LSEG Workspace | Administration Panel

Configuration guide

LSEG DATA & ANALYTICS

Contents

Version history

Document version	Summary of Changes
125.02	New template version.
125.01	This update includes the following changes: • Several screenshot and instruction updates
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	• Added the Configurations and File Version Management sections. • Minor textual changes throughout. • Updated the illustrations.
111.01	Initial version of the [Title]

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:

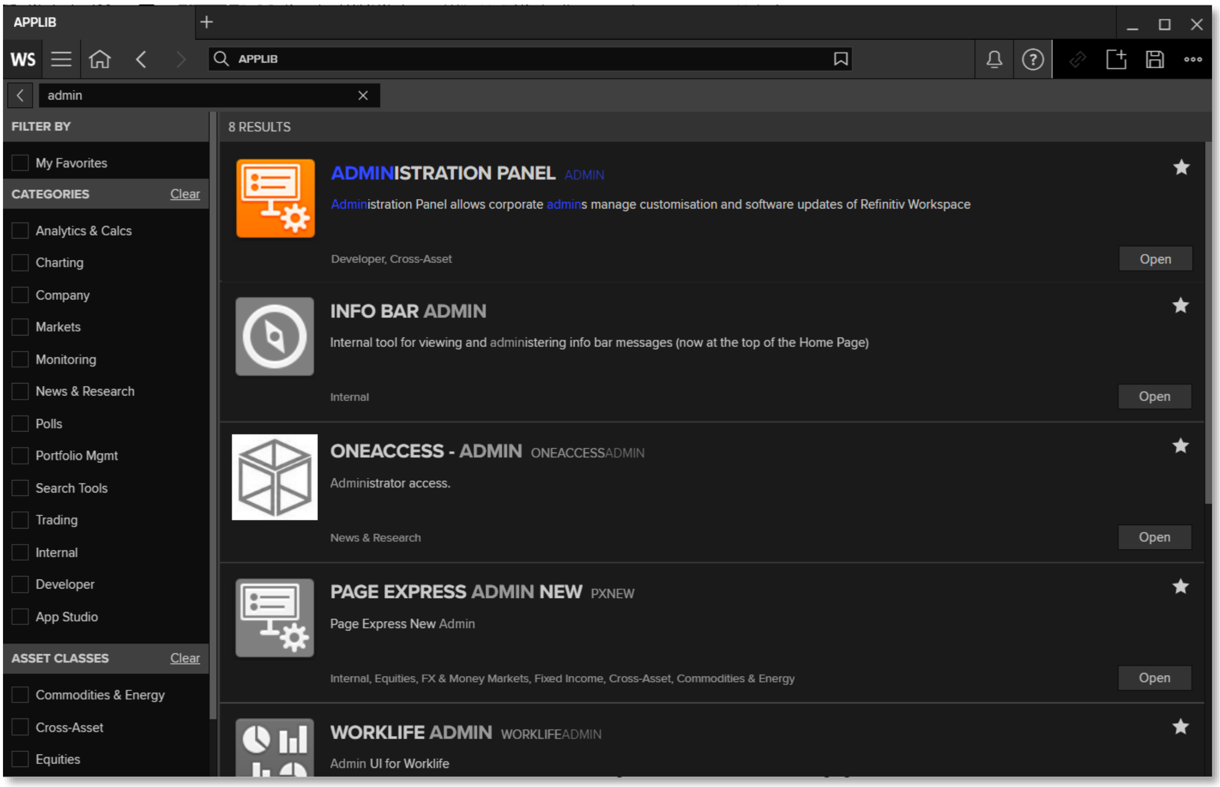
- Have multiple administrators within your organization, or
- Request LSEG to perform this role on your behalf.

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[1]:

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.



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[1] Only registered administrators can find the Administration Panel option in the app library.

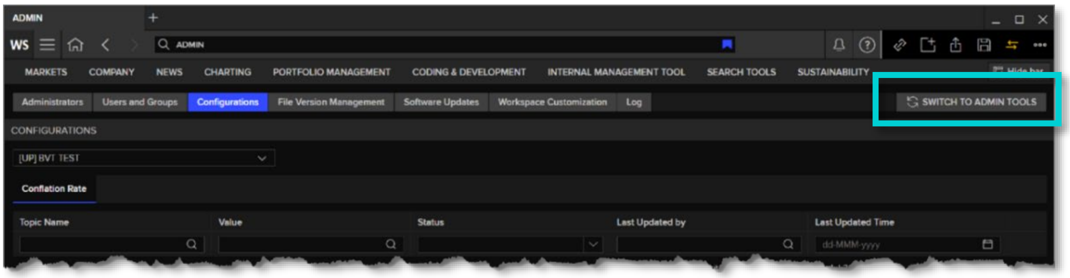
Administration Panel options

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[2] 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 here.



Roles and groups matrix

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

ⓘ UP = Ultimate Parent account; NLE = Nearest Legal Entity; LA = Location Account.

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	●	●
Software Updates: Manages software update policy per user and assigns: • Manual version • Auto-update policy	●	●
Workspace Customization: Assigns: • Homepage Layout • Main Tile-set • Additional layouts and Tile-sets	●	●

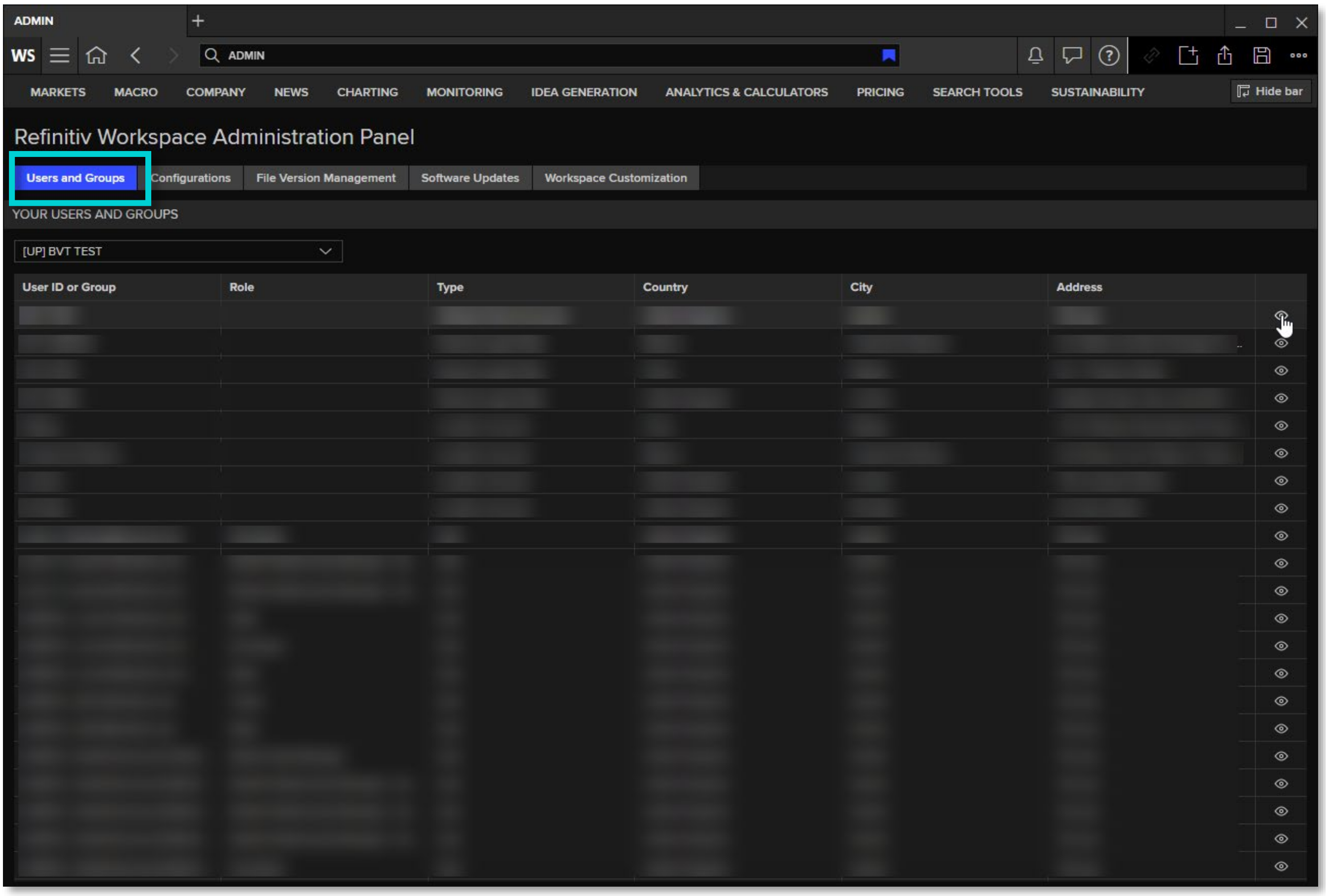
[2] At release of this document, all current Admin Panel users are permissioned to use the Admin Tools app. However, in the future, permission will be granted on request only.

Users and Groups

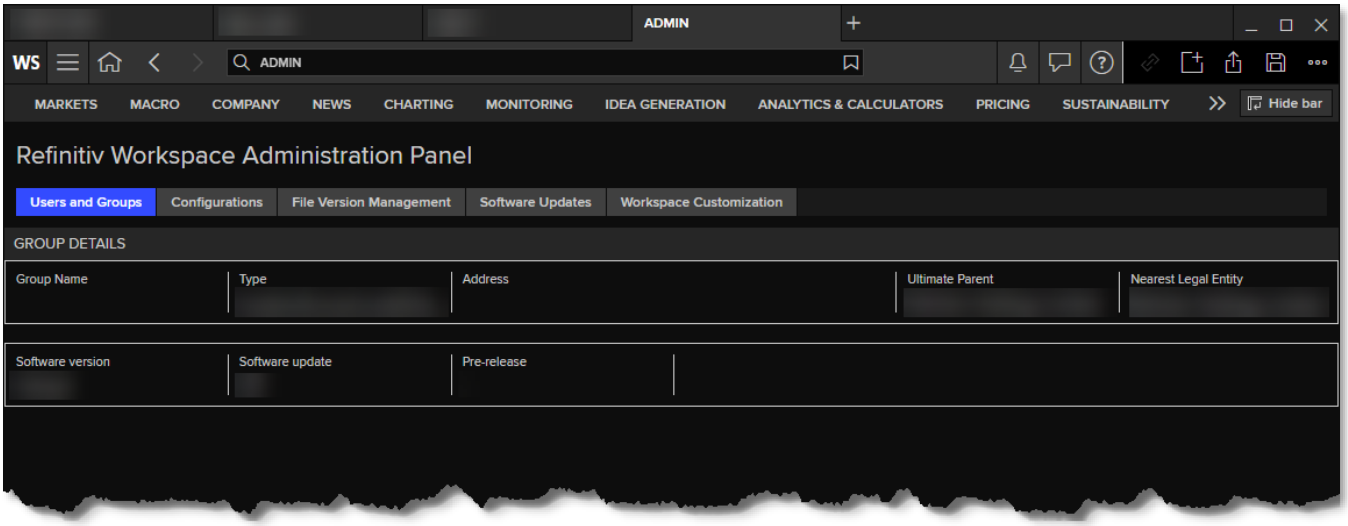
The Users and Groups option allows you to view the currently active users and groups configured under your administration profile.

To view the currently active list of users and groups:

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



Selecting the View (👁) 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.



Workspace customization

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

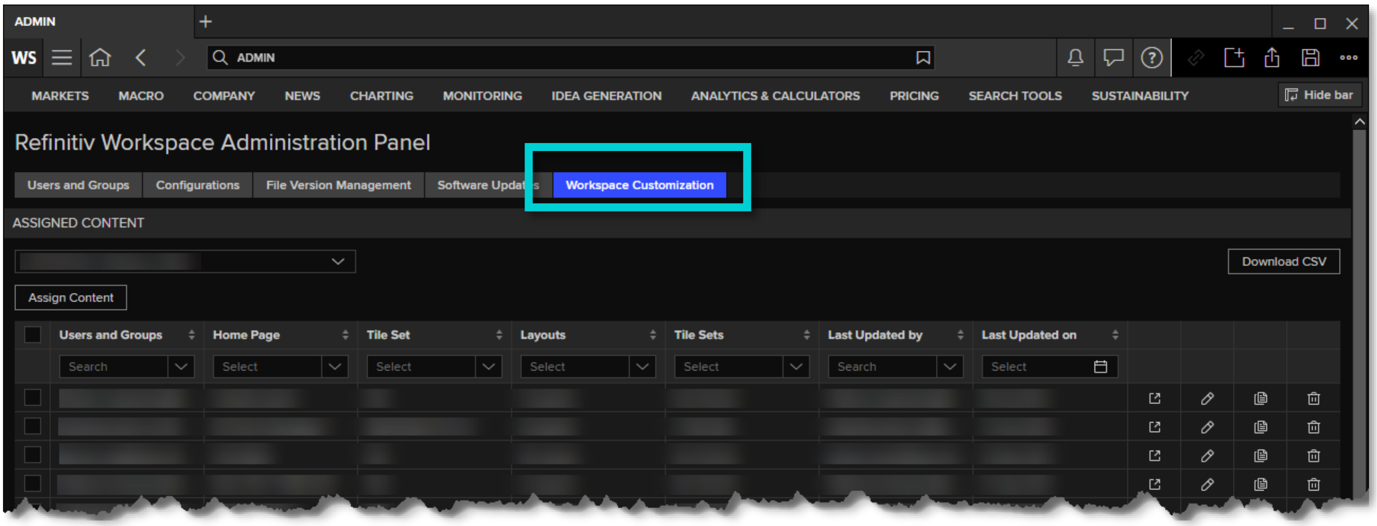
Users can change their home page at any time. However, they can revert to their administrator-set home page using the **My Layouts** menu.

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**.

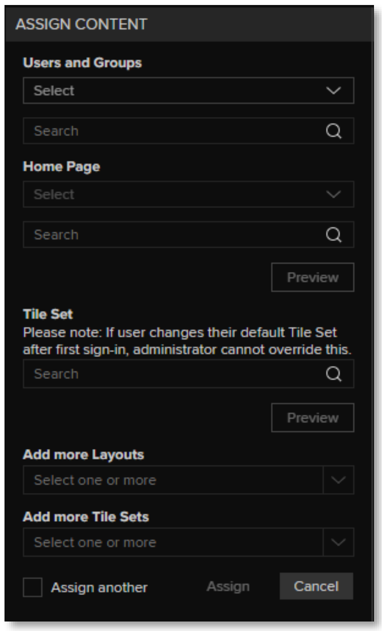


2. Click the **Assign Content** button.
3. The **Assign Content** panel is displayed.
4. From the **Users and Groups** drop down menu, choose whether you want to assign a home page to a **User**, **Group**, or **Role**[3].
5. In the Search box, start typing the name you want to find.

   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.
7. [optional] From the **Add more Layouts** dropdown list, choose further layouts that the selected user, group, or role can access from their ☰ > My Files > <company name, city> Templates menu.



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3 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.

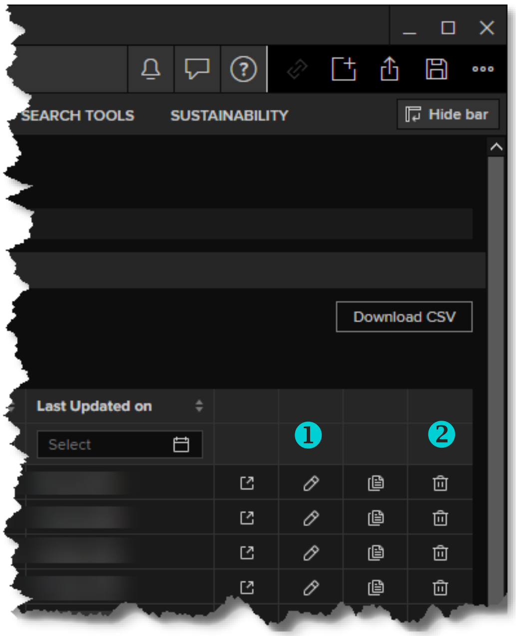
8. [optional] From the **Add more Tile Sets** dropdown list, choose further Tile Sets that the selected user, group, or role can access from their ☰ > My Files > <company name, city> Templates menu.
9. Select **Assign**.

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 ❶ or delete ❷ icons adjacent to the user, group, or role.

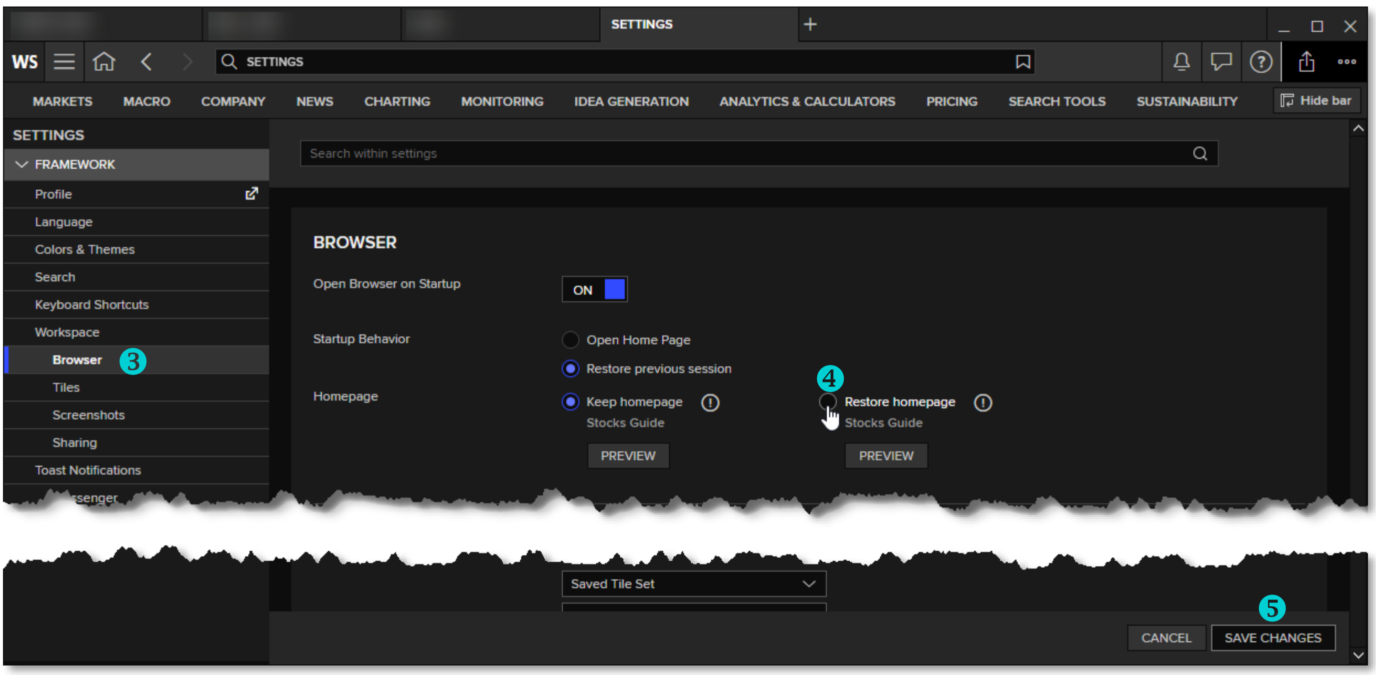


If you remove an assigned home page, the home page of the user, group, or role reverts to the default Workspace layout.

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

For Workspace desktop access (see illustration below):

1. Under the **WS > Settings** option, select the **Browser** option. ❸
2. Under Homepage, select **Restore homepage**. ❹
3. Click **SAVE CHANGES**. ❺



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
# DataType, DataValue, ScopeType (optional)
Location, ClientUPId, UP
Location, ClientNLEId, NLE                                DATA
LocationByEmail, john.doe@lseg.com, LA
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
# DataType, DataValue, ScopeType (optional)
Location, ClientUPId, UP
Location, ClientNLEId, NLE                                DATA
LocationByEmail, john.doe@lseg.com, LA
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 • Layouts • Home_And_Layouts	
Action Options: • CreateOrUpdate • Delete	The operation to be executed. For example, if the Action is `Delete`, the defined data is omitted.
Data Options: • Depends on module and action	See below. Data may have more than one field, dependent on the Module option.

Modules

<table>
<tr><th>Module and options</th><th>Description</th></tr>
<tr><td>Home
Options:
HomeType
HomeValue</td><td>Set default starting page layout for the home button
<table>
<tr><td>App</td><td>App Symbol on Eikon Library</td><td>CHT, OV, MON, and so on</td></tr>
<tr><td>Layout</td><td>File name under the firm folder and scope.
Possible values for ScopeType:
UP, NLE, LA</td><td>LayoutName, ScopeType, ScopeId
Trader1, UP, ScopeId01
Trader2, NLE, ScopeId02
Trader3, LA, ScopeId03</td></tr>
<tr><td>URL</td><td>Any URL</td><td>https://www.google.com</td></tr>
</table>
Examples:
User’s home page URL is set to https://google.com:
<code># Example for Header row only</code>
<code>Home,CreateOrUpdate,URL,https://google.com</code>
User’s homepage App is set to Chart:
<code># Example for Header row only</code>
<code>Home,CreateOrUpdate,App,CHT</code>
User’s homepage set to layout Trader1 from UP folder:
<code># Example for Header row only</code>
<code>Home,CreateOrUpdate,Layout, Trader1, UP, ScopeId01</code>
Customer’s admin wants to delete admin assigned homepage from users in the list
<code># Example for Header row only</code>
<code>Home,Delete</code></td></tr>
<tr><td>Layouts
Options:
NumberOfLayout
LayoutList</td><td>Set the default multiple layout templates.
Where:
<code>NumberOfLayout</code> is the number of layouts that you want to assign. The maximum number of layouts is 99.
Valid values: 0-99.
<code>LayoutList</code> is a key/value pair, consisting of:
<code>LayoutName</code> (optional) – name of the layout.
<code>Scope</code> (required) – 46-character free text field, normally composed of the company name and/or layout.
For example, <code>LSEGBondLayout1</code>
<code>LayoutList</code> depends on number of layouts.
For example, if the number of layouts is <code>2</code>, the <code>LayoutList</code> could be defined as:
<code>LayoutName,ScopeType, ScopeId,LayoutName,ScopeType, ScopeId</code>
There can be multiple layouts with the same name, where each has a different scope:
<code>NumberOfLayout</code> is 1
<code>Trader1, NLE, ScopeId01</code>
<code>NumberOfLayout</code> is 3
<code>Trader1,UP, ScopeId01, Trader2,NLE, ScopeId02, Trader3,UP, ScopeId03</code>
Examples:
A user is to be assigned three layout templates, where the layouts are:
Trader1 – Ultimate Parent Scope, ScopeId01
Trader2 – Location Account Scope, ScopeId02
Trader3 – NearestLegalEntity Scope, ScopeId03
<code>Layouts,CreateOrUpdate,3,Trader1,UP,ScopeId01, Trader2,LA,ScopeId02, Trader3,NLE,ScopeId03</code>
<code>Location,LSEGLocation1</code>
<code>Email,john.doe@lseg.com</code>
The administrator wants to delete layout templates of listed users
<code>Layouts,Delete</code>
<code>Location,LSEGLocation1</code>
<code>Email,john.doe@lseg.com</code></td></tr>
<tr><td>Home_and_Layouts
Options:
HomeType
HomeValue</td><td>Set both the default start page and multiple layout templates
ⓘ As this operation performs the functions of both Home and Layouts, ensure that all conditions for Home and Layouts are met.
Examples:</td></tr>
</table>

Module and options	Description

• NumberOfLayout
• LayoutList
	User are assigned the Chart app as their homepage and the following three layout templates are to be assigned:
	• Trader1 – Ultimate Parent Scope, ScopeId01
	• Trader2 – Location Account Scope, ScopeId02
	• Trader3 – NearestLegalEntity Scope, ScopeId03
	`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 Options: • UUID • Email • UserId (TBD) • Location • LocationByUUID • LocationByEmail • LocationByUserId	If `DataType` is one of the three `LocationBy` options, the Admin service started by the Administration Panel app) finds the user's hierarchy and uses the Scope field when creating a rule.
DataValue Options: • Valid email • Valid UUID	
ScopeType (optional) Options: • UP • NLE • LA	This field is used if the `DataType` is set to `Location` or one of the three `LocationBy` options. If this field is omitted, the default value is LA UPUltimate Parent NLENearestLegalEntity LALocationAccount

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

Assigning the CSV file

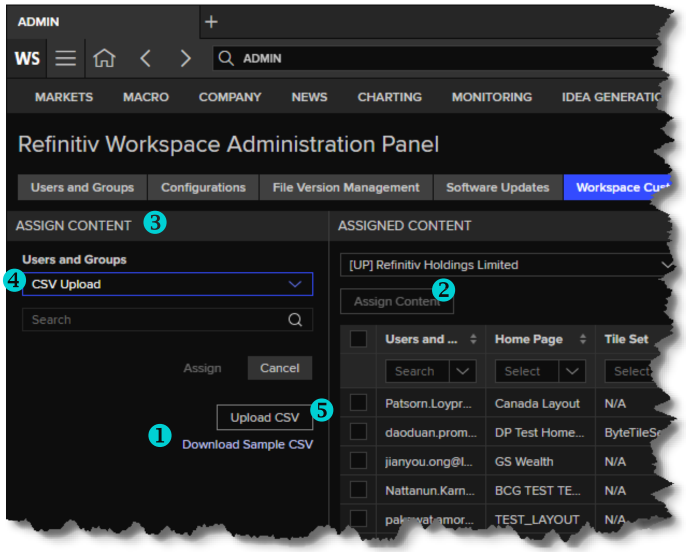
Use the **Download Sample CSV** button to download an example CSV file. ❶

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

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

   The **Assign Content** panel is displayed. ❸
2. From the Users and Groups dropdown, choose the **CSV Upload** option. ❹
3. Select your CSV file[4].
4. Click the **Upload CSV** button to upload the chosen file. ❺

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



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

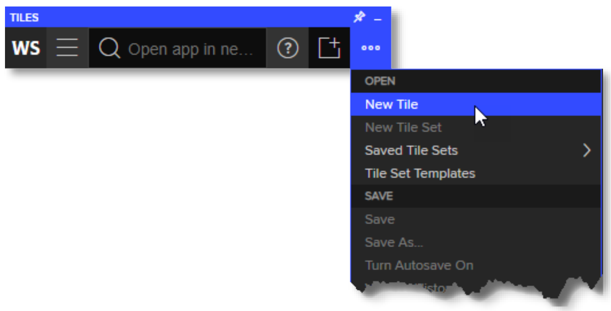
You can use the Tile Manager to work with tile sets. These allow you to display apps anywhere on your desktop to monitor the markets, rather than having them restricted to the Browser.

Creating tile sets

To create a tile set:

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

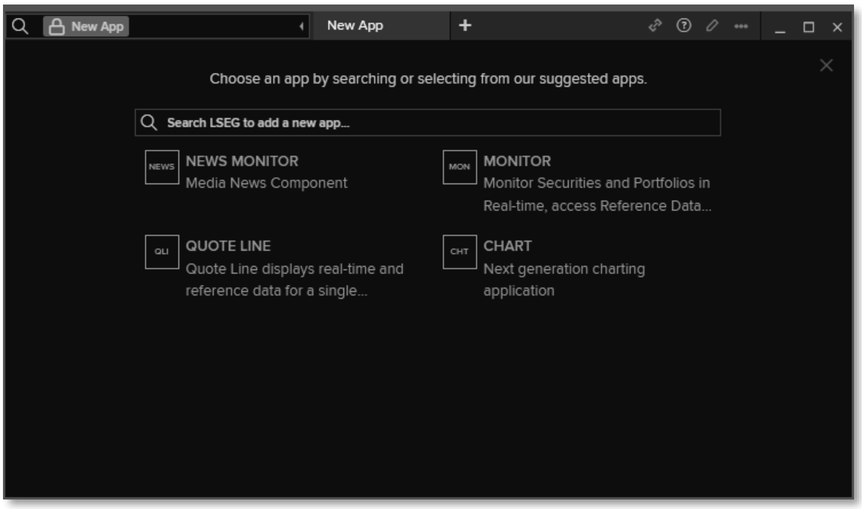
   A search dialog is displayed.



[4] A CSV file can have multiple `DataType` components defined in the data rows.

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

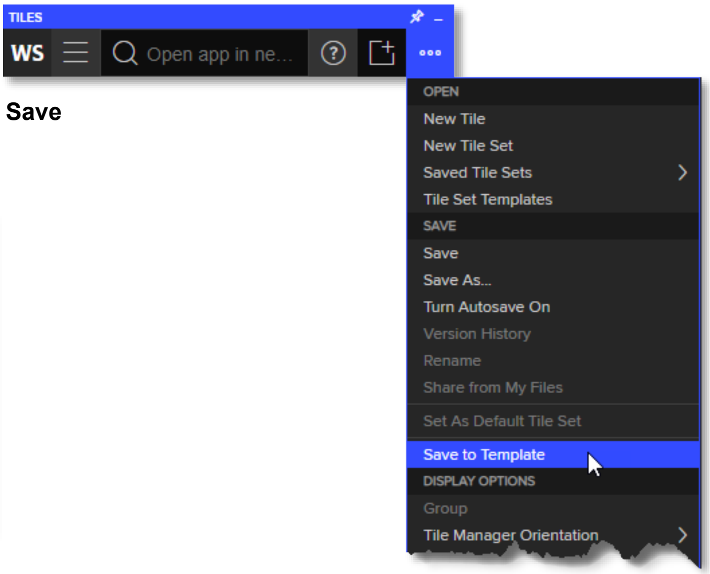


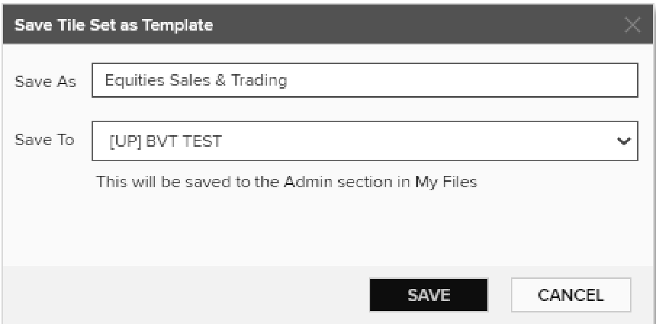
Saving a tile set as a template

To save a tile set as a template:

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

   The Save Tile Set as Template dialog is displayed.





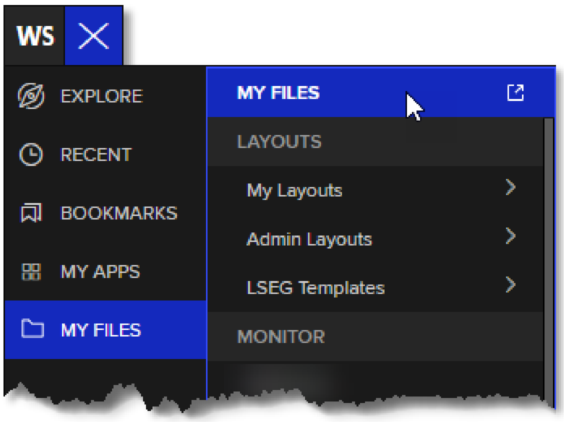
2. In the **Save As** field, enter a name for the tile set.
3. Click **Save**.

Viewing saved settings

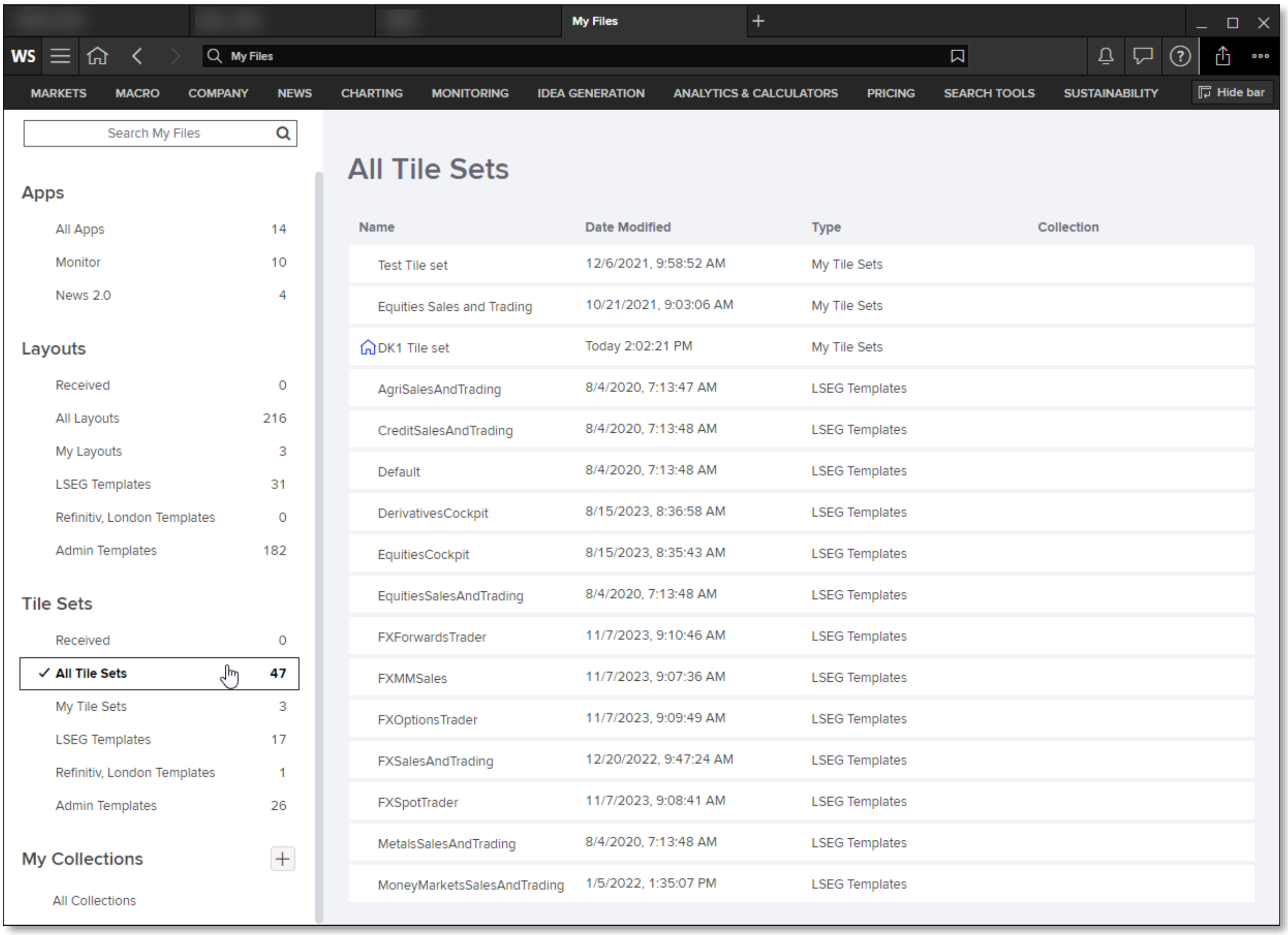
You can find the layouts, tile sets, and other settings you create and those created by other administrators in a single location.

To do so:

1. Select ☰ > My Files > My Files.



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



Here, you can view:

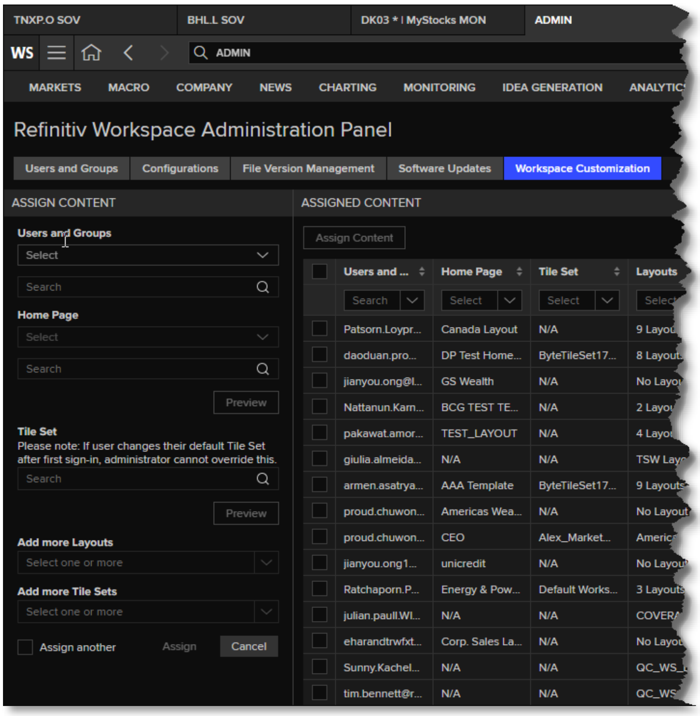
- The apps to which you have access.
- Monitors and news searches you have defined.
- Layouts and Tile Sets created by you and other individuals in your organisation
- Layout and Tile Set templates provided by administrators from your organisation and LSEG.

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[5] for the chosen user or group:
   - Click the **Tile Set** search field, and 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:
   - 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.
   - Click **Done**.
8. Click the **Assign** button.

Choosing a tile set to display locally

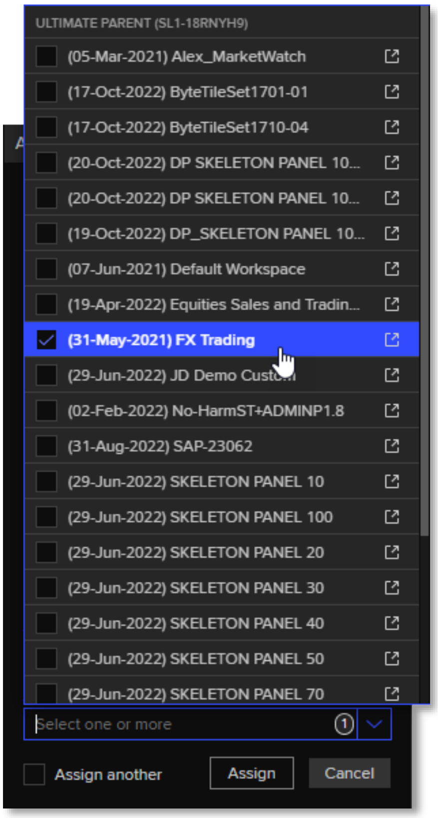
Alternatively, users can determine their tile set defaults by using their local **Desktop** settings option.

To do so:

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

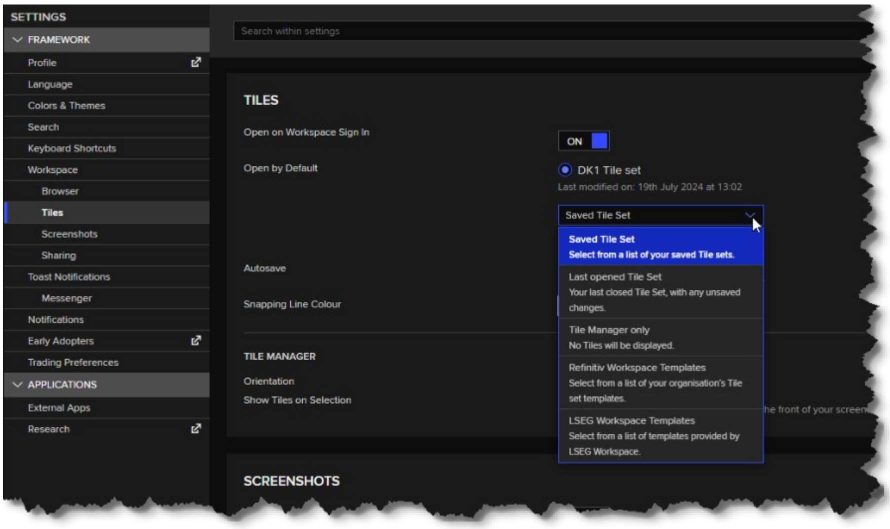
   The settings panel is displayed.
2. Select the **Tiles** option from the **Workspace** section of the side menu.

   The **Tiles** settings dialog is displayed.



[5] 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.

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).



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.

   i. In the Select field below, depending on your selection above, do one of the following:

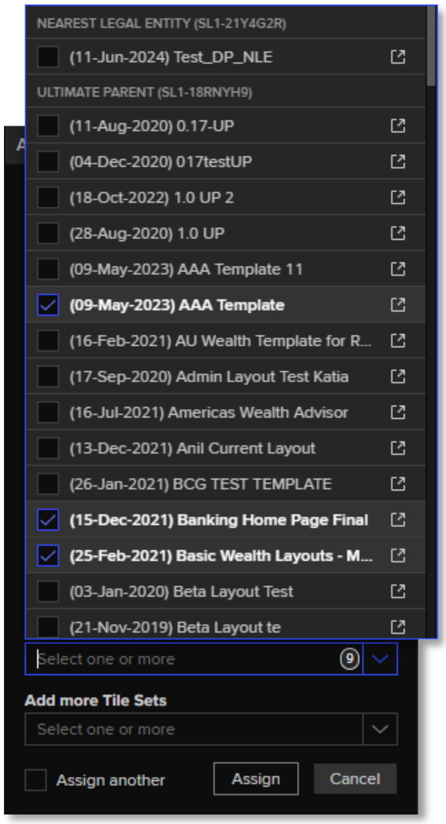
   - Search for a specific user,
   - Select a specific role, or
   - Select one or more groups

3. [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.
4. Click the **Add more Layouts** dropdown.

   The layouts selection list is displayed (shown opposite).

5. Choose up to nine layouts from the list that the selected user, role, or group(s) can access.

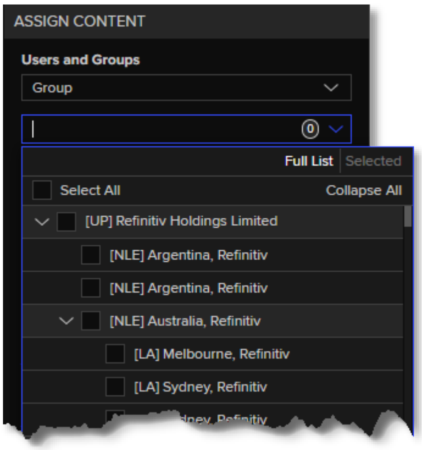
ⓘ You can only use Layouts created by administrators.



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]

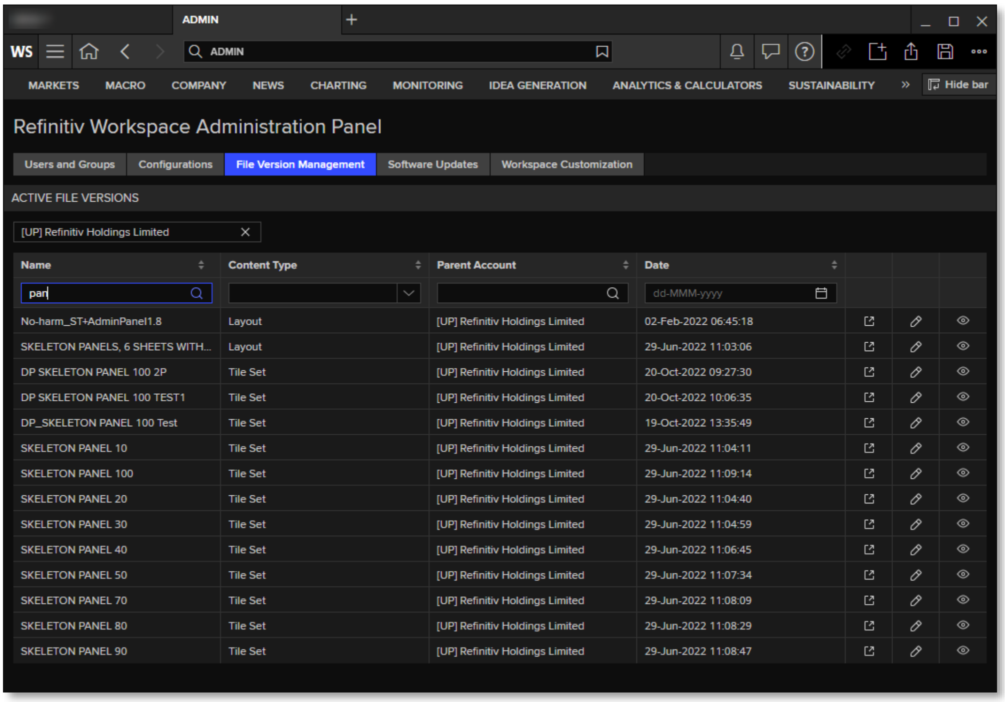


Your users see the home page and use the desktop version that is assigned to the lowest level of this hierarchy. However, if a user has been individually assigned a home page and/or software policy, this supersedes any other that is assigned to a group they may be in. For example: User #1 and User #2 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.

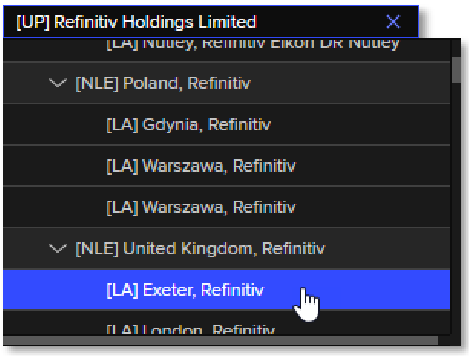
File version management

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.



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.

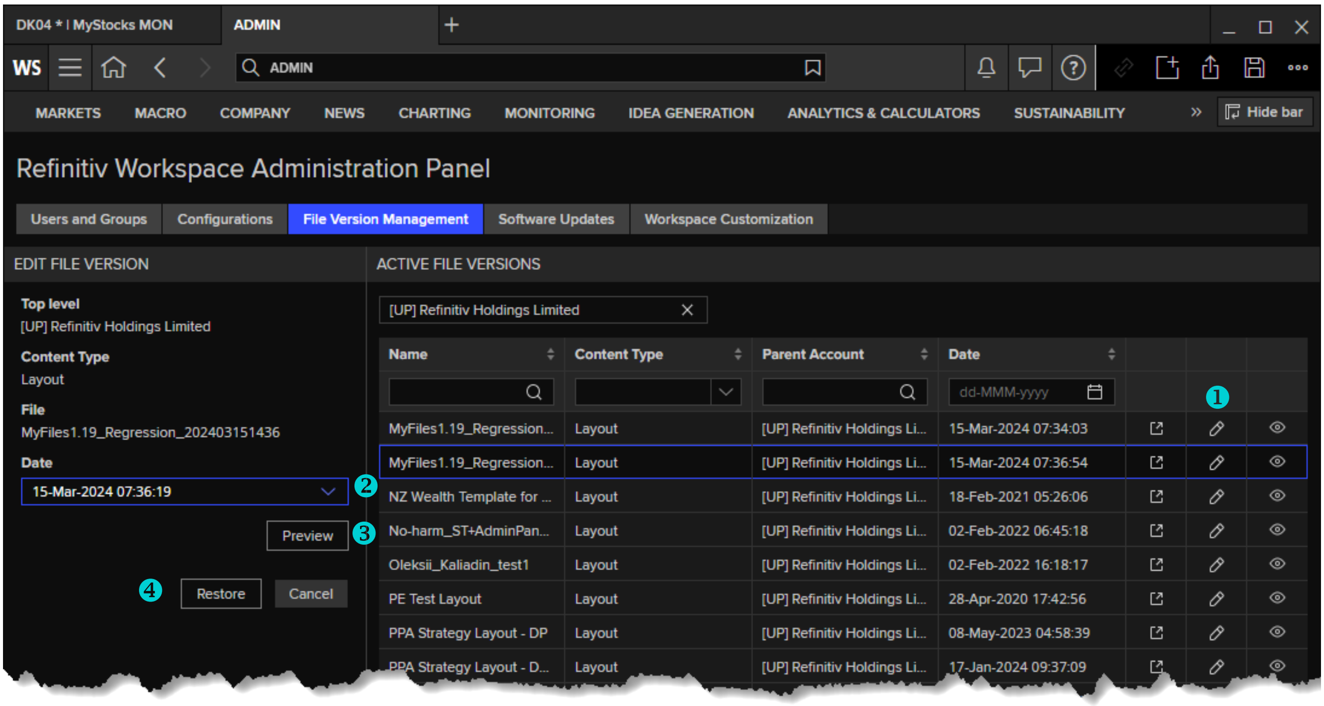
Icon	Action
	Delete a file.
	Restore a deleted file.
	Preview and restore previous file versions.
	Preview the current tile set or layout in a separate window.

Restoring an old file version

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

1. Click the Edit icon. ❶

   The Edit File Version panel is displayed.



2. From the **Date** dropdown ❷, 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** ❸, which opens the file in a new window.

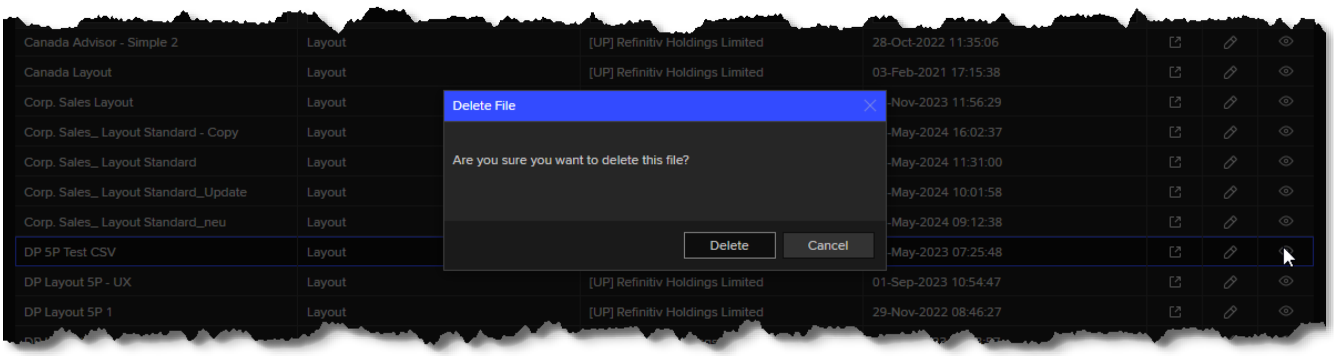
3. Click **Restore** ❹ to confirm your selection.

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.



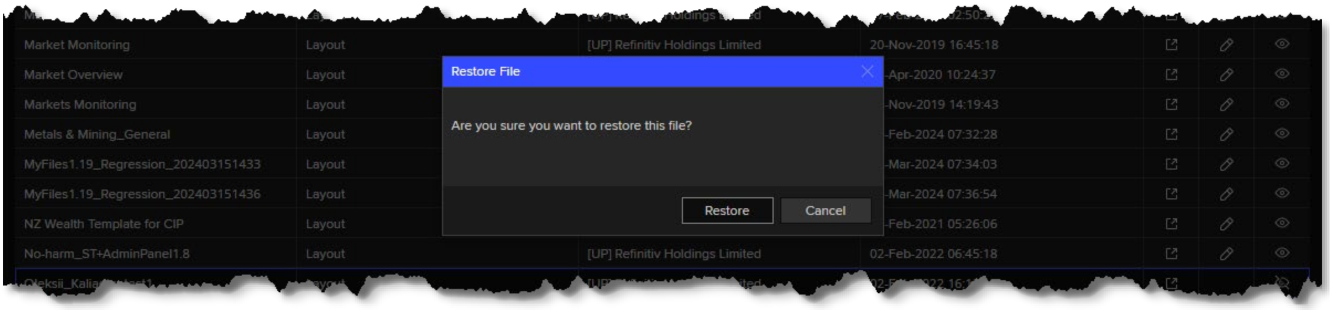
2. Click **Delete** to remove the file from the list.

   The eye icon for the file changes to .

To restore a file[6], do the following:

3. At the end of the file row, click the struck-through eye  icon.

   The Restore File confirmation dialog is displayed.



4. Click **Restore**.

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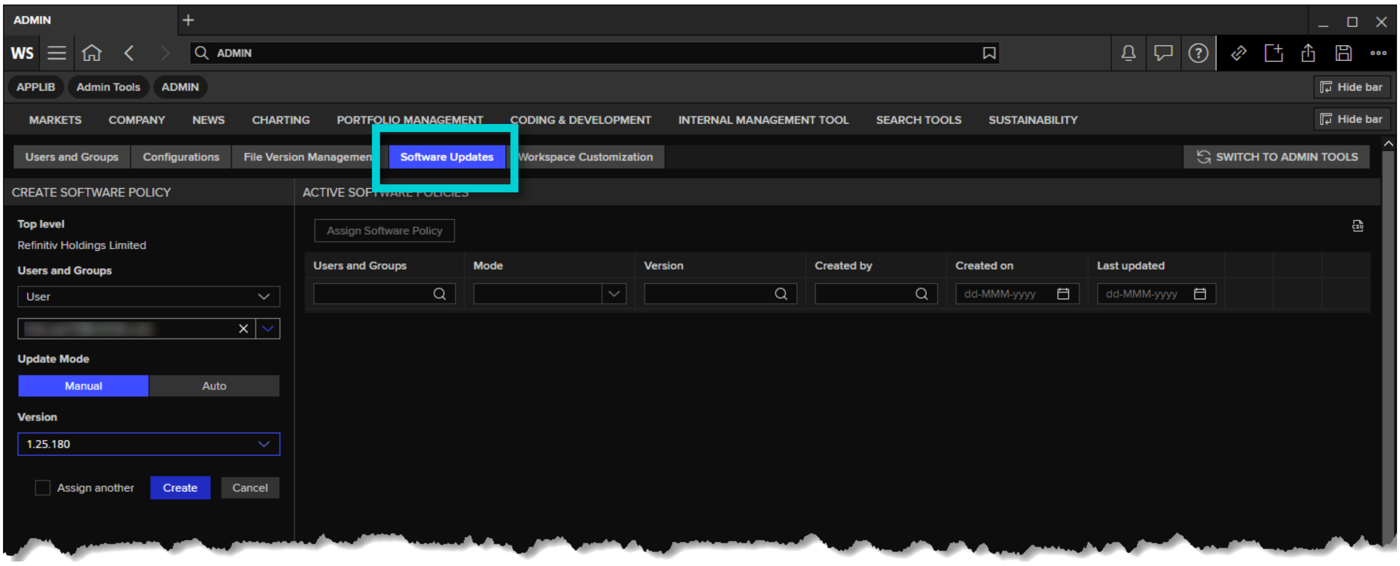
[6] If a file has been deleted manually from the My files folder, contact Support to restore the file.

Software updates

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



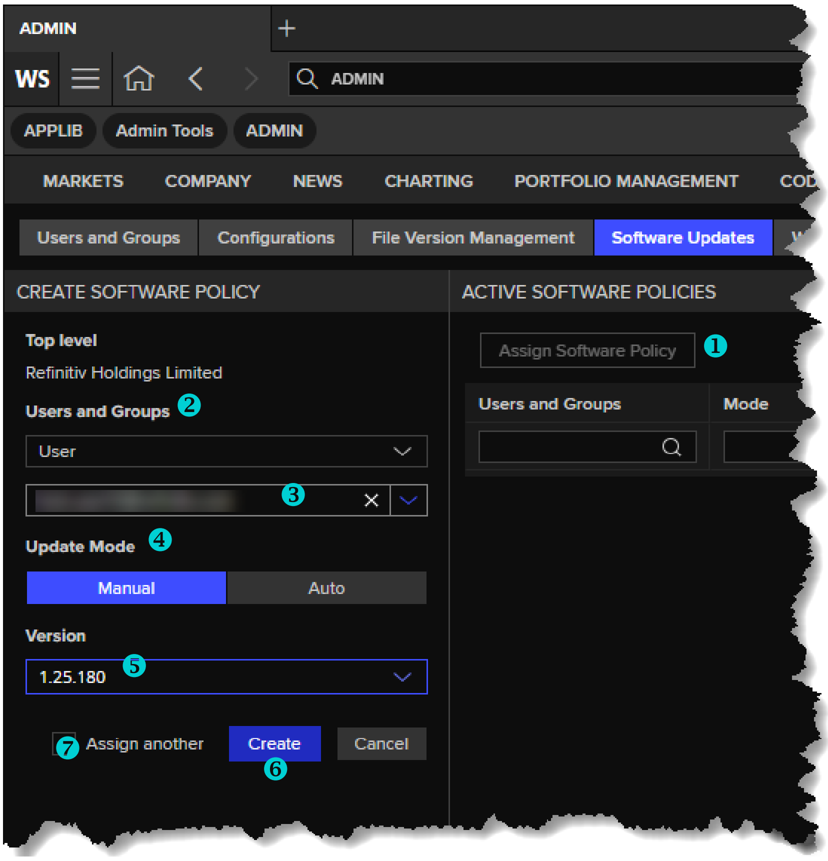
You can determine whether users receive automatic updates or must use a specific supported version of Workspace. You can determine the version used, based on User ID. This means the specified user(s) use the defined version, regardless of what device they use and version they have installed.

Creating software update policies for users

To create a software policy:

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

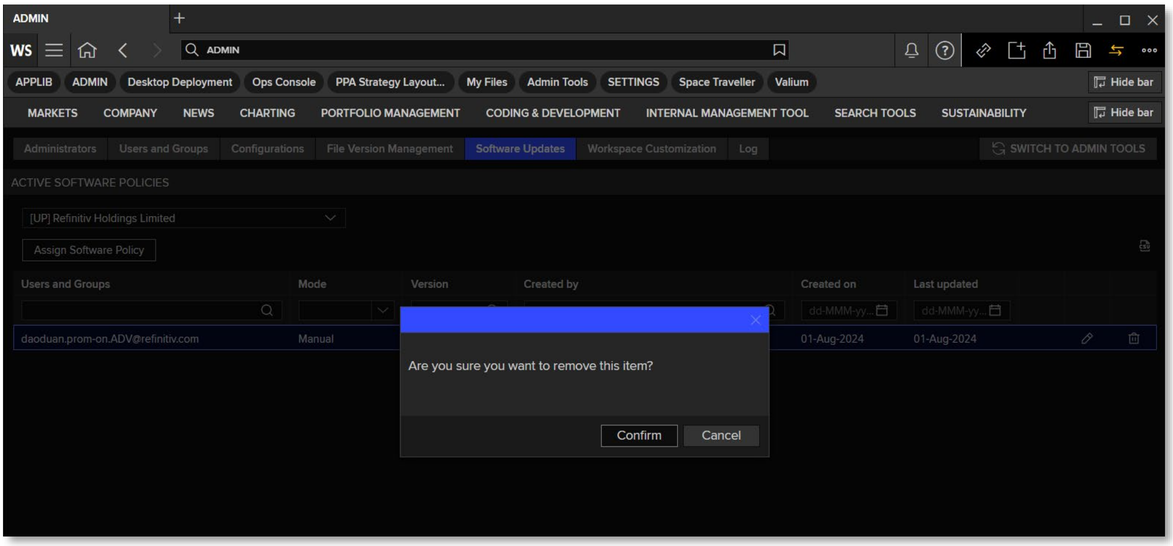
   The **Create Software Policy** panel is displayed.
3. From the Users and Groups dropdown, choose whether you are selecting a software policy for an individual User or Group of users. ❷
4. Click the Search box ❸ and either:
   - Begin entering the name of user. At this juncture, a list is displayed of possible users, as you type, or
   - Choose the group from the displayed list.
5. Choose whether the desktop version they are to use should be manually set or if they can have automatic updates: ❹
   - If **Manual** is selected, use the dropdown menu ❺ to choose the version the user or group should use.
6. When you are finished, click:
   - **Create** ❻, or
   - **Assign Another** ❼, 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**.



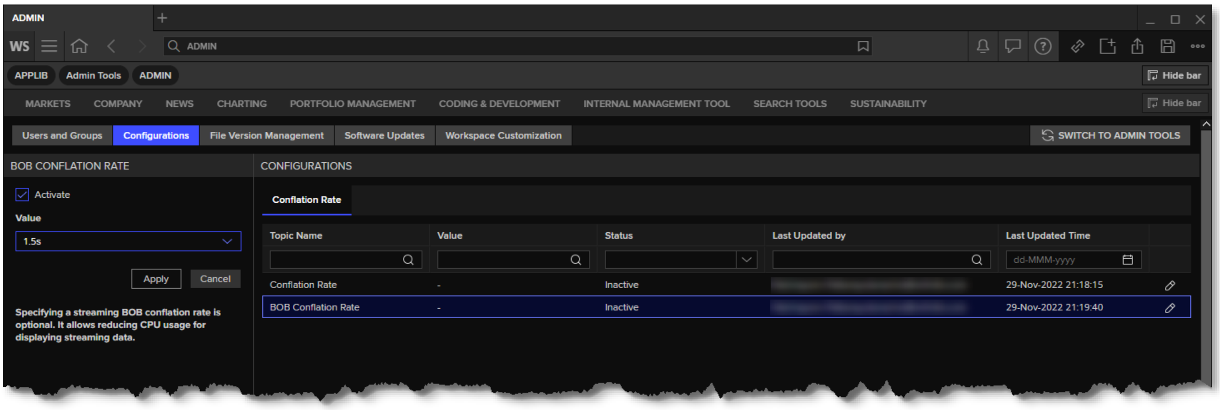
Viewing software versions across accounts

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

Configurations

The Configurations[7] 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)



The Configurations screen contains the following information:

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: • Activating: the request to apply a conflation rate was received by the server and is in progress. • Active: the conflation rate has been applied. • Deactivating: the request to revert the conflation rate value to default was received by the server and is being processing. • Inactive: the conflation rate is specified at a default value.
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.

[7] 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

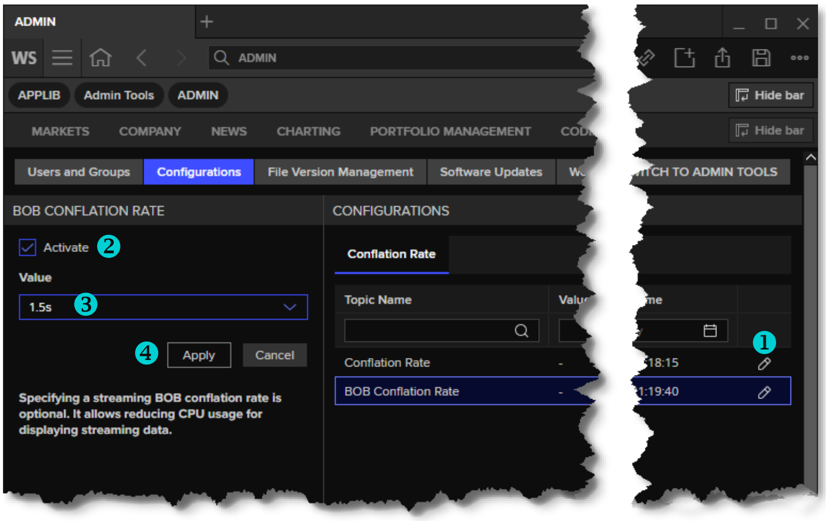
To set the conflation rate[8] for a service, select **Configurations** and do the following:

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

    The Conflation Rate panel opens.
2. Select the **Activate** checkbox. ❷

    This allows you to access the Value dropdown.
3. From the Value dropdown ❸, select conflation rate to be applied.

    The following options are available:
    - 1.5 seconds
    - 3 seconds
    - 6 seconds
4. Click **Apply**. ❹
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. ❶.

    The Conflation Rate panel opens.
2. Select the **Activate** checkbox.❷

    This will untick the checkbox.
3. Click **Apply**. ❹

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.

8 The default conflation rate for desktop and Web access is ~3ms.

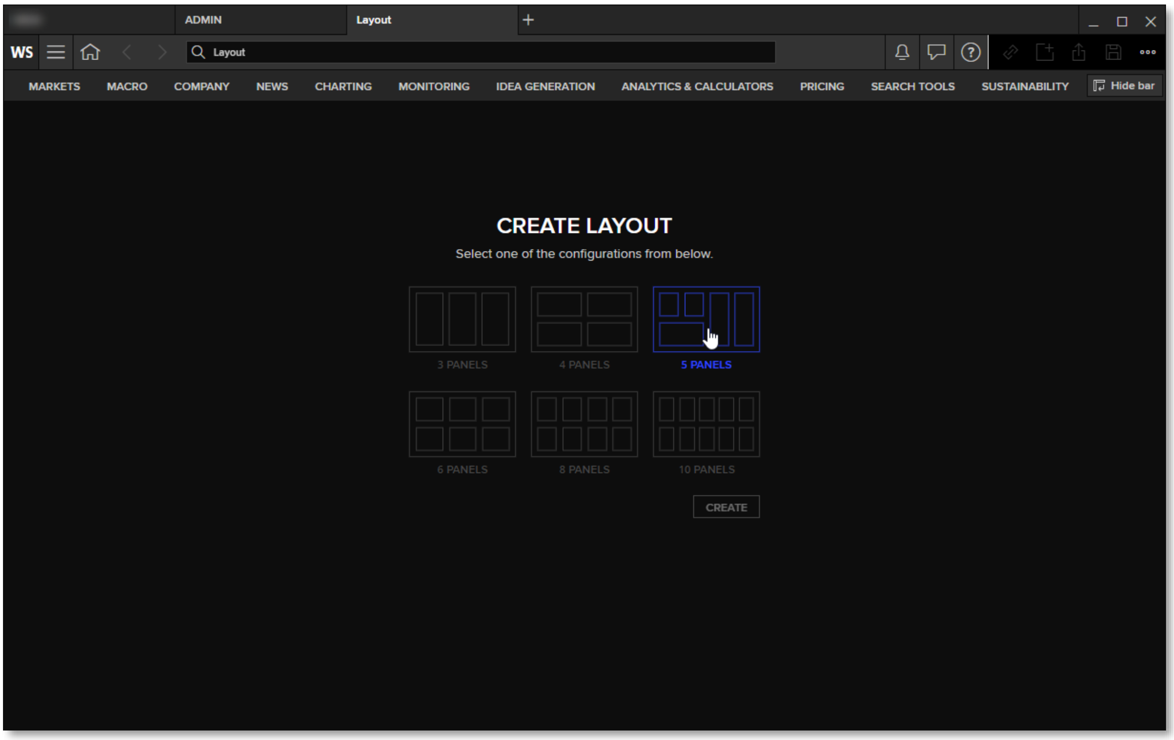
9 This setting can be overridden at individual user level in Workspace desktop using the Configuration Manager. However, there is no such facility in Workspace web access. As such, the conflation rate set using this facility overrides the default configuration for all Workspace web access users.

Appendix A: Creating administrator layouts

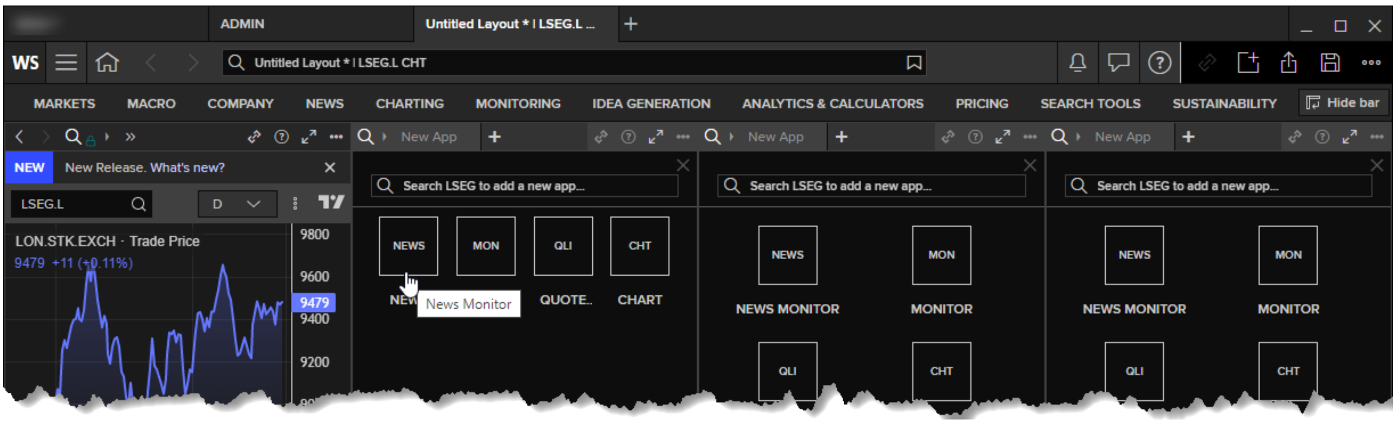
A layout is a collection of panels that you can customize to a meet the specific interests and needs of a group or individual user. You can use the Administration Panel to create and save layouts and assign them to users or groups.

To create a layout:

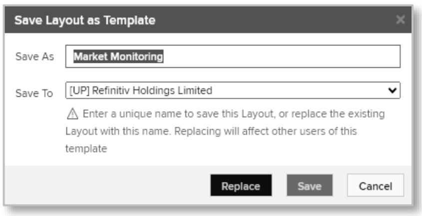
1. Select **WS > New Layout** from the Workspace browser toolbar.



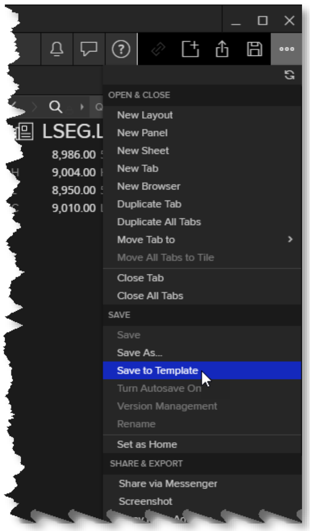
2. In the new window, select the layout you want to use and click **Create**.
3. Populate the layout with your chosen apps, either by:
   - Selecting one of the default four apps, or
   - Searching for the app you wish to add using the search field



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



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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