# LSEG Workspace | Desktop

Administration Tools Configuration Guide



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# **About Workspace Admin Tools**

In LSEG Workspace, the Admin (Administration) Tools app is an enhanced version of <u>Administration Panel</u>, 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.



### 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.

### 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 account team.

### 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 user to Administrators (ULT, NLE, LOC) and application permission		•
<ul><li>Managing permissions for the following capabilities</li><li>Group</li><li>Configuration</li></ul>		•

Function	Customer	LSEG
Group - Group management		
Create, edit, delete group	•	•
Add member(s), that is, user or location accounts (LOCs, NLEs to group)	•	•
Download group members in CSV	•	٠
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	•	•

### Further information

To:

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

# **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
- [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:
  - i. At the end of the search field, select the  $\square$  icon (3).
  - ii. [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<sup>1</sup>.
  - iii. 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/





<sup>&</sup>lt;sup>1</sup> You can create sub-folders under the bookmark bar by using the **New Folder** function **(5)**.

# Administration management

In Admin Tools, the Administration option provides management tools for LSEG and customer administrators, allowing them to:

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

### 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:

 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.

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User details Configuration d	details Template details			
User name				
UUID				
Job Role	Trader			
City	London			
Country	United Kingdom			
Location Account ID				
Location Account Number				
Location Account				
Legal Entity ID				
Legal Entity	Refinitiv			
Ultimate Parent ID				
Ultimate Parent	Refinitiv Holdings Limited			

- **Configuration details**: For the default configuration<sup>2</sup> and each configuration assigned<sup>3</sup> to the user, this contains:
  - The configuration name and type.
  - Whether it is their active configuration<sup>4</sup>. That is, the configuration that is applied to the user when launching LSEG Workspace.
  - When it was last updated and by whom.

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USER SERVICE SUMMARY	GROUP CONFIGURATIONS ACTIVITY LOGS USER STATS [UP] Refinitiv Holdings Limited - SL1 🗸 🖏 SWITCH TO ADMIN PANEL
Select User	
( ×)	
User details Config	uration details Template details
Configuration Name	DefaultConfiguration
Туре	DefaultConfiguration
Active Status	
Updated by	
Updated date	07/10/2024, 03:55:38 AM
Configuration Name	
Туре	AdminManagedConfiguration
Active Status	false
Updated by	
Updated date	08/13/2024, 11:41:05 AM

• **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.

<sup>&</sup>lt;sup>2</sup> 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.

<sup>&</sup>lt;sup>3</sup> 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 <u>Appendix A: User permissions hierarchy</u>.

<sup>&</sup>lt;sup>4</sup> 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 <u>Appendix A</u>.

### 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:

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2. Click the Create New button 2.

#### The Create Group panel is displayed:

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

The Add New Members section is displayed:

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EDIT GROUP												^
Name												1
Description												
				SAVE								
ADD NEW MEMBERS												1
Search for users, locations or c				Q ADD								
Upload CSV file - a faster way fo	or bulk changes											
To upload members with a CSV f	file use the template.											
UPLOAD CSV 🛓 CSV TI	EMPLATE EXAMPLE											
GROUP MEMBERS												
Member Name	ID		Country		City	Last updated by		Last upo	dated _			
											DONE	•

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 <u>Adding group members</u>.

### 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:

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							<u>^</u>
CREATE NEW							
Name	Description	Created date	Last updated	Last updated by	Created by	Members	
(Without group 1)		2024-08-07 14:28:14	2024-08-07 14:28:14				
(Withold group 1		2024-08-07 11:12:49	2024-08-07 11:14:07			1	2
Section Prop.		2024-08-07 03:37:21	2024-08-07 03:38:27			3 Edit	
Ball 11		2024-08-05 07:38:48	2024-08-05 07:38:48			Download members as CSV f	ile
-		2024-07-30 11:27:26	2024-07-30 11:27:39			A Delete	
London Valley Real		2024-04-11 13:13:19	2024-07-26 03:22:56			4 :	
		2024-04-17 07:30:01	2024-07-25 12:38:38		Auropa	3	

- 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 <u>Creating a new group</u> section. Or

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

A confirmation dialog is displayed:

		2024-08-0	07 03:37:21	2024-08-07 03:38:27		dura.			
1000 C									:
-			Delete Group "DK	Test Group 1*?		×	t		:
			Are you sure you v	vant to delete group? Al	associated conte	ent and			:
			configurations will	be removed from the us	ers in this group				:
									:
			This action cannot	be undone.					:
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					CONFIRM	CANCEL	pm		:
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State State	And the second second	2024-06-2	24 11:15:19	2024-06-24 11:15:19	A			 	a standard a standard

iv. 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 <u>upload</u> it to a new group.

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

1. Select the Group option.

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

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							^
CREATE NEW							
Name	Description	Created date	Last updated	Last updated by	Created by	Members	
(Without group 1)		2024-08-07 14:28:14	2024-08-07 14:28:14				:
Diff lands groups 1		2024-08-07 11:12:49	2024-08-07 11:14:07				<u>i</u> 2
test by Ting		2024-08-07 03:37:21	2024-08-07 03:38:27			3 Edit	
Ber01210		2024-08-05 07:38:48	2024-08-05 07:38:48				as CSV file
-		2024-07-30 11:27:26	2024-07-30 11:27:39			5 Delete	
London Hadder Root		2024-04-11 13:13:19	2024-07-26 03:22:56				:
		2024-04-17 07:30:01	2024-07-25 12:38:38	- Andrewsky	A second second	3	:

- 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:

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CREATE NEW					Ĵ

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

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1	entitiesId	type	userld	name	city	country	accountName	locationAccount	tl nearestLegalEn	tit ultimateParentId	lastUpdatedBy	lastUpdated				1
2	GESG1-128161	User		Emea1 TestB02	St Helier	United Kingdom	St Helier	SL1-CCZBIW0	SL1-CCZ1JIZ	SL1-3GIA6TA		Thu Aug 08 2024	4 13:58:26 GMT+0	100 (British Sum	mer Time)	
3	GESG1-128171	User		Emea1 TestA03	London	United Kingdom	London	SL1-CCZB9Y5	SL1-CCZ1JIZ	SL1-3GIA6TA		Thu Aug 08 2024	4 13:58:26 GMT+0	100 (British Sum	mer Time)	
4	GESG1-128162	User		Emea1 TestB03	St Helier	United Kingdom	St Helier	SL1-CCZBIW0	SL1-CCZ1JIZ	SL1-3GIA6TA		Thu Aug 08 2024	4 13:58:26 GMT+0	100 (British Sum	mer Time)	
5	GESG1-128170	User		Emea1 TestA02	London	United Kingdom	London	SL1-CCZB9Y5	SL1-CCZ1JIZ	SL1-3GIA6TA		Thu Aug 08 2024	4 13:58:26 GMT+0	100 (British Sum	mer Time)	
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### 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<sup>5</sup> 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:

Name						
Description			∼ _			
			✓			
			♥ Indon (SL1-CCZB9Y5)			
			Emea1 TestA02 (GESG1-128170)			
			Emea1 TestA03 (GESG1-128171)			
ADD NEW MEMBERS			A Emea1 TestA04 (GESG1-128176)			
emeal 1		0	A Emea1 TestA05 (GESG1-128177)			
		~ ~	St Helier (SL1-CCZBIW0)			
Upload CSV file - a faster way for t	pulk changes		A Emea1 TestB01 (GESG1-128160)			
To upload members with a CSV file	use the template.		A Emea1 TestB02 (GESG1-128161)			
UPLOAD CSV 🛃 CSV TEM	PLATE EXAMPLE		🖉 Emea1 TestB03 (GESG1-128162)			
			📃 🖉 Emea1 TestB04 (GESG1-128163)			
GROUP MEMBERS			📃 🖉 Emea1 TestB05 (GESG1-128164)			
Member Name	ID	Country	د fxallqa emea1 (GEUS2-45979)	by	Last updated	

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<sup>6</sup> to the group, click the Add button (5), found immediately below the search field.

Name		
Description		
	6 A / F	〜 📄 前 BVT-EMEA (SL1-CCZ1JIZ)
	SAVE	
		3
ADD NEW MEMBERS		Emea1 TestA04 (GESG1-128176)
[USR] Emea1 TestA02 (GES ×) ([USR] Emea1 TestA03 (GES ×) emea1	Q	A Emea1 TestA05 (GESG1-128177)
ADD C		✓ Ø St Helier (SL1-CCZBIW0)
		A Emea1 TestB01 (GESG1-128160)
Upload CSV file - a faster way for bulk changes	-	A Emeal TestB02 (GESG1-128161)

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

<sup>&</sup>lt;sup>5</sup> 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.

<sup>&</sup>lt;sup>6</sup> The Add button is displayed only once you have selected two or more entries.

### 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.

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	CONFIGURATIONS			[UP] BVT TEST - SL1-3GIA6TA	∨ С ѕwiтсн т	O ADMIN PANEL
(GP 0				and an an a state of the second		Î
Search for users, locations or	companies	QAD				<b>.</b>
Upload CSV file - a faster way	for bulk changes					
To upload members with a CSV	file use the template.					
UPLOAD CSV 🛃 CSV						- 1
GROUP MEMBERS						
Member Name	ID	Country	City	Last updated by	Last updated	
Emea1 TestB02	GESG1-128161	United Kingdom	St Helier	duncan.keeling@refinitiv.com	2024-08-08 12:58:26	Ô

- 2. Once the Excel file has opened:
  - i. Clear<sup>7</sup> 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.

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F	ile Ho	me Insert	Page Layou	Formulas	Data	Review	View	Automa	te Help	Acrobat	Worksp	ace \	Norkspa	ce   🖓	ß	~
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1	entitiesle	# This is	a comment.	This file mus	st begi	n with 'er	ntities	d'. Witho	out 'entiti	esld', it wi	ill fail the	e file ve	erificatio	n.		П
2	GEUS2-4	59 # Please	replace the	example of U	UID wi	ith your s	electio	n of UU	IDs. Ensu	ire they ar	e in Colu	mn A d	only.			
3	GEUS2-4	59 # The sci	ipt will chec	k whether the	e UUID	is valid	in LSEG	. Only th	ne match	ed UUIDs	can be a	dded i	nto a gro	oup		
4	GEUS2-4	59 # To pres	erve system	performance	e, the l	JUID per	batch	must no	t exceed :	150 rows.						Ш
5	GEUS2-4	5955														
6	GEUS2-4	5956														
7	GEUS2-4	5957														
8	GEUS2-4	5958														
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iii. Save the file.

<sup>&</sup>lt;sup>7</sup> Ensure that cell A1 contains **entitiesID**, as shown in the file example.

- 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.
- 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 <u>UUID verification</u>, below.

	Pictures	aproduced		
	Videos	✓ A long time a	ago (10)	
	🔛 OS (C:)			
ADD NEW MEMB		× • •		×
Search for users, loca	File na	ame: DK UUID group upload.csv	✓ Microsoft Excel Comma Separa	~ <
Lipload CSV file - a fast			2 Open Cancel	
opioad Cov nic - a last				
To upload members with	a CSV file use the template.			
UPLOAD CSV	CSV TEMPLATE EXAMPLE			
GROUP MEMBERS				
Member Name	ID	Country	City	Last
Emea1 TestB02	GESG1-128161	United Kingdom	St Helier	dur
Emea1 TestA03	GESG1-128171	United Kingdom	London	du

 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**.

Upload CSV file - a faster w	ay for bulk changes					
To upload members with a C	CSV file use the template.					
UPLOAD CSV 🛃 CS	SV TEMPLATE EXAMPLE					
GROUP MEMBERS						
Member Name	ID	Country	City	Last updated by	Last updated	
Emea1 TestB02	GESG1-128161	United Kingdom	St Helier	duncan.keeling@refinitiv.com	2024-08-08 12:58:26	Ô
Emea1 TestA03	GESG1-128171	United Kingdom	London	duncan.keeling@refinitiv.com	2024-08-08 12:58:26	ŵ
Emea1 TestB03	GESG1-128162	United Kingdom	St Helier	duncan.keeling@refinitiv.com	2024-08-08 12:58:26	匬
Emea1 TestA02	GESG1-128170	United Kingdom	London	duncan.keeling@refinitiv.com	2024-08-08 12:58:26	匬
					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:

	SV TEMPLATE EXAMPLE					
GROUP MEMBERS						
Member Name	ID	Country	City	Last updated by	Last updated	
	GESG1-126950	United States	Stamford		2024-08-19 02:58:28	ŵ
	GESG1-128164	United Kingdom	St Helier		2024-08-19 02:58:28	ê <b>1</b>
	GESG1-126975	China	Beijing		2024-08-19 02:58:28	
	GESG1-126957	Mexico	Ciudad De Mexico		2024-08-19 02:58:28	Ū
	GESG1-128710	United States	Chicago		2024-08-19 02:58:28	ŵ
A Construction of the		and a state of the state of the		and the state of the second	4	

- 5. For each member you want to delete:
  - i. Click the  $\overline{\mathbf{m}}$  icon (1) at the end of the member row.
  - ii. A confirmation dialog is displayed:

A	And the second	Difficentifie	and a state of the	American Arrent	A COLORED AND A COLORED AND A	
						Û
		United Kingdom	London	terror instruction		
		Remove Member		×		
		Are you sure you want	to remove member?			
		This will remove this sp	ecific member from the group			
			2 ок	Cancel		
			New York			
the second second	and the second second second	United States	New York	An owner of the second	74-08-09 17 1012	A

#### 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 undergone notable improvements. Customer administrators who have 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:

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ADMINISTRATION GROUP	CONFIGURATIONS			[UP] Refinitiv Holdings Limited - SL1	😪 🔓 SWITCH TO ADMIN PANEL
All Configurations Active Co	onfigurations				
CREATE NEW					
Name	Descriptions	Shared with	Last Updated	Last Updated By	Created By
(	a [ a]		dd-MMM-yyyy 🛗	Q	Q
		2 GRPs	2024-06-12 11:01:00		enanderstandigen, i
		1 GRP, 1 USR	2024-06-11 07:55:09		innin deservations, i
		1 USR	2024-06-10 07:12:47		
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- 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

#### **Using Admin Tools**

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:

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All Configurations Active Configurations						
CREATE CONFIGURATION						
Name NewConfig 3						
Description						
CONFIGURATION EDITOR						
Filter	0	Filter	Value		0	
+ Add setting			Added settings: 0   Edited setting	gs: 0   Deleted settings: (	Disca	
: MORE OPTIONS				5	SAVE	CANCEL

- 4. Type a Name 3 and Description 4 for the configuration.
- 5. Click the Save button 5.

You return to the main Configurations panel with the newly added configuration at the top of the list of configurations:

	Admin Tools	+				_ 🗆 X
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MARKETS MACRO	COMPANY NEWS CHAP	TING MONITORING IDE	GENERATION ANALYTICS &	CALCULATORS PRICING	SUSTAINABILITY	» 🖟 Hide bar
ADMINISTRATION GROUP	CONFIGURATIONS		(UP) F	Refinitiv Holdings Limited - SL1	<ul> <li>ୁ switc</li> </ul>	H TO ADMIN PANEL
All Configurations Active C	onfigurations					
CREATE NEW					Sh	are with
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Name	Descriptions	Shared with	Last Updated	Last Updated By	Created By	iit 7 _ <mark>Im</mark>
Q	Q		dd-MMM-yyyy 📋	Q	De	elete
Of the config 1						• • 6
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······	and the second					and second in

- 6. At the end of the new confirmation row, click the i con 6 to open the context menu, and select the Edit option 7.
- 7. In Admin Tools, you can add configuration statements to your configuration:
  - Using the Add setting function
  - Importing a JSON file

#### Using the Add setting function

The Add setting function allows you to create a configuration file entirely or add statements to an imported JSON file.

To use this function, do the following:

1. In the Edit Configuration panel, click the Add setting button.

A blank row is created in the Configuration Editor section, with the Name field selected:

	and the second should be	and the second				id in the
Description	had configuration for the completion parameter					
CONFIGURA	ATION EDITOR					
EIKON.STRE#	aming.api.local.allowhosted <mark>f</mark> allback			Value		
EIKON.STREA		Q			Q	
EIKON.STRE			Adobe PDF		 m	added
EIKON STREA			info		 而	
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F					 而	
+ Add se	etting			Added settings: 2   Edited settings: 0   Deleted settings: 1	G Disca	ard changes
MORE OPTIO	NS				SAVE	CANCEL

- 2. To choose a statement to add to your configuration, either:
  - Scroll through the list of statements, or
  - Start typing a keyword from the statement you want to add
- 3. To add the statement, click the entry in the statement list.
- 4. Select the Value field and edit the default entry as required:

Description					
CONFIGURATION EDITOR					
Name		Value			
	Q		Q		
REFINITIV.WORKSPACE.TRADING.PRINTER_NAME		Adobe PDF		ŵ	added
EIKON.LOG.TRACELEVEL		info		Û	
EIKON.STREAMING.JETQUOTES.DESKTOP.CONFLATION		1500		ŵ	added
EIKON.STREAMING.API.LOCAL.OFFICE.ALIASES		0 I		ŵ	added
+ Add setting		Added settings: 3   Edited settings: 0   Deleted settings: 1	G	Discarc	l changes
MORE OPTIONS			SAVE		CANCEL

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

The created configuration can now be applied to groups.

#### Importing a JSON file

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

ONFIGURATION EDITOR			
Name		Value	
	Q		Q
+ Add setting		Added settings: 0   Edited settings: 0   Deleted settings: 2	G Discard changes
nport configuration 2			
xport configuration			
review resulting configuration			

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:

	Import Configuration	
NFIGURATION EDITOR	Are you sure you want to replace the current configuration with the imported one?	
	OK L Cancel	
	Added settings: 0   Edited settings: 0   Deleted settings: 2	

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.

	rescription			
(	CONFIGURATION EDITOR			
	Name	Value		
	Filter Q		Q	
	REFINITIV.WORKSPACE.RUN_ABOVE_NORMAL_PRIORITY	true	Û	
	REFINITIV.WORKSPACE.TRADING.PRINTER_NAME	Adobe PDF	Û	
	EIKON.STREAMING.API.LOCAL.ENABLE	true	Û	
	EIKON.STREAMING.API.LOCAL.SESSIONS	["rwf+wss://testserver1:1500/WebSocket","rwf+wss://testserver2:1501/WebSocket"]	Û	
		DACSuer1	nin -	
:	MORE OPTIONS		SAVE	CANCEL

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

### Using Configuration Manager

Creating a configuration in LSEG Workspace, using Configuration Manager, is covered in extensive detail in the <u>Workspace Installation and Configuration Guide</u>. 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 ⑦ (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 <u>using</u> the Import facility, described above.



### Configuration context functions

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

	Admin Tools	+			-	
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ADMINISTRATION GROUP	CONFIGURATIONS		[UP] F	Refinitiv Holdings Limited - SL1		IN PANEL
All Configurations Active Cor	nfigurations					
CREATE NEW						
Name	Descriptions	Shared with	Last Updated	Last Updated By	Created By	
Name	Descriptions	Shared with	Last Updated	Last Updated By	Created By	
Name Q	Descriptions Q	Shared with	Last Updated           dd-MMM-yyyy	Last Updated By	Created By	
Name Q	Descriptions Q	Shared with	Last Updated           dd-MMM-yyyy 2024-08-13 08:46:09            2024-08-12 12:46:39	Last Updated By	Created By Q Share with	:
Name Q	Descriptions Q	Shared with 1 GRP, 1 USR	Last Updated           dd-MMM-yyyy 2024-08-13 08:46:09            2024-08-12 12:46:39           2024-07-24 08:24:09	Last Updated By	Created By Q Share with Preview	:
Name	Descriptions Q	Shared with 1 GRP, 1 USR 1 USR	Last Updated           dd-MMM-yyyy         ⊟           2024-08-13 08:46:09            2024-08-12 12:46:39            2024-07-24 08:24:09            2024-07-18 08:41:05	Last Updated By Q	Created By Q Share with Preview Edit	: •
Name Q	Q	Shared with 1 GRP, 1 USR 1 USR 1 GRP, 1 USR	Last Updated           dd-MMM-yyyy         ⊟           2024-08-13 08:46:09         Ξ           2024-08-12 12:46:39         Ξ           2024-07-24 08:24:09         Ξ           2024-07-18 08:41:05         Ξ           2024-07-15 10:30:20         Ξ	Last Updated By Q	Created By Q Share with Preview Edit Delete	:
Name Q	Q Q	Shared with 1 GRP, 1 USR 1 USR 1 GRP, 1 USR	Last Updated           dd-MMM-yyyy         ➡           2024-08-13 08:46:09         ■           2024-08-12 12:46:39         ■           2024-07-24 08:24:09         ■           2024-07-18 08:41:05         ■           2024-07-18 08:41:05         ■           2024-07-19 10:30:20         ■	Last Updated By	Created By Q Share with Preview Edit Delete	:

#### 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:

-		2024-08-13 08:46:09				
Preview Configuration "DK"	Test Config 1"				$\times$	
["EIKON.LOG.TRACELEVI	EL": "info", "REFINITIV.WORKSPACE.TRADI	ING.PRINTER_NAME": "Adobe PDF", "EIK	ON.STREAMING.JET	QUOTES.DESKTOP.CONF	FLATION": "1500")	ŝ.
["EIKON.LOG.TRACELEVI	EL": "info", "REFINITIV.WORKSPACE.TRADI	ING.PRINTER_NAME": "Adobe PDF", "EIK	ON.STREAMING.JET	QUOTES.DESKTOP.CONF	FLATION": "1500")	e.
["EIKON.LOG.TRACELEVI	EL": "info", "REFINITIVWORKSPACE.TRADI	ING.PRINTER_NAME": "Adobe PDF", "EIK	ON.STREAMING.JET		FLATION": "1500")	
["EIKON.LOG.TRACELEVI	L": "info", "REFINITIVWORKSPACE.TRADI	ING.PRINTER_NAME": "Adobe PDF", "EIK	ON.STREAMING.JET	QUOTES.DESKTOP.CONF	FLATION": "1500"]	4
("EIKON.LOG.TRACELEVI	EL": "info", "REFINITIV.WORKSPACE.TRADI	ING.PRINTER_NAME": "Adobe PDF", "EIK	ON.STREAMING.JET	QUOTES.DESKTOP.CONF	FLATION": "1500")	4
("EIKON.LOG.TRACELEVI	EL": "info", "REFINITIVWORKSPACE TRADI	ING.PRINTER_NAME*: "Adobe PDF", "Eik 2024-07-01 03:46:05	ON.STREAMING.JET	QUOTES.DESKTOP.CONF	FLATION": "1500") K CANCEL	4

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

### Editing configurations

You can make 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 m function.

Any changes made are labelled and enumerated.

EDIT COM	NFIGURATION				
Name	DK config test 2				
Description	Second configuration test				
CONFIGUR	ATION EDITOR				
	Name		Value		
Filter		Q		Q	
EIKON.STRE	AMING.API.LOCAL.ENABLE		true	Û	
EIKON.STRE	AMING.API.LOCAL.SESSIONS		[*rwf+wss://testserver1:1500/WebSocket*,*rwf+wss://testserver2:1501/WebSocket*]	Û	
EIKONPROT	OCOL.ISDEFAULTAPPLICATION		TUE I	Û	
EIKON.STRE	AMING.API.LOCAL.DACS.USERNAME		DACSusr1	Û	
REFINITIV.W	ORKSPACE.TRADING.PRINTER_NAME		PRT1	ŵ	edited
EIKON.STRE	AMING.JETQUOTES.DESKTOP.CONFLATION.ENABLE		true	ŵ	
EIKON.LOG.	RACELEVEL		info	Û	added
+ Add se	etting		Added settings: 1   Edited settings: 1   Deleted settings: 1	G Discard	d changes
MORE OPTIO	NS			SAVE	CANCEL

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:

1 LGL, 1 GRP, 1 USR	2024-08-13 08:46:09	And the second s	
Delete Configuration "DK Config Test 2"?			
The Configuration will be deleted from Work	space Configuration. It will be un-shared from	the associated users.	
This action connet be undered			
This action cannot be undone.			
	2024-06-28 13:57:42		

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 <u>Managing groups</u> 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<sup>8</sup>.

### 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.

<sup>&</sup>lt;sup>8</sup> For further information regarding setting compatibility, refer to the Appendix G: Shared configuration Settings section of the <u>LSEG Workspace</u> <u>Installation and Configuration Guide</u>.

### 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:

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		1										H ب	lide bar
USER SERVICE SUMMARY		NFIGURATIONS AC	TIVITY LOGS			[UP] BVT	TEST - SL1-3GIA6	БТА		S sw	псн то		PANEL
All Configurations Active	Configurations	2											
ACTIVE CONFIGURATION	3						ACTIVE CONFIG	GURATION					
Users and Groups Ac	count Type	Active Configurati	Last Updated	Last Updated By	Created By	4	Search by nan						Q
Q	Q		dd-MMM-yyyy 🛱	Q	Q		Active Configure	ation					
TEST admintools24 GR	P	TEST admintools2	2024-09-23 04:41:	emea1.testA05@tr	emea1.testA05@tr	. :	Select shared	configuration				6	$\sim$
amers2.testA01@tr US	R	PostcheckWSConfi	2024-06-06 02:10:	amers2.testA01@tr	amers2.testA01@tr.							0	
amers1.testB05@tr US	R	TEST admin113	2024-06-06 02:10:	emea1.testA05@tr	emea1.testA05@tr	. :							
London market dat GR	2P	London A	2024-06-06 02:10:	emea1.academic0	emea1.academic0								
									ļ	<mark>8</mark> _s	GAVE	CANC	ŒL

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.

Admin Tools	+						-		
ws $\equiv$ $\textcircled{a}$ < $>$	Q Admin Tools				ŪΓ	] (?)	[± ₫	<b>•••</b>	
							믭	Hide bar	
USER SERVICE SUMMARY	GROUP CONFIGURATIONS	CTIVITY LOGS		UP] BVT TEST - SL1-3GIA61	TA				
Successfully activate configuration 'DK Test config' for 'Emea1 TestA02 (GESG1-128170)'									
All Configurations Active C	onfigurations								
ACTIVE CONFIGURATION									
Users and Groups	Account Type	Active Configuration	Last Updated	Last Updated By		Created By			
(	a a		dd-MMM-yyyy 🗎		Q		Q		
emea1.testA02@tr.com	USR	DK Test config	2024-11-14 10:56:63	duncan.keeling@refinitiv.	com	duncan.keeling@re	finitiv.com	:	
TEST admintools24	GRP	TEST admintools24 config	2024-09-23 04:41:25	emea1.testA05@tr.com		emea1.testA05@tr.o	com	:	
amers2.testA01@tr.com	USR	PostcheckWSConfigAdmin10	2024-06-06 02:10:37	amers2.testA01@tr.com		amers2.testA01@tr.	com	:	
amers1.testB05@tr.com	USR	TEST admin113	2024-06-06 02:10:42	emea1.testA05@tr.com		emea1.testA05@tr.o	com	:	
London market data team	GRP	London A	2024-06-06 02:10:24	emea1.academic04@bvtt	est.c	emea1.academic04	@bvttest.c	:	
And the second states of the		and and the second		and the second	-				

### 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.

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Μ	y Monitor		- 🗋 🖿		Σ 👯 🔺	. ~		NEW New Release	. What's new?				×
	RIC	Name	Last	Net	%Ch	WTD%	G	LSEG.L C	0 0 0	D		≋ ©	: 5 17
5	7203.T	TOYOTA MOTOR CO	3792.0	-14.0	-0.37	-2.07	4						
6	/TPR.N	TAPESTRY INC O/d	47.480	+0.8000	1.71	1.13	2	LON.STK.EXCH · Tr	ade Price 949			~	
	8306.T	MITSUB UFJ FG	1557.0	+22.0	1.43	-2.81	2		•	~	~	$\sim$	9490.00000
	/FANG.OQ	DIAMOND BAK EN/d	198.17	+1.6400	0.83	1.78	:		^				
	TAMO.NS	TATA MOTORS	992.80	+14.15	1.45	1.50	:		57		·~~~~		
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6	/BARC.L	BARCLAYS/d	183.20	+ An	admin share	d configuratio	on has	been assigned from		2024	Mar		
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	/HP.N	HELMERICH PAYN/d	42.060	-0.170	ad and appl	y the configu	rations	S.	нт	+			° ⊻ <sup>7</sup> …
	/MCK.N	MCKESSON CRP/d	536.85	-2.410					What's new?				×
	/SPY	SPDR S&P 500/d	523.07	-0.100		Restart	Now	Restart Later				~ @	• 6 77
5	/OXY.N	OCCIDENTAL PET/d	64.990	+0.7900	1.23	1.85				D		≈ ©	: 5 •
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			450.00	A Contractor	diam'r a san a		-	No-OA			and an entered of the statement		And the second

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**:

Screenshots	140	V.	19. Au	and the second second								
Sharing		CONFIGURATION PRESETS										
Toast Notifications		CONTROLATION PRESETS										
Messenger	Select your preferred configuration.											
Notifications												
Configuration Presets		(!) You	ı must restart	LSEG Workspace for any con	figuration change	es to take effect.						
Early Adopters 🛛 🗹			Name	Description	Last updated	Last updated by	Created by					
Trading Preferences			DK test	Test configuration for	2024-08-13	duncan.keeling@refinitiv.com	duncan.keeling@refinitiv.com	Preview				
			comig i	documentation purposes	11.41.05							
External Apps			أروحك	and the second	in a star	and the second second second		and a second second				

#### 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.

	the second second			1. A.					
Language									
Colors & Themes	CON	FIGURAT	ION PRESETS						
Search	Select	Select your preferred configuration.							
Keyboard Shortcuts									
Workspace	① You must restart LSEG Workspace for any configuration changes to take effect.								
Browser		News	Description	Last	I and up date d hus	Constant has			
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Messenger									
Notifications	TRAL	DING PRE	FERENCES						
Configuration Presets									
Early Adopters		ive Trading	A.A. Carterine			and the second second	44.4		

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

	LSEG Workspace Configuration Manager >
	English 🗸
CONFIGURATION	Admin Configuration
Network	
Client SSO	"REFINITIV.WORKSPACE.TRADING.PRINTER_NAME": "Microsoft Print to : "EIKON.STREAMING.AFI.LOCAL_ENABLE": "true",
Admin Configuration	"EIKON.STREAMING.API.LOCAL.SESSIONS": "[\"ws://epr-streams-2.int "EIKON.STREAMING.API.LOCAL.DACS.USERNAME": "permit_all_exchanges
Shared Configuration	"EIKON, STREAMING, AFI, LOCAL, DACS, POSITION": "\$USERDETALLS, LASTNAM "EIKON, STREAMING, AFI, LOCAL, DESKTOP, ALIASES": "(\"IDN_RDF_2\":(\" "EIKON, STREAMING, AFI, LOCAL, OFFICE, ALIASES": "(\"IDN_RDF_2\":(\"F
Streaming	"EIKON.STREAMING.API.LOCAL.LOADBALANCING": "ordered", "EIKONPROTOCOL.ISDEFAULTAPPLICATION": "true"
Servers	3
Feeds	
DACS	
Printer	
Other	
ADVANCED	
Logs	
Cache	
Tools	
IMPORT EXPORT	APPLY CLOSE

- 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.

System Status	Some secondar	y feeds are unavail	able.		
System Status					
	Primary Feed:				
Streaming	Feed Name	Key Letter(s)	Alias(es)	Subscription(s)	Status
User Details	IDN_RDF		IDN	34	
Data API Proxy	Other Feeds:				
Services & Apps	Feed Name	Key Letter(s)	Alias(es)	Subscription(s)	Status
	ATS_GLOBAL_1				?
	IDN_RDF_2				
	LOCAL CONNECTIVI	тү			
	Primary ADS:	ws://epi	-streams-2.int.thon	nsonreuters.com:15000	/WebSocket
	DACS User Name:	permit_	all_exchanges		
	DACS Position:	10.29.1	/6.30/Prom-on_SL	1-2L5N4CV	
				1850 14-4	
Copy to Clipboard				is up to	o date Upgrade now
<		About LSEG Workspa	ce		_ 🗆 X
Search Q	ACTIVE CONFIGURA	TION Test by:	vina.		
System status	Last updated	2024-07	-26 10:35:28		
Streaming	Last updated by	daodua	n.prom-on@refinitiv	.com	
Streaming	Created by	daodua	n.prom-on@refinitiv	.com	
User details					
Data API proxy	CONTENT				
Configuration	EIKON.LOG.TRACELE	VEL		debug	
Component versions	EIKON.STREAMING.A	PI.LOCAL.ENABLE		true	
	EIKON.STREAMING.A	PI.LOCAL.SESSION	s	["wss://ep	or-streams-1.int.refinit
	EIKONPROTOCOL.ISE	DEFAULTAPPLICATI	ON	false	
	WORKSPACE.ADMINI	OOLS.LOGIN.CIAN	I.BACKUP	FALSE	
	EIKON STREAMING A	PILEOCAL DACS.PC		MyPositio	on Il overbanges
	EIKON STREAMING A			ordered	ii_exchanges
	EIKON STREAMING A		LIASES	rwstes	TO": "W"1"IDN RDF 2
	EIKON.STREAMING.A	PI.LOCAL.DESKTO	ALIASES	("WSTES	T0":1"W"1"IDN RDF 2
	EIKON.STREAMING.J	ETQUOTES.DESKTO	P.CONFLATION	6000	
Constant Internation				LSEG Works	space

•

# 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:

Admin Tools	+							_ 🗆 X
ws 🗏 🏠 < 🔿	Q Admin Tools					£ ₽ (	2) 🖉 🖆 (	t 6 ····
MARKETS MACRO	COMPANY NEWS CHARTIN	g Monitoring	IDEA GENERATION A	NALYTICS & CALCU	ILATORS PRICING	SEARCH TOOLS	SUSTAINABILITY	🖵 Hide bar
USER SERVICE SUMMARY	GROUP CONFIGURATIONS	ACTIVITY LOGS			[UP] Refinitiv Holdin	gs Limited - SL1 🗸	S SWITCH TO	ADMIN PANEL
Application V	dd-MMM-yyyy - dd-	МММ-уууу 📋						
Log Date-Time	Log by	Account ID	Action	Application	Message			
29 Oct 2024, 08:07:00			Delete	Group				
29 Oct 2024, 08:06:10			Update Group Memb	Group				
29 Oct 2024, 08:05:22			Update Group Memb	Group				
29 Oct 2024, 07:40:53			Update Group Memb	Group				
29 Oct 2024, 07:33:53			Delete	Group				
29 Oct 2024, 07:33:35			Update Group Memb	Group				
29 Oct 2024, 07:33:10			Update Group Memb	Group				
29 Oct 2024, 07:33:00			Update Group Memb	Group				
29 Oct 2024, 07:32:31	and a state of the second state of		Update	Group	-			

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:

Admin Tools	+							_ 🗆 X
ws $\equiv$ $\bigcirc$ < >	Q Admin Tools					Ϋ 🖓 🤅	) 🖉 🗅	1 B ····
MARKETS MACRO	COMPANY NEWS CHARTIN	g Monitoring	IDEA GENERATION	ANALYTICS & CALCUL	ATORS PRICING	SEARCH TOOLS	SUSTAINABILITY	🖵 Hide bar
USER SERVICE SUMMARY		ACTIVITY LOGS			[UP] Refinitiv Holdings	Limited - SL1 🗸	G switch to	ADMIN PANEL
Application V dd-MMM-yyyy - dd-MMM-yyyy								
Log Date-Time	Log by	Account ID	Action	Application	Message			
29 Oct 2024, 04:11:31	tana.jarungtanakijkul10@lseg.com	SL1-2NH0HFB	Activate Configuration	Configuration	tana.jarungtanakijkul10@ls	seg.com activate GPIC T	esting Hosted for p	radipkumar
11 Oct 2024, 04:04:09	tana.jarungtanakijkul10@lseg.com	SL1-2NH0HFB	Activate Configuration	Configuration	tana.jarungtanakijkul10@ls	seg.com activate GPIC T	esting for suvikrom	anantakuln
10/10/10/07-24-19,	en esupater kil 199/ren hm		Activat Configuration	And an and a second second	hand the set of the set	การการเพ.ละ <b>ในประ</b> ภาณ์	nșteri forti	

# 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<sup>9</sup>:

🗕 Microsoft Azure 🔎	Search resources, services, and	docs (G+/)					
Home >							
I SEG Workspace	A Overview						
	Alovennew						
×	« 🕂 Add 🗸 🐯 Mar	nage tenants [ 🔄 What's new 🛛 😨 Preview features					
() Overview	To improve your e	experience, we're experimenting with your Home page. Click '					
Preview features	Overview Menitor	ring Properties Percommendations Setup qui					
🗙 Diagnose and solve problems		ing Properties Recommendations Setup gui					
∨ Manage	Search your tenar	nt					
🔒 Users							
🤷 Groups	Basic information						
External Identities	Name	LSEG Workspace A					
🤱 Roles and administrators	Tenant ID	D					
Administrative units		,					
Delegated admin	Primary domain	LSEGWorkspaceA.onmicrosoft.com					
partners	License	Microsoft Entra ID P2					
Enterprise applications	A1						

	Π	Ū	Åľ	?	C± 1	jB	
SCIMINTEGRATION				G sv	ИТСН ТО 🖡		NEL
۶.							Î
No SCIM Integration found							
Start by creating a tenant configuration and SCIM integration de	tails.						
+ New Tenant							

2. Click + NEW TENANT.

<sup>&</sup>lt;sup>9</sup> 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.

ws	Q LSEG Workspace App			Ū ()
		Create tenant configuration		
		Tenant details Your organisation tenant ID can be found in the overview tab of your Microsoft E center	Entra admin	
		Tenant name		
		Test Tenant		
		Tenant ID		
		d76193cf-b247-4603-83d9-04864a954837		
		× cancel +	CREATE	
(	the contract of the second		which a second state state	

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<sup>10</sup> •
- 4. Record<sup>11</sup> 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.



WS C LSEG Workspace App	Ū	?	+ 8 •
SUCCESS Tenant configuration successfully created.			
← BACK HOME Test Tenant			
Tenant details			
Tenant name Test Tenant	 		a contraction

6. On the Azure / Microsoft Entra portal, create a new non-gallery application<sup>12</sup> for the appropriate product<sup>13</sup>.

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. 10 11

If the service account details are misplaced, simply re-generate them using the Create tenant configuration panel. For detailed information about this process and on provisioning users, refer to the <u>LSEG Workspace | Entra Administrator's Activation Guide</u>. 12

<sup>13</sup> 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<sup>12</sup> 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<sup>14</sup> through the Entra SSO.

ome >	LSEG Workspace A   Enterprise applications > Enterprise applications   All applications > heimdall-test-scim
rovi	sioning
🚽 Save	e 🗙 Discard
ovisioni	ing Mode
Automa	tic V
oup ass	ignment. min Credentials
Adı	min Credentials
Mic	crosoft Entra needs the following information to connect to heimdall-test-scim's API and synchronize user data.
Ten	iant URL * 🕕
ht	ttps://api.ppe.refinitiv.com/iam/scim/v1
Sec	:ret Token

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

WS			Ū 🛈 🕂 🗎		
	+ New Tenant Config				
	Tenant name	Tenant ID	Service account	Status	
	Test Tenant	d76193cf-b247-4603-83d9-04864a954837	SCIM-04864a954837-account	🧭 Enabled	
Υ.	mit have been a set	and a sum of the second diversion of the second state of the second state.	and the strain of the state of the state of the	A	

<sup>&</sup>lt;sup>14</sup> Entra SSO authentication is currently available for the Web (through <u>https://login.workspace.lseg.com/</u>) and OpenFin variants of Workspace.

# 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:

User	- GRP				
	Group		LGL		
		Location Account	Nearest Legal Entity	ULT	
		-		Ultimate Parent	

## Version history

Software version	Document version	Summary of Changes
2.10 xx Apr 2025	210.01	<ul> <li>Fix issue where user cannot get admin's assigned configuration if the configuration update happened after 600 seconds lead time. User will be notified right after admin's assigned the configuration from admin tool</li> <li>Enable A-number for location account, nearest legal entity, and ultimate parent when search for a user on the User Service Summary page</li> <li>Introduce read-only permission on admin tool</li> <li>Ability to view Workspace user statistic via UserStats</li> </ul>
2.7 30 Nov 2024	27.01	<ul> <li>This document version contains the following changes:</li> <li>Added the <u>Accessing activity logs</u> section</li> <li>Added the <u>Mapping Entra accounts</u> section</li> </ul>
		<ul> <li>This Admin Tools version will contain the following changes:</li> <li>Data filters added in Group, Configuration, and Activity log tables.</li> <li>User search facility added for all groups.</li> <li>Backend infrastructure availability improvements.</li> </ul>
2.4 23 Nov 2024		<ul> <li>This Admin Tools version contains the following changes:</li> <li>SCIM secret token management added for customer Entra tenant integration with LSEG platform</li> <li>Enable audit log to track administrative activities.</li> <li>Allow client administrators to manage the market configuration at NLE/LA.</li> </ul>
2.1 15 Jul 2024	21.01	<ul> <li>Initial version of the LSEG Workspace   Desktop – Administration Tools Configuration Guide.</li> <li>This Admin Tools version contained the following changes: <ul> <li>Share multiple admin-managed configuration files with user(s).</li> <li>Activate a configuration file for a user or group or an account entity.</li> <li>Desktop users only:</li> <li>View list of admin-shared configuration files in their Workspace Settings and activate the file for their use.</li> </ul> </li> </ul>
2.0 31 May 2024		<ul> <li>This Admin Tools version contained the following changes:</li> <li>Improve UI for Workspace Configuration.</li> <li>Allow JSON file import to create Workspace Configuration.</li> <li>Deploy migration script.</li> </ul>
1.2 31 Mar 2024		<ul> <li>This Admin Tools version contained the following changes:</li> <li>All configurations and groups created with Admin Panel can be managed with Admin Tools, together with improved performance.</li> <li>Bulk select and add users/account locations to a group.</li> <li>Add a list of UUIDs/account id using CSV upload to a group.</li> <li>Download group members in CSV.</li> <li>Provide User Service Summary Page for customer admins to view which configurations/templates are assigned to a user.</li> <li>Admin Tools can be used for both Workspace Desktop and Workspace for OpenFin.</li> </ul>

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