



LSEG
WORKSPACE

MEETING PREP FINANCIAL DATA SERVICE
DESCRIPTION



LSEG DATA & ANALYTICS

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About this document

Intended readership

This document is available for current and prospective customers of LSEG Workspace who want to see LSEG Workspace data within Microsoft Meeting Prep for Finance (hereafter referred to as Meeting Prep).

In this document

This document describes the service that customers of LSEG Workspace can expect when accessing LSEG Workspace data within Meeting Prep, alongside the experiences and options designed within the service.

It is not a legally binding document but is intended to give a reasonable expectation of the service you will receive as a customer of LSEG Workspace.

You should refer to this document for any information about the service included when accessing LSEG Workspace data in Meeting Prep, whether as a prospective or ongoing customer.

If you have any further questions, do not hesitate to contact your Account Team.

Privacy

Your privacy and trust are important to LSEG. For more information, see the [LSEG Privacy Statement](#).

About LSEG Workspace data in Meeting Prep

Meeting Prep is a Microsoft developed and Microsoft owned solution designed for financial professionals. It delivers reports on publicly traded companies with essential insights in an easily accessible format via Microsoft Teams.

LSEG data via the Meeting Prep application in Microsoft Teams will be available for LSEG Workspace users only. The app will incur no additional costs for the user.

Seamlessly integrating into the Microsoft 365 Teams environment, Meeting Prep greatly improves an investment banker's workflow, assisting quick and comprehensive preparation for customer meetings. It is available as an extra tab in their calendar view, where a Teams bot provides bespoke AI-enabled reports on a variety of useful topics.

Scope and scale

LSEG Workspace data is accessible in Meeting Prep for all users with a valid Workspace licence. For more information on how to access the application in Microsoft Teams, see the [Microsoft Meeting Prep site](#).

Discover

To find out more about accessing LSEG Workspace data in Meeting Prep, contact your Account Team.

You can also find more information about LSEG Workspace on the [Workspace section](#) of the authenticated website.

You can also find more information about Microsoft Meeting Preparation Assistant (Meeting Prep) on the authenticated [Microsoft website](#).

Evaluate

Trials

Free trials of all variants of LSEG Workspace are available, all of which can access LSEG Workspace content in Meeting Prep.

Free trials, which last for a period of up to 30 days, can be requested from the [LSEG Workspace e-commerce site](#) and can be set up with your Account Team.

Once a free trial period is over and a purchase is made, a user can continue using LSEG Workspace data in Meeting Prep seamlessly.

If no purchase is made, the user will lose access to LSEG Workspace when the trial concludes.

Support during trials

LSEG offers the same level of support to those on trials as it does to licensed users. More information on support can be found [later in this document](#).

Trials of Meeting Prep

Meeting Prep is a free application available to users of Microsoft Teams and Copilot for Microsoft 365.

Free trials are not available for Microsoft Copilot. However, details to obtain it can be found on the [Copilot for Microsoft 365 website](#).

Purchase and renew

Ordering LSEG Workspace

New customers should request an LSEG Workspace license through the Account Team in their IT or Market Data department. If you do not know your Account Team, you can Contact Us and we will make sure you get to the right person.

Thereafter, the LSEG Workspace administrator in the customer's organisation can order additional applications using the License Management tools on the [Workspace section](#) of the authenticated website.

Training for LSEG Workspace administrators is available on our Training Site.

If a customer is not set up to order additional applications through the [Workspace section](#) of the authenticated website, they can request additional licenses from the Account Team within the customer's IT department.

Purchasing Microsoft Meeting Prep

Meeting Prep is available free of charge for users that have:

- MS Teams (with Microsoft 365 or Standalone)
- Copilot for Microsoft 365
- ① Microsoft Teams Premium (with Microsoft 365 or Standalone) is required to access capabilities such as Meeting Recap content in Meeting Prep, but is not a pre-requisite to use the app itself.

Purchasing Microsoft Teams (with Microsoft 365 or Standalone)

Questions relating to trials and purchasing of Microsoft Teams will be handled by our partner – Microsoft. However, you can visit the Microsoft website for more details about [Microsoft Teams](#) and about [Microsoft 365](#).

Purchasing Copilot for Microsoft 365

Questions relating to the purchasing of Microsoft 365 are handled by our partner – Microsoft. However, details to obtain Microsoft Copilot can be found on the [Copilot for Microsoft 365 website](#).

Free trials

Free trials are not available for Meeting Prep, as it is a free application.

Accessing Meeting Prep

You can access Meeting Prep from the app gallery in Microsoft Teams.

Purchasing additional content

Premium LSEG Workspace data can be accessed in Workspace via deep links from Meeting Prep reports. To access this, you can purchase additional LSEG data and partner content by requesting it from your Account Team.

You can find a catalogue of the available content in the Content Kiosk application in LSEG Workspace. The Content Kiosk app is available in the Workspace App Library or by searching 'Content Kiosk'.

If you are a customer administrator, you can purchase additional content by using the License Management tool on the [Workspace section](#) of the authenticated website. If a user already has a license for a particular product, administrators can purchase all available add-ons for that product too.

Billing

You are billed for LSEG Workspace data according to the billing frequency specified for your account. Some partner services will bill you directly, based on their own billing rules.

For more details, contact your Account Team.

Microsoft applications and content

The cost of Microsoft applications will be handled directly by Microsoft.

User maintenance

There are various situations where changes need to be made to an LSEG Workspace license. The quickest method of completing these changes is by a customer administrator using the License Management tools in the [Workspace section](#) of the authenticated website.

Where this is not possible, you can also contact your Account Team directly.

Maintenance scenarios

The following table outlines which processes a customer can perform themselves, and which they cannot:

Process	Self-service availability
Purchase (Product and Add-ons)	✓ (same product only)
User Swap	✓
Assign/Unassign licenses	✓
User detail changes	✓
Cancellation	✓
Relocation	✗ international ✓ same country

Renewals and cancellations

For details on renewal and cancellation terms, contact your Account Team.

Setup

Deployment

LSEG offers customers different methods of deploying LSEG Workspace. Requirements vary by user community, and the deployment of LSEG Workspace can be tailored to meet each community's needs.

Contact your Account Team to discuss which deployment method is most suitable for you.

Microsoft also offers customers different methods of deploying applications. You can find more information on Microsoft websites about how to deploy [Microsoft Teams](#), [Microsoft 365](#) and [Copilot for Microsoft 365](#).

LSEG hosted data

The financial data accessible in Meeting Prep sits on LSEG infrastructure until report generation occurs. LSEG Workspace connects to Meeting Prep via APIs and services, through either the Internet or private lines.

Microsoft hosted

The Meeting Prep infrastructure sits with Microsoft. LSEG Workspace connects to Meeting Prep via APIs and services through either the Internet or private lines.

Installation and onboarding

Windows and macOS Desktop

LSEG data in Meeting Prep is automatically made available as a plug-in for LSEG Workspace users. As a result, the system requirements are the same as for Microsoft Teams.

More information on hardware requirements for Microsoft Teams can be found [here](#).

System requirements

Running LSEG Workspace has specific requirements which are documented [here](#). You should consider the system requirements for Microsoft Teams to ensure a smooth access of LSEG Workspace data in Meeting Prep.

More information on the system requirements for Microsoft Teams can be found [here](#).

Installation support

LSEG Workspace and Meeting Prep are self-installed products, so the user is expected to install the product themselves with the help of the installation guide and/or their internal IT departments.

Installing LSEG Workspace data in Meeting Prep is a two-stage process that involves:

1. Installing the Meeting Prep app from the Microsoft Store.

2. Enabling the connectivity between a user's LSEG Workspace account and their Microsoft Teams account.

The connectivity between a user's LSEG Workspace account and their Microsoft Teams account can be enabled by an administrator within the user's internal IT department or through self-service in Workspace.

More information on enabling LSEG Workspace data on Meeting Prep can be found [here](#). There are also specific support offerings for [enterprise users](#) and [applications](#).

For failed LSEG Workspace installations or connectivity issues between LSEG Workspace and Meeting Prep, we will follow the processes described in the [Support](#) section of this document. Frontline LSEG support is available 24 / 7.

Web and Mobile access

There are no requirements to access LSEG Workspace data in Microsoft Meeting Prep that are specific to the Web or Mobile applications of LSEG Workspace.

Single sign-on

LSEG offers Single Sign-on (SSO) to Workspace data in Meeting Prep based on Microsoft Entra. This allows your IT administrator to set up SSO authentication between Microsoft Entra and Meeting Prep using the admin console. Alternatively, the administrator can enable self-service approval for SSO, where each user is able to set up SSO between their LSEG Workspace and Microsoft Teams platforms.

Successful installation

A successful installation of LSEG Workspace data in Meeting Prep can be demonstrated when a user is able to search for publicly traded companies in Meeting Prep and generate a report.

Product usage

Like LSEG Workspace itself, LSEG Workspace data in Meeting Prep is an individual information service, intended to be installed on a user's device for the use of the licensed user only.

Detailed information on permitted usage can be found in your contract. The usage of interactive services is covered in the [Code of Business Conduct & Ethics](#).

If you have additional questions, contact your Account Team.

Product hours of availability

LSEG Workspace data in Meeting Prep is available 24 / 7.

Product languages

LSEG Workspace data in Meeting Prep will be delivered in the following languages:

- English, Danish, Dutch, French, German, Italian, Japanese, Portuguese (Brazil), Spanish, Chinese (Simplified), Czech, Finnish, Greek, Korean, Norwegian (Bokmål), Polish, Russian, Swedish, Thai, Turkish Arabic, Hebrew

You can change your preferred language through Settings in Microsoft Teams.

- ① Note that the available languages will be determined by Microsoft language updates and therefore could be subject to change.

General security

As the world's largest financial information source, LSEG is serious about safeguarding the security and quality of all the proprietary and third-party information that flows through our systems.

As a result, we have taken steps to formalise and embed information security management and quality management systems into the Information Technology Infrastructure Library (ITIL) service management processes that are operating in our major data centres. These steps include attaining certifications in two industry-proven global standards ISO 9001 (Quality Management) and the new ISO 27001 (Information Security Management).

More information can be found in our [Statement of Service](#).

Microsoft Teams is designed and developed in compliance with the Microsoft Trustworthy Computing Security Development Lifecycle (SDL), which is described at [Microsoft Security Development Lifecycle \(SDL\)](#).

For more information on the security of Microsoft Teams, see [here](#).

Use of personal data

LSEG Workspace allows users to search for companies in Meeting Prep. It uses word search terms entered by individual users and stores them to enable the product to suggest previous search terms, thereby enhancing the user experience.

In using this personal data, Microsoft follows strict confidentiality obligations. More details can be found on its approach [here](#).

For more information about the use of personal data, contact your Account Team.

Business Continuity (BC) and Disaster Recovery (DR)

LSEG Business Continuity Management Office (BCMO) maintains a [business continuity policy](#). LSEG provides data centre redundancy and failover. It is the responsibility of the customer to obtain the correct level of service from their ISP to meet their own connectivity resiliency needs.

For more information, contact your Account Team.

Microsoft's Enterprise Resilience and Crisis Management (ERCM) team oversees business continuity management and disaster recovery activities across Microsoft services and cloud offerings. Representatives from Microsoft business units coordinate with the ERCM team to develop business continuity plans and validate compliance with business continuity requirements.

More information on Microsoft resiliency and continuity can be found [here](#).

Information security

LSEG is committed to its Information Security program, the mandate of which is approved by the Executive Committee. We have a Chief Information Security Officer and an extended team of security specialists, spread across the globe, dedicated to the security of LSEG's financial and risk products and services.

Our commitment to security is achieved through the application of demonstrable security controls at a level appropriate to the service being offered. Furthermore, our security strategy ensures that appropriate security controls exist within service design and operation. This is to counter threats to the confidentiality, integrity, and availability of customer information which we store, process, or transmit.

We have staff trained to identify issues and resolve these threats as quickly as possible, with minimal impact on customers. Our involvement in industry and government security forums and groups further demonstrate our proactive approach to understanding and countering the threats we face.

Further information on information security at Microsoft can be found on their [InfoSec site](#).

Legal and regulatory

LSEG's global legal department will interpret the laws and regulations that apply in the countries in which we operate and provide appropriate policies to enable us to comply with them. We have implemented a publicly available [Code of Conduct](#), to provide guidance and advice on how to report ethical, legal, and policy issues.

Details on legal compliance and ethics at Microsoft can be found [here](#).

Security patches

Any security issue will be assessed immediately upon detection. A software patch will be made available as soon as a solution is identified and implemented.

For any issues where LSEG is reliant on Microsoft for a solution, communication to customers will be delivered through the [Workspace section](#) of the authenticated website.

Help and support

Meeting Prep is a Microsoft product; therefore, users have access to Microsoft support. See the Microsoft website for details on their support offerings for [enterprise users](#) and [applications](#).

For LSEG data issues in Meeting Prep, including data access, account linking and data quality, customers and users can also contact LSEG directly from the [Workspace section](#) of the authenticated website.

Languages and availability

Live Chat

Live Chat is a real-time support channel that LSEG offers to all users of LSEG Workspace. If you have issues in Meeting Prep relating to data access, account linking and data quality, you can access this channel by choosing 'Get Help & Support' from the Help menu in LSEG Workspace.

Live Chat is available in English on a 24 / 7 basis.

Local language support is available during local business hours in the following languages:

- Japanese, Mandarin

Customer Support

For issues relating to the LSEG data in Meeting Prep reports such as data access, LSEG Workspace account access and data quality, LSEG Customer Support, delivered by phone and email, is available in the Help & Support app in LSEG Workspace.

Customer Support is available in English on a 24 / 7 basis.

Local language support is available during local business hours in the following languages:

- Arabic, Cantonese, French, German, Greek, Indonesian Bahasa, Italian, Japanese, Korean, Malay, Mandarin, Polish, Portuguese, Russian, Spanish

Resolver groups

LSEG resolver groups are used when a data issue needs escalation for further investigation. They will deliver support in English only.

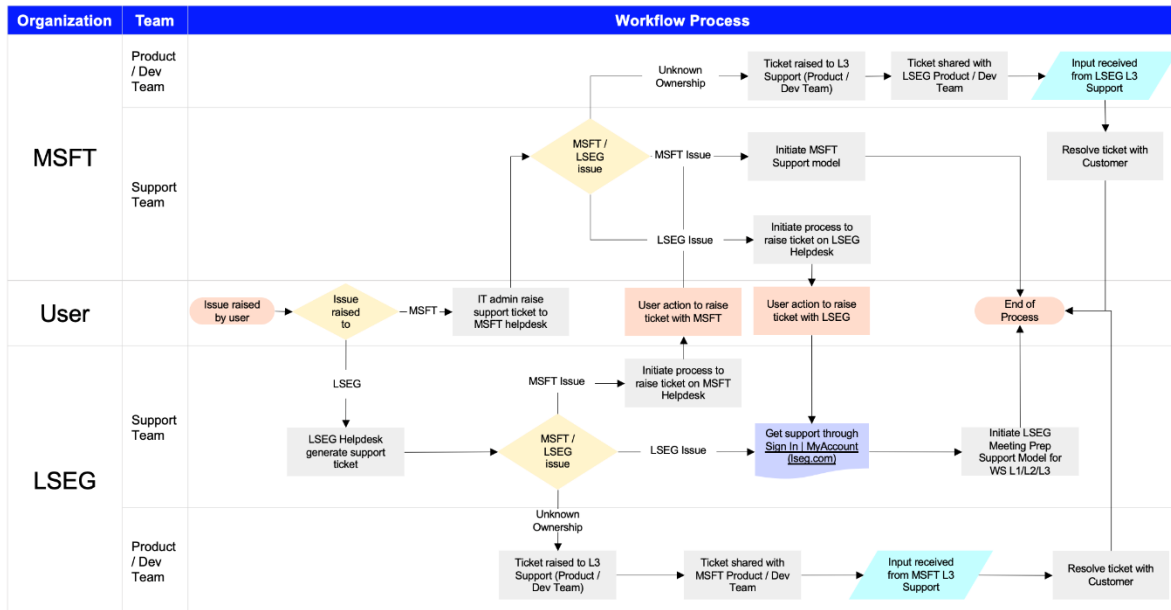
Training and documentation

Meeting Prep is a Microsoft product; therefore users can access training and documentation on their website [here](#).

Relevant documentation on LSEG data within Meeting Prep can be found on the [Workspace section](#) of the authenticated website.

Support model

The flowchart below sets out the support model for Meeting Prep:



Service level targets and description

To ensure that LSEG is doing everything we can to meet or exceed our customers' expectations, we have set the below target response times for contacting LSEG Support:

Channel	Target response time
Live Chat	Within one minute
Email	Within 60 minutes
Global contact phone numbers	Within 20 minutes
MyAccount	Within 60 minutes

Feedback and continuous improvement

LSEG is committed to continuously improving its products and support. After interacting with LSEG data in Meeting Prep, or with an employee of LSEG, customers may receive an opportunity to either give their feedback or to learn more, either in-product or by email.