

# LSEG

# WORKSPACE ADD-INS

## WORKSPACE INSTALLATION GUIDE

Access to LSEG® data and tools is provided through either of the following separately installed add-ins. These tools provide an additional menu ribbon in certain Microsoft® Office apps, where:

- **Workspace:** This add-in is the core product, which has a comprehensive set of capabilities. This add-in is the recommended add-in for most users.
- **Workspace Lite:** This add-in provides basic capabilities and is typically recommended for macOS and web browser-based environments due to its functional limitations.

This document describes the pre-requisites and installation of the **Workspace** add-in.

## Pre-requisites

The following facilities must be installed or configured for tools within the menu ribbon to be made available.

### Installing required Microsoft components

To use the **Workspace** add-in, install the following application:

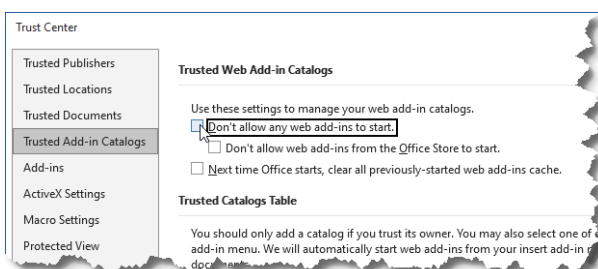
- [Microsoft Edge WebView2 Runtime](#)

### Microsoft 365 Trust Center policy settings

Certain groups under the Workspace add-in ribbons contain web-based capabilities<sup>1</sup>. As such, for these capabilities to be made available, the Group and/or Trust Center policies must be set to allow use of Web add-ins, otherwise they do not load.

To enable the use of Web add-ins, do the following:

1. Open a Microsoft 365 file (Word, Excel, ...).
2. Open the **File** menu.
3. Select **Options**.
4. In the Options dialog, select **Trust Center**.
5. Click the **Trust Center Settings...** button.
6. Select **Trusted Add-in Catalogs**.



7. Uncheck the **Don't allow any web add-ins to start** checkbox.

## Installing the add-in

The **Workspace** add-in<sup>2</sup> is installed automatically when you [download](#) and [install](#) LSEG Workspace for desktop.

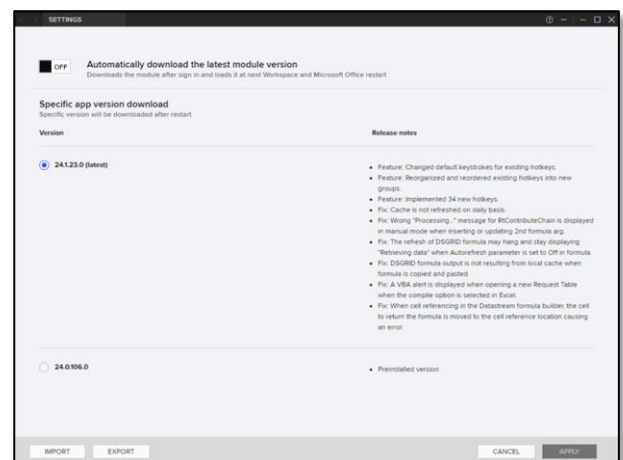
Make sure that your PC hardware and the operating system meet the required levels. For further information, refer to the [LSEG Workspace System Requirements](#).

## Updating the add-in

As part of the Workspace Desktop quarterly releases, the Workspace add-in for Microsoft Office is upgraded automatically. However, we provide a feature which allows you to download critical updates outside of the release schedule. This feature allows you to control the timing of updates. To access this feature:

1. Select **Settings** from the Options section of the ribbon.
2. In the Settings dialog, select **Updates** from the Office section of the menu.

The add-in update options are displayed in a separate dialog, where automatic updates are disabled by default:



<sup>1</sup> Web-based capabilities include Deals BI, Linking, Hotkeys, Traces, Auto Color, Define Palette, Comp List, Annotations, and Logos.

<sup>2</sup> This add-in only works for Windows users. If you are a Mac user, refer to the [Workspace Add-Ins – Workspace Lite Installation Guide](#).



## Enabling automatic updates

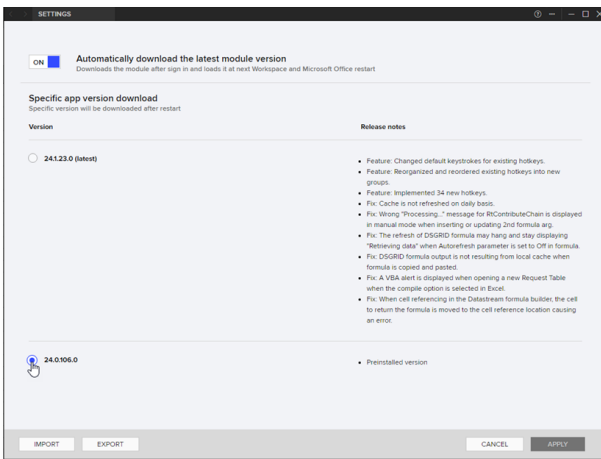
To enable the Workspace add-in to update to the latest version automatically:

1. Click the **OFF** slider button, labelled **Automatically download the latest module version**. You can reverse this change simply by clicking the slider button again.
2. Click **Apply**, which saves the **ON** setting and closes the dialog.
3. Restart all instances of Workspace.

## Upgrading to a selected version

If automatic updates are turned off, you can select an update to apply, allowing you to roll back or forward to a version of your choice. To do so:

1. Select the radio button that is adjacent to the required version:



2. Click **Apply**, which saves the changed setting and closes the dialog.
3. Restart all instances of Workspace to revert to your chosen version.

## Importing and exporting settings

The **Import** and **Export** buttons provide standard setting management functions. You can use:

- **Export** to create a shared configuration file, and
- **Import** to apply a shared configuration.

## Additional information

For more detailed information regarding:

- Microsoft 365/Office version requirements, browser compatibility, and tools supported by each add-in, refer to the [Workspace Add-Ins - System Requirements](#).
- Prerequisites, installation, and deployment instructions for the required add-in, refer to:
  - This document for **Workspace** installation guidance, or
  - the [Workspace Add-Ins – Workspace Lite Installation Guide](#).

## Known issues

### Workspace installations without automatic update

For users installing LSEG Workspace using `--machine-autoupdate-no`, the Excel add-in will not load correctly on non-virtual machines. This is because the default location of the Office registry key is registered at HKLM.

To correct the registry key location, use the command:

```
<install path>/RefinitivWorkspace.exe --update-office-registry=HKCU
```

For more information, see [PCN206237](#).