

LSEG Workspace Add-in

Administrator Guide



LSEG DATA &
ANALYTICS

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About this document

This document describes how to install the LSEG Workspace Add-in within your organisation.

In this guide

The purpose of this document is to outline the relevant installation procedures for the LSEG Workspace Add-in.

Intended readership

This guide is intended for administrators and end users of LSEG Workspace who want to use the new LSEG Workspace Add-in.

Further information

To:

- Request product assistance, contact [Support](#).
- Access other LSEG Workspace technical content, see the [Workspace technical documentation site](#).
- Provide feedback on Workspace technical content, contact DocFeedback@lseg.com.

Pre-requisites

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

Minimum update channel policy and build of Microsoft 365

To use this add-in, you must enable the Current or Monthly update channel of M365.

For more information, including how to change this setting for your organisation or for groups of individuals within your organisation, see the [Overview of update channels for Microsoft 365 Apps](#).

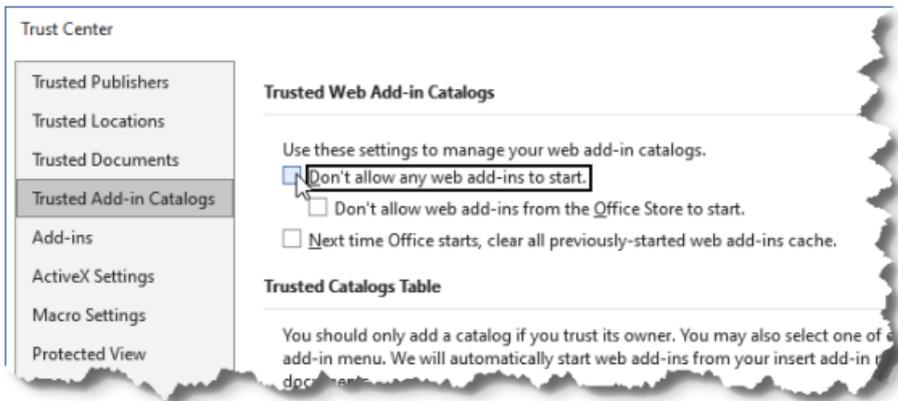
Installing required Microsoft components

To use this add-in, you must 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. 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.



Authenticating with Entra

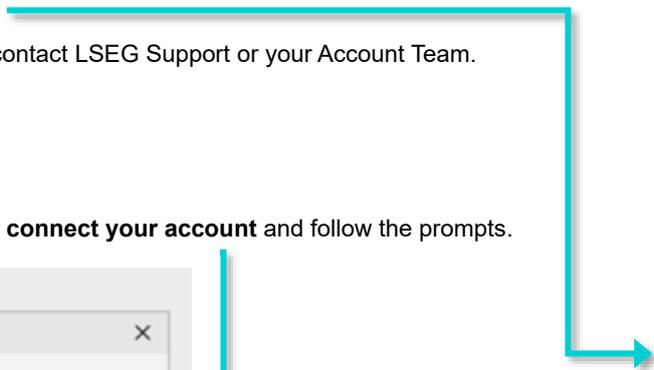
There are two ways to establish the Entra sign in authentication; one is by using the Sign in button within the LSEG Workspace Office add-ins (performed by the user), and the other is by using the centrally managed System Cross-domain Identity Management (SCIM) provisioning process (performed by the administrator).

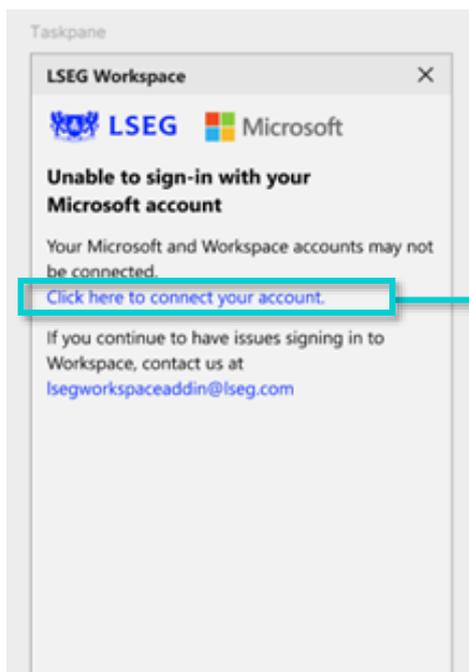
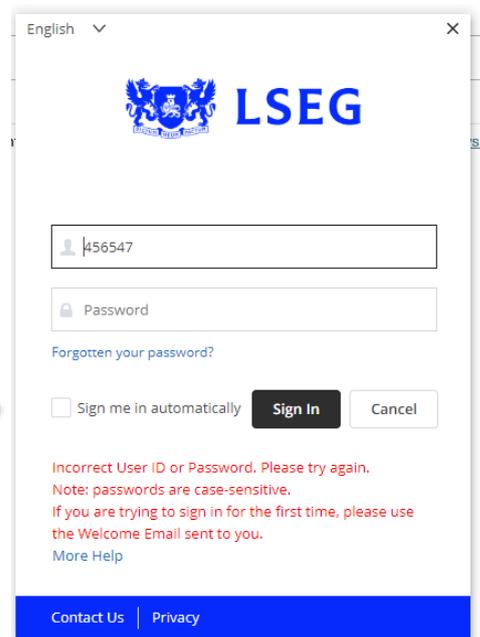
- [Authenticating using the Sign in button](#)
- [Authenticating using Security Cross-domain Identity Management \(SCIM\)](#)

Authenticating using the Sign in button

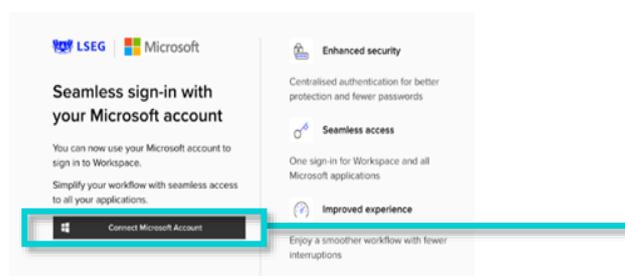
✦ This procedure is performed by an LSEG Workspace Add-in user.

To authenticate using the Sign in button:

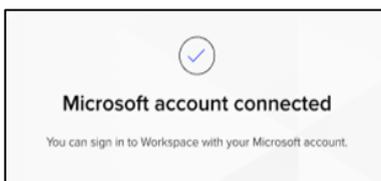
1. Click the **Sign-In** button within the LSEG Workspace Add-in.
2. Sign in to Workspace.  If you cannot sign in, contact LSEG Support or your Account Team.
3. Click on **Click here to connect your account** and follow the prompts.

4. Click **Connect Microsoft Account** in the resulting screen.



A successful connection will be confirmed by the following message:



5. You should now verify your access by repeating the sign in process from the LSEG Workspace Add-In and checking you can access all ribbon buttons.

If account connection has been unsuccessful, click **Contact Support** from the ribbon.

Authenticating using System Cross-domain Identity Management (SCIM)

✦ This procedure is performed by an LSEG Workspace Add-in administrator.

For information on the centrally managed SCIM provisioning process, see the provided [documentation](#).

Note that there are several pre-requisites to performing this procedure. For information on these, see the [LSEG Entra Workspace Administrators' Activation Guide](#).

Additional requirements to access deals content sets

To access deals content sets, you must obtain a SDC Platinum add-on to your Workspace license. For more details, contact your Account Team.

Installing the LSEG Workspace Add-in

The LSEG Workspace Add-in can be deployed centrally for all users, or individually per user.

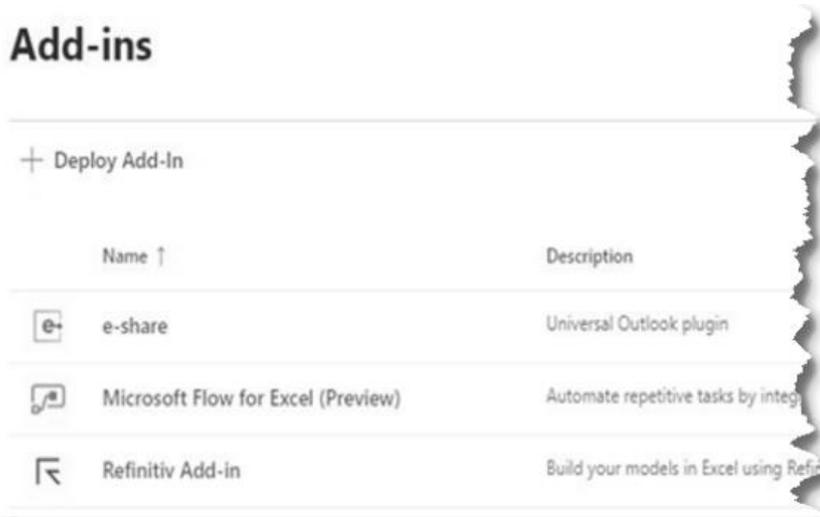
- [Deploying the add-in centrally](#)
- [Installing the add-in individually](#)

Deploying the add-in centrally

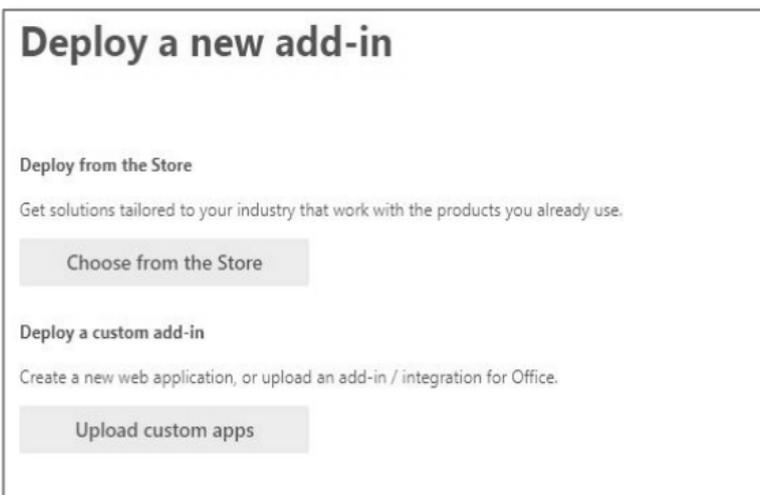
Before you begin, see [Determine if Centralized Deployment of add-ins works for your organization](#).

To deploy the add-in:

1. In the [Microsoft365 admin center](#), go to the **Settings > Add-ins** page. If you cannot find the Add-in page, go to the **Settings > Integrated apps** page and choose **Add-ins**.



2. Select **Deploy Add-in** at the top of the page, and then click **Next**.
3. Click **Choose from the Store**.
4. Search for LSEG Workspace Add-In or [use this link](#).
5. On the next page, select **Everyone**, **Specific users / groups**, or **Just me** to specify to whom the add-in is deployed.
6. You can use the Search box to find specific users or groups.
7. Select **Deploy**.

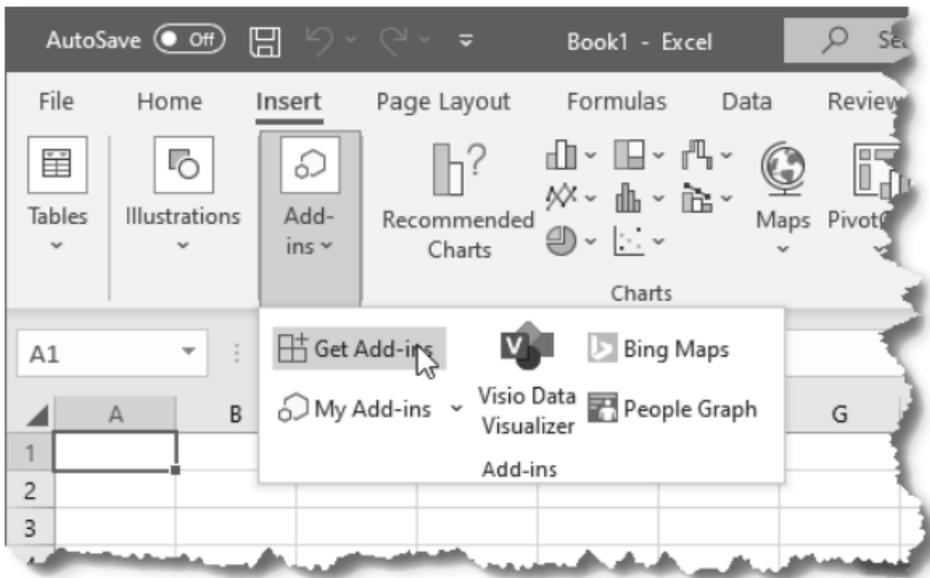


8. A green tick appears when the add-in is deployed.
9. Follow the on-page instructions to test the add-in¹.
10. When finished, click **Next**.
11. If you have deployed the add-in to yourself only, you can select **Change who has access to add-in** to deploy to more users.

Installing the add-in individually

To install the LSEG Workspace Add-in on your own machine:

1. Log in to Office 365 and open an Excel workbook or PowerPoint presentation.
2. Click the **Insert** tab in the navigation bar.
3. Select **Get Add-ins** from the ribbon. The Office Add-Ins window opens.



4. Select **Store** then type LSEG Workspace Add-in into the search tool and press **Enter**.
5. Select **Add** to start the installation.

When it is done, you will see a new LSEG Workspace tab in the navigation bar.

Important: If you cannot access the Store, your administrator may have blocked third-party add-ins. Go to the My Organization and Admin Managed tabs to check whether the add-in is available for download. If not, contact your IT department and request the whitelisting of the following link for the add-in: <https://appssource.microsoft.com/en-us/product/office/WA200008646>

¹ You may need to relaunch the Office app to view the add-in icon on the app ribbon.

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