LSEG Workspace | Teams

Teams with Open Directory User Guide



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About this document

This document describes the main features of LSEG Workspace for Teams with Open Directory, which offers an immersive LSEG Workspace experience in Microsoft Teams, enabling the discovery of people and content.

In this guide

The purpose of this document is to inform users about the main features of LSEG Workspace for Teams with Open Directory, including how to access and utilise these features in order to get the most out of the product.

Intended readership

LSEG Workspace users using the LSEG Workspace application on Microsoft Teams.

Further information

To:

- Request product assistance, contact <u>Support</u>.
- Access other LSEG Workspace technical content, see the Workspace technical documentation site.
- Provide feedback on Workspace technical content, contact <u>DocFeedback@lseg.com</u>.

Overview

This section provides a general overview of:

- The LSEG Workspace for Teams app, and
- Open Directory

LSEG Workspace for Teams

LSEG provides a comprehensive Workspace Teams experience, allowing users to:

- Discover financial content
- Interop seamlessly back to Workspace
- Share Workspace content
- Discover and collaborate with their community in Microsoft Teams
- Access to data and features in the app will be driven by user's LSEG entitlements.

The application provides Workspace users with immediate access to an additional workflow tool that combines the best of LSEG's innovation and partnership with MSFT with their existing Workspace license.



Open Directory

Open Directory, accessable through the LSEG Workspace for Teams app, provides bilateral compliant chat and collaboration for all financial services professionals.

Today, LSEG Workspace users can choose solutiion providers based on criteria such as quality of financial data and user experience. However, they are constrained in these choices by closed chat networks that are integrated into their workflow solutions.

With LSEG Open Directory, users can discover, chat and collaborate with other financial services professionals over Microsoft Teams, enabling cross-firm workflows.



Features overview

This section provides detail on the features provided by:

- Discover Workspace, and
- Open Directory

Discover Workspace

Discover Workspace includes:

- Equities and Bonds (within the native Teams search)
- Reuters Top News (in the homepage and chat interfaces)
- Deal League Table (n the homepage and chat interfaces)
- Links to Workspace apps

Open Directory

Open Directory provides users with the ability to:

- Discover internal and external professionals in the Open Directory and Native Teams search
- <u>Chat to users from the Directory via the native Teams chat</u>
- Add users to their Directory contacts list
- <u>Create groups</u>
- Send blast messages
- <u>Customise their LSEG Workspace Teams profile via Microsoft account or LSEG account</u>
- Edit their profile

Sharing between Workspace and Teams

LSEG Workspace for Teams with Open Directory provides the ability to share Workspace apps with Microsoft Teams users; furthermore, additional apps can be requested through Teams.

Installing the LSEG Workspace for Teams application

Adding LSEG Workspace for Teams to Microsoft Teams

To enhance productivity and streamline your workflow, after you have been appropriately permissioned you can add the Workspace Teams application to your Microsoft Teams environment.

To add LSEG Workspace for Teams to Microsoft Teams:

- 1. Launch Microsoft Teams application on your device.
- 2. Click the Apps icon 1 in the bottom left-hand side of the screen.



30k 30k Cornet	Apps	Search results for "LSEG Workspace"	
(m) Chit	LSEG Workspace \times	Apps (20)	₩ Filter
Q. Activity	🗄 Apps	LSEG Workspace % Open	CSM Team Open
85 Teams	Q. Search for apps	sover, connect and collaborate with clients, colleagues,	Access company knowledge with our LSEG chatbot in Teams.
Wva Engage	A 5	it for your org	(Built for your org
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	LSEG Workspace Copilot for Sales Workf	Titan Workspace Request Adapt Software India Pvt. Ltd.	Meetings Workspace Request Southveyr Solutions
Aces	& <mark>\$</mark>	ital workplace and collaboration platform built for Micr 5.0 (1 rating)	Meetings Workspace that brings everything you need toge ★ 3.0 (2 ratings)
	Approvals LSEG Chatbot LSEG	A munication (Project management)	Comunication (Productivity)
	Get more	Splashtop Secure Workspace	- Boards Lite

5. A detailed overview of the application and its permissions will be displayed. Review and click the **Add** button 4 again to proceed.

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COD Teams	Built for your o	Overview Permissions	SEG chatbot in Teams.
~	Featured		
Viva Engage	Agents	Discover, connect and collaborate with clients, colleagues, and peers	
	Categories	Connect with over 350,000 financial service professionals across multiple firms and organisations using Al-assisted discoverability. Find people with similar roles, at specific organisations or in particular sectors and industries.	Request
Calendar	Education	You can also access Workspace content and data, organise your contacts into groups, and easily send blast messages	
C	Productivity	to individuals and groups. Blast messages are a time-saving way to send the same message, as a 1-1 conversation, to multiple people or groups at the same time.	our scheduling nee
Calls	Project manag	Plus use bot commands to quickly carry out tasks like creating league tables, finding users, or retrieving the latest	
	Utilities	news.	
OneDrive	Social	Please note that whilst using this App, users from companies other than LSEG, will also be able to see the	
	Communicatic	information you choose to make public and will be able to contact you via this App. By continuing, you agree to your nersonal information being used in line with our privacy statement. Please avoid disclosing sensitive personal	Request
	See more	information whilst using this app.	thing you need toge
•	Industries	For the use of LSEG Interactive Services, please review LSEG's Code of Interactive Services	
Apps	Distribution	Disclaimer	
	Distribution		
	🙀 Manage your	By using LSEG Workspace, you agree to the privacy policy, terms of use, and permissions.	

- 6. A message will appear confirming that the application has been added successfully. Close the window.
- 7. Click the menu above the Apps section and select View more apps.
- 8. Click the LSEG Workspace application. The LSEG Workspace Teams app will open within your Microsoft Teams application, and the LSEG Workspace logo 5 will also appear in the left-hand panel.

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N.E n.e Connect	Set LSEG Workspace Home Chat I	Discovery Contacts Profile	T Present now
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Activity COS Teams			
Viva Engape Calendar	Insights Use generative AI to easily access LSEG data, Generate league tables, learn the latest Open in new window About	news, and tools Connect, that and collabor policy changes I across the globe. Ind classifications Send time saving 'bi from your contacts	rate with over 350,000 financial professionals from
LSEG Works	Share app Block bot conversation Pin 6 Uninstall	Discover contacts	
+ Apps	Mexico wins one-month tariff	exemption; nothing yet for Canada	tes again but risk of April pause growing 1 hour ago

9. Right-click the LSEG Workspace logo and select **Pin 6** to add it to your side panel for easy access.

Accessing Workspace Teams features

This section describes how to access LSEG Workspace features on Microsoft Teams.

Discovery using the native Teams search

Searching for equity and bond content

To discover entities and bonds content in the native Teams search:

- 1. Type '/LSEG Workspace' in the Teams search bar.
- 2. Select LSEG Workspace from the drop down list.
- 3. Select **Data Search 1** from the drop down list.
- 4. Search for any equity or bond, as you like 2.
- * You can also share this content with a colleague by clicking the Copy button 3 and pasting it into a Microsoft Teams chat.

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(=) Chat		▼ 228.9800 USD -6.3300 -2.690%
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ະຕິງ ∎ams	 Al⁺ Insights Use generative AI to easily ac 	31-Dec-2024 LTM FY1
Viva Engage	Generate league tables,	EV 258.668 USD EV to Sales 4.12 3.98 Market Cap 218.198 USD EV to EBITDA 16.01 15.17
Calendar	 Visualise company data 	Beta 0.01 PE 22,78 21.99 WACC 6.03 EPS 10.33 10.70
•••		View In LSEG Workspace
+	Coming soon	Overview News & Research Price & Chart

Searching for internal and external professionals in the Directory

To discover internal and external professionals in the Directory through the native Teams search:

- 1. Type '/LSEG Workspace' in the Teams search bar.
- 2. Select **LSEG Workspace** from the drop down list.
- 3. Select **People Search** from the drop down list.
- 4. Search for any user, as you like \bigcirc .
- ★ You can watch the video of this procedure <u>here</u>.

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Accessing Reuters Top News

Discovering Reuters Top News in the homepage

To discover Reuters Top News in the homepage:

- 1. Add or open the application, then click the **Home 1** tab.
- 2. Scroll to the **Top News 2** section.

VS LSEG Workspace Home Chat Open Directory Profile Visualise company data, quickly find fund classifications Coming soon	Present now form your contacts Discover contacts
Cop News C US calls China escalation a 'big mistake' as tariff war rages Or Adves 1 hour age AVALVSIS-Tariff-driven Wall Street pain sparks investors to weigh more gloomy scenarios Or Adves 4 hour age BEAKINGVIEWS-Texas market bulls run into ferodous bear case Or Adves 4 hour age US more in Workspace C	ULS STOCKS SNAPSHOT-Wall Street opens sharply higher on hopes of tariff talks Constraints ago AVALVSIS-Limited options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options push China into trade 'war of attrition' with Trump Constraints' Available options' Available options' attrition' with Trump Constraints' Available options' Available options' attrition' with Trump Constraints' Available options' Available options' attrition' attri
Suggested contacts AA Argenberg, Alexander Lord Abbett Head of Workplace Technology	Scarpa Domenico ENE. (LORAL SERVICES S.R.L. GECM DEMAND & ADOPTION

Discovering Reuters Top News in the chat interfaces

To discover Reuters Top News in the chat interfaces:

- 1. Navigate to the **Chat** tab **3**.
- 2. Click View prompts 4.

3. Select Show me Reuters Top News 5.

WS LSEG Workspace Home	Chat Open Directory Profile	1 Present now •••
WS LSEG Workspace Home	Chat Open Directory Profile 3 LSEG Workspace 2/6 2/41 PM Edited Reuters Top News - Front Page US judge blocks Trump buyout offer for government workers until at least Monday © Reuters 21 minutes ago Bessent's focus on 10-year US Treasury yield may bet Sef of the banks	Present now 2/6 2:41 PM Show me Reuters Top News ⊙
	Ict Fed off the hook Image: Strategy of the hook <	Prompt Suggestions from LSEG Workspace Show me Reuters Top News View the latest Top News curated by Reuters Open the league table for Deals Create your league table with Workspace deals data Equity quick view for LSEG.L Get a quick view of public companies Bond quick view of DS10YT=RR Get a quick view of bonds How can Workspace help? 4
	Type a message	How can Workspace help? □ View prompts A₂ ⋮> D₂ ⋮> D₂ ⋮>

★ To add Reuters Top News to a pre-existing chat with another user, add Workspace by typing '@LSEG Workspace' 6.



Workspace Chat tools

Accessing the Deals league table

To access the Deals league table:

- 1. Navigate to the **Chat** tab.
- 2. Click View prompts 1 and select Open the league tables for deals 2.

	iouay	
	6	10:0
	•	Open the league table for Dea
	Last read	
SEG Workspace 10:09 AM		
Create a league table		
Workspace league tables provide aggregated deals of count, and year-over-year analytics. Table type	lata with ranking, market share, deal	
Select an Option	~	
Time period		
Select an Option	~	
Number of rows		
Select an Option	~	
Create table		
Create table		1 View promp

Accessing or sharing Workspace links

To access or share Workspace links, type: 'RIC <space> App short code' into:

- The Workspace app chat, or
- A pre-existing chat with another user after adding Workspace by typing '@LSEG Workspace'.



Sharing Workspace applications to Teams

To share applications with 'deep links' (in other words, sharing the specific location and/or application, rather than simply a 'parent' URL) from Workspace to Teams:

- 1. Open Workspace and navigate to the application you want to share.
- 2. Right-click the app or click the App menu at the top right-hand corner.
- 3. Select Share via MS Teams in the SHARE & EXPORT section 1.
- 4. If prompted by a pop-up window, log in to your MSFT Teams account.
- 5. Search for and select the Teams recipient(s) or group in the pop-up module below.

Share via MS Teams	×
Add a recipient	Q
Add optional message	2
(i) The recipient may not able to see the same content due to access perm	nissions SHARE CANCEL

6. Add your message and click SHARE 2.



Discovering and connecting with financial professionals Discovering professionals in the Directory

To discover professionals in the Directory:

- 1. Click the Open Directory tab.
- 2. Click a user's picture / card to view their profile.



To search for professionals in Workspace Teams Open Directory:

- 1. Navigate to the search bar in the LSEG Workspace Open Directory tab.
- 2. Type in the name of the user you are searching for $\mathbf{0}$.



Chatting and collaborating with professionals in the Directory

To chat and collaborate with professionals in the Directory:

- 1. Locate the user you would like to contact.
- 2. Click the **Chat** icon **1** on the user's card to start a chat in the native Teams Chat.



Growing your financial network through contacts and groups

Adding users to your Directory contacts list

Note that this procedure only adds them to your Directory contacts. It does not guarantee that you are connected. External users must still accept your connection / message to enable this connection.

To add a user to your Directory contacts list:

- 1. Find the user you would like to add to your contacts list.
- 2. Click the Add to your contacts 1 button.



3. Click **Confirm ?** to add this user to your contacts list.

People with	n similar roles			
	Braslasi Refinitiv Product N Add to your contacts Add "Braslasu, Bogdan" (bogdan.	praslasu@lseg.com) to your contacts	-	D'Jelal, Nej Refinitiv Group Head of Workspace Platform, Data &
<i>©</i> 20		Close Confirm	e e	
ND	Nej D'Jelal Refinitiv Other Corporate Functions	Reichenbach, Stefan Refinitiv Group Head of Commercial Strategy and Op		
	External	© 26		

Deleting users from your Directory contacts list

To delete a user from your Directory contacts list:

- 1. From the left hand menu in Open Directory tab, click the **My Contacts** button **1**.
- 2. Select the user's name 2.
- 3. Click Delete contacts 3.



Creating a group and adding contacts

Adding a group

To create a group:

- 1. In the Open Directory tab in LSEG Workspace, click Create Group.
- 2. Type a group name, and click **Confirm 1**.

Card view	~	Search for financial professionals by name or company	
People wi	th similar roles		
P ,	Create group		
0 4	Group name	Close Confirm	ک ک
ND	Nej D'Jelal	Reichenbach, Stefan	

Your new group will appear in the **My Groups** tab in the left hand menu **2**.



Adding contacts to a group

To add contacts to a group:

- 1. Navigate to **My Contacts 3** in the left panel.
- 2. Select the contacts that you want to add to a group.
- 3. Click Add to group 4 in the top bar.
- 4. Select the group from the dropdown list and click **Confirm 5**.

ws	LSEG Workspace	Hor	ne Chat Open Directo	ory Profile			1 Present r	ow ••	••
≡	Create group	Q1 B	last message 🛛 🖧 Ac	ld to group 🛛 🗞 Delete co	intacts				
۵ ۲	Open Directory members My contacts		My contacts 1 contact						
87	Nhu arauna		Name 个		Company		Role		
L :	My groups	Ň	🔽 🦓 Braslasu, B	logdan	Refinitiv		Product Manager - Platform, Workspace		
			1	Add to group Traders	Close ca	nfirm			

Only existing contacts can be added, and only to existing groups.

Editing group names

To edit a group name:

- 1. Navigate to the group you would like to edit.
- 2. Click Edit group name 6 in the top bar.
- 3. Type the new name that you would like to call this group earrow
 earrow

Home Chat Open Directory Profile

Trac	lers												
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				Ec	dit gro	up nan e	ne	Traders	. 7)			

4. Click Save.

Removing users from a group

To remove a user from a group:

- 1. Select the name of the user in your group you would like to remove.
- 2. Click **Delete group members (3)** in the top bar.
- 3. Confirm the deletion by clicking **Delete** 9.



Sending blast messages

Blast messages are messages that will be available in users' native Teams chat.

To send a blast message:

- 1. In the **Open Directory** tab in LSEG Workspace Teams, enter the **Name of the Blast 1**, that being, the title of your blast message.
- 2. Select the users (from your contacts) or groups 🕑 to whom you want to send your blast message.
- 3. Add the blast text that you would like to send 3.
- 4. Click Send 4.



Managing your profile

Editing your Microsoft or LSEG profile

To select the profile that you want to edit:

- 1. Click the Profile tab in LSEG Workspace Teams and click the edit / pen icon in the top-most profile section.
- 2. Select your Microsoft or Workspace profile and click **Save 1**.

1
rkspace

To customise your profile:

- 1. Navigate to the **Profile** tab on LSEG Workspace Teams.
- 2. Click the edit / pen icon in the section you want to customise. In the example here, the section is 'Add work experience'.
- 3. Add your details and click **Save 2**.

Product Manager			
Company			
London Stock Exchange	Group PLC		~
Country		City	
United States		New York City	
Currently working in Start date	this role \checkmark	Year	~
Currently working in Start date	this role \checkmark	Year	~
Currently working in Start date Month End date	this role	Year	~
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