LSEG WORKSPACE

ADMINISTRATION TOOLS CONFIGURATION GUIDE

LSEG DATA & ANALYTICS

Version history

Software version	Document version	Summary of Changes
2.x TBC		This Admin Tools version will contain the following changes: – Enable audit log to track administrative activities. – Allow client administrators to manage the market configuration at NLE/LA.
2.1 15 Jul 2024	**21.01**	**Initial version of the LSEG Workspace Administration Tools Configuration Guide.** This Admin Tools version will contain the following changes: – Share multiple admin-managed configuration files with user(s). – Activate a configuration file for a user or group or an account entity. Desktop users only[1]: – View list of admin-shared configuration files in their Workspace Settings and activate the file for their use.
2.0 31 May 2024		This Admin Tools version will contain the following changes: – Improve UI for Workspace Configuration. – Allow JSON file import to create Workspace Configuration. – Deploy migration script.
1.2 31 March 2024		This Admin Tools version contains the following changes: – All configurations and groups created with Admin Panel can be managed with Admin Tools, together with improved performance. – Bulk select and add users/account locations to a group. – Add a list of UUIDs/account id using CSV upload to a group. – Download group members in CSV. – Provide User Service Summary Page for customer admins to view which configurations/templates are assigned to a user. – Admin Tools can be used for both Workspace Desktop and Workspace for OpenFin.

[1] The Workspace Desktop users only feature will be made available at a TBC date in July 2024.

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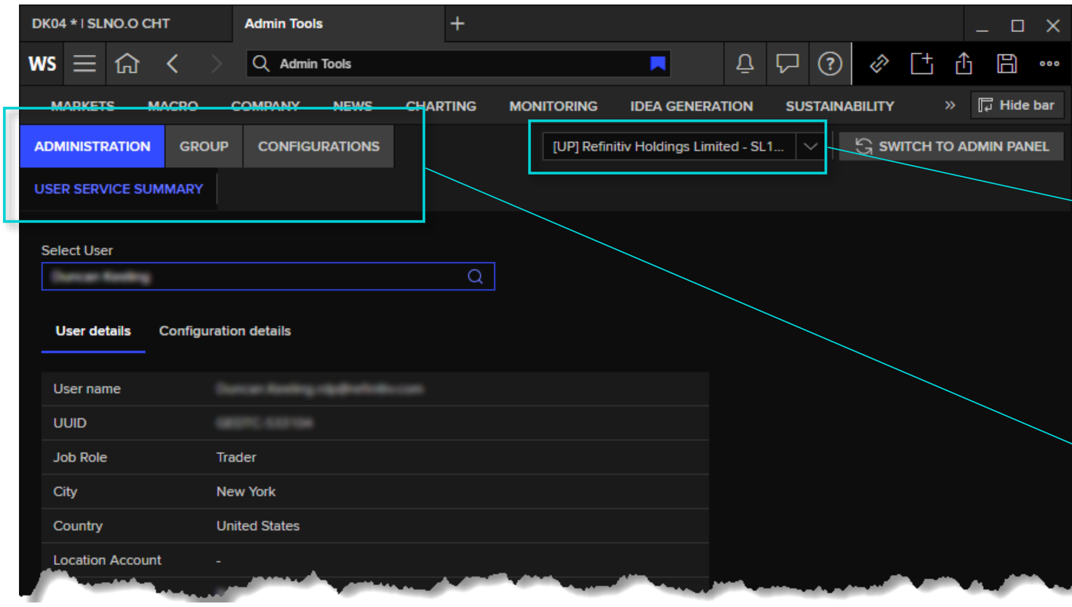
About Workspace Admin Tools

In LSEG Workspace, the 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.

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.



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

Main and sub navigation

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		●
Managing permissions for the following capabilities – Group – Configuration		●
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	●	●
Configuration - Workspace configuration management		
Create, edit, delete admin configuration files	●	●
Assign configuration file to users, LOCs, NLEs, ULT, and group of users	●	●

Accessing Admin Tools

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.

Accessing Workspace 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 an access.

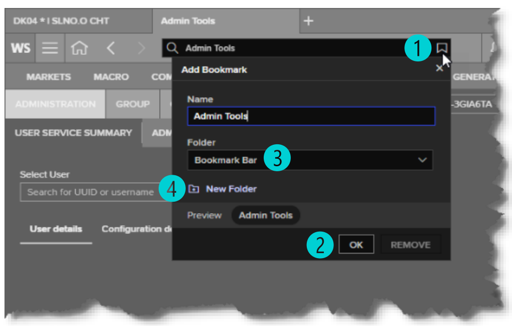
Accessing from the desktop

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:
   a. At the end of the search field, select the icon 1.
   b. From the **Folder** dropdown 3, optionally choose the location where you want to save the Admin Tools bookmark – either the bookmark bar or a sub-folder[2].
   c. Click the **OK** button 2 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/

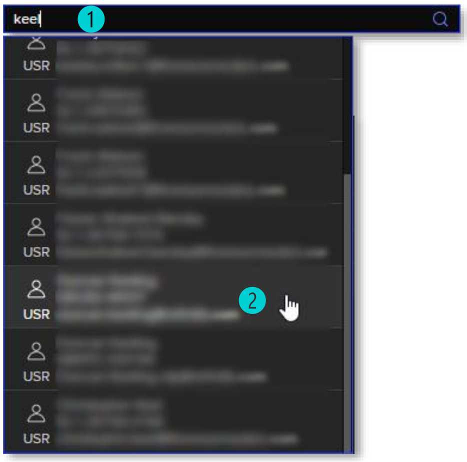
[2] You can create sub-folders under the bookmark bar by using the **New Folder** function 4.

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.

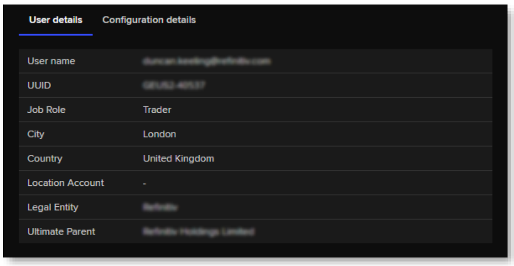
As a customer administrator, this allows you to investigate whether users are assigned the correct configuration. For example, new joiners being assigned the same configuration as their colleagues in the same role.

To do so:

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

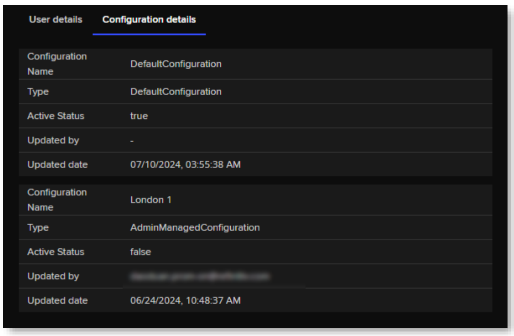
   As you type, up to 10 matching values are shown in a panel below the **Select User** field.

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, and company information.
- **Configuration details**: For the default configuration[3] and each configuration assigned[4] to the user, this contains:
  - The configuration name and type.
  - Whether it is their active configuration[5]. That is, the configuration that is applied to the user when launching LSEG Workspace.
  - When it was last updated and by whom.

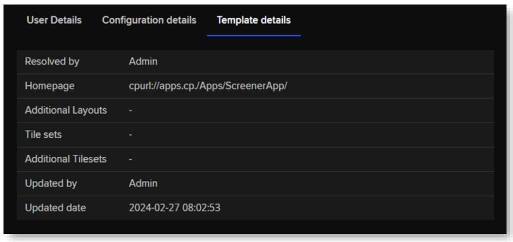


[3] The default configuration is applied only if a custom configuration has not been assigned to the user.

[4] 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.

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

– **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.



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

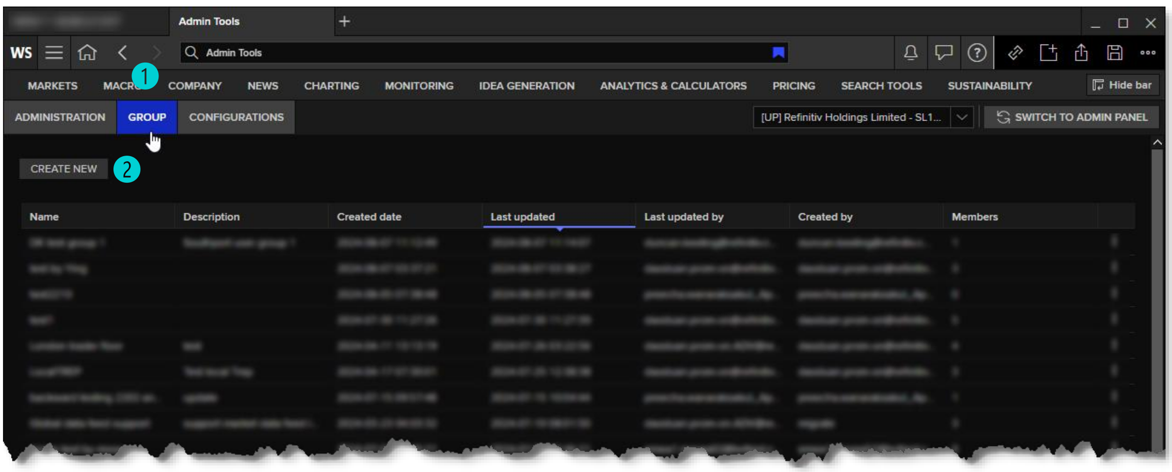
The following rules and limitations apply to group creation using this facility:

- 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:

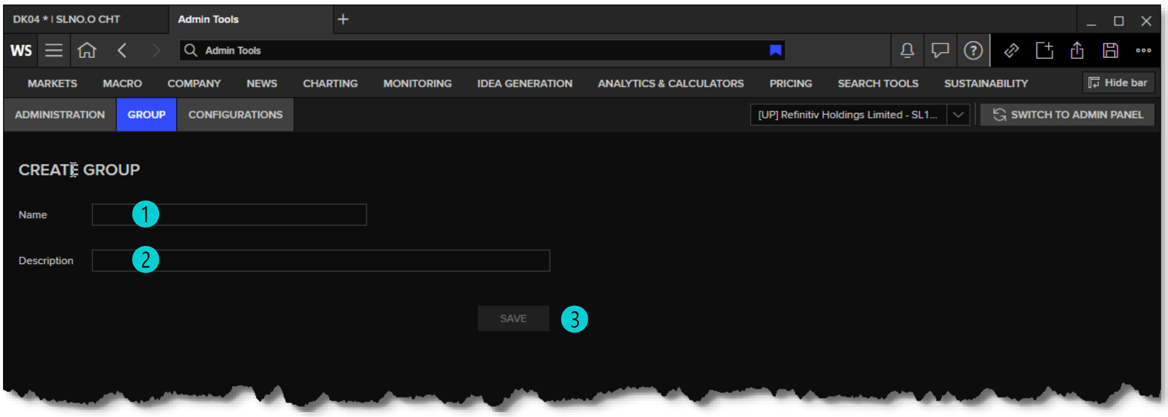
1. Click the **Group** menu option 1.

   The Group page is displayed:

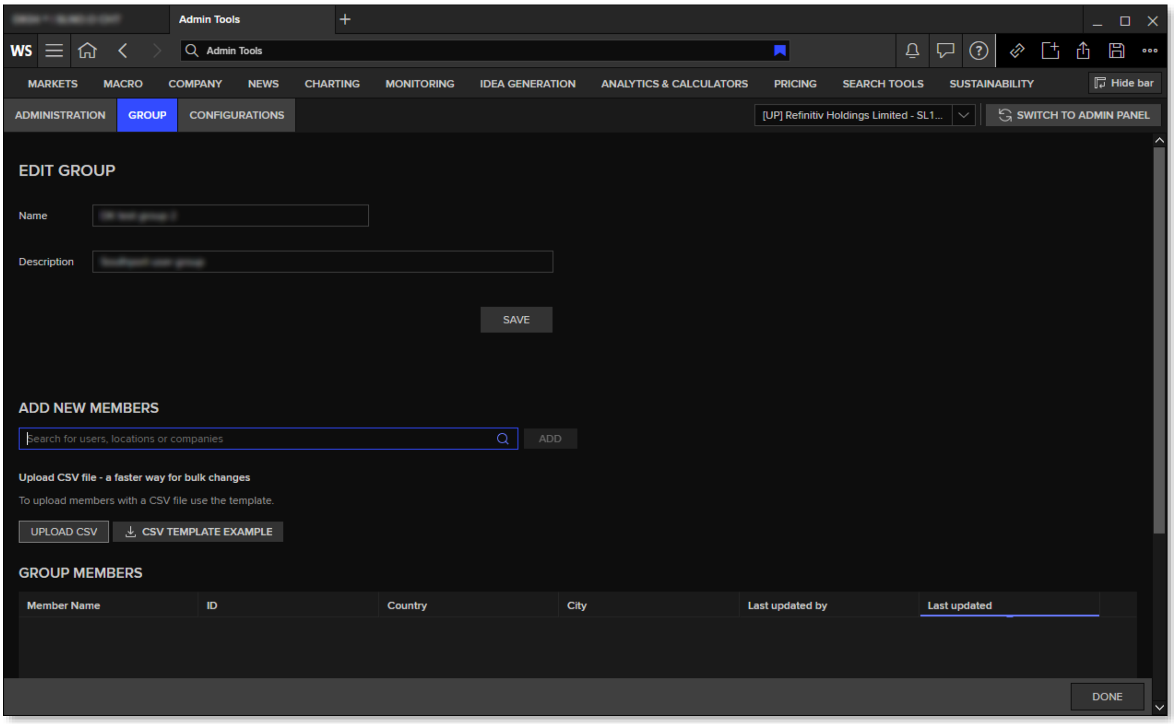
2. Click the **Create New** button 2.

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.

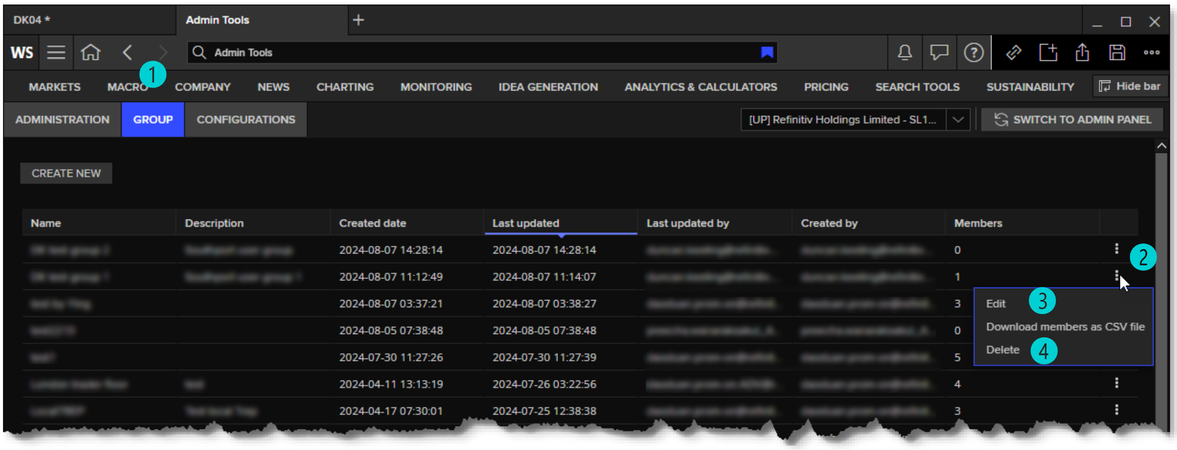
Editing and deleting groups

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:



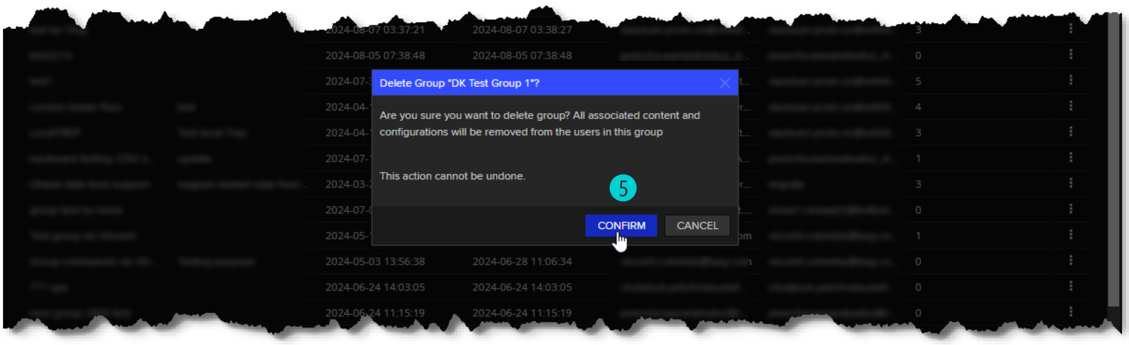
2. Scroll through the list of defined groups to find the group you want to edit or delete. You can also sort the list by clicking any of the headings – Name, Description, Created date, and so on.
3. Once you find the group, click the ⁝ symbol ② at the end of the group row to open the context menu (as 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

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

      A confirmation dialog is displayed:



   b. 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.

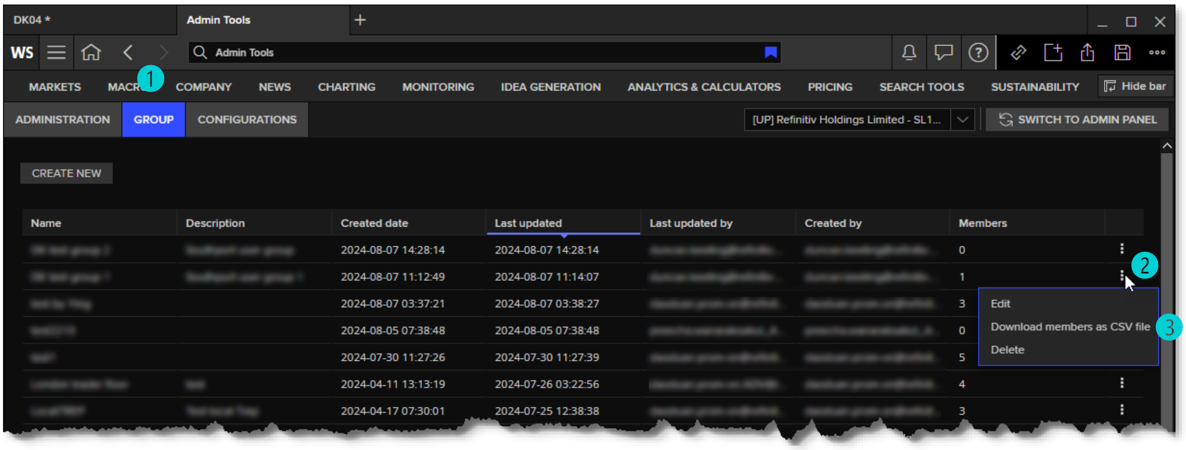
Downloading group members in CSV format

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.

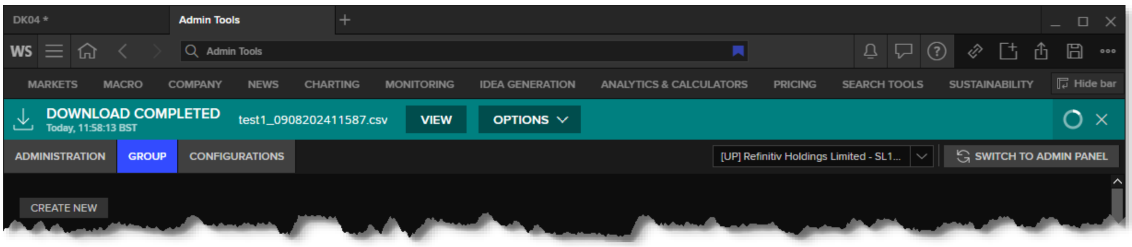
   All groups that have been created under your entity are listed:



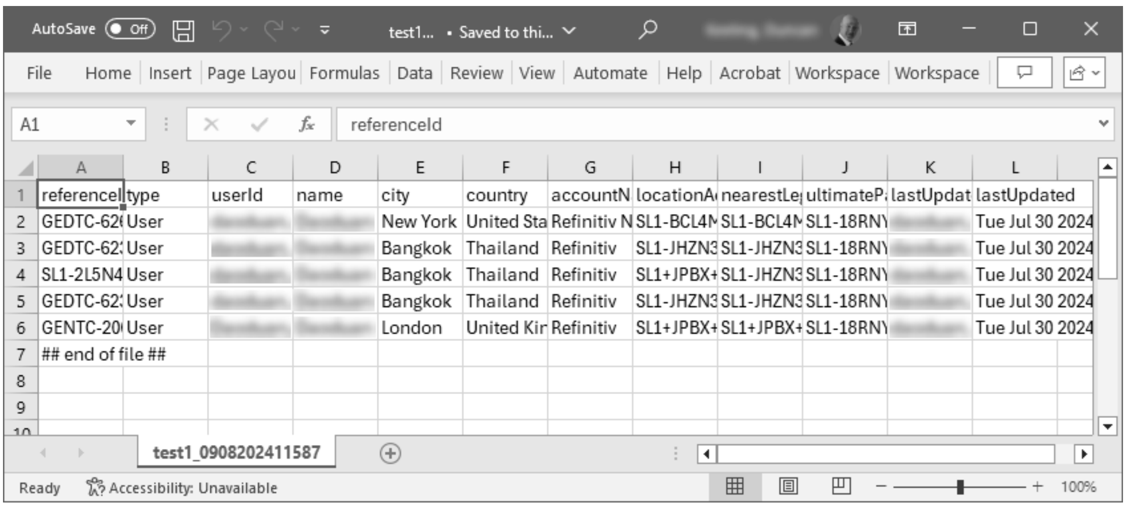
2. Scroll through the list of defined groups to find the group whose member list you want to download. You can also sort the list by clicking any of the headings – Name, Description, Created date, and so on.
3. Once you find the group, click the **⋮** symbol ② at the end of the group row to open the 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.

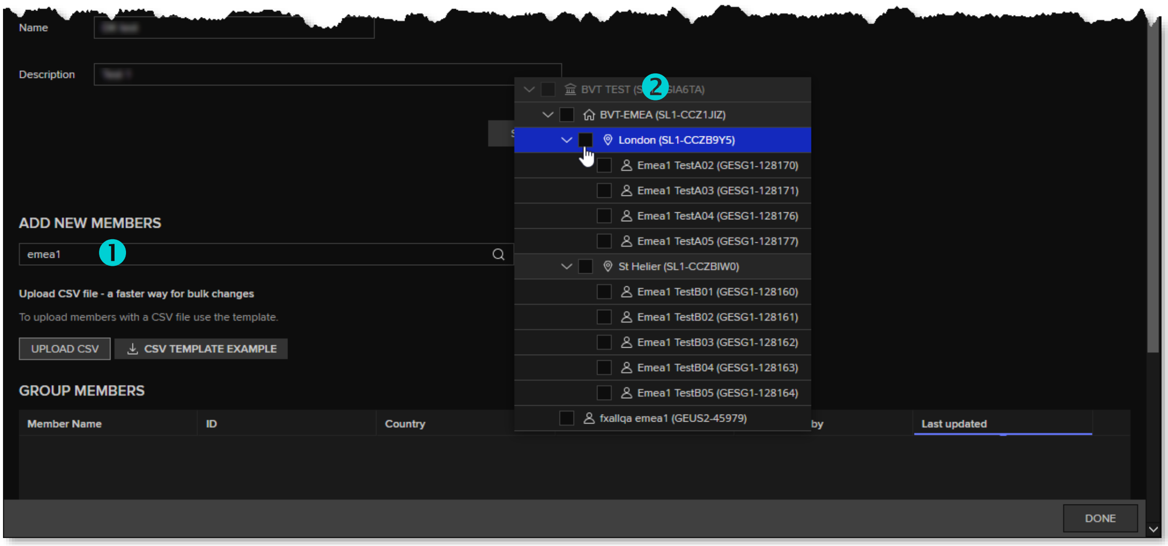
When you add a new member to a group that has an assigned configuration, within 15 minutes, the member will receive a notification advising them to restart Workspace to apply the new configuration. However, the restart is not mandatory, and the configuration can be applied when they next log in to Workspace.

Using the search facility

You can user the search facility to add one or more users[6] as members of the selected group. To do so:

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

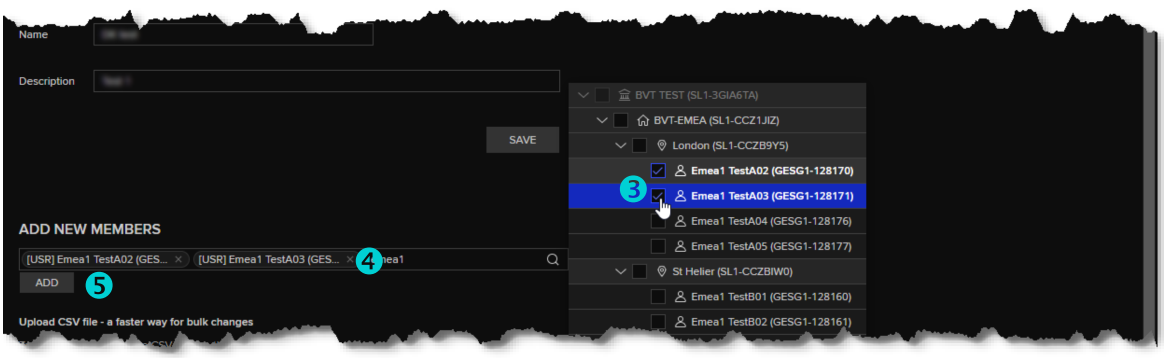
   The results popup ➋ appears, listing all entries that match your search criteria:



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

   Selected entries appear in the search field ➍.

3. To add the selected users[7] to the group, click the **Add** button ➎, found immediately below the search field.



6 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.

7 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.

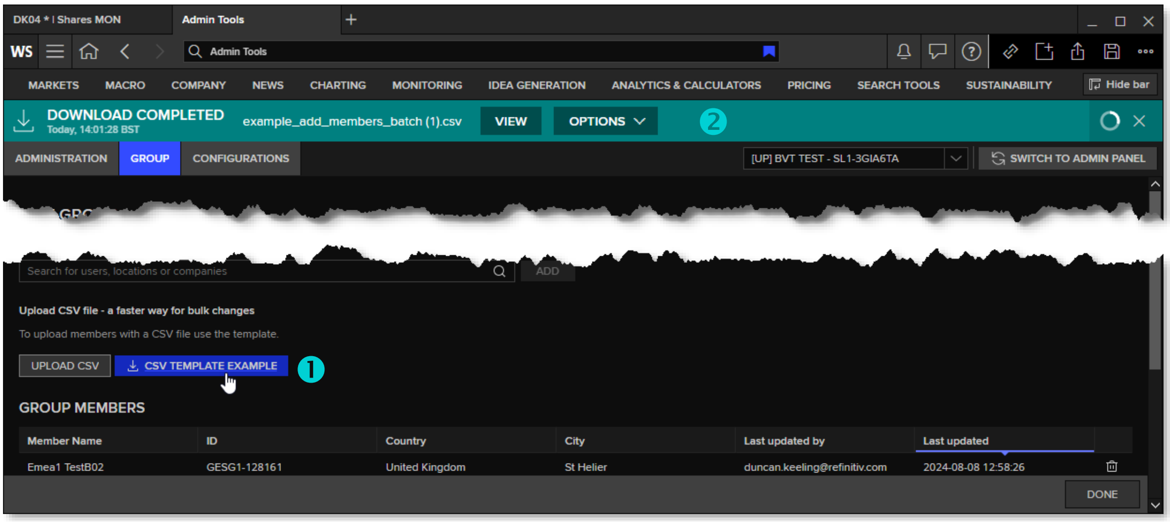
Using CSV upload

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 ❶.

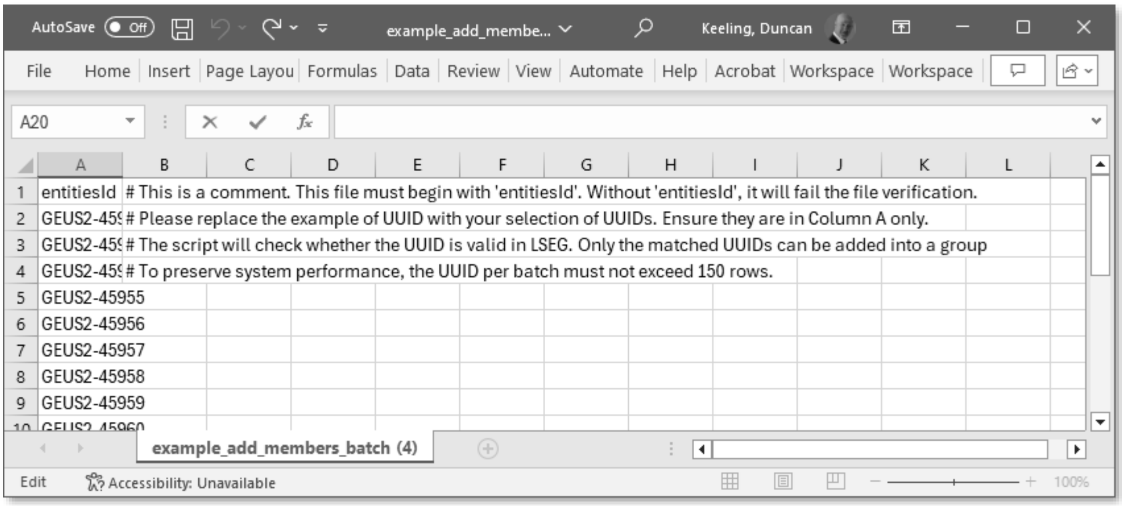
   When the file has finished downloading, a banner message ❷ is displayed, and the file is opened in the foreground.



2. Once the Excel file has opened:

   a. Clear[8] the example UUIDs from rows 2-6, and

   b. 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.



   c. Save the file.

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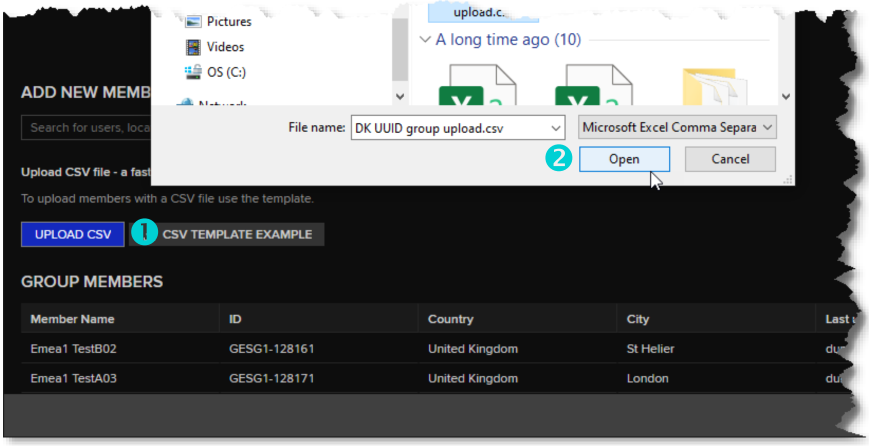
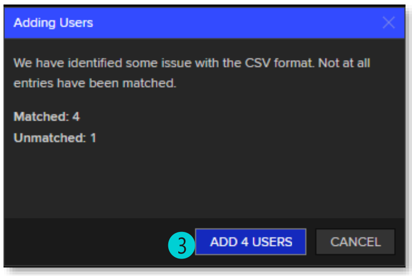
8 Ensure that cell A1 contains **entitiesID**, as shown in the file example.

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.
5. In the Open dialog, locate and select the CSV file, and click the **Open** button ②.

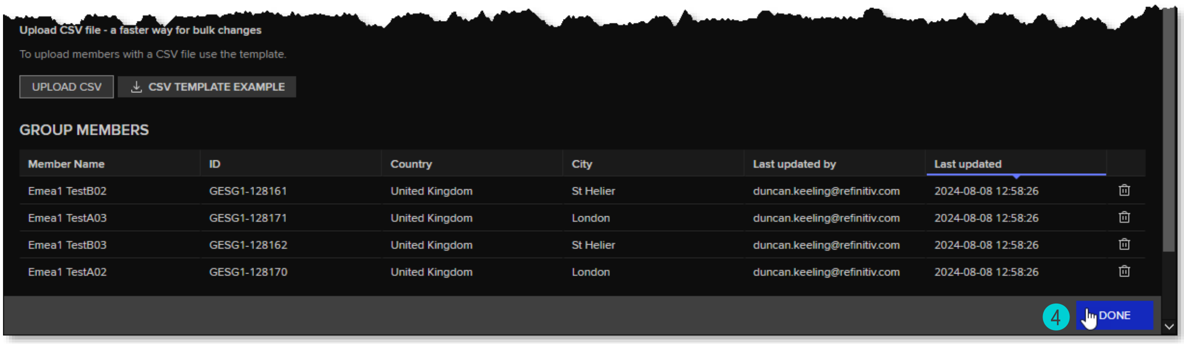


The entries in the CSV file are verified and a summary of the upload process is displayed. For more information, see UUID verification, below.



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

   Successfully added members will appear in the Group Members table.
7. Click **Done** ④ to leave the Edit Group page and go back to the main Group panel.



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.

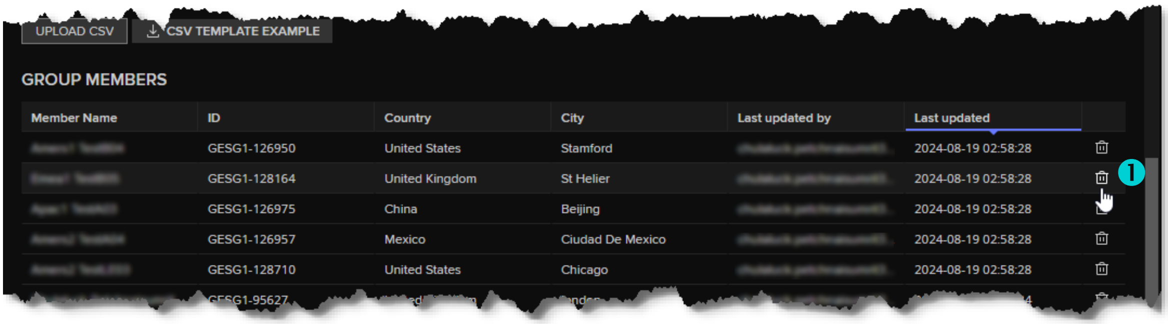
Deleting members from a group

When you delete a member from a group that has an assigned configuration, within 15 minutes, 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.

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.

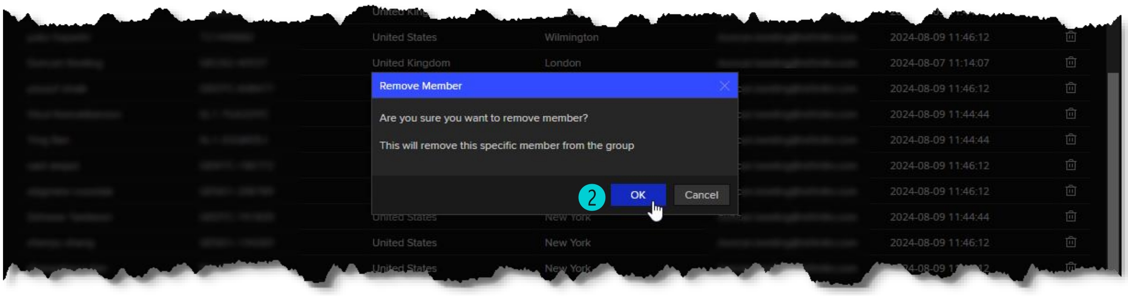
   The Edit Group panel is displayed.
4. Scroll down to the Group Members list, as shown in the example below:



5. For each member you want to delete:

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

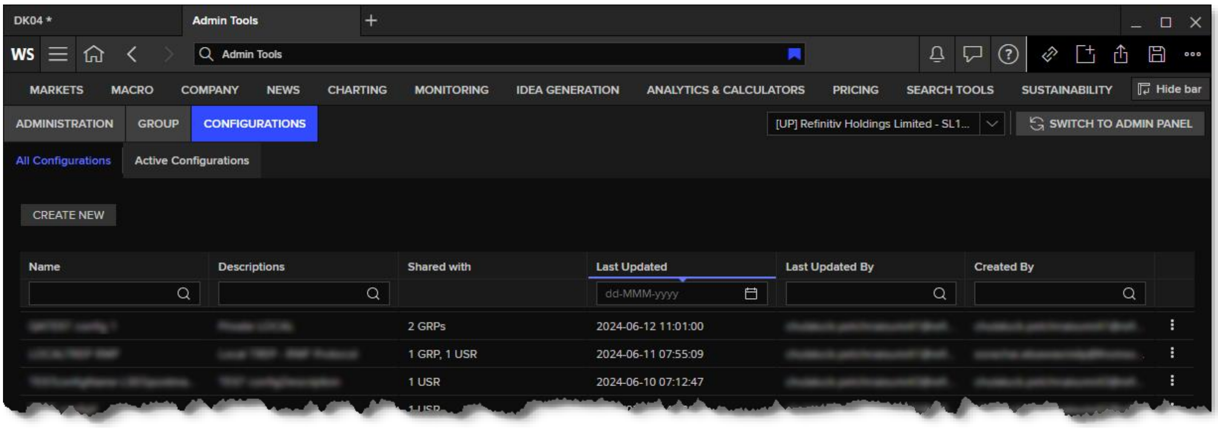
   b. A confirmation dialog is displayed:



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

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:

– 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

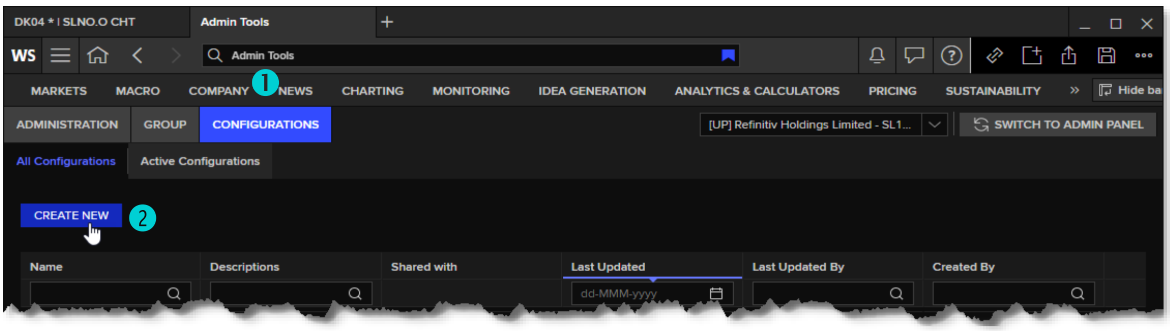
You can create new Workspace configurations either:

– Directly, using the Admin Tools app, or
– In LSEG Workspace, using Configuration Manager

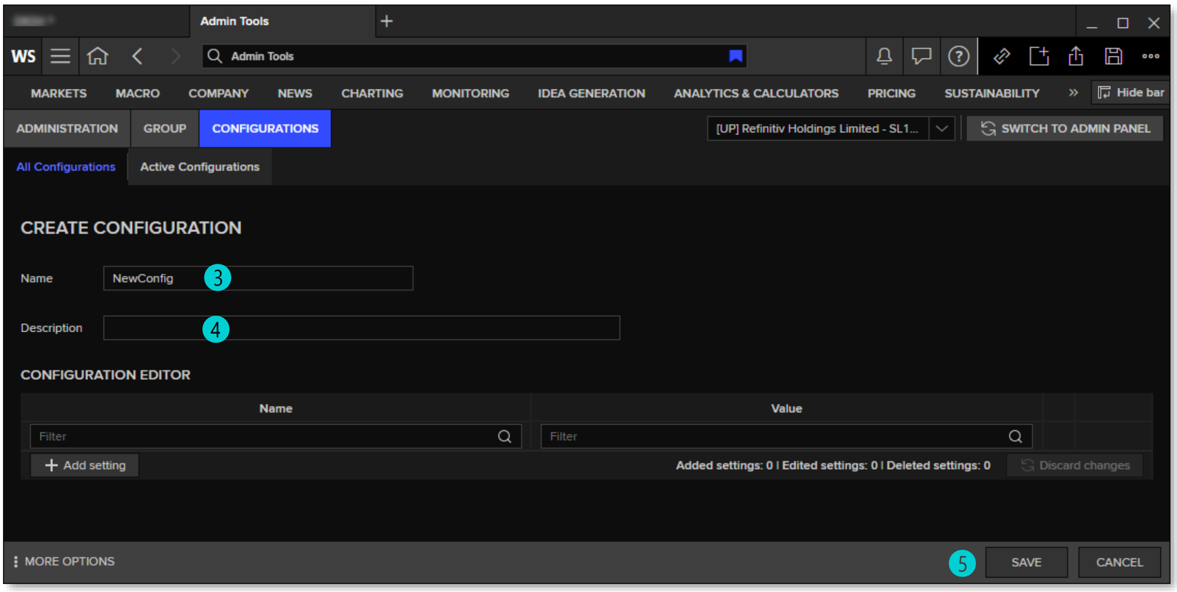
Using Admin Tools

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

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

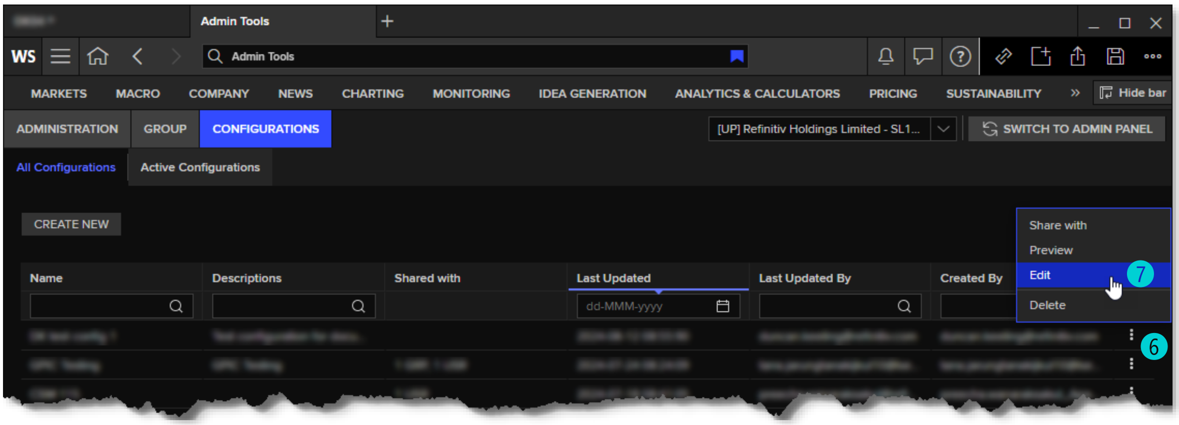


3. The Create Configuration panel is displayed:



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:



6. At the end of the new confirmation row, click the **⋮** icon 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

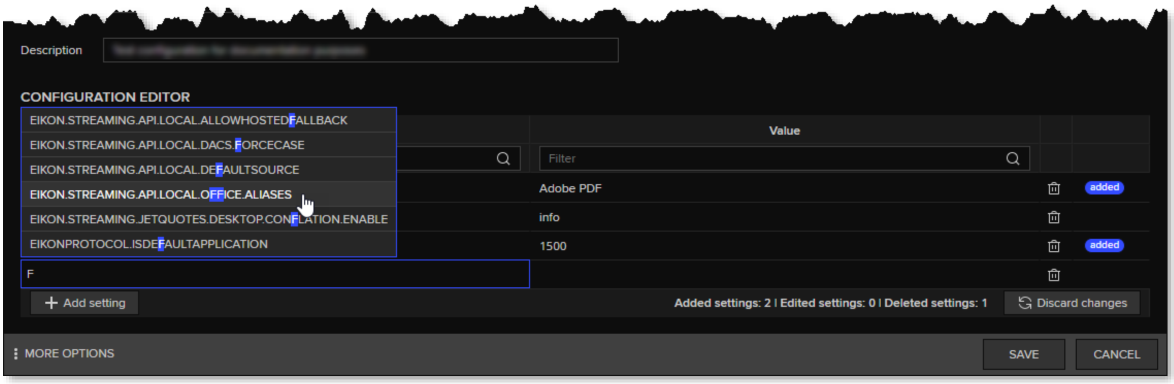
Using the Add setting function

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

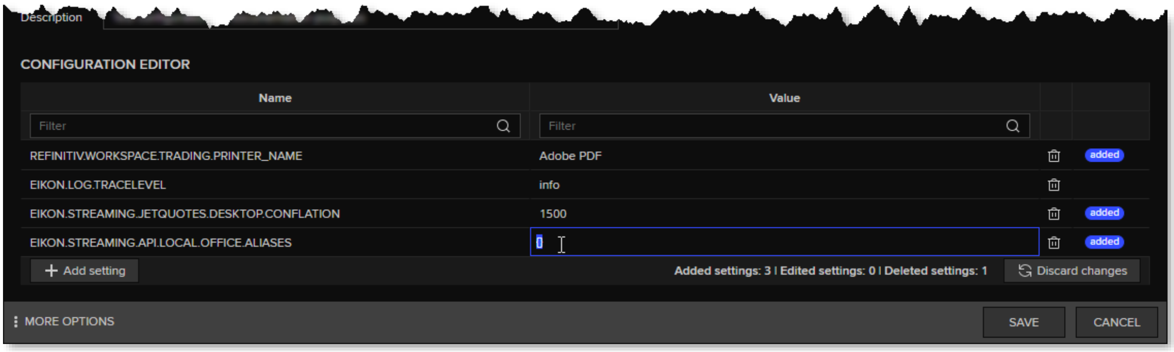
To use this function, do the following:

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:



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:



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

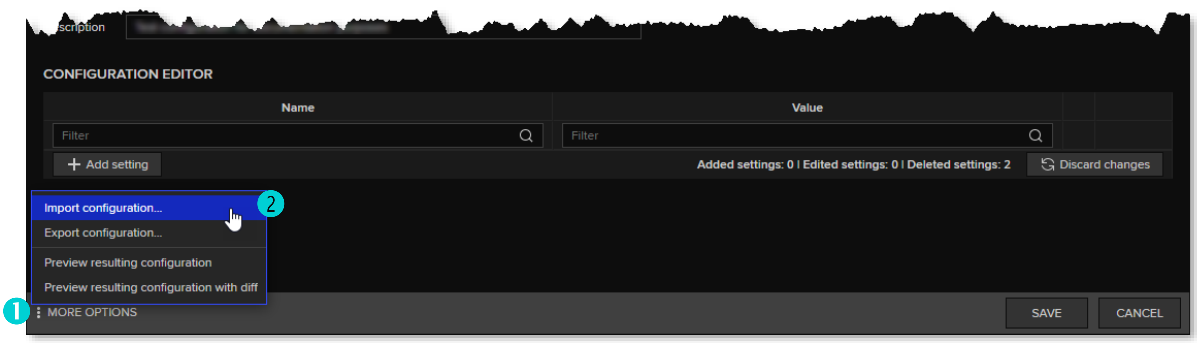
   The created configuration can now be applied to groups.

Importing a JSON file

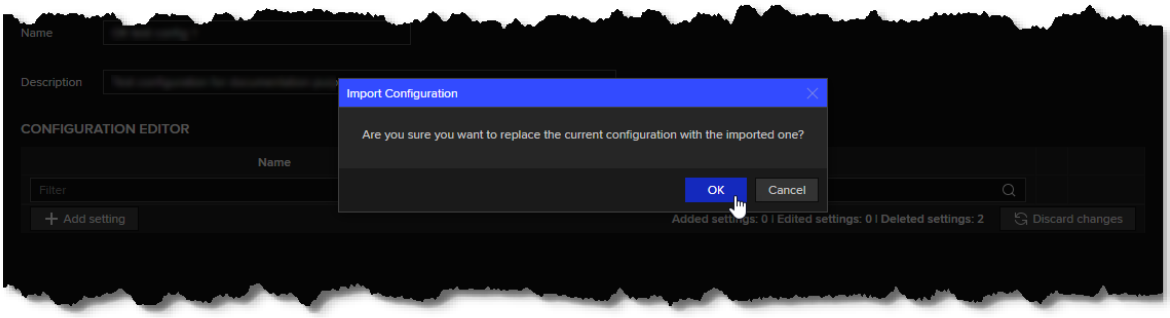
Configuration files that were created using Configuration Manager in LSEG Workspace can be imported into Admin Tools using the Import feature.

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.

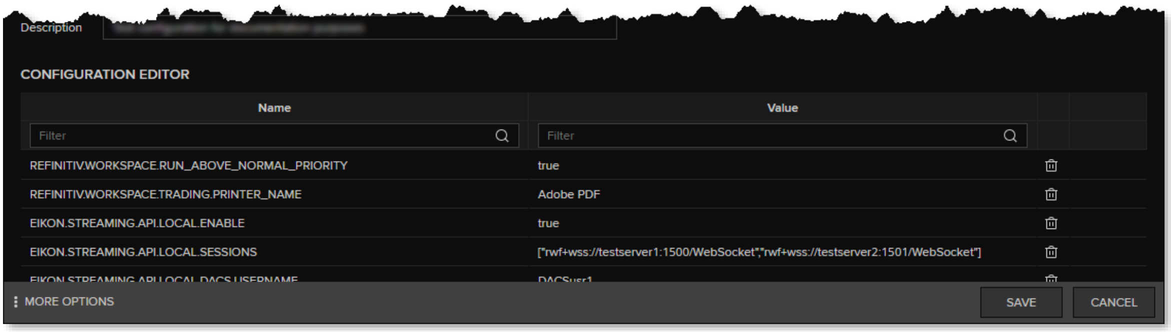


3. In the Windows Open dialog, navigate to the folder containing the exported JSON configuration file, select the file, and click the **Open** button.
4. The following confirmation dialog is displayed:



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

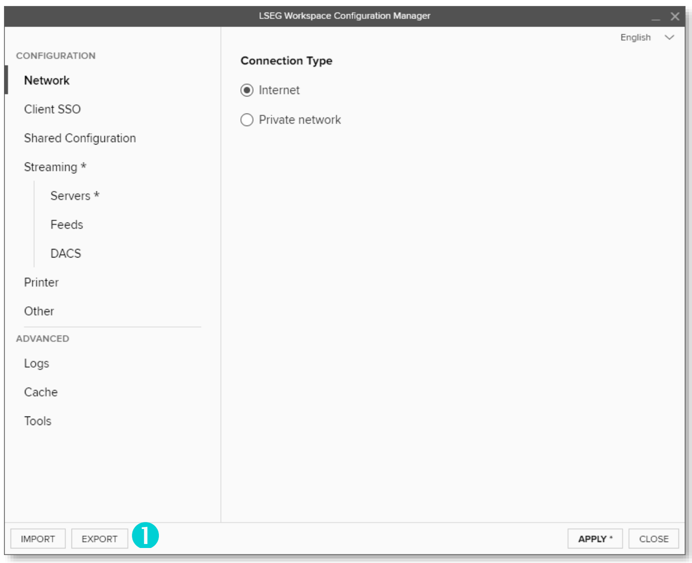
   The entries in the JSON file are added to the configuration, replacing any entries that already exist.



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

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.



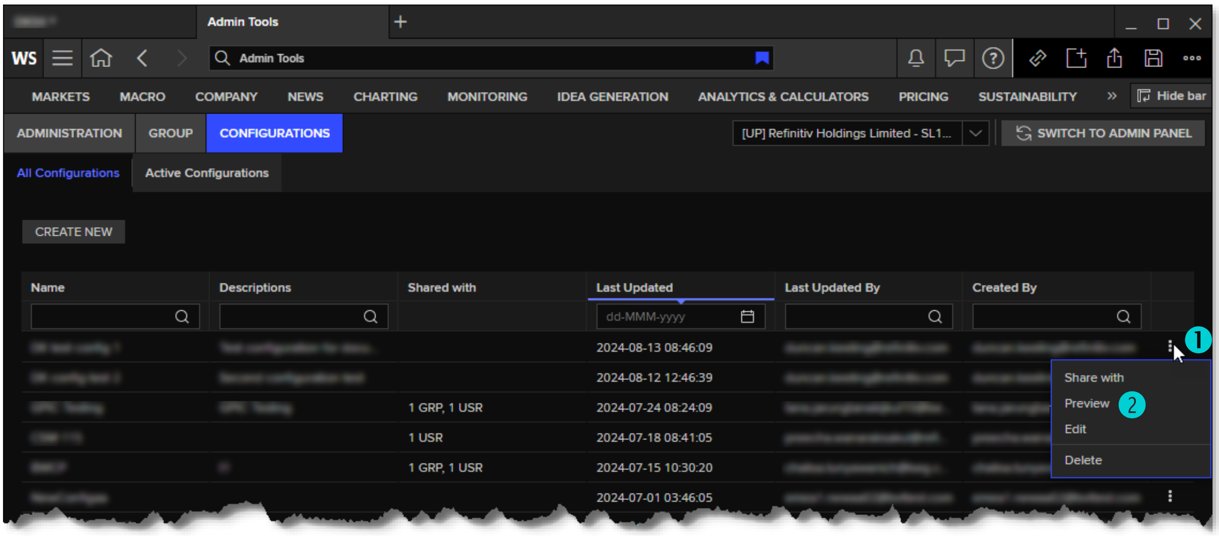
However, as a high-level overview, to create a configuration and save the JSON file so that it can be imported into Admin Tools, do the following:

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 above.

Configuration context functions

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



Sharing configurations

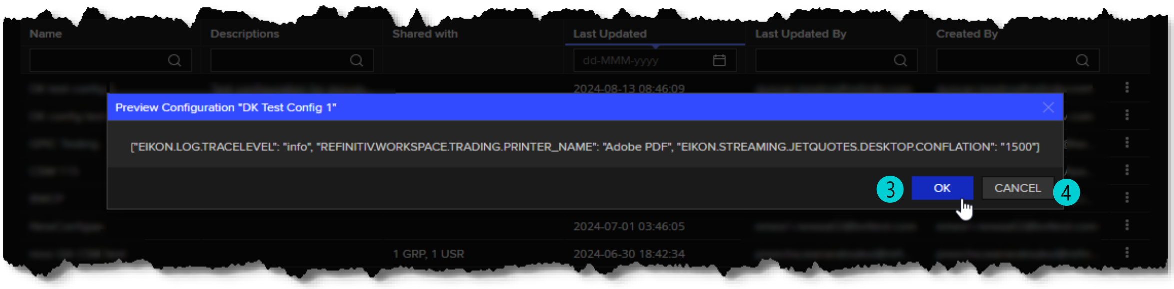
For information regarding sharing and assigning configurations, refer to the following section, Assigning configurations.

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 ❶.
2. Choose the **Preview** option ❷.

   The Preview Configuration <Configuration> dialog is displayed:



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

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.

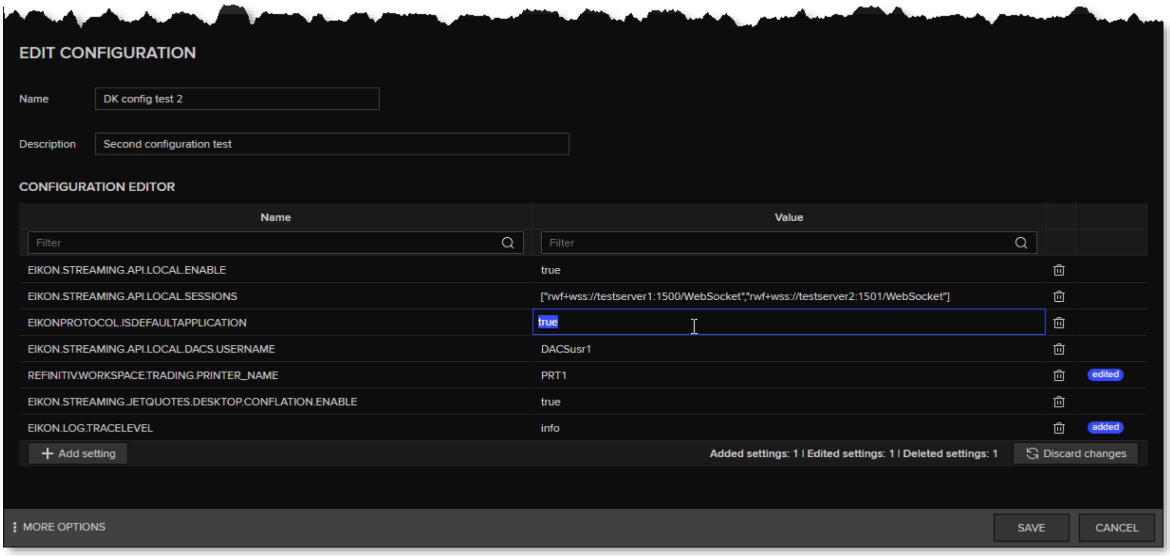
2. Choose the **Edit** option.

   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 🗑 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.

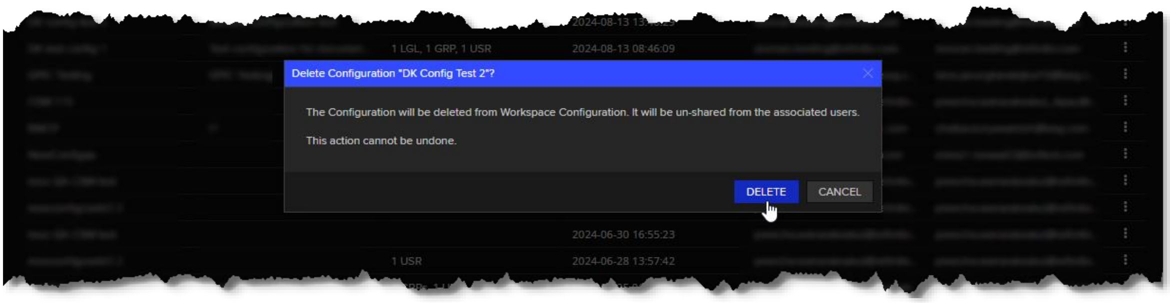
Deleting configurations

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.

Warning: Deleted configurations cannot be retrieved.

Assigning configurations

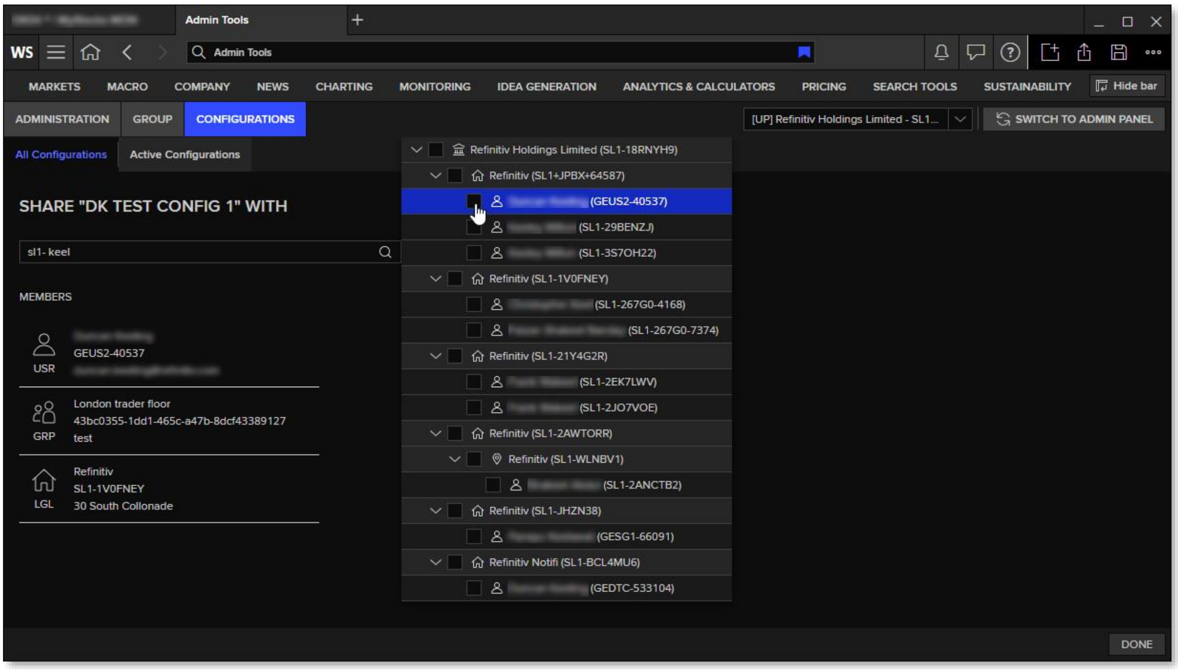
You can create groups of users, legal entities and/or locations using the capabilities outlined in the Managing groups section. Configurations can then be assigned to these groups using the Share with capability.

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.

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

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

   The Share <Configuration> With panel is displayed:



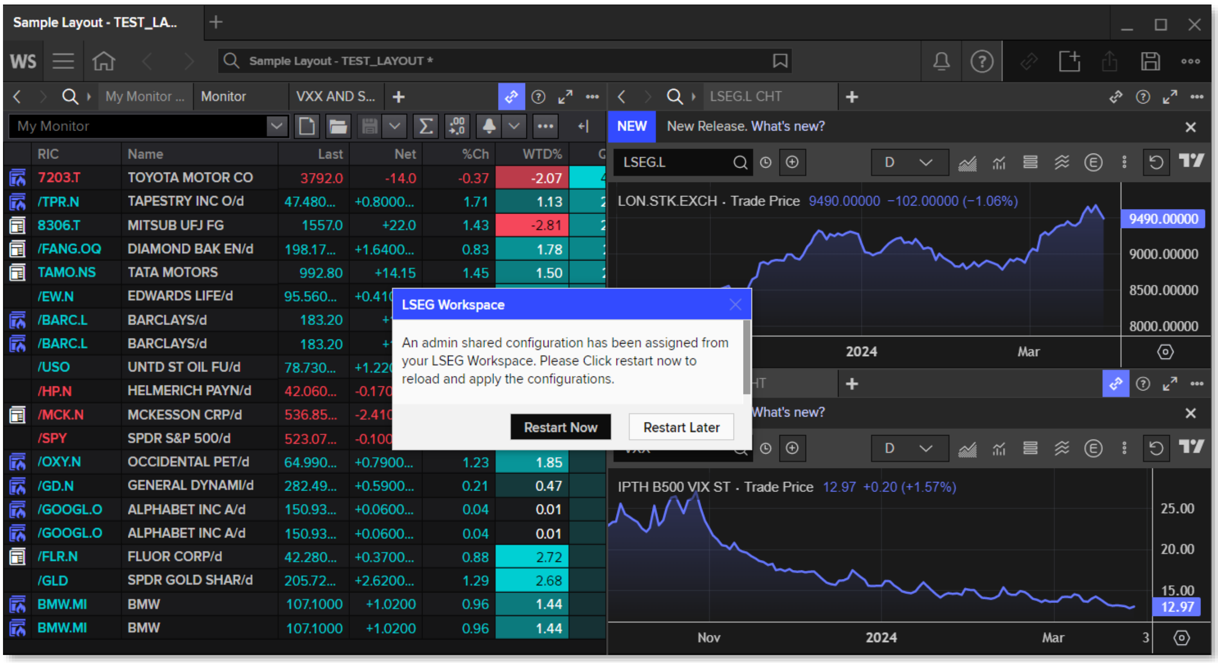
3. Add groups and individual users, as required, using the search facility.
4. Click the **Done** button to save your selections and share the configuration.

Important: User 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.

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

Applying assigned configurations

Within 15 minutes 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.



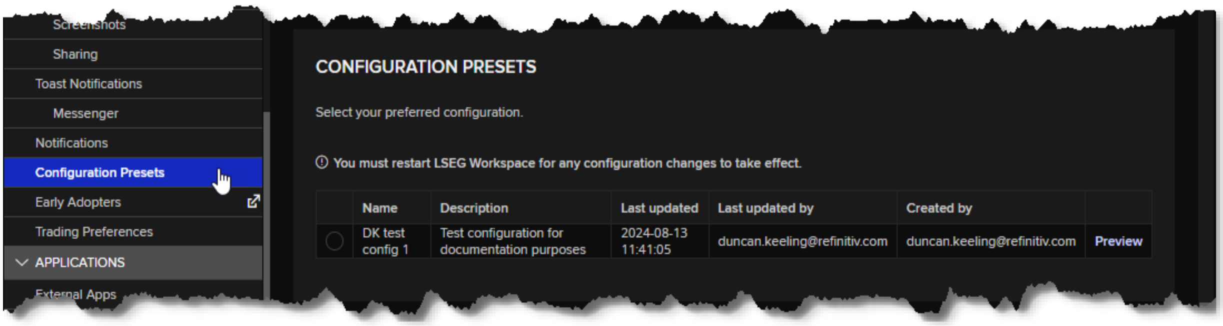
The restart Workspace notification is triggered once the `admin-managed-settings.json`, located in `%AppData%\Refinitiv\Refinitiv Workspace\Cache\Config`, has been updated on the user's device. If the file has not been received within 15 minutes, it is recommended that affected users sign out and back 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.

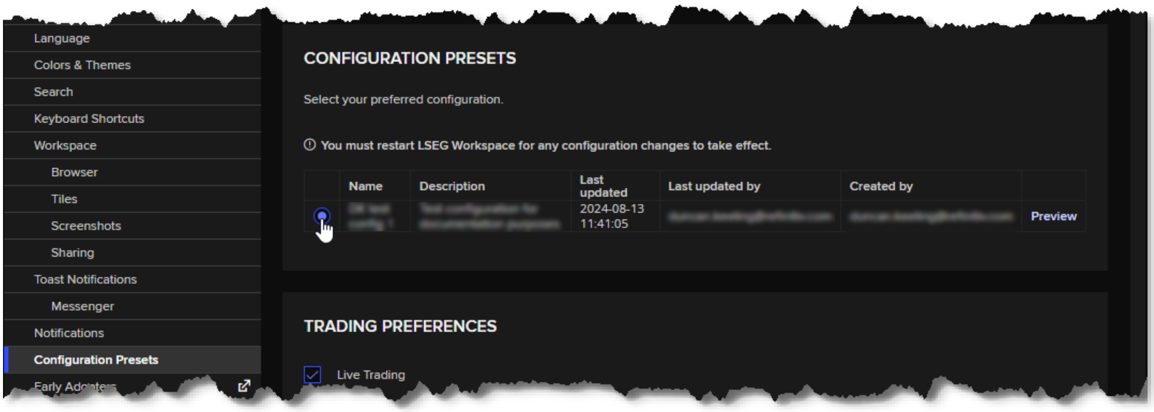
Users can also find configurations that have been shared with or assigned to them under **WS > Settings > Configuration Presets**:



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.



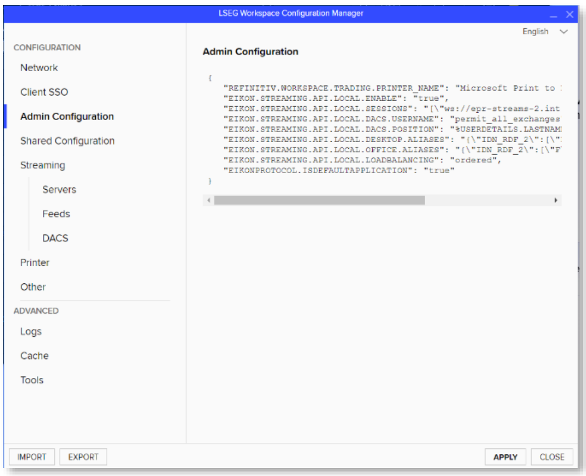
2. Click the **Save Changes** button, in the bottom right corner of the panel.

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

Reviewing assigned configurations

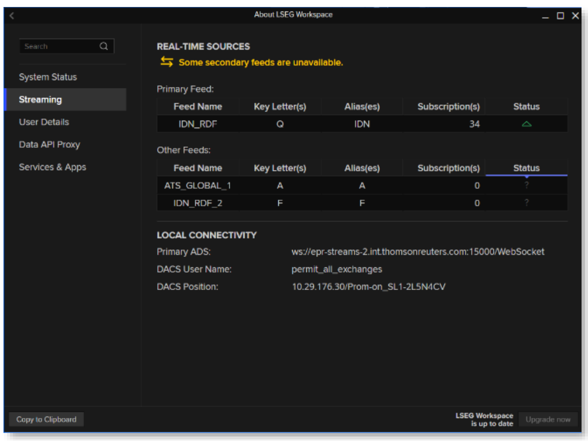
After restarting Workspace, users can either:

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

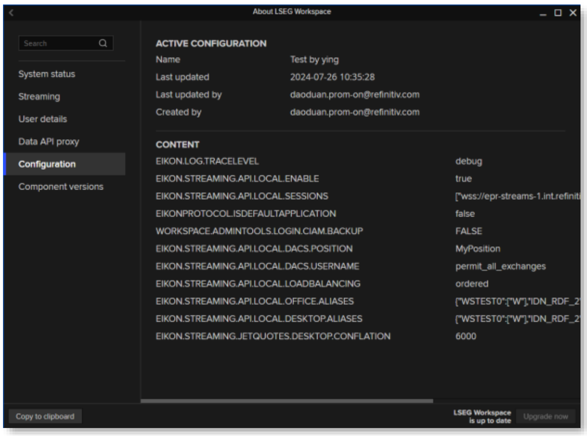


– Open **About LSEG Workspace** and view:

  – 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`

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: