# LSEG Workspace | Entra

Administrator's Activation Guide



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# About this document

LSEG Workspace now supports user authentication through Microsoft Entra. This document describes the steps that are performed to associate users in your organisation with Workspace, allowing them to access the product seamlessly.

# Intended readership

The LSEG Workspace – Entra Administrator's Activation Guide is intended for administrators on customer sites that are responsible for the maintenance of Workspace and Microsoft Entra tenants.

# Contact information

To:

- Receive further assistance, contact <u>Support</u>.
- Provide feedback on Workspace technical content, contact DocFeedback@lseg.com.

## Prerequisites

To enrol users for Entra authentication into Workspace, the following conditions must be met:

- You must have access to Workspace to provision credentials for System Cross-domain Identity Management (SCIM)<sup>1</sup>. •
- You also require access to the Workspace Admin Tools app to register your Entra tenant.

**Important**: Initial access to the Workspace Admin Tools app does not include the tenant registration process, for which additional privileges are required.

To request these privileges, either contact LSEG through the <u>MyAccount Support channel</u> or contact your dedicated Account Team.

<sup>1</sup> SCIM is a protocol used to standardise how identity information is exchanged between entities.

### Entra setup steps

Setting up users for Entra access involves performing the following steps, which are discussed in the sections that follow:

- <u>Accessing the Client Admin Tools app</u>
- Finding your Entra tenant ID
- Provisioning the Workspace gallery application
- Registering your tenant in Client Admin Tools
- Setting up an app in the Entra admin portal
- <u>Mapping application attributes</u>
- Provisioning users in the Entra admin portal

Also, following these steps, the Useful links section contains links to additional material provided by third parties.

## Accessing the Client Admin Tools app

To access the Client Admin Tools app:

1. Log in to Workspace.

browser, press Alt+L

- Select WS > App Library.
   Alternatively, to open the App Library in a new
- To filter the app list, in the Search box <sup>1</sup>, type Client.
   The apps are filtered, as shown in the example, opposite.
- 4. To run the Client Admin Tools app, click **Open 2**.



The Client Admin Tools app launches in the same browser window.



# Finding your Entra tenant ID

Your Microsoft Entra tenant ID is the unique identifier for your organisation that is assigned by Microsoft. You need this ID to register your tenant in the Client Admin Tools app.

To find this code:

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

The Microsoft Azure Welcome page opens (opposite).

 Click the Manage Microsoft Entra ID View button.



The **Overview** page opens (opposite) where the Tenant ID **2** is shown under the Basic Information section.

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Home >									
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Overview	Azure Active Directory	is now Microsoft Entra ID. Learn.more							
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Identity Governance	Azure AD is now Microsoft Entra ID	Microsoft Entra ID I is the new name for Azure Active	Service Chang We are making	e to Microsoft Entra security-related servi	Connect ice changes to	A	Upcomi Please n	ng MFA Serv vigrate from N	er deprecation IFA Server to Microsoft Entra

#### Provisioning the Workspace gallery application

The Workspace gallery application must be provisioned to your Entra tenant. This allows users to access the Workspace application<sup>2</sup> using their Microsoft credentials.

Once the application has been provisioned to the tenant, your conditional access policies, such as MFA, compliant devices, and so on, can be applied. To find further information on conditional access policies, refer to the <u>Plan a Conditional Access deployment</u> page on Microsoft Learn.

To provision Workspace to your Entra tenant, do the following:

 On your Microsoft Azure portal, navigate to Enterprise applications > Manage > All applications 1 and select New application 2.

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Enterprise applic	ations   All applications	5 ···· sh 🎍 Download (Espent)   👩 Proviewi	info   🎫 Columns   💀 Novice/Isaturo	s 🛛 💂 Got feedback?		×
> Overvieur -> Managa	View, filter, and search application	s in your organization that are set up to use ye	ur Microsoft lintra tenent as their identity Provi	der.		
All applications	The list of applications that are ma	sintained by your organization are in applicate	n registrations.			
Private Network connectors	P Search by application name of NI applications found	e object ID Application type Bet	arprise Applications 🗙 Application 10 v.	ata alih 🗙 🦙 Adi Bara		
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	dt Graph Lipicove 3848	05/2-ft3e-f8as-91. dethc3h5-dille-f0b1-a	https://developer.micro 1/9/2024			dethctb5-diffe-tb1+a
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- In the Search box <sup>3</sup>, type LSEG.
- 3. From the filtered list, select the **LSEG Workspace** app **④**.



The LSEG Workspace app panel is displayed.

- 4. Click the **Sign up for LSEG Workspace** button.
- 5. In the Permissions requested dialog, click Accept <sup>3</sup>.





<sup>&</sup>lt;sup>2</sup> The currently supported Workspace application variants are **Workspace | Web** and **Workspace | OpenFin**.

<sup>&</sup>lt;sup>3</sup> Currently, as your credentials will not be valid for Workspace, a "We are having trouble logging you in" error message is displayed. This can be ignored and will be fixed in future versions.

- 6. Return to Enterprise applications > Manage > All applications.
- 7. In the Search box **5**, type **LSEG Workspace**.
- 8. From the filtered list, select the LSEG Workspace application with the pink logo, highlighted in the screenshot 6.

The LSEG Workspace Overview panel is displayed (see step 7, below).



 In the left-hand menu of the LSEG Workspace Overview panel, select Security > Permissions ?



8

The LSEG Workspace permissions panel is displayed (opposite).

10. Select the Grant admin consent for London Stock Exchange Group button (8).

# Additional resources

For further information about:

• Granting admin consent to applications, refer to the Microsoft Learn Grant tenant-wide admin consent to an application page.

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LSEG Workspace | Permissions

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Below is the I this app (app

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Admin consent

• App validation, refer to the Microsoft Learn What is app provisioning in Microsoft Entra ID? page.

# Registering your tenant in Client Admin Tools

To register your tenant in the Client Admin Tools app:

- 1. Run LSEG Workspace and open the Client Admin Tools app.
- 2. Select the SCIM INTEGRATION menu item 1.
- In the centre of the SCIM Integration panel, click the + NEW TENANT button 2.



4. Enter the Tenant Name (3) and Tenant ID (4) of your organisation (see <u>Finding your Entra tenant ID</u>) and click **CREATE**.

Once the following automated tasks have been performed (denoted by a green checkbox), the setup has been successful.

- Creating application
- Certifying application
- Certifying service account
- Assigning license
- Creating tenant configuration
- 5. Copy the generated Tenant URL 5 and Secret Token
  6 individually into a text tool, such as Notepad.





# Generating a new Secret Token

The secret token has a validity of six months. When the token is within 30 days of expiry, the date will be highlighted in amber, along with a warning pop-up box.

If the Secret Token has expired, a new token must be generated to re-link the Entra tenant to Workspace This is done by following the steps below:

- 1. Navigate to the Admin Tools app.
- 2. Select the SCIM integration menu item.
- 3. Select your tenant from the tenant list.
- Under the SCIM integration details section, select the New Token button (7).

Admin Tools	New App	+	
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COVERAGE MARKETS NEWS	COMPANY FILINGS & EVENTS	OWNERSHIP CHARTING MY LA	routs
ADMINISTRATION GROUP CON	FIGURATIONS ACTIVITY LOGS	SCIM INTEGRATION	
← BACK HOME			
Tenant details			
Tenant name			
Tenant ID	d1dda6d3-ad27-417c-9615-0e379e11	13664	
SCIM integration details			
Authentication method	OAuth2 Client Credentials		
Tenant URL	https://api.ppe.refinitiv.com/iam/scim/	Your secret token is close expiry. Please generate token.	e to a new
Secret token	Creation 20-Sep-2024 Expi	y 20-Mar-2025 O G NEW TOKEN	
To check whether the SCIM integrat	ion and Entra connection is working, pl	ease go to the Azure app portal. 7	1
a sufficiently the summary	And and an other	and a state of the	man descent and

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

To set up an app in the Entra admin portal that allows users to be provisioned to any LSEG application that is integrated with Entra, do the following:

.....

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





5. Under the All applications panel, select **New** application **(**).



ent

MSOnline Powers

 Click Create your own application
 5.

> The Create your own application side panel appears.

- 7. In the What is the name of your app? box 6, type LSEG SCIM.
- 8. Under What are you looking to do with your application?, select Integrate



any other application you don't find in the gallery (Non-gallery) 7

- 9. Click the Create button, at the bottom of the side panel (not shown in the illustration, above).
- A new application overview page, opposite, opens.
- 10. In the left-side menu, select Manage > Provisioning (8).



11. In the Overview (Preview) panel, select Manage > Provisioning 9.

- Provisioning Mode .
- Admin Credentials .

- Settings ٠
- 12. In the Provisioning Mode section, select Automatic 10.

Manage > Provisioning 9	Home > for Iseg documen	tation purpos	2
This displays the Provisioning panel,	for lseg docum	entation	purpose   Provisioning
which is comprised of three expandable sections:	• Our in Our in )	× «	🔚 Save 🗙 Discard
Provisioning Mode	<ul><li>Overview (Preview)</li><li>Overview</li></ul>		Provisioning Mode
Admin Credentials	Provision on demand ✓ Manage	10	Automatic  Use Microsoft Entra to manage the creation and synchronization of user accounts in for Iseg documentation purpose
• Settings	Ø Connectivity (Preview	v)	based on user and group assignment.
12. In the <b>Provisioning Mode</b> section, select <b>Automatic</b> (10).	Attribute mapping		V Admin Credentials
	Expression builder		✓ Settings
	Provisioning logs	المعدم	En a mar
13. In the Admin Credentials section, enter <b>Te</b> 1 and <b>Secret Token</b> (2), obtained from S	nant URL Step 7 above.	∧ Admi	n Credentials
14. In the Settings section of the panel, ensur Provisioning Status is set to Off <sup>4</sup> .	е	Admi Micro	n Credentials soft Entra needs the following information to connect to LSEG-SCIM-TEST's API and synchronize user data.
15. Click Test Connection 🚯.			
		12 Secret	Token
	•	В	st Connection
			and an and the second

If the test is successful, a green tick will appear, together with a message confirming the supplied credentials are authorised to enable provisioning.

Testing connection to temp-test	
---------------------------------	--

The supplied credentials are authorized to enable provisioning

×

<sup>4</sup> The Provisioning Statis slider switch is shown in the illustration at the top of the following page.

#### Mapping application attributes

To synchronise user and group attributes between Azure Active Directory and the target Workspace application, follow the instructions in the sections below.

Attribute Mapping

# Mapping group attributes

- From the left-side menu, select Manage > Provisioning 1.
- Expand the Mappings section (2) and click Provision Microsoft Entra ID Groups (3).

Microsoft Azure	$\mathcal{P}$ . Search resources, services, and does (G $*/$	🚱 Capilat 🛛 🖓 🗇 📈 kulisa phatohasiya papa.
iome > LSEG Workspace A   Ente	prise applications > Entroprise applications   All applications > heimdall test scim	
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Dveniex	group assignment.	
Provision on domand		
Manage	<ul> <li>Admin Credentials</li> </ul>	
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② Provisioning	^ Mappings	
Users and groups	Mapping	
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(Proview)	Name En	inabled
Expression builder	Provision Microsoft Entre ID Groups 😽 No	in .
Monitor	Provision Microsoft Entra ID Users	bei .
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	<ul> <li>Seconda</li> </ul>	
	Provisioning Status	
	()	

The Attribute Mapping panel is displayed.

- 3. Set Enabled 4 to No<sup>5</sup> and click Save.
- Return to the previous page and, from the expanded Mapping section, select Provision Microsoft Entra ID Users (5).
- 5. The Attribute Mapping panel is displayed.
- 6. Set Enabled 4 to Yes.
- 7. For Target Object Actions 6, uncheck Delete.
- Delete unused Attribute Mappings but keep the following (7), with the illustrated settings:
  - userName
  - emails[type eq "work"].value
  - name.givenName
  - name.familyName
- 9. Click **Add New Mapping** (8), found at the bottom of the Attribute Mappings section.

🔚 Save 🗙 Discard						
Name Provision Microsoft Entra ID Groups						
Enabled Yes No 4 Source Object Group						
Source Object Scope					_	
Microsoft Azure	,P. Search resources, services, and does (51)	Copilot	<b>E</b> 0	00	R	kultisa.phatchariyapapa
Home > LSEC Workspace A [Enterprise applications > Enterprise applications Attribute Mapping	(All applications > helmdall-test-scim   Provisioning >					×
🖬 Save 🗙 Discard						
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Target Object						
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emails[type eq.'work'].salae	mal	Edit Delete
namegivenName	givenName	Edit Delete
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Add.Now.Mapping		
name.orvenName		givenName
		9.10.1.10
and the Alassa		
name.tamiiyName		surname
_		
Add New Mapping		

<sup>&</sup>lt;sup>5</sup> Currently, LSEG does not support group provisioning.

The Edit Attribute panel is displayed.

- From the Source attribute dropdown (9), select objectId.
- 11. From the Target attribute dropdown (0), select externalld
- 12. To save your settings and return to the Attribute Mapping panel, click **OK** (1).
- 13. Found immediately below the Attribute Mapping heading, click the **Save** option.

Attrib	ute Mapping	
🔚 Save	× Discard	

A mapping lats you define how the attributes in one of this postilization	dass of Microsoft Finite object (e.g. Users) should Bow to and from		
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objecild	V		
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larget attribute * @			
externalid	~		
Match objects using this attribute			
No	~		
Matching precedence G			
Apply this mapping ()			
Always	~		

# Mapping user attributes

To provision Workspace users with Entra authentication successfully, you need to set Entra attributes that can be mapped to the Workspace User IDs<sup>6</sup>.

By default, SCIM attempts to map the Entra userPrincipalName to their Workspace User ID. However, in some instances, this mapping will not work, as they will not match. In this circumstance, to customise the user attribute mapping and select an Entra attribute that matches the Workspace User ID, follow the steps below:

- 1. In your Entra tenant, open the app you created. In this example, it is named Workspace SCIM Integration.
- From the left side menu, select Manage > Provisioning 1.

The Provisioning panel is displayed.

3. Under the Mappings section, select the **Provision Microsoft** Entra ID Users option **2**.

objectId

The Attribute mapping panel is displayed.

4. Configure the mappings<sup>7</sup>, as shown in the table below:

X K	🗟 Save 🗙 Discard	
Overview (Preview)	https://api.ppe.refinitiv.com/iam/scim/v1	
Overview	Secret Token	
Provision on demand	•	
Manage	Test Connection	
𝔅 Connectivity (Preview)		
Provisioning     1	∧ Mappings	
Users and groups	Mappings	
Attribute mapping	Mappings allow you to define how data should fic	ow between Microsoft Entra ID and customappsso.
Evoression builder	Name	Enabled
Monitor	Provision Microsoft Entra ID Groups	No
Registaning logs	Provision Microsoft Entra ID Users	Yes
Audit loos	Restore default mappings	
- Huuri rugo		
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Troubleshoot		

This attribute	Map to	Home > LSEG Workspace A   Enterprise applications > Enterprise appli Attribute Mapping	ications   All applications > Workspace SOI	M Integration   Provisioning >					
userName	userPrincipalName	Save X Discard Target Object Unstellinguaritieschemacenternoloscenterprise2.00.0er Target Object Actions							
Matching Precedence should only be selected for the username attribute and must be set to 1. No other attribute should		uget styler. Actors  Conservation  Attributer support after the set flat of an anythropical between Microsoft Rates Conservations  Attributer support after the set flat of an anythropical between Microsoft Rates Conservations  Attributer support after the Attributer and Attributer support  Attributer support after the Attributer and Attributer support  Attributer support after the Attributer support after the Attributer support  Attributer support after the Att							
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emails[type eq "work"].value	surname								

externalld

<sup>&</sup>lt;sup>6</sup> The use of Workspace user IDs is specifically for onboarding LSEG Workspace users onto Entra. Other products may use their own user IDs for Entra onboarding.

<sup>&</sup>lt;sup>7</sup> It is crucial that these mappings are configured as shown in the table, as incorrect mappings will result in provisioning failure.

#### Changing a non-matching userName

If the UserPrincipalName in Entra does not match the userName in SCIM, you need to amend the mapping by changing to another Entra attribute that does match with the userName.

To do so:

Click the Edit button, next to userPrincipalName 3.

The Edit Attribute panel is displayed.

#### Mapping an existing Entra attribute

To map an existing Entra attribute to the SCIM userName, do the following:

In the **Source Attribute** field, click  $\checkmark$  to open the dropdown menu (4). ٠

#### Customising the attribute mapping

If none of the existing Entra attributes match the SCIM userName, to customise the attribute mapping, do the following:

- 1. Open the Mapping type dropdown menu and select Expression.
- Select Use the expression builder 5.

Home > LSEG Workspace A   Enterprise applications > Enterprise applications   A	II applications > Workspace SCIM Integration   Provisioning >
Edit Attribute	
A mapping lets you define how the attributes in one class of Microsoft Entra object (e.g. this application.	Users) should flow to and from
Mapping type ①	
Direct	~
Source attribute * ()	
userPrincipalName	~ 4.
Default value if null (optional)	
Target attribute * 💿	
userName	$\sim$
Match objects using this attribute	
Yes	$\sim$
Matching precedence * ①	
1	~
Apply this mapping ①	
Always	$\sim$
Ok	

his application.		
Mapping type ①		
Expression	~	]
Expression ①		
[userPrincipalName]		
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nter an expression		
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arget attribute *		
userName	~	1
Natch objects using this attribute		
Yes	~	]
Natching precedence * 💿		

The Expression builder panel is displayed.	Home > LSEG Workspace A   Enterprise applications > Enterprise applications   All applications > Workspace SCIM Integrat Expression builder ··· Microsoft Entra ID	ion   Provisioning > Attribute Mapping > Edit Attribute > X
This panel can be used to write custom expressions that transform or combine attributes, such as:	Got feedback?      Build an expression      Select the appropriate function(s) and attribute(s) to build your expression.      Select a function      Function signature	Expression input You can edit the expression by using the dropdowns on the left, or in the editor below. Please note that the left and right sides operate independently. Learn more about building expressions [userPrincipalHame]
<ul> <li>Concatenating first and last names</li> </ul>	Add expression	
<ul> <li>Formatting email addresses, or</li> </ul>	Test expression 9 To test your expression, you can enter custom values or select a preexisting user to use their existing properties. Search user      Set default values	
<ul> <li>Applying conditional logic.</li> </ul>	P Search No results found Selected user	
The available functions,	Apply expression 14	

such as Join(), Append(), and Replace(), and operators can be used to build expressions.

For more information regarding writing custom expressions, refer to Reference for writing expressions for attribute mappings in Microsoft Entra Application Provisioning.

#### Using Expression builder

This section provides an example showing how Expression builder can be used to customise the userName attribute, by joining the employeeId attribute to the @lseg.com domain.

ing > Edit Attribute

8

Join("", "", [employeeId], "@lseg.com")

Expression input You can edit the ex

6

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Û

To do	this:
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 From the Select a function dropdown menu, choose the Join function
 6.

> This is used to join the employeeId attribute with the @lseg.com domain and must be defined using the structure<sup>8</sup> shown in the Expression input panel **3**.

2. Click the **Add expression** button **7**.

The expression syntax is generated in the Expression input panel, on the right-hand side <sup>(B)</sup>

 To choose a user on whom to test the expression, in the Test connection section 

 of the Expression builder panel (see the previous page):

Expression builder

Function signature ①

1 Learn more about this funct

ion

🖉 Got feedback

Build an expression

ect the approp

Enter seperator value

Enter argument valu

₽ [em

Add ex

Select a function

- i. Select the **Search user** radio button 10.
- ii. In the field below 1, start typing the name of the user. Matching names appear in a dropdown list.
- iii. Select the user<sup>9</sup> you want to test from the list.
- iv. Click the **Test expression** button 12.

The resulting output from the expression is shown in the View expression output field <sup>13</sup>.

The output – in this example, x500014@lseg.com – is the final custom attribute that SCIM receives from Entra. This attribute is crucial, as it is used to search against the Workspace User ID in LSEG.

	est expression	
To	b test your expression, you can enter custom values or select a preexisting user to use their existin	g properties.
0	● Search user ○ Set default values	
ħ	🔎 serhii	
•	No results found	
	Sk Serhii Koval	
	SK Serhii Koval	
12	Test expression	
v	iew expression output	
	X500014@lseg.com 13	

 Once you have successfully tested the expression, click the Apply expression button (4) (see previous page) at the bottom of the Expression builder panel.

<sup>&</sup>lt;sup>8</sup> When you start typing an attribute name, a list of matching attributes is shown, from which you can select the attribute you want. Static values, such as @lseg.com, are entered enclosed in quotation marks (for example, "@lseg.com").

<sup>&</sup>lt;sup>9</sup> The selected user must contain the required attribute(s) used in the expression.

#### Provisioning users in the Entra admin portal

To provision users in the Entra admin portal:

- Navigate to Enterprise applications > All applications, then search for and select your application.
- Select Manage > Users and groups 1.
- The Users and groups panel is displayed (see the example, opposite).
- Click Add user/group 2.
   The Add Assignment panel is displayed.
- 5. Click None Selected.

The Users and groups panel is displayed on the right side of the screen.

- 6. Choose the users you want to enable 3.
- 7. Once you have selected all applicable users, click the **Select** button, found at the bottom of the right hand panel.



Try changing or adding filters if you don	't see what you're lookin	g for.	
arch			
			×
Users Groups			
Name	Type	Details	
🗆 🤱 Januar 1440	User	protection of the local and	-

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

Add Assignment

Users and groups 1 user selected. Select a role

Assign

8. Click the **Assign** ④ button at the bottom of the left side panel.

A green tick will appear on screen, indicating successful assignment.



10. To provision all the users that were selected in step 6, select **Start Provisioning 6**.

Once complete:

- Current cycle status displays 100 % complete.
- Provisioned users now have their Microsoft and LSEG accounts linked and can authenticate into Workspace using Entra.
- 11. (Optional) To add more users, follow steps 1-7 in this section.



# Accessing Workspace variants with LSEG credentials

Enabling Entra authentication for Web and OpenFin users does not affect their access to the desktop variant of Workspace. Versions 1.23-1.25 are still accessible using their dedicated authentication.

Whilst being enabled for Entra access, users can also access Workspace | Web using their LSEG issued credentials using the following URLs:

- <u>https://workspace.refinitiv.com/web</u>
- <u>https://workspace.extranet.refinitiv.biz/web</u>

However, once users have logged in through Entra, they will continue to be automatically authenticated into Workspace through their Windows single sign on.

To revert to logging into Workspace using LSEG credentials, do the following:

1. Select WS > Sign Out 1.



2. In the resulting panel, select the Sign back in using LSEG Authentication button.



# 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>
- What is automated app user provisioning in Microsoft Entra ID Microsoft Entra ID | Microsoft Learn
- Plan a Microsoft Entra Conditional Access deployment Microsoft Entra ID | Microsoft Learn

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