# LSEG WORKSPACE ADMINISTRATION PANEL CONFIGURATION GUIDE

LSEG DATA & ANALYTICS

# Version history

Document version	Summary of Changes
125.01	This update includes the following changes: <ul> <li>Several screenshot and instruction updates</li> </ul>
124.01	Updated illustrations and template
123.02	Added the Shared configuration content to the Configurations section.
123.01	LSEG rebranded version.
121.01	Added conflation rate settings to the Configurations section.
119.01	Added roles and functionality matrix.
116.02	Added the Managing tile sets section to Workspace Customization.
116.01	<ul> <li>Added the Configurations and File Version Management sections.</li> <li>Minor textual changes throughout.</li> <li>Updated the illustrations.</li> </ul>
111.01	Initial version of the LSEG Workspace Administration Panel Configuration Guide

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# About this document

# Intended readership

The LSEG Workspace Administration Panel Configuration Guide is intended for IT specialists that are responsible for the Workspace Administration Panel. This document should be viewed as a companion to the Workspace Administration Tools Configuration Guide.

# In this guide

This guide describes the functions of the Workspace Administration Panel.

The Workspace Administration Panel lets administrators perform the following actions, based on their permissions:

- Workspace customization: Create and assign default home pages to users.
- Software updates: Manage Workspace desktop version updates for users.

# Becoming an administrator

Your organization can request that LSEG grant Workspace administrator permissions to you. However, as a pre-requisite, you require a Workspace account.

You can also:

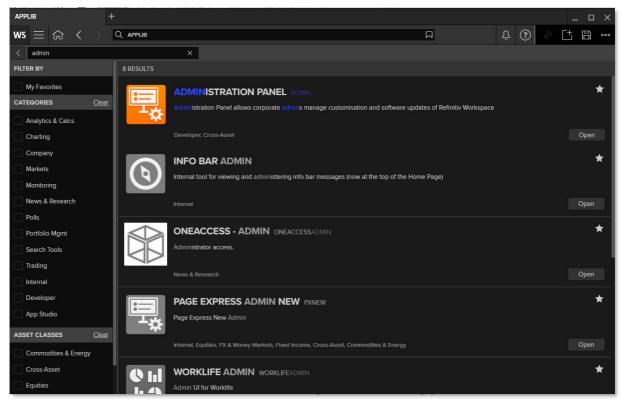
- Have multiple administrators within your organization, or
- Request LSEG to perform this role on your behalf.

If you do not currently have access to Workspace or require further information, contact your account team.

# Accessing the Administration Panel

To access the Administration Panel <sup>1</sup>:

- 1. Select the App Library icon in the Workspace browser.
- 2. In the search box, type **admin**.
- 3. Click Open in the Administration Panel app block.



<sup>&</sup>lt;sup>1</sup> Only registered administrators can find the Administration Panel option in the app library.

# **Administration Panel options**

The Administration Panel configuration options are divided over several panels, which are accessed using the buttons along the top. The buttons that are displayed depend on your permissions, so you may find you only have access to a subset of these.

If you are permissioned<sup>2</sup> to do so, you can also open the Admin Tools app, which provides you with group management and other configuration features.

To open Admin Tools:

- Click the **Switch to Admin Tools** button, highlighted below:

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# Roles and groups matrix

The table below list the capabilities that are available to administrators at LSEG and at customer sites:

Function	Customer	LSEG
Administrator management		•
Assigning accounts to Administrators (UP, NLE, LA)		•
Managing permissions for the following sections:         Users and Groups         Configurations         File Version Management         Software Updates         Workspace Customization		•
View logs		•
Users and Groups: Gets information about users (UP, NLE, LA, User)	•	•
Configurations: Manages conflation rate for specific (UP)	•	•
File Version Management: Manages Layouts and Tile-sets for each UP	•	•
File Version Management: Manages file versions	٠	٠
<ul> <li>Software Updates: Manages software update policy per user and assigns:</li> <li>Manual version</li> <li>Auto-update policy</li> </ul>	•	•
Workspace Customization: Assigns:         –       Homepage Layout         –       Main Tile-set         –       Additional layouts and Tile-sets	•	•

#### Where:

- UP Ultimate Parent account
- NLE Nearest Legal Entity
- LA Location Account

<sup>&</sup>lt;sup>2</sup> At release of this document, all current Admin Panel users are permissioned to use the Admin Tools app. However, in the future, permission will be granted on request only.

# Users and Groups

The Users and Groups option allows you to view the currently active users and groups configured under your administration profile.

To view the currently active list of users and groups:

- In the Administration Panel, select the Users and Groups tab.

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Refinitiv Workspa	ace Administration	Panel				
	igurations File Version Manag	ement Software Updates Worksp	ace Customization			
were were wie energy's						
[UP] BVT TEST						
User ID or Group	Role	Туре	Country	City	Address	
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Selecting the View ( $\circledast$ ) icon, at the end of the row, provides details about the adjacent user or group. This includes any settings – home page, layout, and so on – that have been applied to that user or group.

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Users and Groups Configu	rations File Version Management	t Software Updates	Workspace Customization		
GROUP DETAILS					
Group Name	Туре	Address		Ultimate Parent	Nearest Legal Entity
Software version	Software update	Pre-release			
				<b></b>	

# Workspace customization

The **Workspace Customization** function allows you to assign home pages to users. These home pages replace the default home page for Workspace.

Users can change their home page at any time. However, they can revert to their administrator-set home page using the **My Layouts** menu.

For further information regarding the **My Layouts** option, see Appendix 1: Creating administrator layouts.

# Assigning home pages to users or groups

To assign a home page layout to a user or group:

1. Click Workspace Customization.

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ASSIGNED CONTENT												
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Users and Groups	Home Page	tile Set	≑ Layouts		Tile Sets	÷ Last U	pdated by	Last Updated o	n ‡			
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- 2. Click the Assign Content button.
- 3. The Assign Content panel is displayed.
- From the Users and Groups drop down menu, choose whether you want to assign a home page to a User, Group, or Role<sup>3</sup>.
- 5. In the Search box, start typing the name you want to find.

As you type, matching values appear in a dropdown list, from which you can select the appropriate option.

- 6. Frome the **Home Page** drop down menu, choose the composition of the home page. This can be:
  - A single App
  - A created Layout, or
  - A direct link to a URL
  - You can also click the **Preview** button to check that you have selected the correct home page.

ASSIGN CONTENT
Users and Groups
Select
Search
Q
Home Page
Select
Search
Q
Home Page
Select
V
Freview
Tile Set
Preview
Tile Set
Preview
Add more Layouts
Select one or more
Select one or

<sup>&</sup>lt;sup>3</sup> To assign homepages, layouts, or tile sets by role, administrators require UP-level permissions. This capability is not available to administrators with NLE- or LA-level permissions.

- 7. [optional] From the Add more Layouts dropdown list, choose further layouts that the selected user, group, or role can access from their Ξ > My Files > <company name, city > Templates menu.
- [optional] From the Add more Tile Sets dropdown list, choose further Tile Sets that the selected user, group, or role can access from their Ξ > My Files > <company name, city > Templates menu.
- 9. Select Assign.

If you want to assign another home page to another user or group immediately, select **Assign another** before pressing the **Assign** button.

## Editing or removing home pages

To remove or edit a user or group's home page:

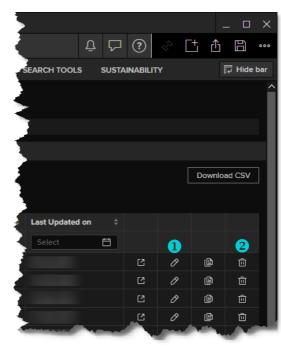
 On the Workspace Customization screen, use the edit 1 or delete 2 icons adjacent to the user, group, or role.

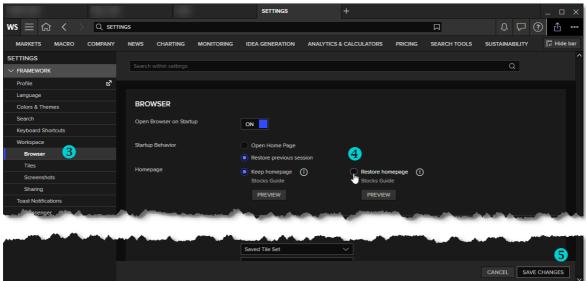
If you remove an assigned home page, the home page of the user, group, or role reverts to the default Workspace layout.

To revert to the administrator-defined home page, follow the instructions for your Workspace environment.

For Workspace desktop access (see illustration below):

- Under the WS > Settings option, select the Browser option. 3
- 2. Under Homepage, select **Restore** homepage. ④
- 3. Click SAVE CHANGES. 6





For Workspace web access:

select Settings > Web > Homepage > Restore Default.

## Assigning home pages using CSV upload

LSEG has added the function allowing home pages to be assigned by uploading CSV files. You can now assign more than one user at the same time using a CSV file.

#### CSV file structure

The file can have one or more batches, where each batch begins with [Batch]. The next valid row in each batch is a header row, and the following rows hold the data.

#### **CSV** examples

Only one batch in the file:

[Batch]	
# Module, Action, Data	
Home, CreateOrUpdate, URL, https://google.com	HEADER
<pre># DataType, DataValue, ScopeType (optional)</pre>	
Location, ClientUPId, UP	
Location, ClientNLEId, NLE	DATA
LocationByEmail, john.doe@lseg.com, LA	DATA
Email, john.doe@lseg.com	
UUID, XXX-XXXX-XXXX	

#### Two batches in the file:

[Batch]	
# Module, Action, Data	
Home, CreateOrUpdate, URL, https://google.com	HEADER
<pre># DataType, DataValue, ScopeType (optional)</pre>	
Location, ClientUPId, UP	
Location, ClientNLEId, NLE	
LocationByEmail, john.doe@lseg.com, LA	DATA
Email, john.doe@lseg.com	
UUID, XXX-XXXX-XXXX	
[Batch]	
Home, CreateOrUpdate, APP, OV	
Location, ClientLAId, LA	
Email, jane.doe@lseg.com	

#### Header row

The header row is the first valid row within each batch. It describes the operation that is performed on the data in the batch. It has the structure of Module, Action, and Data, where:

Component	Description
Module	
Options:	
– Home	
<ul> <li>Layouts</li> </ul>	
<ul> <li>Home_And_Layouts</li> </ul>	
Action	
Options:	The operation to be executed.
<ul> <li>CreateOrUpdate</li> </ul>	For example, if the Action is Delete, the defined data is omitted.
– Delete	

Component	Description
Data	
Options: – Depends on module and	See below. Data may have more than one field, dependent on the Module option.

#### Modules

action

Module and options	Description		
Home		starting page layout for the home button	
Options:			
– HomeType	Арр	App Symbol on Eikon Library	CHT, OV, MON, and so on
– HomeValue	Layout	File name under the firm folder and scope. Possible values for ScopeType: UP, NLE, LA	LayoutName, ScopeType, Scopeld Trader1, UP, Scopeld01 Trader2, NLE, Scopeld02
			Trader3, LA, Scopeld03
	URL	Any URL	https://www.google.com
Layouts Options: - NumberOfLayout - LayoutList	<pre># Example Home, Creat User's home # Example Home, Creat User's home # Example Home, Creat Customer's # Example Home, Delet Set the defa Where: - Number Valid v - Layout - Layout - Layout - Layout - Ca Ca Ca Fa La Ca Fa Ca Ca Fa La Ca Fa La Ca Fa Ca Ca Fa La Ca Fa Ca Ca Fa La Ca Fa La Ca Fa La Ca Fa La Ca Fa La Ca Fa Ca Fa La Ca Fa Ca Ca Fa Ca Ca Fa Ca Ca Fa Ca Ca Fa Ca Ca Ca Fa La Ca Fa Ca Ca Ca Fa Ca Ca Fa Ca Ca Fa Ca Ca Ca Fa Ca Ca Ca Ca Ca Ca Ca Ca Ca Ca Ca Ca Ca</pre>	ault multiple layout templates. rOfLayout is the number of layouts that y r of layouts is 99. alues: 0-99. tList is a key/value pair, consisting of: ayoutName (optional) – name of the layou cope (required) – 46-character free text file ompany name and/or layout. or example, LSEGBondLayout1 ayoutList depends on number of layouts is 2, ayoutName,ScopeType, ScopeId,Layou here can be multiple layouts with the same cope: umberOfLayout is 1 rader1, NLE, ScopeId01 umberOfLayout is 3 rader1,UP, ScopeId01, Trader2,NLE, copeId03 be assigned three layout templates, where 1 – Ultimate Parent Scope, ScopeId02 3 – NearestLegalEntity Scope, ScopeId02 ScopeId03 SEGLocation1 n.doe@lseg.com strator wants to delete layout templates of	<pre>opeId01 omepage from users in the list ou want to assign. The maximum t. eld, normally composed of the s. the LayoutList could be defined as: tName,ScopeType, ScopeId e name, where each has a different ScopeId02, Trader3,UP, re the layouts are: 3 D1, Trader2,LA,ScopeId02,</pre>
	,		

Module and options	Description
Home_and_Layouts	Set both the default start page and multiple layout templates
Options:	① As this operation performs the functions of both Home and Layouts, ensure that all
– HomeType	conditions for Home and Layouts are met.
– HomeValue	Examples:
<ul> <li>NumberOfLayout</li> </ul>	User are assigned the Chart app as their homepage and the following three layout
<ul> <li>LayoutList</li> </ul>	templates are to be assigned:
	<ul> <li>Trader1 – Ultimate Parent Scope, Scopeld01</li> </ul>
	<ul> <li>Trader2 – Location Account Scope, Scopeld02</li> </ul>
	<ul> <li>Trader3 – NearestLegalEntity Scope, ScopeId03</li> </ul>
	Home_And_Layouts,CreateOrUpdate,App,CHT,3,Trader1,UP,ScopeId01,
	Trader2,LA,ScopeId02, Trader3,NLE, ScopeId03
	Location, REFINITIVLocation1
	Email.john.doe@refinitiv.com
	The administrator wants to delete the assigned home page and layout templates of listed
	users:
	Home_And_Layouts,Delete
	Location, REFINITIVLocation1
	Email.john.doe@refinitiv.com

#### Data row

Data rows follow the header in each batch. Each data row contains the details of the user to which the action is assigned. A data row is composed of DataType, DataValue, and, optionally, Scope.

Component	Description
DataType	If DataType is one of the three LocationBy options, the Admin service started by the
Options:	Administration Panel app) finds the user's hierarchy and uses the Scope field when
– UUID	creating a rule.
– Email	
– Userld (TBD)	
– Location	
<ul> <li>LocationByUUID</li> </ul>	
<ul> <li>LocationByEmail</li> </ul>	
<ul> <li>LocationByUserId</li> </ul>	
DataValue	
Options:	
<ul> <li>Valid email</li> </ul>	
– Valid UUID	
ScopeType (optional)	This field is used if the DataType is set to Location or one of the three LocationBy
Options:	options.
– UP	If this field is omitted, the default value is LA
– NLE	UP Ultimate Parent
– LA	NLE NearestLegalEntity
	LA LocationAccount

# Important: Ensure that the administrator can manage all users or locations by checking their assigned scope.

# Assigning the CSV file

#### Use the **Download Sample CSV** button to download an example CSV file. **1**

Once you have made your required changes, do the following in the Workspace Administration Panel:

1. Under Workspace Customization, click the Assign Content button.

The Assign Content panel is displayed. 3

- 2. From the Users and Groups dropdown, choose the CSV Upload option.
- 3. Select your CSV file<sup>4</sup>.
- 4. Click the Upload CSV button 5 to upload the chosen file.

When the file is uploaded, a success or error code is returned.

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Users and Groups	Configurations	File Versio				re Updates	Wor	kspace C
ASSIGN CONTENT	3		ASSIG	NED CON	ITENT			
Users and Groups		~ Q		<b>Refinitiv H</b>		imited		
		Cancel		Users an		Home Page Select	e ¢ ~	Tile Set
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				jianyou.o Nattanur		GS Wealth BCG TEST	TE	N/A N/A
				pakenyat	amor	TEST_LAY		N/A

For further information about error codes, see Invalid format response messages below.

Error code	Description
'upId' is invalid\n	UltimateParentId value was not defined
cannot find 'home' property or its empty\n	Module is home but value is not defined
cannot find 'layouts' property or its empty\n	Module is layouts but value is not defined
invalid format\n	Module name is not correct
cannot connect to database\n	The Admin Panel database is not currently available

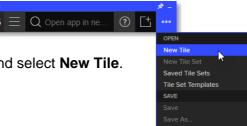
# Managing tile sets

You can use the Tile Manager to work with tile sets. These allow you to display apps anywhere on your desktop to monitor the markets, rather than having them restricted to the Browser.

#### Creating tile sets

To create a tile set:

ws Q Open app in ne... ? [t



5. In Tile Manager, click the ellipsis (...) button and select **New Tile**.

A search dialog is displayed.

<sup>&</sup>lt;sup>4</sup> A CSV file can have multiple DataType components defined in the data rows.

Monitor Securities and Portfolios in

Real-time, access Reference Data

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- 6. In the search dialog, either:
  - Click the search field and choose or search for an app, or
  - Select one of the displayed apps.

Your chosen app is displayed in a separate tile.

7. Repeat steps 1 and 2 until you have built the tile set you require.

# Saving a tile set as a template

To save a tile set as a template:

1. In Tile Manager, click the ellipsis (...) button and select the **Save to Template** option.

Q 🔒 New App

The Save Tile Set as Template dialog is displayed.

Save Tile	Set as Template	
Save As	Equities Sales & Trading	
Save To	[UP] BVT TEST	~
	This will be saved to the Admin section in My Files	
	SAVE	CANCEL

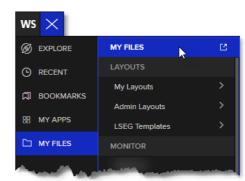
- 2. In the Save As field, enter a name for the tile set.
- 3. Click Save.

#### Viewing saved settings

You can find the layouts, tile sets, and other settings you create and those created by other administrators in a single location.

To do so:

1. Select  $\equiv$  > My Files > My Files.





TILES	<i>Ř</i> –
WS $\equiv$ Q Open app in ne ?	
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	New Tile

CHART

New App

Q Search LSEG to add a new app...

NEWS MONITOR

Media News Component

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Choose an app by searching or selecting from our suggested apps

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Apps		All Tile Sets				
All Apps	14	Name	Date Modified	Туре	Collec	tion
Monitor	10	Test Tile set	12/6/2021, 9:58:52 AM	My Tile Sets		
News 2.0	4	Equities Sales and Trading	10/21/2021, 9:03:06 AM	My Tile Sets		
Layouts		GDK1 Tile set	Today 2:02:21 PM	My Tile Sets		
Received	0	AgriSalesAndTrading	8/4/2020, 7:13:47 AM	LSEG Templates		
All Layouts	216	CreditSalesAndTrading	8/4/2020, 7:13:48 AM	LSEG Templates		
My Layouts	3	Default	8/4/2020, 7:13:48 AM	LSEG Templates		
LSEG Templates	31	DerivativesCockpit	8/15/2023, 8:36:58 AM	LSEG Templates		
Refinitiv, London Templates Admin Templates	182	EquitiesCockpit	8/15/2023, 8:35:43 AM	LSEG Templates		
Tile Sets		EquitiesSalesAndTrading	8/4/2020, 7:13:48 AM	LSEG Templates		
Received	o	FXForwardsTrader	11/7/2023, 9:10:46 AM	LSEG Templates		
✓ All Tile Sets	47	FXMMSales	11/7/2023, 9:07:36 AM	LSEG Templates		
My Tile Sets	3	FXOptionsTrader	11/7/2023, 9:09:49 AM	LSEG Templates		
LSEG Templates	17	FXSalesAndTrading	12/20/2022, 9:47:24 AM	LSEG Templates		
Refinitiv, London Templates Admin Templates	26	FXSpotTrader	11/7/2023, 9:08:41 AM	LSEG Templates		
	-	MetalsSalesAndTrading	8/4/2020, 7:13:48 AM	LSEG Templates		
My Collections	+	MoneyMarketsSalesAndTrading	1/5/2022, 1:35:07 PM	LSEG Templates		

The My Files panel is displayed in the selected Workspace browser panel.

#### Here, you can view:

- The apps to which you have access.
- Monitors and news searches you have defined.
- Layouts and Tile Sets created by you and other individuals in your organisation
- Layout and Tile Set templates provided by administrators from your organisation and LSEG.

#### Assigning tile sets

Using the Administration Panel app, you can assign saved tile sets to individual users, groups of users, or roles.

To do so:

- 1. In the Workspace browser, open the Administration Panel app.
- 2. Select the Workspace Customization option from the sub-menu bar.

- 3. Click the Assign Content button.
- 4. Click the **Users and Groups** dropdown and choose whether you are defining the tile set for a specific user, group of users, or role.
- 5. Use the **Users and Groups** search field to filter and select the appropriate user or group ID.
- 6. Define the default tile set<sup>5</sup> for the chosen user or group:
  - a. Click the **Tile Set** search field, and
  - a. Search for a specific tile set by name, or
     Scroll through and choose from the list of tile sets.
- 7. Optional steps to define additional tile sets:
- BHLL SOV DK03 \* | MyStocks MOI WS ∃ 俞 Q ADMIN NEWS CHADTING COMPANY IDEA GENERATION ANALYT **Refinitiv Workspace Administration Panel** Users and Groups Configurations File Version Management Software Updates Workspace Customization ASSIGN CONTENT ASSIGNED CONTENT ers and ... 💠 DP Test Home ByteTileSet17 8 Lav BCG TEST TE N/A n Karn N/A N/A N/A eida... AAA Ter ByteTil Americas Wea. N/A Alex Ma ong1. unicredit N/A Energy & Pr Defa N/A N/A N/A
- a. Click the **Add more Tile Sets** dropdown list and choose additional tile sets that will be made available to the selected user or group.

Any tile sets that are selected here can be chosen by the user, group, or role using their local **Desktop** settings option. See Choosing a tile set to display locally.

- a. Click Done.
- 8. Click the Assign button.

#### Choosing a tile set to display locally

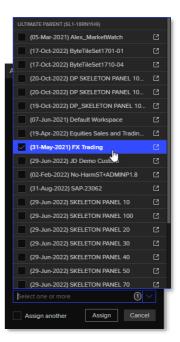
Alternatively, users can determine their tile set defaults by using their local **Desktop** settings option.

To do so:

1. Select the **WS > Settings** option.

The settings panel is displayed.

2. Select the Tiles option from the Workspace section of the side menu.



<sup>&</sup>lt;sup>5</sup> If a user for whom the default tile set is being defined is logged in, the tile set is not activated automatically. This must be done so locally by the user through their local **Desktop** settings option. See Choosing a tile set to display locally below.

The **Tiles** settings dialog is displayed.

- 3. Under the **Open by Default** option, click the dropdown menu and choose the **Saved Tile Set** option.
- 4. Click the search field that appears and either enter the name of the tile set or choose from the displayed list of available tile sets.
- 5. Click the **Save Changes** button (bottom right).

V FRAMEWORK		Search within settings	
Profile	ď		
Language			
Colors & Themes		TILES	
Search		Open on Workspace Sign In	
Keyboard Shortcuts		Open on Workspace agrin	ON
Workspace		Open by Default	OK1 Tile set
Browser			
Tiles			Saved Tile Set
Screenshots			Seved Tile Set
Sharing			Select from a list of your saved Tile sets.
Toast Notifications		Autosave	Last opened Tile Set
Messenger		Snapping Line Colour	Your last closed Tile Set, with any unsaved changes.
Notifications			Tile Manager only
Early Adopters	2		No Tiles will be displayed.
Trading Preferences		TILE MANAGER	Refinitiv Workspace Templates
APPLICATIONS		Orientation	Select from a list of your organisation's Tile set templates,
External Apps		Show Tiles on Selection	he front of your so
Research	Ľ <sup>2</sup>		LSEG Workspace Templates Select from a list of templates provided by
			LSEG Workspace.
		SCREENSHOTS	

# Assigning multiple layouts

You can assign up to nine layouts, in total, to users and groups. To do this:

1. Under the Workspace Customization screen, click the Assign Content button.

The Assign Content panel is displayed.

- 2. From the first dropdown, select whether you are assigning layouts to a **User**, a **Group** of users, or **role**.
- 3. In the Select field below, depending on your selection above, do one of the following:
  - a. Search for a specific user
  - b. Select a specific role, or
  - c. Select one or more groups
- 4. [optional] From the second dropdown, select whether the home page is an **App**, **Layout**, or **URL** then click the search box below to choose from a filtered list.
- 5. Click the Add more Layouts dropdown.

The layouts selection list is displayed (shown opposite).

- 6. Choose up to nine layouts from the list that the selected user, role, or group(s) can access.
- You can only use Layouts created by administrators.

# Account hierarchy

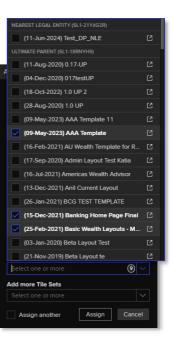
All Workspace user IDs belong to organization-level accounts that can be organized in the following hierarchy:

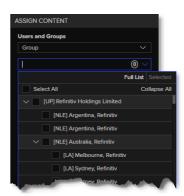
**Ultimate Parent Account [UP]** 

- Nearest Legal Entity [NLE]

- Location Account [LA]

Your users see the home page and use the desktop version that is assigned to the lowest level of this hierarchy. However, if a user





has been individually assigned a home page and/or software policy, this supersedes any other that is assigned to a group they may be in.

For example: User #1 and User #2 both belong to the same groups in the Ultimate Parent Account and Location Account:

User #1 has been assigned an individual home page and software policy.	User #1 receives the individual home page and software policy.
User #2 has not been assigned an individual home page or software policy.	User #2 receive the home page and software policy associated with the group at Location Account level, as it is lower in the hierarchy than the Ultimate Parent Account.

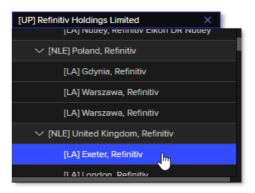
# File version management

The File Version Management function allows IT administrators with the required permissions to manage layouts and tile sets that have been defined in their location.

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DP SKELETON PANEL 100 TEST1		Tile Set		[UP] Refin	tiv Holdings Limited		20-Oct-2022 10:06:35		Ľ	Ø	
DP_SKELETON PANEL 100 Test		Tile Set		[UP] Refin	tiv Holdings Limited		19-Oct-2022 13:35:49		Ľ	Ø	
SKELETON PANEL 10		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:04:11		Ľ	Ø	
SKELETON PANEL 100		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:09:14		Ľ	Ø	
SKELETON PANEL 20		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:04:40		Ľ	Ø	
SKELETON PANEL 30		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:04:59		Ľ	Ø	
SKELETON PANEL 40		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:06:45		Ľ	Ø	
SKELETON PANEL 50		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:07:34		Ľ	Ø	
SKELETON PANEL 70		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:08:09		Ľ	Ø	
SKELETON PANEL 80		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:08:29		Ľ	Ø	
SKELETON PANEL 90		Tile Set		[UP] Refin	tiv Holdings Limited		29-Jun-2022 11:08:47		Ľ	Ø	

## Filtering by location

If you are responsible for multiple locations, you can select a specific location from the location dropdown to filter the entries.



## Performing actions

The icons at the end of each file row allow you to perform actions on a chosen layout or tile set

Icon	Action
۲	Delete a file.
Ś	Restore a deleted file.
Ø	Preview and restore previous file versions.
	Preview the current tile set or layout in a separate window.

#### Restoring an old file version

To restore the previous version of a tile set or layout, do the following:

- Click the Edit 𝖉 icon ❶.
  - The Edit File Version panel is displayed.

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Date	MyFiles1.19_Regression	Layout	[UP] Refinitiv Holdings Li	15-Mar-2024 07:36:54	Ľ	Ø (0)				
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	PPA Strategy Layout - D	Layout	[UP] Refinitiv Holdings Li	17-Jan-2024 09:37:09	Ľ	0 0				

2. From the **Date** dropdown **2**, select the version of the Layout or Tile set you want to restore.

Once you have selected a version, you can view your choice before restoring it by clicking **Preview 3**, which opens the file in a new window.

3. Click **Restore 4** to confirm your selection.

#### Deleting and restoring files

To delete a file, do the following:

1. At the end of the file row, click the eye @ icon.

The Delete File confirmation dialog is displayed.

	Delete File	Nov-2023 11:56:29		
		-May-2024 16:02:37		
	Are you sure you want to delete this file?			
	Delete Cano	el -May-2023 07:25:48		R
	[UP] Refinitiv Holdings Limited			

2. Click **Delete** to remove the file from the list.

The eye icon for the file changes to 3

To restore a file<sup>6</sup>, do the following:

<sup>&</sup>lt;sup>6</sup> If a file has been deleted manually from the My files folder, contact Support to restore the file.

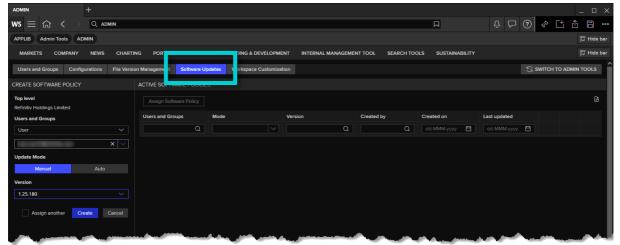
At the end of the file row, click the struck-through eye & icon.
 The Restore File confirmation dialog is displayed.

	[UP] Refinitiv Holdings Limited				
	Restore File		-Apr-2020 10:24:37		
	Are you sure you want to restore this file?	Are you sure you want to restore this file?			
	Restore	ancel			

2. Click Restore.

# Software updates

The **Software Updates** tab allows administrators to manage Workspace desktop software updates.



You can determine whether users receive automatic updates or must use a specific supported version of Workspace. You can determine the version used, based on User ID. This means the specified user(s) use the defined version, regardless of what device they use and version they have installed.

## Creating software update policies for users

To create a software policy:

- 1. Select the **Software Updates** function.
- 2. Click the Assign Software Policy button. 1

The **Create Software Policy** panel is displayed.

- From the Users and Groups dropdown, choose whether you are selecting a software policy for an individual User or Group of users.
- 4. Click the Search box <sup>(3)</sup> and either:
  - Begin entering the name of user. At this juncture, a list is displayed of possible users, as you type. Or
  - Choose the group from the displayed list.

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1.25.180 5							1
Assign another Cr	eate	Cancel					
	<b>6</b>						
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- 5. Choose whether the desktop version they are to use should be manually set or if they can have automatic updates: ④
  - If Manual is selected, use the dropdown menu 
     to choose the version the user or group should use.
- 6. When you are finished, click:
  - Create 6, or
  - Assign Another 7, if you need to assign policies to other users or groups

## Editing and deleting software policies

Any new policies appear under the update and delete policy option, in the **Active Software Policies** table. If you want to edit or delete a policy:

- 1. Select a policy
- 2. Click the relevant icons in this table
- 3. In the popup dialog box, click Confirm.

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daoduan.prom-on.ADV@refinitiv.com	Manual	01-Aug-2024			
	Are you sure you want to remove this item?				
	Confirm Cancel				

### Viewing software versions across accounts

To see the targeted and actual software versions for accounts, click the View (@) icon.

# Configurations

The Configurations<sup>7</sup> option provides the capability for IT administrators with the required permissions to set a conflation rate – the frequency at which data is updated – for the following services:

- Workspace (desktop and web access)
- Blended Order Book (BOB)

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Activate	Conflation Rate					
Value 1.5s ~	Topic Name	Value	Status	Last Updated by	Last Updated Time	
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Apply Cancel	Conflation Rate		Inactive		29-Nov-2022 21:18:15	Ø
Specifying a streaming BOB conflation rate is	BOB Conflation Rate		Inactive		29-Nov-2022 21:19:40	Ø
optional. It allows reducing CPU usage for displaying streaming data.						

Field	Description
Topic name	Displays the setting that can be customized.
Value	Displays the value of the conflation rate applied.
Status	One of the following statuses is displayed:
	<ul> <li>Activating: the request to apply a conflation rate was received by the server and is in progress.</li> <li>Active: the conflation rate has been applied.</li> </ul>
	<ul> <li>Deactive the conflation rate has been applied.</li> <li>Deactivating: the request to revert the conflation rate value to default was received by the server and is being processing.</li> </ul>
	<ul> <li>Inactive: the conflation rate is specified at a default value.</li> </ul>
Last Updated by	Displays the email address of the user who made the last change to each conflation rate setting.
Last Updated Time	Displays the date and time at which changes were last made.

The Configurations screen contains the following information:

<sup>&</sup>lt;sup>7</sup> To request the activation of conflation rate settings for services under this facility, contact your Refinitiv account team. Also, note that enabling this feature can take up to two months.

## Applying a new conflation rate

To set the conflation rate<sup>8</sup> for a service, select **Configurations** and do the following:

- 1. Click the edit icon of the conflation rate item you want to amend **1**:
  - Conflation Rate for Workspace<sup>9</sup>, or
  - BOB Conflation Rate for the Blended Order Book

The Conflation Rate panel opens.

2. Select the Activate checkbox 2.

This allows you to access the **Value** dropdown.

 From the Value dropdown <sup>3</sup>, select conflation rate to be applied.

The following options are available:

- 1.5 seconds
- 3 seconds
- 6 seconds
- 4. Click Apply 4.
- ADMIN WS Admin Tools ADMIN APPLIB Admin Tools ADMIN MARKETS COMPANY NEWS CHARTING PORTFOLIO MANAGEMENT COD Users and Groups Configurations File Version Management Software Updates W BOB CONFLATION RATE CONFIGURATIONS Confistion Rate Topic Name Value 3 155 Confistion Rate DBC Confistion rate is optional. It allows reducing CPU usage for displaying streaming data.
- 5. The Conflation Rate panel closes and you are returned to the Configurations panel, where the Status changes to **Activating**. Once the process has completed, the status changes to **Active**.

Once the changes have been submitted, while the status is **Activating**, you cannot make further changes to the conflation rate until the process has finished. This also applies if you are reverting to the default conflation rate, during the period when the status is **Deactivating**.

## Reverting to the default conflation rate

To revert to the default conflation rate from a custom rate, do the following:

1. Click the edit icon **1**.

The Conflation Rate panel opens.

- 2. Select the Activate checkbox 2. This will untick the checkbox.
- 3. Click Apply

<sup>&</sup>lt;sup>8</sup> The default conflation rate for desktop and Web access is ~3ms.

<sup>&</sup>lt;sup>9</sup> This setting can be overridden at individual user level in Workspace desktop using the Configuration Manager. However, there is no such facility in Workspace web access. As such, the conflation rate set using this facility overrides the default configuration for all Workspace web access users.

# Admin configuration

Assignment of the shared Admin configuration file is now handled by the Admin Tools app. For further information, refer to the Administration Tools Configuration Guide.

# Appendix A: Creating administrator layouts

A layout is a collection of panels that you can customize to a meet the specific interests and needs of a group or individual user. You can use the Administration Panel to create and save layouts and assign them to users or groups.

To create a layout:

1. Select **WS > New Layout** from the Workspace browser toolbar.

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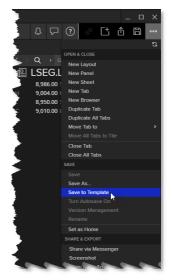
- 2. In the new window, select the layout you want to use and click Create.
- 3. Populate the layout with your chosen apps, either by:
  - a. Selecting one of the default four apps, or
  - b. Searching for the app you wish to add using the search field



- 4. In the Workspace toolbar, click the App Menu icon.
- 5. Select Save to Template to save your new layout.

Save La	yout as Template X
Save As	Market Monitoring
Save To	[UP] Refinitiv Holdings Limited
	$\triangle$ Enter a unique name to save this Layout, or replace the existing Layout with this name. Replacing will affect other users of this template
	Replace Save Cancel

If you want to save any further changes, select **Save to Template** again and save the layout using its original name.



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