# LSEG Workspace | Financia Meeting Prep

Administrator's activation guide

Financial Meeting Prep is an Al-driven Microsoft® application that delivers reports on public companies. It is powered by LSEG® data and news and is easily accessible through Microsoft Teams.

LSEG Workspace users can download Financial Meeting Prep from the Microsoft Teams app store and access their Workspace data in Financial Meeting Prep.

Administrators should follow the instructions below to enable users in their organisation to access Workspace data in Financial Meeting Prep.

# **Pre-requisites**

The pre-requisites for a customer accessing Workspace data in Financial Meeting Prep are:

- The user must have an LSEG Workspace account, and the Workspace User ID must be the same as the Microsoft Entra Email / Entra Principal Name.
- The customer must have an LSEG-granted licence (SCIM access) in place to perform tenant registration.
- The customer's administrator requires Workspace access and an administrator role to access Workspace admin tools.
- ① Current access to Workspace admin tools does not cover the tenant registration process; additional privileges are required.

# Support

To request Workspace licenses, permissioning, and service issues, contact LSEG Support through <u>MyAccount</u>. If you experience any problems performing the steps outlined in this document, raise an issue through <u>MyAccount</u>. If your Workspace ID and Entra ID do not match, contact LSEG Support via <u>MyAccount</u>.



# Enabling users to access Workspace data in Financial Meeting Prep

Enabling users to access Workspace data in Financial Meeting Prep involves performing the following steps:

- Accessing the Workspace admin tool
- Finding your Entra Tenant ID
- Registering your tenant in the Workspace admin tool
- Setting up the gallery app in the Entra admin portal
- Setting up attribute mappings
- Provisioning users in the Entra admin portal
- ① This document also has a section containing <u>Useful links</u>.

# Accessing the Workspace admin tool

To access the Workspace admin tool:

- 1. Log in to Workspace.
- 2. Either:
  - Navigate to admin tools, or
  - Enter cpurl://cdn./rap/admin-tools/ into the Search bar.

ws ≡ 🏠	Q cpurt://cdn./rap/admin-tools/ - More search results			×	Ū	
USER SERVICE SU	More search results for cpurl://cdn./rap/admin-tools/	SHIFT + ENTER	И	Search for Ultimate Parent	Q	

The Workspace admin tool is launched.

# Finding your Entra Tenant ID

Your Microsoft Entra Tenant ID is the authentication identification code for your organisation that is assigned by Microsoft. You will need this ID to register your tenant in the Workspace admin tool.

To find this code:

1. Log in to <u>https://portal.azure.com/#home</u>.

The Microsoft Azure Welcome page opens (opposite).

2. Click the Manage Microsoft Entra ID View button.



The Overview page opens (opposite).

The Tenant ID **2** is shown under the Basic Information section.

## Registering your tenant in the Workspace admin tool

To register your tenant in the Workspace admin tool:

- 1. On the SCIM INTEGRATION tab 1, click + NEW TENANT. 2
- 2. Enter your organisation's Tenant Name and Tenant ID, and click **CREATE**.
- 3. When all the following tasks have been completed (denoted by a green check box), the setup has been successful.
  - Creating application
  - Certifying application
  - Certifying service account
  - Assigning license
  - Creating tenant configuration
- Make a note of the Tenant URL 3 and Secret Token 4 that are generated and displayed.
- ① The Secret Token is valid for six months. To obtain another one after it has expired, you must re-link the Entra tenant to Workspace by generating a new Entra Secret Token using the steps described above.



## Setting up the gallery app in the Entra admin portal

To set up the gallery app in the Entra admin portal:

- 1. Log in to <u>https://portal.azure.com/#home</u>.
- 2. Click the Manage Microsoft Entra ID View button.
- 3. The Overview page opens.

Microsoft Azure		Ø	Search requirem	s services and doe	1/8+/7				D 🖉	008	deniarianturo pizarrodeol
	Welcome to Derit here a sub-	o Azure!	the following opt	ions.							
		2	5	~	-					>	
	Start with an J Get \$200 free cre plus 12 months of	Azure free trial dit toward Azure pr / popular free units	oducts and service	Manage N Manage acc with Microso	Accosoft Entri ma, set smart pol di Entre D.	titD class, and exhance sec	Acce unity Get N Nor Te	ns student bena ee ofteare, Accre o aching alter you re	fits codit, ce access Ar chy your academic	ur# Dev Tools status	
	Azure servic	es		View	Learn more t		9 4	glane Count	on d'		
	+ Create a resource	Curclestart Center	Acure Al services	Kubernetes Services	Vinual machines	Rep Services	Shoriage accounts	SCL databases	Azure Cesmes DB		

4. To open the menu, click the Manage 2 menu item, and then click Enterprise Applications.

Overview	Azure Active Direct	ory is now Microsoft Entra ID. Learn more 🖸			
Preview features	Overview Monitori	ng Properties Recommendations	Tutorials		
Diagnose and solve problems					
Manage 2	Search your tenant				
🧘 Users 🛛 🖈	Resis information				
Sroups	Basic Information				
External Identities	Name	London Stock Exchange Group		Users	61,115
2 Roles and administrators	Tenant ID	2014/95a 31ac 425 31ad c03098072181	D	Groups	158,489
Administrative units	Primary domain	1 SEGroup onmicrosoft com		Applications	2,920
🚸 Delegated admin partners	transi y domani	cat of our of million of the million			
Enterprise applications	License	Microsoft Entra ID P2		Devices	200,543

5. Select **New application** in the new page.

	0 «	+ New application 🕐 Refresh 🚽 Download (Export) 🛛 🕦 Preview info 🗎 🇮 Co
> Overview		View, filter, and search applications in your organization that are set up to use your Microsoft Ent
/ Manage		
<ul> <li>Manage</li> <li>All applications</li> </ul>		The list of applications that are maintained by your organization are in application registrations.

- 7. In the resulting side panel, input LSEG SCIM as the app name and select **Integrate any other application you don't find in the gallery (non-gallery)**. **6**



- 8. Click Create. A new page with the application overview will open.
- 9. Click the **Provisioning** tab on the left-hand side of the screen.
- 10. Click **Get started 7** on the new page or **Provisioning 8** on the side panel.



11. Select Automatic from the Provisioning Mode drop down list.

12. Enter Tenant URL 9 and Secret Token 10 obtained from Step 4 in Registering your tenant in the Workspace admin tool.

$\sim$	Admin Credentials
	Admin Credentials
	Microsoft Entra needs the following information to connect to LSEG-SCIM-TEST's API and synchronize user data.
	Tenant URL * ()
9	
	Secret Token
10	
	Test Connection
<b>1</b>	and the second

① Ensure Provisioning Status is set to Off.

#### 13. Click Test Connection. 1

If successful, a green tick will appear on screen, which means that your app has successfully been registered.

Testing connection to temp-test

The supplied credentials are authorized to enable provisioning

## Setting up attribute mappings

#### To set up attribute mappings:

1. Click Manage > Provisioning, 1 and expand the Mappings section.

	× «	🗟 Save 🗙 Discard	
Overview		∧ Mappings 2	
Provision on demand			
<ul> <li>Manage</li> </ul>		Mappings Mappings allow you to define how data should flow between M	ficrosoft Entra ID and customanosso
Provisioning		Name	Enabled
🏨 Users and groups		Provision Microsoft Entra ID Groups	No
Expression builder		Provision Microsoft Entra ID Users	Yes
Monitor			
> Troubleshoot		Restore default mappings	
		✓ Settings	

- 2. Click Provision Microsoft Entra ID Groups.
- 3. Under Enabled, select No. 4

4. Click Save. 5

Attribute Mapping	)
5 Save X Discard	
Name	_₹,
Provision Microsoft Entra ID Groups	
Enabled	Ì
Source Object	
Group	5

- Note that group provisioning is not currently supported.
- 5. Go back to the previous 'Provisioning' page and click Provision Microsoft Entra ID Users. 6

^	Mappings
	Mappings
	Mappings allow you to define how data should flow between Microsoft Name
	Provision Microsoft Entra ID Groups
	Provision Microsoft Entra ID Users 6
	Restore default mappings

6. Under Enabled, select Yes. 7

Attribute Mapping	1
🖫 Save 🗙 Discard	5
Name	- <b>T</b>
Provision Microsoft Entra ID Users	-
Enabled	1
Yes No 7	
Source Object	
User	
Source Object Scope	3

#### 7. In Target Object Actions, uncheck Delete.

A user's Authentication, Authorization and Accounting (AAA) configuration will not be deleted, because they may have another configuration on other identity providers such as Ping.

#### 8. Delete unused Attribute Mappings but keep:

- userName
- emails[type eq "work"]
- name.givenName
- name.familyName

#### 9. Click Add New Mapping. 8

ustomappsso Attribute	Microsoft Entra ID Attribute
iserName	userPrincipalName
mails[type eq "work"].value	mail
aame.givenName	givenName
ame.familyName	sumame
xternalid	objectId
ld New Mapping 8	
Show advanced options	

### 10. Select objectId as a Source attribute 9 and externalId as a Target attribute. 10

A mapping lets you define how the attributes in one class of Microsoft E his application.	ntra object (e.g. Users) should flow to and from
Mapping type ①	
Direct	~
Source attribute * 🛈	
objectId 9	~
Default value if null (optional) ①	
arget attribute * 🛈	
externalId 10	~
Match objects using this attribute	
No	~
Aatching precedence ①	
Apply this mapping ①	
Always	~

11. Click **Ok** (1) to return to the previous page, then click **Save**.

## Provisioning users in the Entra admin portal

To provision users in the Entra admin portal:

- 1. Click **Provisioning** in the left-hand panel.
- 2. Select Manage 1 > Users and groups. 2
- 3. On the resulting screen, select Add user/group. 3

scim-integration-qa Enterprise Application	Users and groups … 3 + Add user/group   ⊘ Edit assignment	Update credent
Uverview	The application will appear for assigned users within My Apps	s. Set 'visible to users?' to
Deployment Plan		
K Diagnose and solve problems	Assign users and groups to app-roles for your application here.	To create new app-role
Manage	O First 200 shows to search all years 9; and	
Manage Manage Properties	First 200 shown, to search all users & gro	
Manage Mana	<ul> <li>First 200 shown, to search all users &amp; gro</li> <li>Display Name</li> </ul>	Object Type
Manage Manage Properties Owners Roles and administrators	First 200 shown, to search all users & gro      Display Name      AL Account Linking QA	Object Type User
Manage Mana Manage Manage Mana	First 200 shown, to search all users & gro      Display Name      AL Account Linking QA      NK Nitipot Kitcharoenrot (Admin)	Object Type User User
<ul> <li>Manage Manage Manag Manage Manage Mana</li></ul>	First 200 shown, to search all users & gro      Display Name      AL Account Linking QA      NK Nitipot Kitcharoenrot (Admin)      NT Nud Teeraworamongkol (Admin)	Object Type User User User
<ul> <li>Manage Manage Manag Manage Manage Mana</li></ul>	First 200 shown, to search all users & gro      Display Name      AL Account Linking QA      NK Nitipot Kitcharoenrot (Admin)      NT Nud Teeraworamongkol (Admin)      Thanapol Imkulrat (Admin)	Object Type User User User User

- 4. Click None Selected in the resulting Add Assignment screen. A new panel displays on the right side of the screen.
- 5. Choose the users you want to enable 4 and click the **Select** button at the bottom of the right hand panel.

#### Users and groups

iearch			
2			×
2 results fo	und		
Use	rs Groups		
	Name	Туре	Details
	anather heat	User	production of the local distances
_		11	

Home > scim-integration-ppe | Users and groups >

Add Assignment

Click the Assign S button at the bottom of the left side panel.
 A green tick will appear on screen indicating a successful assignment.

LSEG Workspace B	
Users and groups	
1 user selected.	
Select a role	
User	
Assign 5	

...

6. Navigate to the **Overview** option in the left side panel and select **Start Provisioning** 6 from the top of the page. This will provision all the users that have been added.

Home >						
👔 scim-integration-ppe   Overview 🧼						
	6 ○ ≪ ▷ Start provisioning □ S	Stop provisioning 🦿 Restart provisioning 🧷 Edit provi	sion			
() Overview			1			
$egin{smallmatrix} eta_{m{arepsilon}} & {\sf Provision} \ {\sf on} \ {\sf demand} \ \end{array}$	Current cycle status	Statistics to date	1			
<ul> <li>Manage</li> <li>Provisioning</li> <li>Users and groups</li> <li>Expression builder</li> <li>Monitor</li> <li>Provisioning logs</li> <li>Audit loss</li> </ul>	Incremental cycle stopped.	<ul> <li>View provisioning details</li> <li>0% complete</li> <li>View technical information</li> </ul>				
<ul> <li>Audit logs</li> <li>Insights</li> <li>Troubleshoot</li> </ul>	Manage provisioning Update credentials Edit attribute mappings Add scoping filters Provision on demand		5-14			

Once complete, the cycle status will display as '100 % complete'.

# **Useful links**

For more information, click the below links.

- Quickstart: Add an enterprise application
- <u>Microsoft Entra on-premises application provisioning to SCIM-enabled apps</u>

© 2025 LSEG. Republication or redistribution of LSEG content, including by framing or similar means, is prohibited without the prior written consent of LSEG. LSEG is not liable for any errors or delays in LSEG content, or for any actions taken in reliance on such content. LSEG Data & Analytics logo is a trademark of LSEG and its affiliated companies.

lseg.com



Document version: 100.01