LSEG WORKSPACE FINANCIAL 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 MyAccount.

If you experience any problems performing the steps outlined in this document, raise an issue through MyAccount.

If your Workspace ID and Entra ID do not match, contact LSEG Support via MyAccount.

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 Useful links.



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.



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.

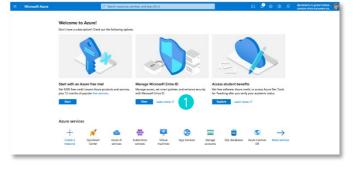
To find this code:

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

The Microsoft Azure Welcome page opens (opposite).

2. Click the Manage Microsoft Entra ID View 1 button.

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

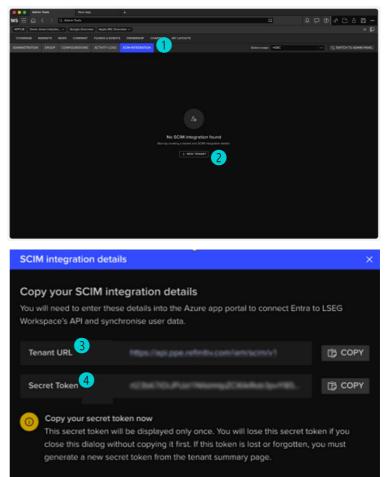


Microsoft Azure		search resources, services, and docs (017)				
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0 Overview	Azure Active Director	r is now Microsoft Entra ID. Learn more D				
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Identity Governance			te Change to Microsoft Entra e making security-related servi			erver deprecation n MFA Server to Microsoft Entra

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. 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
- 4. Make a note of the Tenant URL 3 and Secret Token 4 that are generated and displayed.
- 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.



O DONE

Setting up the gallery app in the Entra admin portal

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

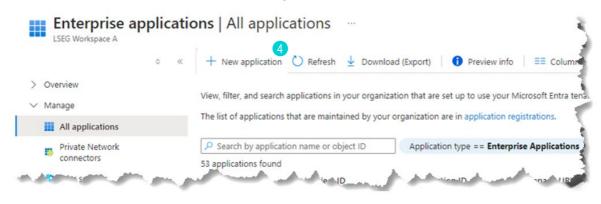
- 1. Log in to https://portal.azure.com/#home.
- 2. Click the Manage Microsoft Entra ID View button.
- 3. The Overview page opens.

Microsoft Azure		B	Search resources of	ervices, and doo	191+0				D 🖉	0 0 <i>R</i>	denielarturo pizarrodeol
	Welcome to		the following option								
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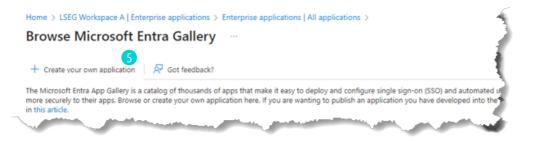
4. To open the menu, click the Manage 2 menu item, and then click Enterprise Applications. 3

Overview	Azure Active Director	y is now Microsoft Entra ID. Learn more		
Preview features Diagnose and solve problems Manage	Overview Monitoring	Properties Recommendations Tutorials		
👗 Users 🖈	L			
A Groups	Basic information			
External Identities	Name	London Stock Exchange Group	Users	61,115
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Administrative units	Primary domain	LSEGroup.onmicrosoft.com	Applications	2,920
Delegated admin partners		Microsoft Entra ID P2	Devices	200,543

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



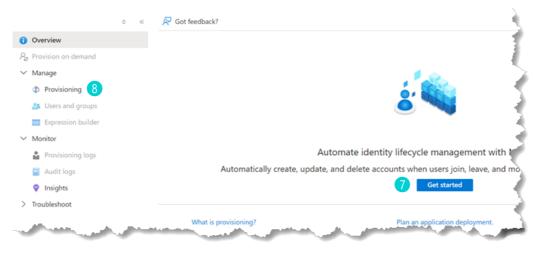
6. Click Create your own application. 5



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**

Home > LSEG Workspace A Enterprise applications Browse Microsoft Entra Galler		Create your own application	×	
+ Create your own application 🔰 🎘 Got feedback	a		R Got feedback?	
	s of apps that make it easy to deploy and configure single or create your own application here. If you are wanting to		If you are developing your own application, using application Poxy, or want to inte application that is not in the gallery, you can create your own application here. What's the name of your app?	egrate an
	Single Sign-on : All User Account Management : A	All Categories : All	What are you looking to do with your application?	
Cloud platforms			Configure Application Proxy for secure remote access to an on-premises applie	cation
Amazon Web Services (AWS)	Google Cloud Platform	Oracle	Register an application to integrate with Microsoft Entra ID (App you're develo Integrate any other application you don't find in the gallery (Non-gallery)	ping)
aws	Google Cloud	¢.	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.

^	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 1
1.0	the second and the se

- () 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

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The supplied credentials are authorized to enable provisioning

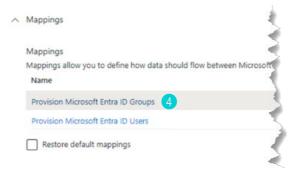
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Setting up attribute mappings

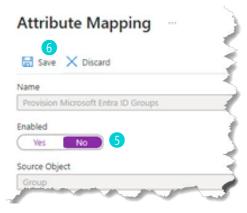
To set up attribute mappings:

	X «	🔄 Save 🗙 Discard	
Overview		∧ Mappings 2	
Provision on demand			
/ Manage		Mappings	
Provisioning		Mappings allow you to define how data should flow between Name	Microsoft Entra ID and customappsso. Enabled
Users and groups		Provision Microsoft Entra ID Groups	No
Expression builder		Provision Microsoft Entra ID Users	Yes
Monitor Troubleshoot		Restore default mappings	
		✓ Settings	

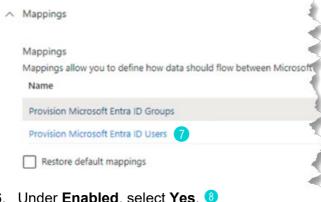
2. Click Provision Microsoft Entra ID Groups.



- 3. Under Enabled, select No. 5
- 4. Click Save. 6



- ① Note that group provisioning is not currently supported.
- 5. Go back to the previous 'Provisioning' page and click **Provision Microsoft Entra ID Users**.



6. Under Enabled, select Yes. 8

Attribute Mapping	 3
🛛 Save 🗙 Discard	3
Name	
Provision Microsoft Entra ID Users	-
Enabled Ves No Source Object	3
User	-2
Source Object Scope	3

7. In Target Object Actions, uncheck Delete.

① 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. 9

Attribute Mappings Attribute mappings define how attributes are synchronized betw	veen Microsoft Entra ID and customappsso
customappsso Attribute	Microsoft Entra ID Attribute
userName	userPrincipalName
emails[type eq "work"].value	mail
name.givenName	givenName
name.familyName	sumame
externalld	objectId
Add New Mapping 9	
Show advanced options	
and the second secon	

10. Select objectId as a Source attribute 🔟 and externalId as a Target attribute. 🕕

his application.	ould flow to and from
A mapping lets you define how the attributes in one class of Microsoft Entra object (e.g. Users) sho this application.	ould flow to and from
his application.	ould flow to and from
Mapping type ①	
mapping type ()	
Direct	\sim
Source attribute * ①	
objectId 10	\sim
Default value if null (optional) 💿	
Target attribute * 🔘	
externalid 11	\sim
Match objects using this attribute	
No	\sim
Matching precedence ①	
Apply this mapping ①	
Always	\sim

11. Click **Ok** 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

Enterprise Application	qa Users and groups … 3	
0 0	🗴 🕂 Add user/group 🛛 🖉 Edit assignment 📋 Ren	nove 🖉 Update crede
Overview	1 The application will appear for assigned users within M	y Apps. Set 'visible to users'
Deployment Plan		
Diagnose and solve problems	Assign users and groups to app-roles for your application	here. To create new app-
Manage 1		
Manage 1	P First 200 shown, to search all users & gro	
	First 200 shown, to search all users & gro Display Name	Object Ty
III Properties		Object Tyj User
 Properties Owners Roles and administrators 	Display Name	
Properties Owners Content Roles and administrators	Display Name Account Linking QA	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

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2 results fo	und		
All Use	rs Groups		
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6. Click the **Assign 5** button at the bottom of the left side panel.

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

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

Add Assignment

LSEG Workspace B

lears and groups		
Jsers and groups		
1 user selected.		
elect a role		
User		
Action		

7. 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 > i scim-integra	tion-ppe Overview		
	c ≪ ▷ Start provisioning □ Sto	p provisioning ୯	Restart provisioning 🧷 Edit provisions.
() Overview			1
$\mathcal{P}_{\!\!\mathcal{B}}$ Provision on demand	Current cycle status		Statistics to date
 Manage Provisioning 	Incremental cycle stopped.	0% complete	✓ View provisioning details
Users and groups	Users		\checkmark View technical information
 m Expression builder ✓ Monitor 	2		
Provisioning logs	View provisioning logs		
Audit logs			
💡 Insights	Manage provisioning Update credentials		
> Troubleshoot	Edit attribute mappings Add scoping filters Provision on demand		

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

Useful links

For more information, click the below links.

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

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