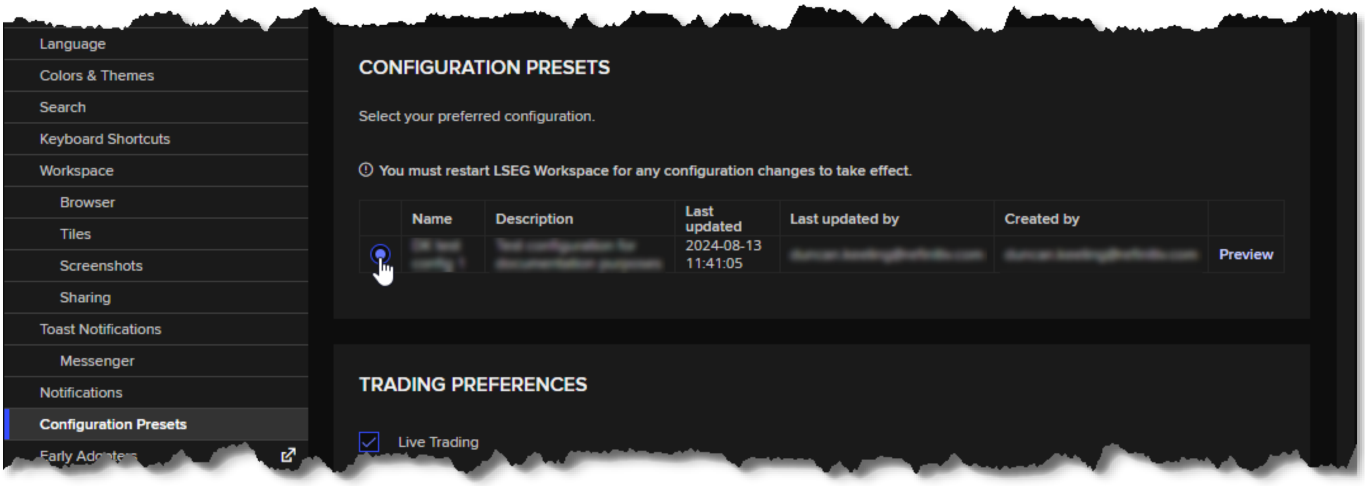
Users can also find configurations that have been shared with or assigned to them under **WS > Settings > Configuration Presets**:



Activating assigned configurations

To activate an assigned configuration, users can do the following:

1. Select the radio button adjacent to the configuration to be activated.



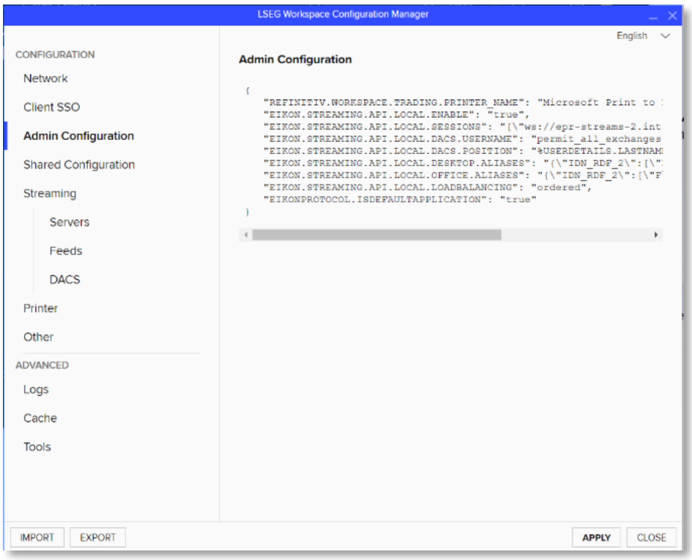
2. Click the **Save Changes** button, in the bottom right corner of the panel.

   Users will be prompted to restart Workspace to activate the selected configuration.

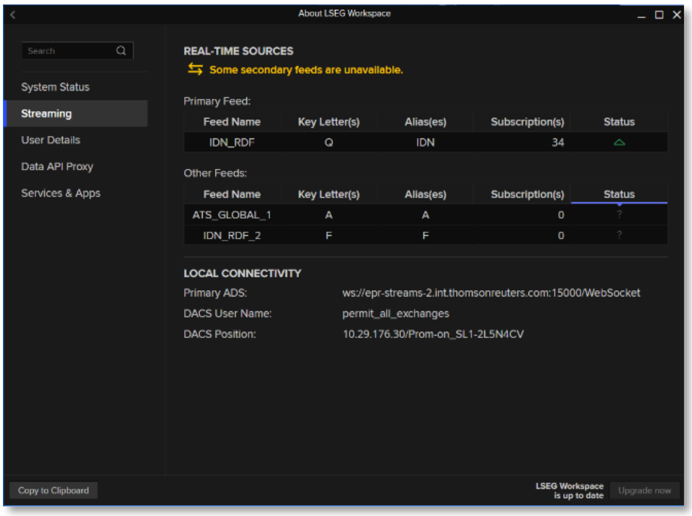
Reviewing assigned configurations

After restarting Workspace, users can either:

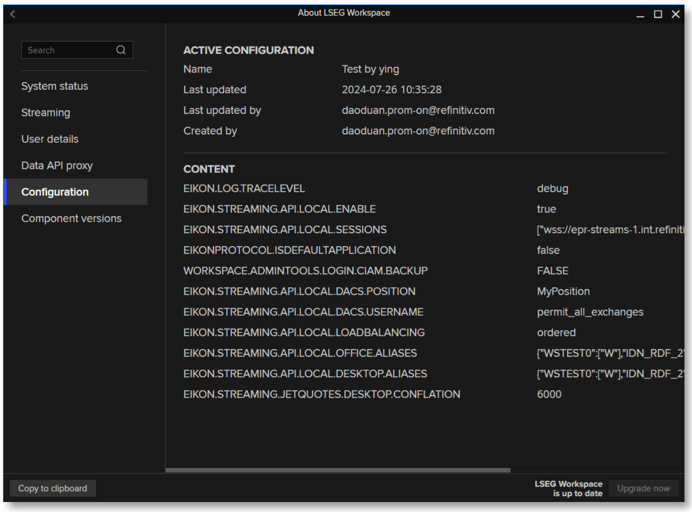
- Review the configuration assigned to them through Configuration Manager, or



- In Workspace, open **About LSEG Workspace** and select either of the following panels:
  - the Streaming panel, to view their local feed and connectivity details, and



  - The Configuration panel, to view details of the administrator-assigned configuration.



Troubleshooting

Settings file location

The location of the Admin-managed `settings.json` is dependent on the installation mode:

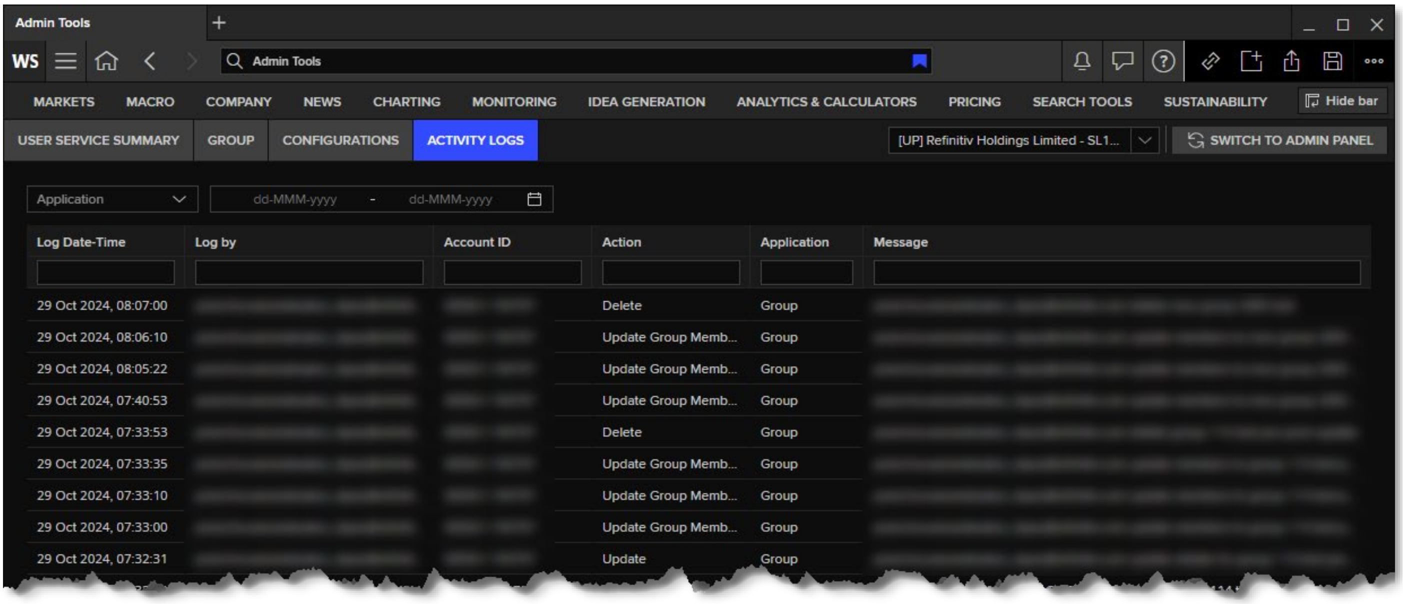
Installation mode	Settings location
`--user`	`%APPDATA%\Refinitiv\Refinitiv Workspace\Cache\Config\admin-managed-settings.json`

`--machine-autoupdate-service`
`--machine-autoupdate-no`
`--machine-autoupdate-peruser`
	`%PROGRAMDATA%\Refinitiv\Refinitiv Workspace\Cache\Config\admin-managed-settings.json`

Accessing activity logs

The Activity Logs option allows you to review the maintenance activities that were performed on the Ultimate Parent account by client administrators.

By default, all log entries are show, sorted in new-to-old date order:



However, they can be:

- Filtered by activities performed under the Configurations or Group menu items, and by a range of dates
- Sorted (or reverse sorted) by date, administrator, action, application, or message

Recorded activities

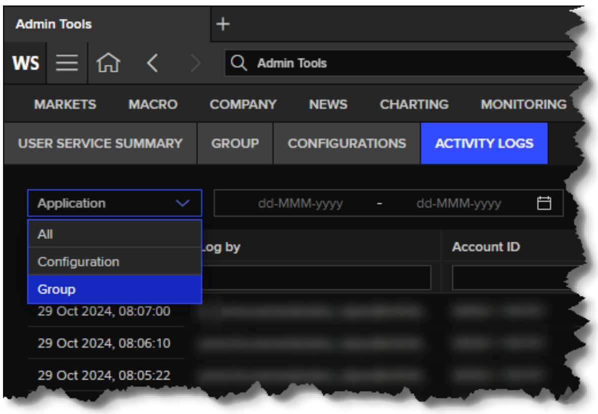
The following activities under the Group and Configurations menu items are recorded:

- Group
  - Create or delete group
  - Update group description
  - Add members using a CSV file
  - Remove members from the group
- Configurations
  - Create, delete or update a configuration
  - Share with or remove sharing from users or groups
  - Activate a configuration

Filtering activity logs

To filter activity logs by menu item, do the following:

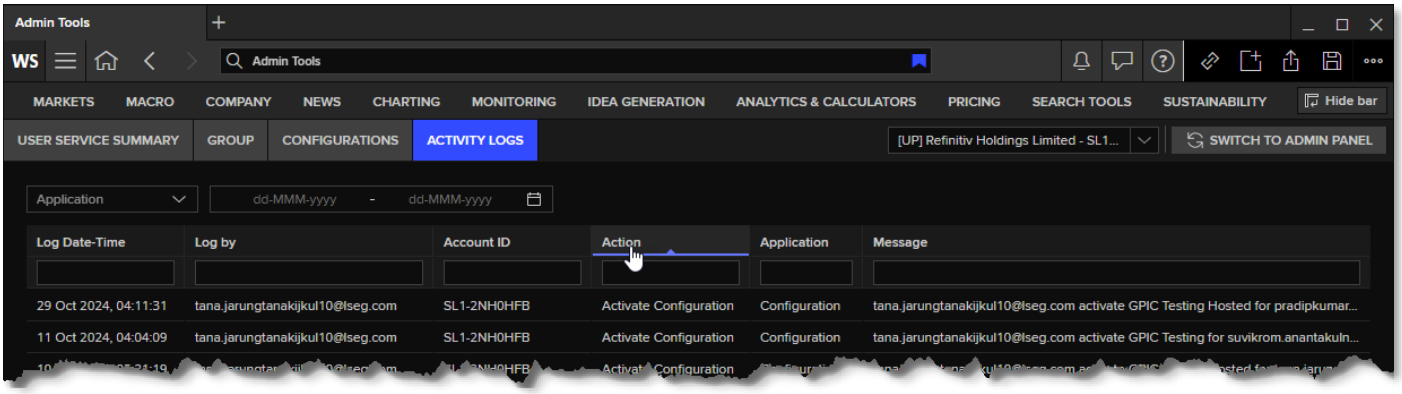
1. Click the **Application** drop down box.
2. From the list displayed, choose:
   i. **All**, to display logs created by every activity performed using the Group and Configurations menu items.
   ii. **Configuration**, to display only those logs created by activities performed using the Configurations menu item.



iii. **Group**, to display only those logs created by activities performed under the Group menu item.

Sorting activity logs

To sort activities, simply click the table heading by which you want to sort the activity list:



Mapping Entra accounts

System Cross-domain Identity Management (SCIM) is a protocol used to standardise how identity information is exchanged between entities. If your organisation is already using Entra, use of the **SCIM Integration** feature of Admin Tools allows you to register your Entra tenant on the LSEG platform, so Workspace users can authenticate through their Microsoft Windows SSO.

For more detailed information, refer to the [LSEG Workspace | Entra Administrator's Activation Guide](#).

Prerequisites

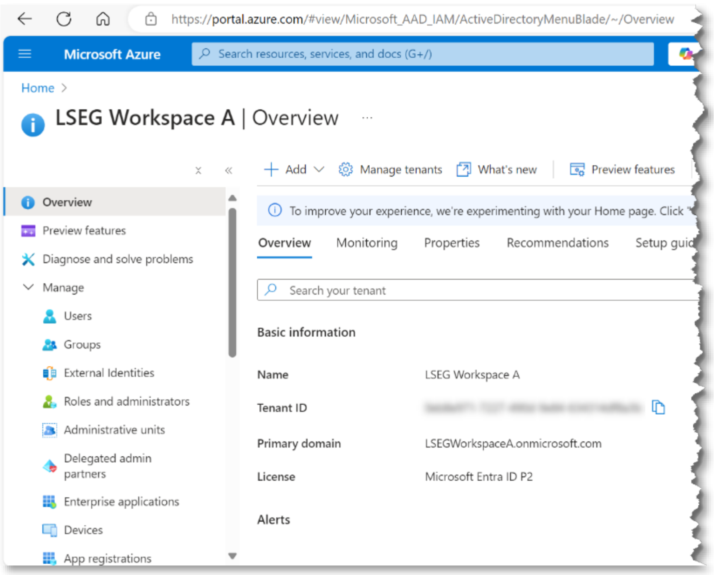
To register your Entra tenant on the LSEG platform, the following prerequisites must be met.

LSEG tasks:

- On the Ultimate Parent account of your organisation, set up a PLATFORM ADMIN IAM SCIM license (using deployment method 7).

Customer administrator tasks:

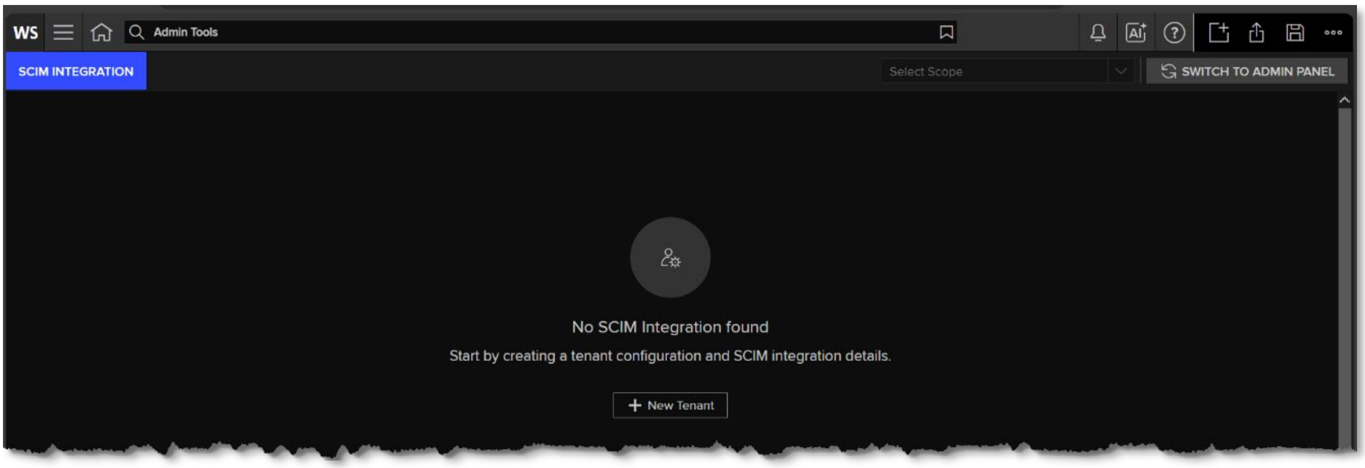
- Gain access to Workspace.
- Gain access to Admin Tools, permissioned with access to the SCIM Integration feature.
- Obtain the tenant Name and ID of your organisation. These can be found on portal.azure.com (opposite) or entra.microsoft.com.



Registering your Entra tenant

To register your Entra tenant information, do the following:

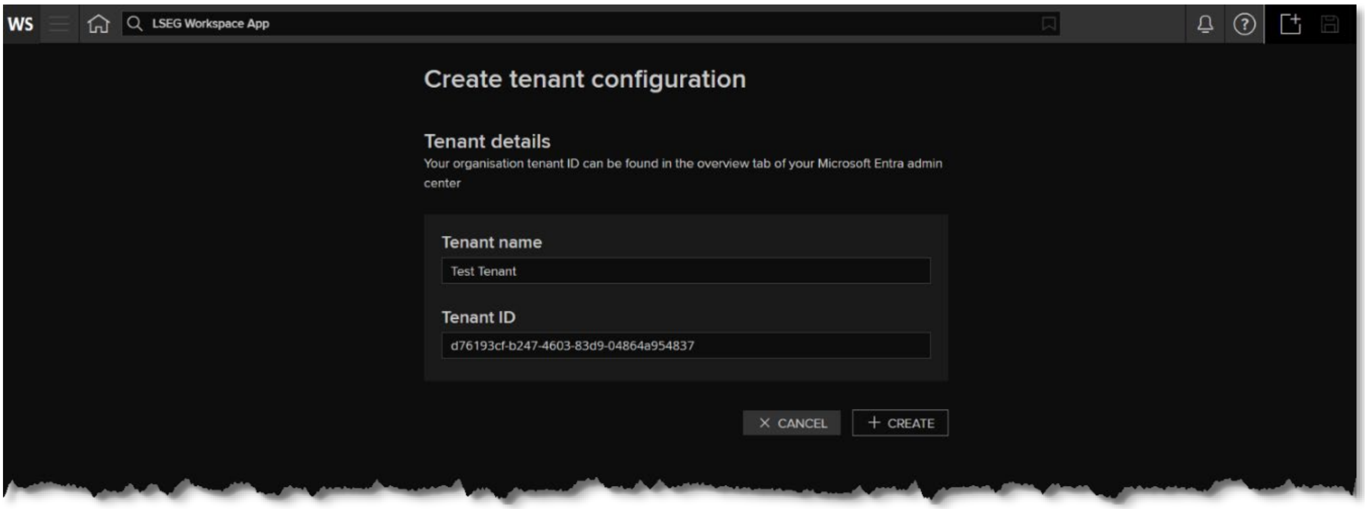
1. In Admin Tools, select SCIM Integration[14]:



2. Click + NEW TENANT.

[14] If you have yet to install a SCIM license under your ultimate parent location, in Admin Tools version 2.7, a `SCIM integration access restricted` message is displayed in the panel.

The Create tenant configuration panel is shown.



3. Do the following, using information retrieved during the [Prerequisites](#) phase:

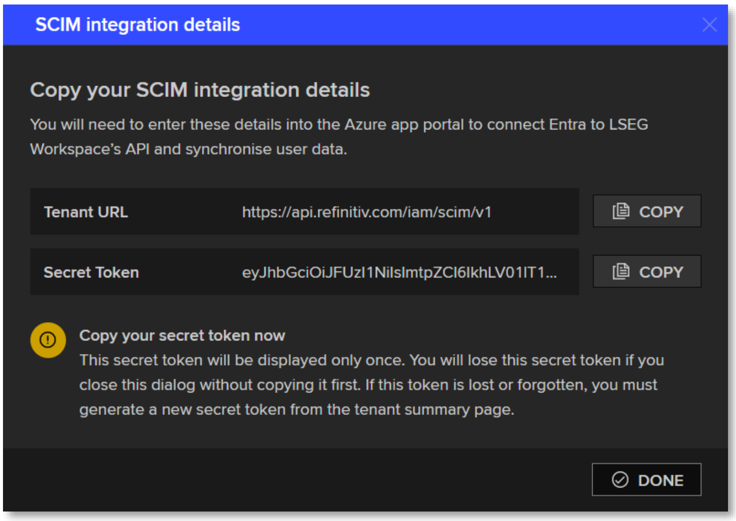
   i. In the **Tenant name** field, type the Tenant name of your organisation.

   ii. In the **Tenant ID** field, type the Tenant ID of your organisation.

   iii. Click **+ CREATE**.

   The SCIM Integration feature performs a series of tasks and informs you of progress using a checklist. Once integration is complete, the SCIM Integration details panel (opposite) is shown, containing the generated service account details:

   - Tenant URL
   - Secret Token[15]



4. Record[16] these details for use in SCIM integration step 6, below, on the Azure / Microsoft Entra portal.

5. Click **DONE**.

   The SUCCESS message shown in the example below is displayed.

6. On the Azure / Microsoft Entra portal, create a new non-gallery application[17] for the appropriate product[18].

---

15 The secret token is valid for six months. As such, as a half-yearly maintenance activity, you will need to generate a new token to relink your Entra tenant to Workspace. As a reminder, admins will receive notifications at 30 days, 10 days, and one (1) day before the token expires.

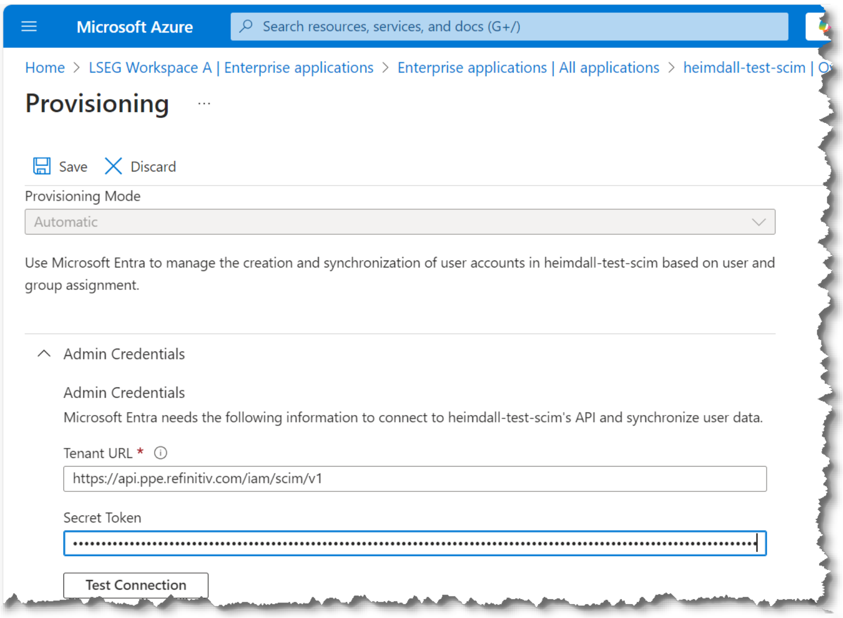
16 If the service account details are misplaced, simply re-generate them using the Create tenant configuration panel.

17 For detailed information about this process and on provisioning users, refer to the [LSEG Workspace | Entra Administrator's Activation Guide](#).

18 Companion documents will be made available in Q4 2024 for Meeting Prep and LSEG Workspace.

7. In the Admin Credentials section, enter the Tenant URL and Secret Token obtained in step 4.
8. Click **Test Connection**.
9. Once connection is confirmed, to set up the SCIM provisioning, click **Save**.
10. Provision users[17] to access the Meeting Prep application.

    Provisioned user information is sent to LSEG to map their Entra Object IDs to their AAA User IDs, allowing users to authenticate into Workspace[19] through the Entra SSO.

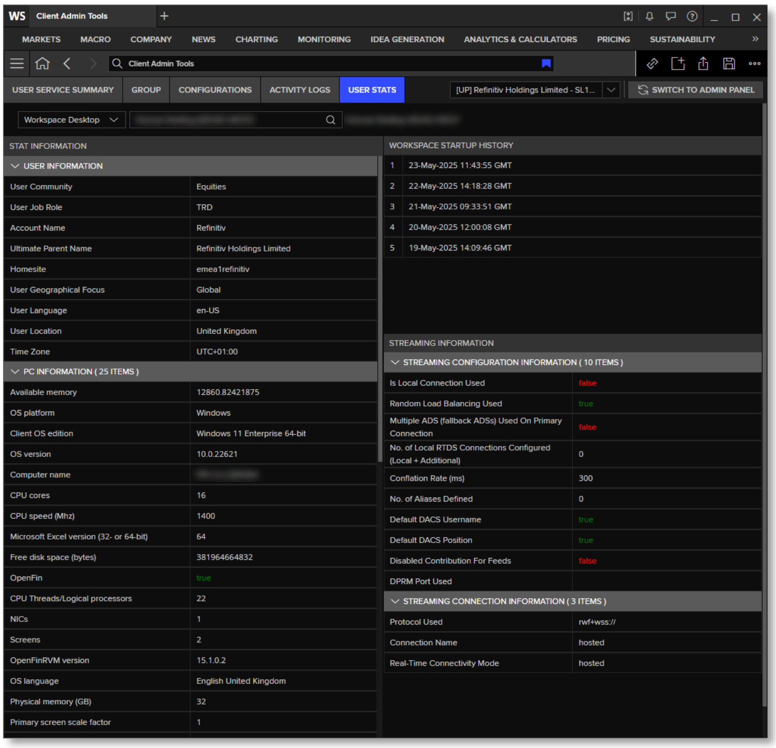


Once the tenant configuration has been created for your Ultimate Parent account, the tenant configuration is shown on the **SCIM Integration** landing page.

[19] Entra SSO authentication is currently available for the Web (through https://login.workspace.lseg.com/) and OpenFin variants of Workspace.

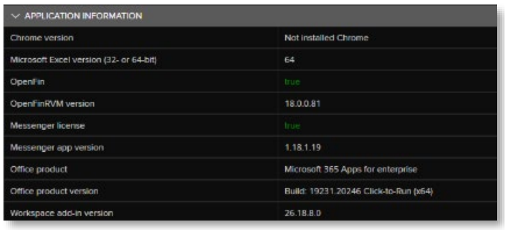
Viewing user statistics

The **User Stats** option allows you to view usage history and technical information of a user after a successful login to Workspace Desktop, Workspace for Web, and Workspace for OpenFin. The display is divided into several sub-panels and includes:



- User information – Workspace user account information, such as user role, location, language, and so on.

  This information provides you with details that can be used for Workspace-related issue investigation.
- PC information – The technical hardware and software specification of the selected user's PC, such as CPU, memory, OS version, computer name, OpenFin version, and so on.
- Workspace startup history – The five (5) most recent records where the selected user is successfully launched Workspace application.
- Streaming information – The user's Workspace streaming configuration, including connection protocols, load balancing setting, and so on.
- Connectivity health check – Important connectivity health check, such as the protocol used, whether the user has connectivity to Workspace platform, applications, Messenger, OpenFin, and so on.
- Application version information – For the November 2025 release, the Application Information panel has been extended to include additional information for Microsoft Office. The additional fields are:
  - Microsoft Office product details and version number
  - Workspace add-in for Office version number

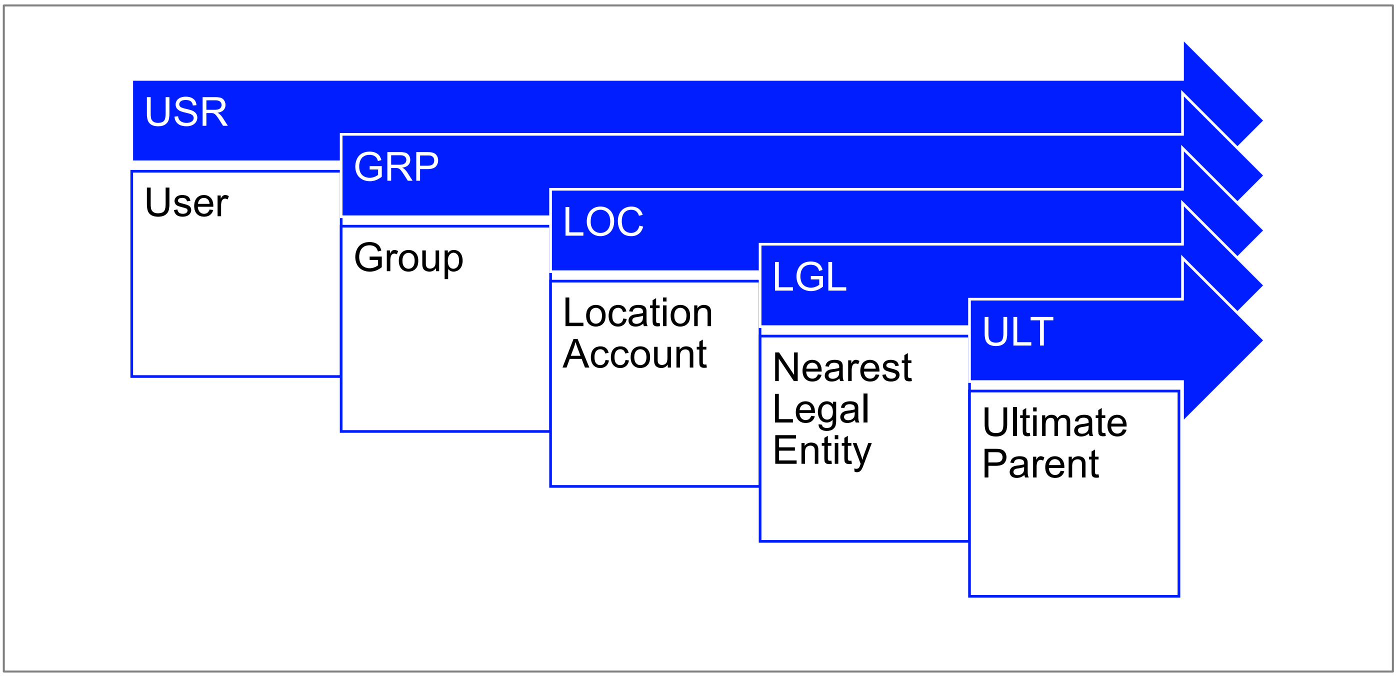


For a detailed list of fields, refer to Appendix B: User Stats fields.

Appendix A: User permissions hierarchy

Configurations or content settings can be assigned to users, account entities, and groups. As such, it is important to consider the hierarchy that determines which settings are applied.

The following diagram illustrates the override user permission hierarchy:



Appendix B: User Stats fields

For administrators of Workspace Desktop, Workspace for OpenFin, and Workspace for Web, the fields listed below are found under the User Stats section of Admin Tools.

Field name	Description	Example value
User Information		
User community	LSEG-assigned role category, assigned during user creation	Equites
User job role	LSEG-defined job role, user selection during first login	MKD
Account name	Account or company name of the user	Refinitiv
Ultimate parent name	Parent account name, usually the full company name, for the user	Refinitiv Holdings Limited
Homesite	Primary LSEG service location for the user	emea1refinitivmon
User geographical focus	User geographical focus, related to licensing	Global
User language	The Language setting, defined when the selected user's profile was created in the Workspace user database.	en-US
User location	User location setting	United Kingdom
Time zone	User time zone setting	UTC+01:00
PC Information		
Available memory	Free RAM, shown in bytes, on the selected user's machine.	30000.12345678
OS platform	The operating system installed on the selected user's machine	Windows
Client OS edition	The operating system edition	Windows 11 Enterprise 64-bit
OS version	The operating system version number	10.0.22631
Computer name	The name given to the selected user's computer	CPC-A-DW00K
CPU cores	Number of CPU cores	16
CPU speed (Mhz)	CPU speed, in megahertz	2450
Microsoft Excel version (32- or 64-bit)	Microsoft Excel version	64
Free disk space (bytes)	Available disk space, in bytes	207036500000
OpenFin	Whether OpenFin RVM is installed	true
CPU threads/Logical processors	Number of CPU threads / logical processors	22
NICs	Number of network interface cards	1
Screens	Number of active screens connected to the selected user's machine	2

Field name	Description	Example value
OpenFinRVM version	The Runtime Version Manager (RVM) is a background process that manages OpenFin updates and other functions	15.1.0.2
OS language	Operating system language	English United Kingdom
Physical memory (GB)	Physical memory, in gigabytes	32
Resolution – screen 1	Resolution of screen 1, in pixels, as defined in your operating system display settings.	1536 x 864
Resolution – screen 2	Resolution of screen 2, in pixels.	1920 x 1080
Secure protocol	Selected secure communication protocol(s)	TLS 1.2, TLS 1.3
System memory usage (GB)	System memory usage, in gigabytes	19.12345678901234
Resolution - all	The total width of all connected screens by the largest height, in pixels	3456 x 1080
Windows login user ID	The Windows login ID of the selected user	jdoe
Workspace memory usage	Workspace app usage in MB	1150
User time zone	User Time Zone	UTC+01:00
Workspace Desktop		
Account name	Account name for the user	Refinitiv
Cache[20] path	Application catch path	%APPDATA%\Refinitiv\Refinitiv Workspace\Cache
External IP	External IP addresses that connect to LSEG Workspace	167.103.63.94, 64.252.103.239
Application installation path	Workspace installation path	%PROGRAMFILES%\Refinitiv\Refinitiv Workspace\1.26.155
Log folder size (MB)	Workspace log folder size in MB	1.44
Application log path	Workspace log path	%LOCALAPPDATA%\Refinitiv\Refinitiv Workspace Logs
Product version	Workspace desktop version	1.26.170
User ID	Workspace login username	jane.doe@lseg.com
Connection type	Whether Workspace connects to the Internet or through a Private network	internet
Installer mode	Workspace installation mode[21]	machine-autoupdate-service

[20] OpenFin only: A cache of important user data is stored in the Core Runtime path, which contains login details and window positions. It is also used to store typical Web browser cache data, such as cookies and information stored using the standard IndexedDB or local storage APIs.

[21] For more information about installer modes, refer to the Installing Workspace section of Workspace Installation and Configuration Guide.

Field name	Description	Example value
Is installed messenger only mode	Whether Workspace is installed as Messenger only mode. If this is has the value `true`, the selected user is only able to run Workspace Messenger and cannot access Workspace desktop or other features.	false
Connection mode	User authentication method	AAA
User local usage	Language setting currently in use on the Workspace desktop	en-US
Workspace user log level setting	Application log level[22]	info
Connectivity Platform - OpenFin		
app-directory.openfin.co	Whether the selected user can connect to the required OpenFin domains. To allow access to multiple subdomains, *.openfin.co must be whitelisted in the user's network. For further information, refer to [Antivirus and access controls | Here Core Developer Guide].	true
cdn.openfin.co		true
dl.openfin.co		true
ingest.openfin.co		true
install.openfin.co		true
of.os.openfin.co		true
start.openfin.co		true
workspace.openfin.co		true
is-local-enabled		true
Streaming configuration information		
Local connection	Whether the selected user's connection is local connection mode	false
Random load balancing	Whether random load balancing is defined in the selected user's streaming configuration	false
Multiple ADSs (fallback) on primary connection	Whether multiple ADSs (used for fallback) are used on primary connection	false
Local RTDS connections configured (Local + Additional)	The number of local RTDS connections configured (local + additional)	1
Conflation rate (ms)	Conflation (or *data refresh*) rate, in milli-seconds	300
Aliases	Number of local feed aliases defined	18
Default DACS username [23]	Whether the default Real-Time Data Access Control System username is used	true
Default DACS position [23]	Whether the default Real-Time Data Access Control System position is used	true
Disabled contribution for feeds	Whether data feed contribution is disabled for the selected user (the	false

[22] For further information, refer to the **Using the logs viewer** section of the Workspace Installation and Configuration Guide.
[23] For further information, refer to the **Real-Time Data Access Control System configuration** section of the Workspace Installation and Configuration Guide.

Field name	Description	Example value
	EIKON.STREAMING.API.LOCAL.DISABLEDCONTRIBUTIONSOURCES setting[24]).	
DPRM port	The port used by Deployed Permissions Reconciliation Manager (DPRM) service[25]	
Connectivity Testing		
sts.identity.ciam.refinitiv.net login.ciam.refinitiv.com	Check connectivity to login services	
amers1.heartbeat.ciam.refinitiv.net amers1.identity.ciam.refinitiv.net amers2.heartbeat.ciam.refinitiv.net amers2.identity.ciam.refinitiv.net apac1.heartbeat.ciam.refinitiv.net apac1.identity.ciam.refinitiv.net emea1.heartbeat.ciam.refinitiv.net emea1.identity.ciam.refinitiv.net sts.identity.ciam.refinitiv.net	Check connectivity to the login service heartbeat	
https://wag.workspace.lseg.biz/healthcheck (new) https://wag.workspace.lseg.com/healthcheck (new)	Connectivity to the new Geenfield Azure	
workspace.refinitiv.com	Connectivity to Workspace product page - internet	
workspace.extranet.refinitiv.biz amers1-workspace.extranet.refinitiv.biz amers2-workspace.extranet.refinitiv.biz apac1-workspace.extranet.refinitiv.biz emea1-workspace.extranet.refinitiv.biz	Connectivity to Workspace product page - private	
cdn.refinitiv.com	Tests connectivity to content delivery network over internet	
amers1-cdn.extranet.refinitiv.biz amers2-cdn.extranet.refinitiv.biz apac1-cdn.extranet.refinitiv.biz emea1-cdn.extranet.refinitiv.biz	Tests connectivity to content delivery network over private network	
apps.platform.refinitiv.com amers1-apps.platform.refintiv.com amers2-apps.platform.refinitiv.com apac1-apps.platform.refinitiv.com emea1-apps.platform.refinitiv.com apps.platform.refinitiv.biz amers2-apps.platform.refinitiv.biz emea1-apps.platform.refinitiv.biz apac1-apps.platform.refinitiv.biz	Tests connectivity to Workspace applications over internet and private network	

[24] For further information about the disabled data feed contribution and other settings, see the **Workspace configuration** section of the Workspace Installation and Configuration Guide.

[25] For further information regarding the DPRM service, refer to the **DPRM configuration** section of the Workspace Installation and Configuration Guide.

Field name	Description	Example value
app.rad.refinitiv.com app.rad.refinitiv.biz	Tests connectivity to Advanced Dealing	
amers1-views.platform.refinitiv.com amers2-views.platform.refinitiv.com apac1-views.platform.refinitiv.com emea1-views.platform.refinitiv.com amers1-views.platform.refinitiv.biz amers2-views.platform.refinitiv.biz apac1-views.platform.refinitiv.biz emea1-views.platform.refinitiv.biz	Tests connectivity to Workspace View over internet and private network	
api.refinitiv.com amers1-gateway.platform.refintiv.com amers2-gateway.platform.refinitiv.com apac1-gateway.platform.refinitiv.com emea1-gateway.platform.refinitiv.com amers1-proxy.platform.refinitiv.com amers2-proxy.platform.refinitiv.com apac1-proxy.platform.refinitiv.com emea1-proxy.platform.refinitiv.com	Checks connectivity to API/s	
messenger.collaboration.refinitiv.com messenger.refinitiv.com	Checks connectivity to Messenger platform over internet	
messenger.collaboration.refinitiv.com messenger.refinitiv.com	Checks connectivity to Messenger platform over internet	
amers-messenger.collaboration.refinitiv.biz amers1-messenger.extranet.refinitiv.biz amers2-messenger.extranet.refinitiv.biz apac-messenger.collaboration.reinifitv.biz apac1-messenger.extranet.refinitiv.biz emea-messenger.collaboration.refinitiv.biz emea1-messenger.extranet.refinitiv.biz messenger.extranet.refinitiv.biz	Checks connectivity to Messenger platform over private network	
app-directory.openfin.co cdn.openfin.co dl.openfin.co ingest.openfin.co install.openfin.co of.os.openfin.co start.openfin.co workspace.openfin.co	Checks connectivity to OpenFin	

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