

# LSEG Workspace | Teams

Teams with Open Directory User Guide



**LSEG** DATA &  
ANALYTICS

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

# Overview

This section provides a general overview of:

- The [LSEG Workspace for Teams app](#), and
- Open Directory

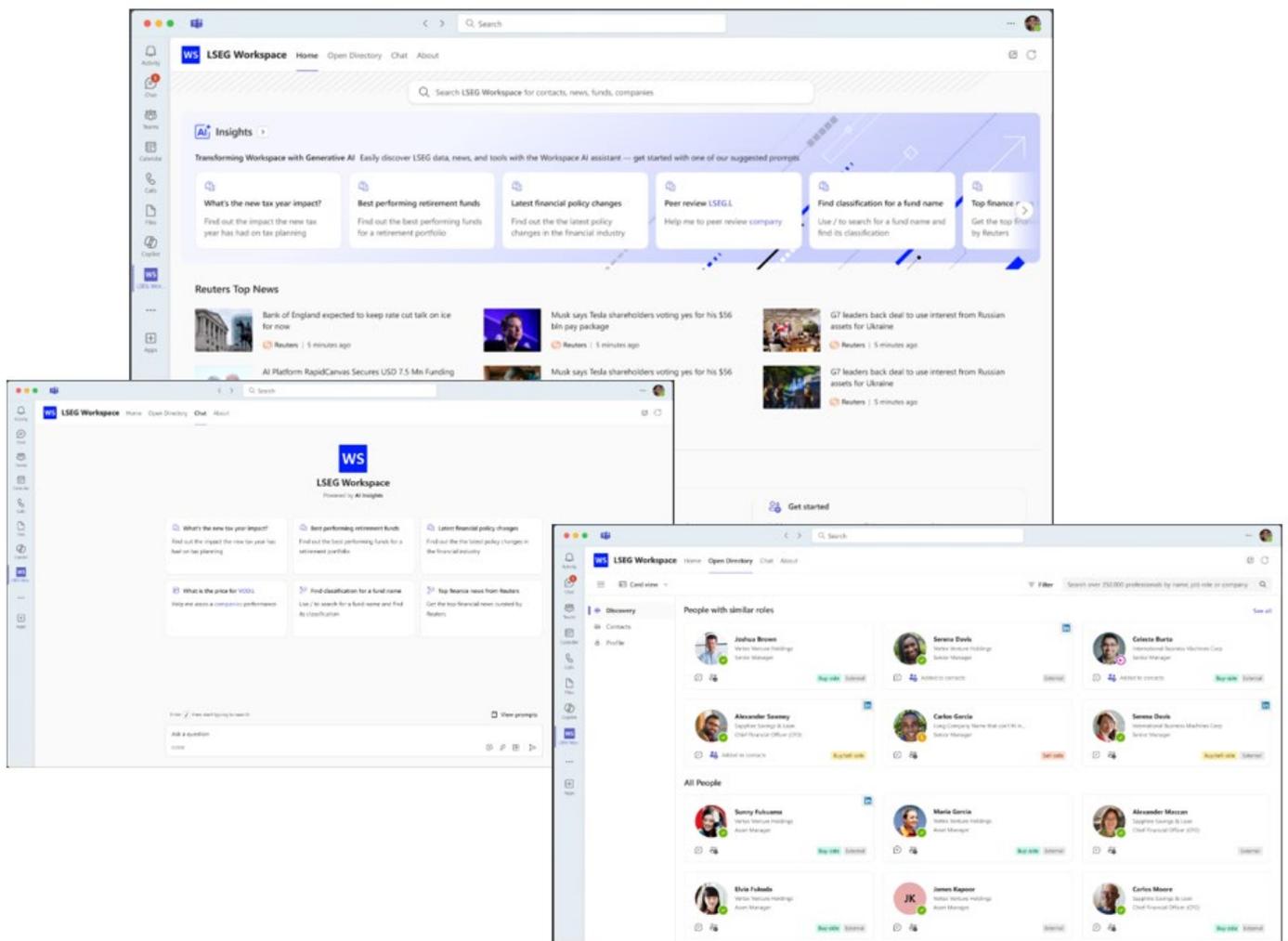
## LSEG Workspace for Teams

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.

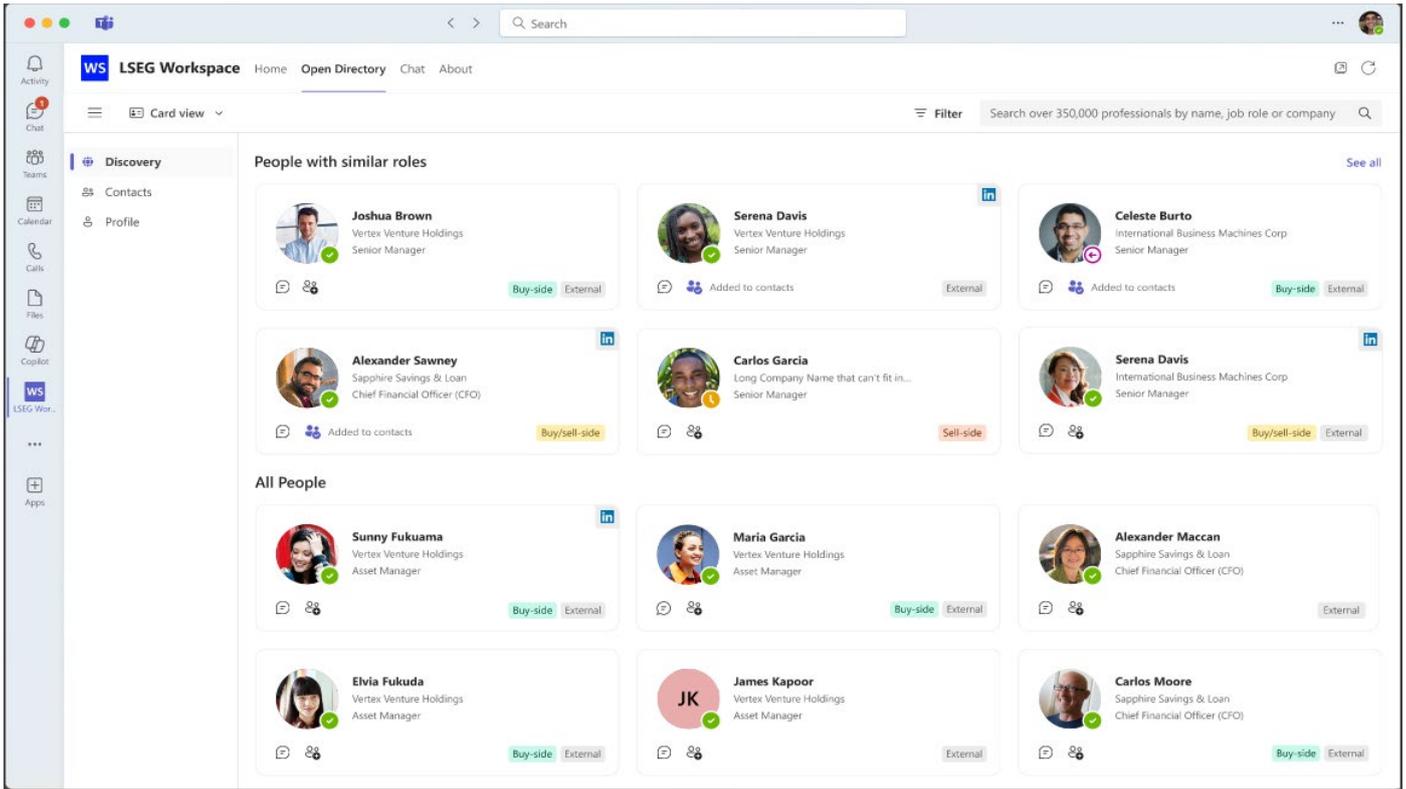


# Open Directory

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

Today, LSEG Workspace users can choose solution 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 (in 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](#)
- [Chat to users from the Directory via the native Teams chat](#)
- [Add users to their Directory contacts list](#)
- [Create groups](#)
- [Send blast messages](#)
- [Customise their LSEG Workspace Teams profile via Microsoft account or LSEG account](#)
- [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.

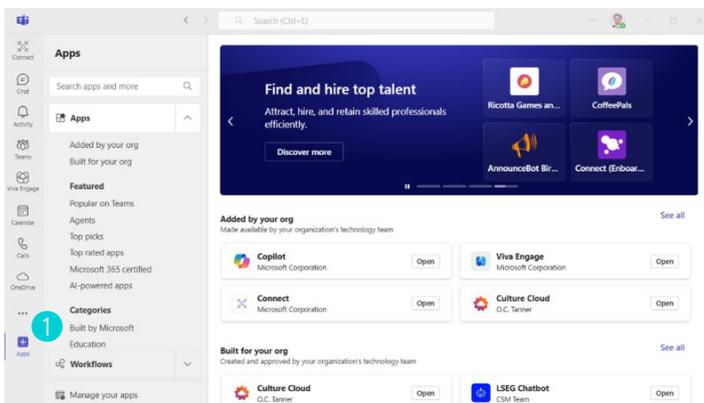
# Installing the LSEG Workspace for Teams application

## Adding LSEG Workspace for Teams to Microsoft Teams

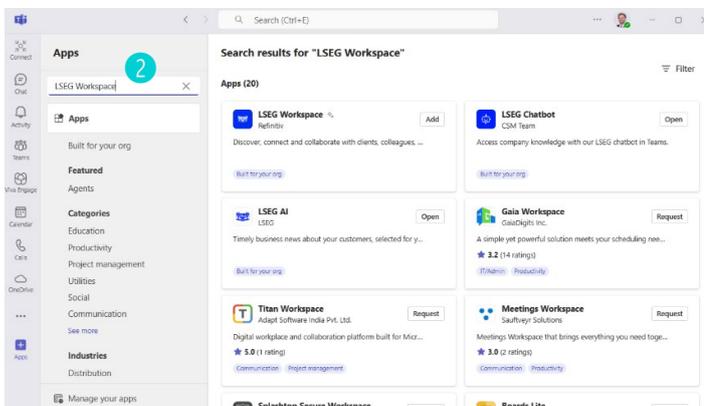
To enhance productivity and streamline your workflow, after you have been appropriately permissioned you can add the Workspace Teams application to your Microsoft Teams environment.

To add LSEG Workspace for Teams to Microsoft Teams:

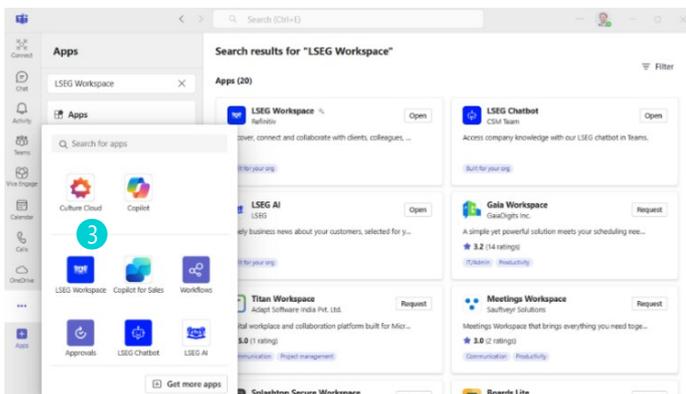
1. Launch Microsoft Teams application on your device.
2. Click the **Apps** icon <sup>1</sup> in the bottom left-hand side of the screen.



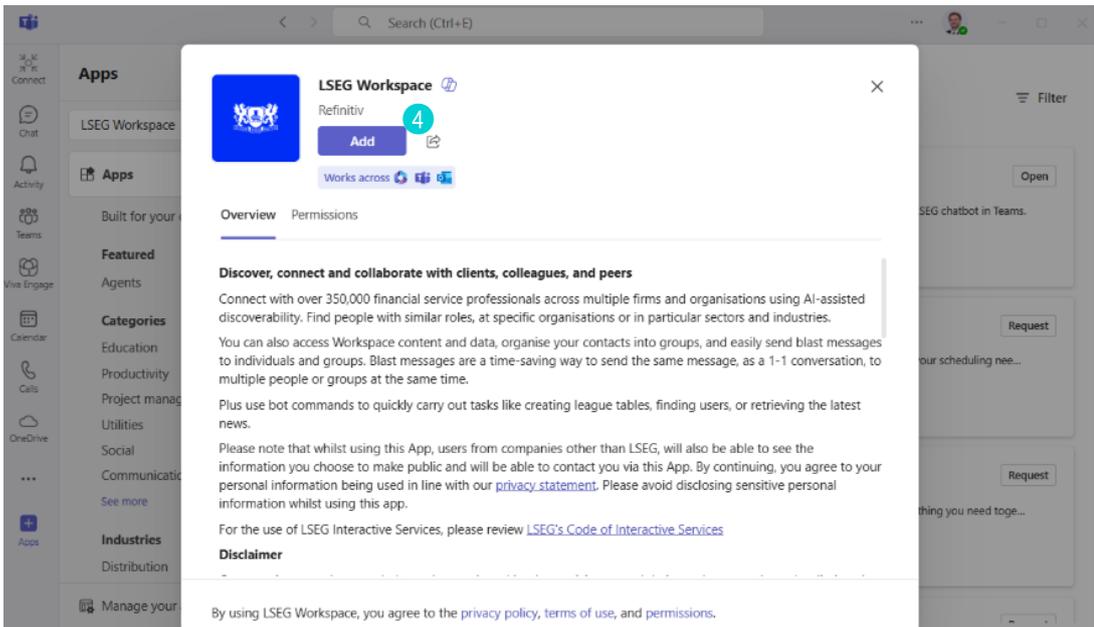
3. In the search bar on the left, type 'LSEG Workspace' <sup>2</sup>.



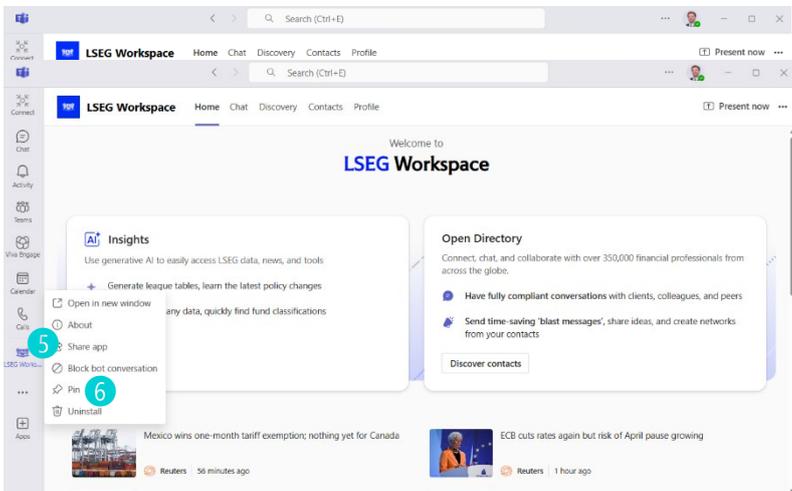
4. From the search results, find the LSEG Workspace application <sup>3</sup> and click **Add**.



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



- A message will appear confirming that the application has been added successfully. Close the window.
- Click the menu above the Apps section and select **View more apps**.
- 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.



- 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.

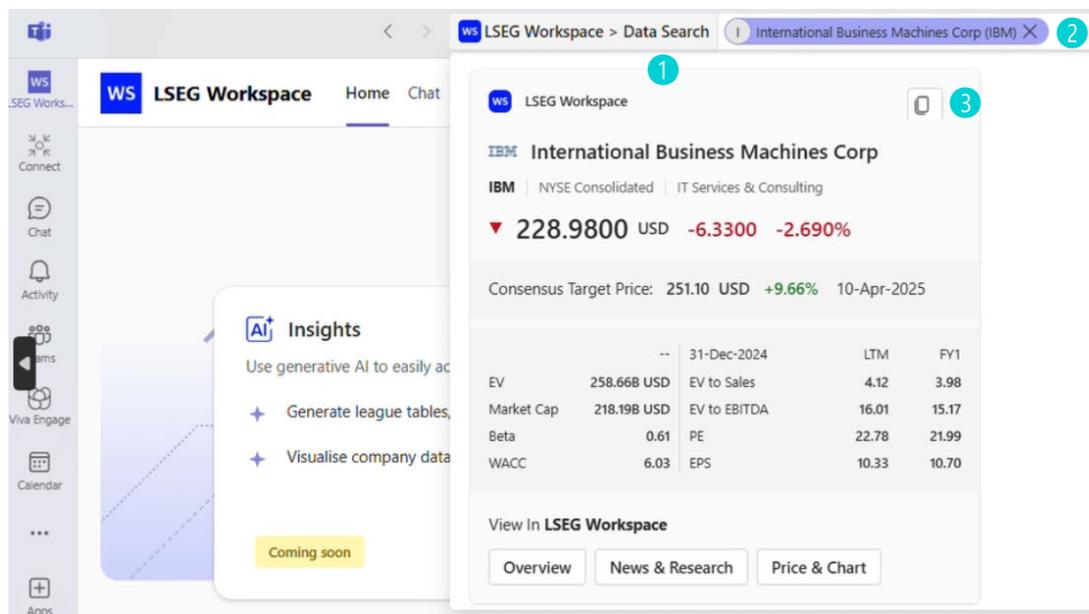
## Discovery using the native Teams search

### 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.

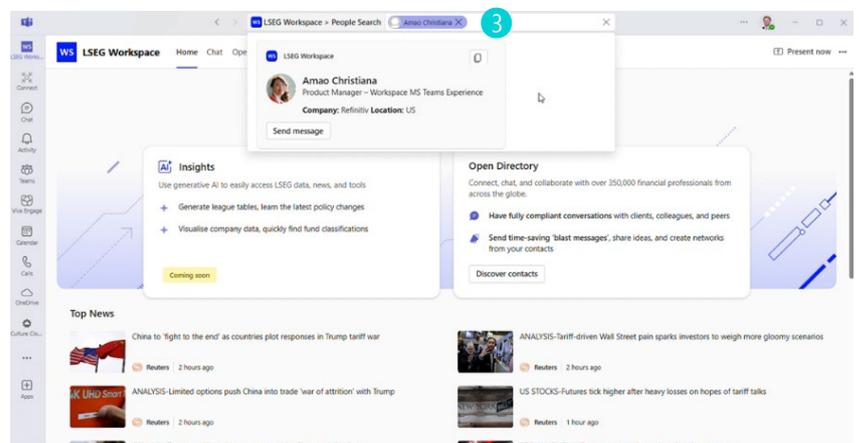


### Searching for internal and external professionals in the Directory

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 3.

★ You can watch the video of this procedure [here](#).

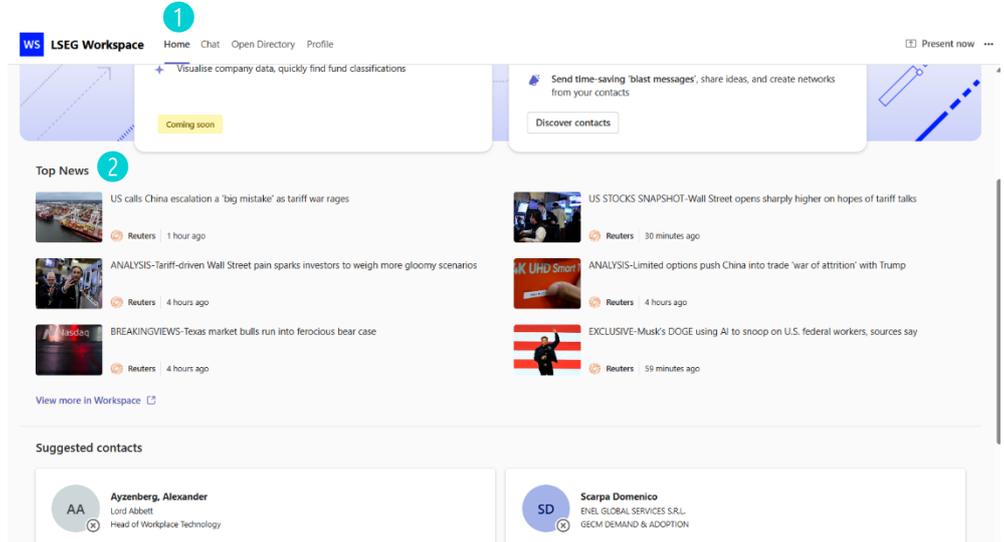


# Accessing Reuters Top News

## Discovering Reuters Top News in the homepage

To discover Reuters Top News in the homepage:

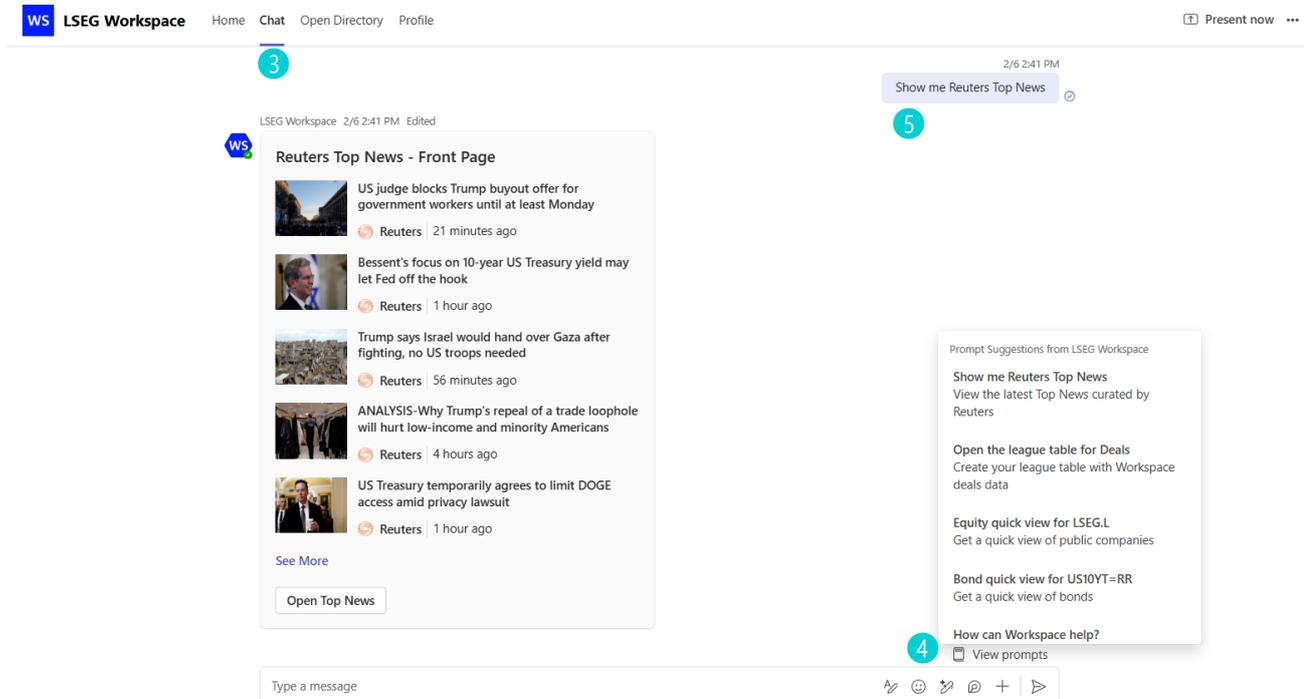
1. Add or open the application, then click the **Home** 1 tab.
2. Scroll to the **Top News** 2 section.



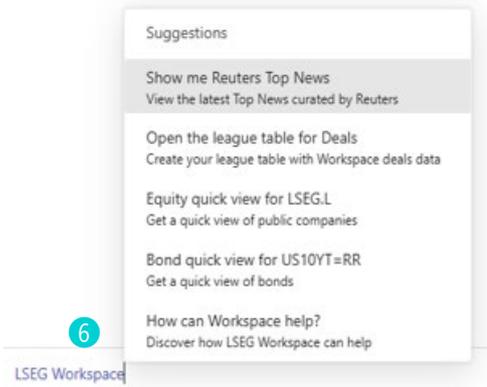
## Discovering Reuters Top News in the chat interfaces

To discover Reuters Top News in the chat interfaces:

1. Navigate to the **Chat** 3.
2. Click **View prompts** 4.
3. Select **Show me Reuters Top News** 5.



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

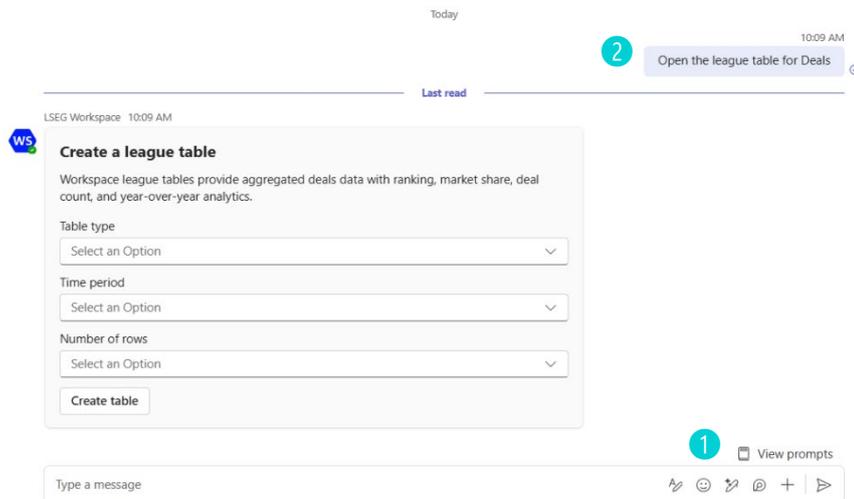


## Workspace Chat tools

### Accessing the Deals league table

To access the Deals league table:

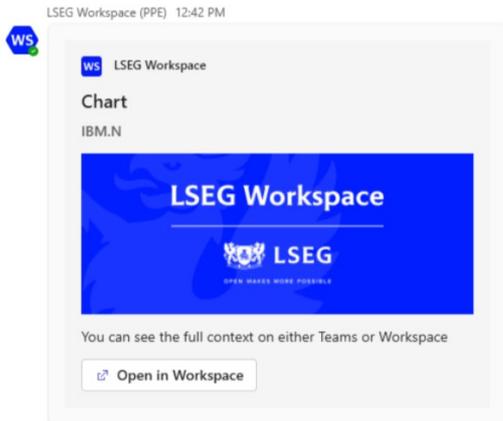
1. Navigate to the **Chat** tab.
2. Click **View prompts** **1** and select **Open the league tables for deals** **2**.



## Accessing or sharing Workspace links

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

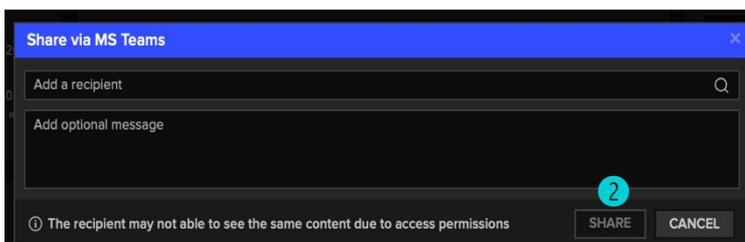
- The Workspace app chat, or
- A pre-existing chat with another user after adding Workspace by typing '@LSEG Workspace'.



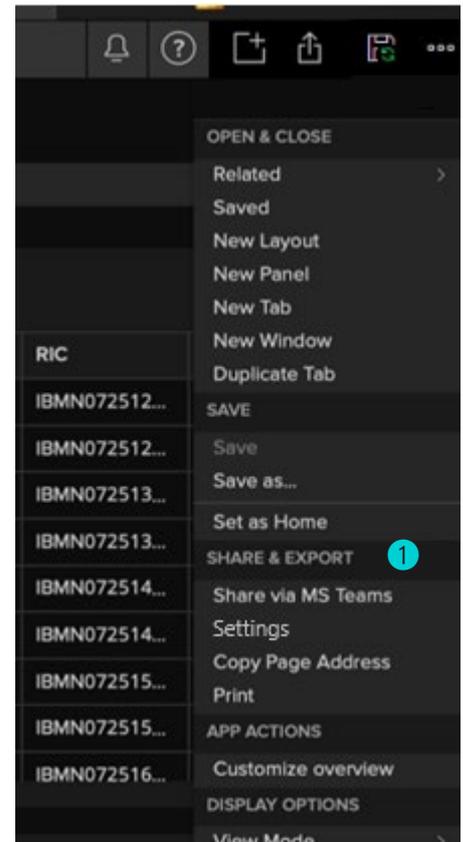
## Sharing Workspace applications to Teams

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.



6. Add your message and click **SHARE** ②.

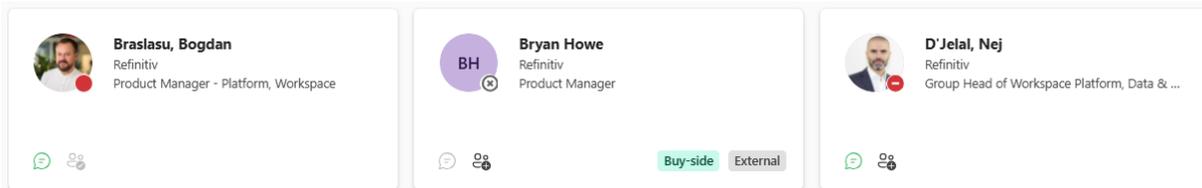


# Discovering and connecting with financial professionals

## Discovering professionals in the Directory

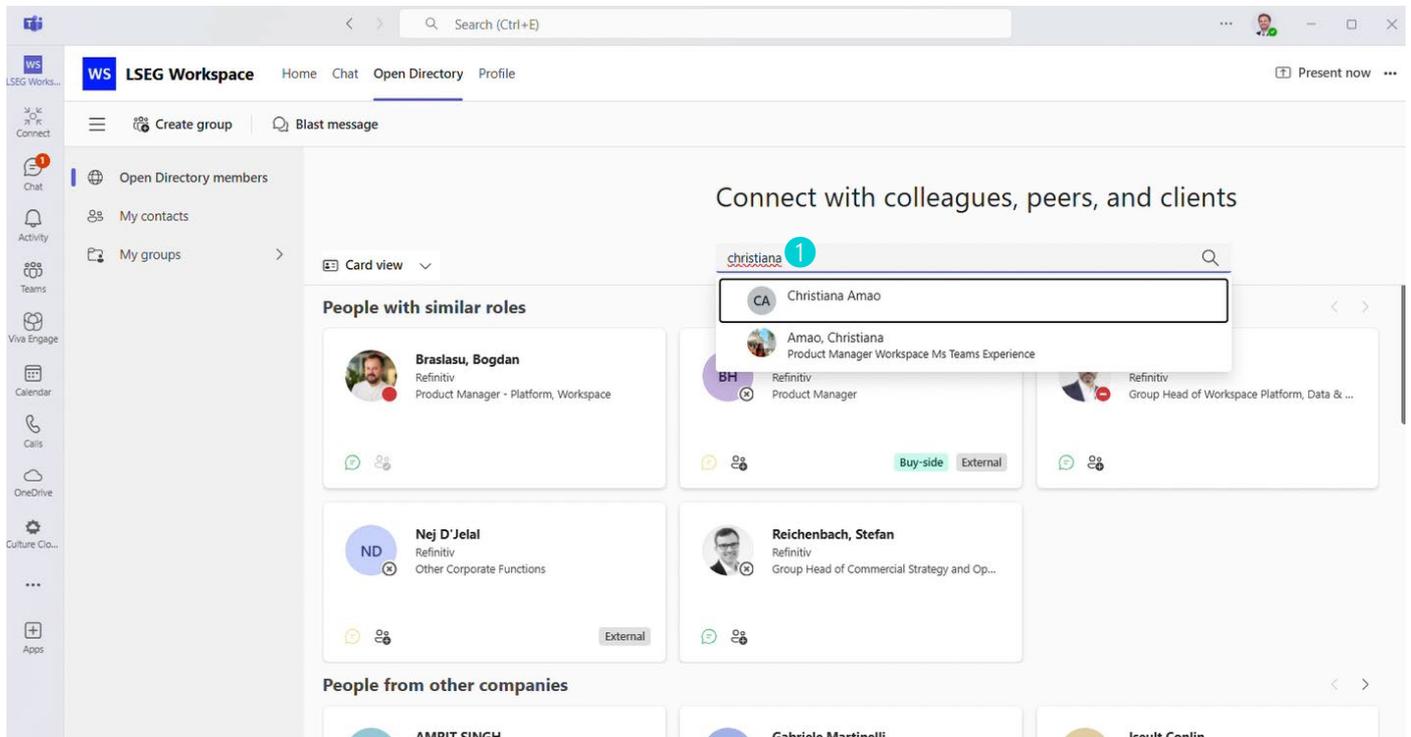
To discover professionals in the Directory:

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 <sup>1</sup>.



## 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.

The screenshot shows the 'Open Directory' page in LSEG Workspace. The top navigation bar includes 'Home', 'Chat', 'Open Directory', and 'Profile'. A 'Present now' button is visible in the top right. The main content area is titled 'Connect with colleagues, peers, and clients' and features a search bar for financial professionals. Below the search bar, there are three sections of profiles:

- People with similar roles:**
  - Braslasu, Bogdan** (Refinitiv, Product Manager - Platform, Worksp...): Has a chat icon with a red '1' next to it.
  - Bryan Howe** (Refinitiv, Product Manager): Labeled as 'Buy-side' and 'External'.
  - D'Jelal, Nej** (Refinitiv, Group Head of Workspace Platform, ...)
  - Nej D'Jelal** (Refinitiv, Other Corporate Functions): Labeled as 'External'.
  - Reichenbach, Stefan** (Refinitiv, Group Head of Commercial Strategy...)
- People from other companies:**
  - AMRIT SINGH** (Refinitiv)
  - Gabriele Martinelli** (Refinitiv)
  - Iseult Conlin** (Tradeweb Markets LLC)

3. Type your message into the resulting chat window **2**.

The screenshot shows a chat window for 'Braslasu, Bogdan'. At the top, there is a header with the name and a profile picture. Below the header is a large graphic of a speech bubble containing three colored dots (orange, blue, green). Underneath the graphic, the text reads: 'You're starting a new conversation' followed by 'Type your first message below.' At the bottom of the window, there is a text input field with a red '2' next to it, containing the placeholder text 'Type a message'.

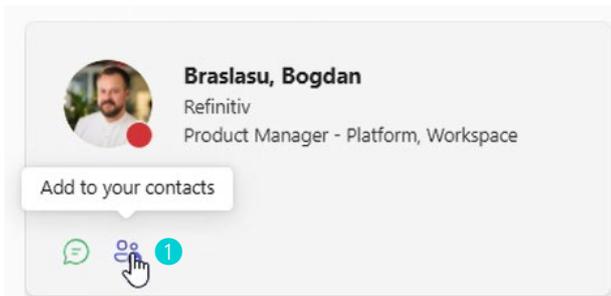
# Growing your financial network through contacts and groups

## Adding users to your Directory contacts list

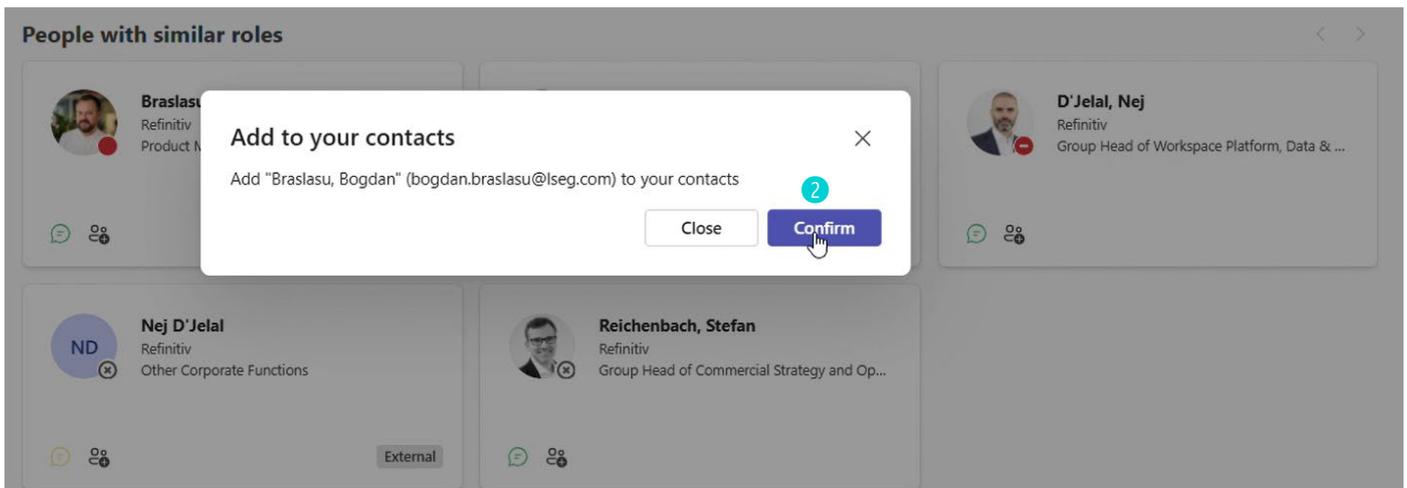
★ Note that this procedure only adds them to your Directory contacts. It does not guarantee that you are connected. External users must still accept your connection / message to enable this connection.

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.



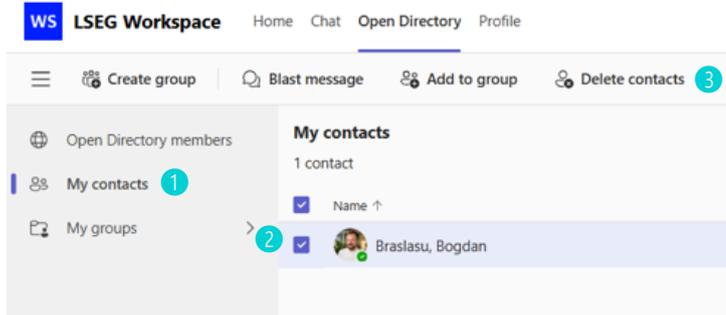
3. Click **Confirm** 2 to add this user to your contacts list.



## 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.

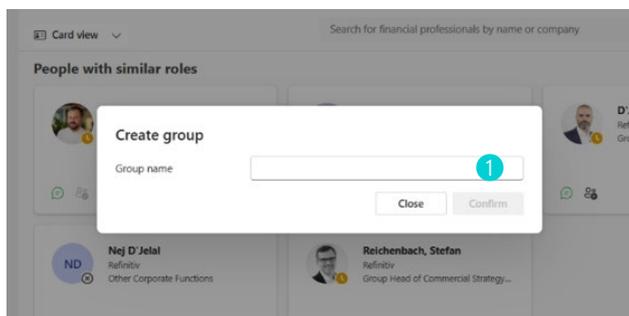


## Creating a group and adding contacts

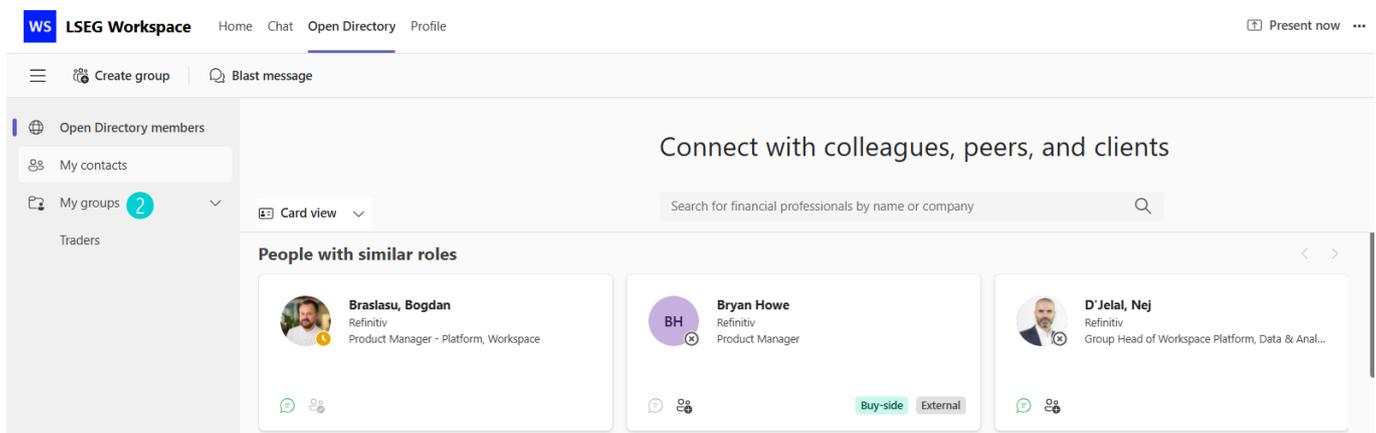
### Adding a group

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.



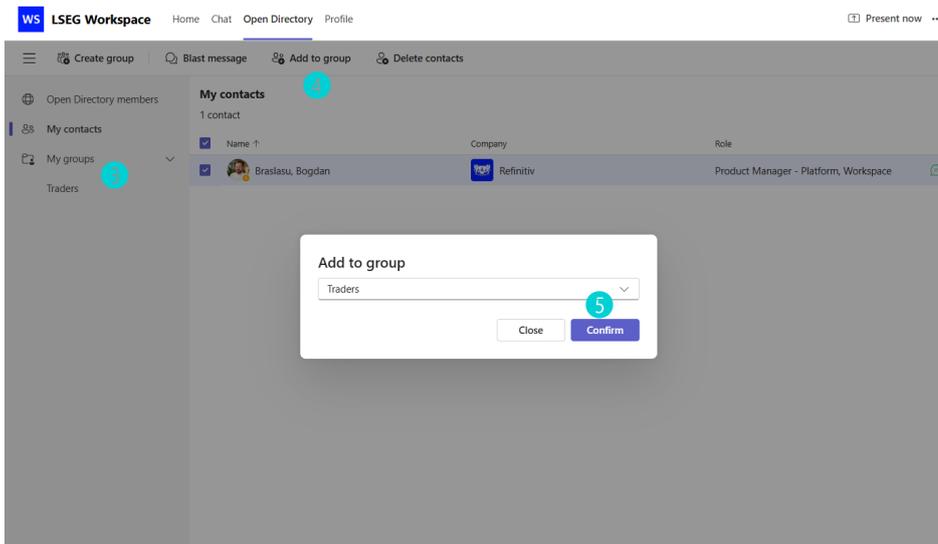
Your new group will appear in the **My Groups** tab in the left hand menu ②.



## Adding contacts to a group

To add contacts to a group:

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

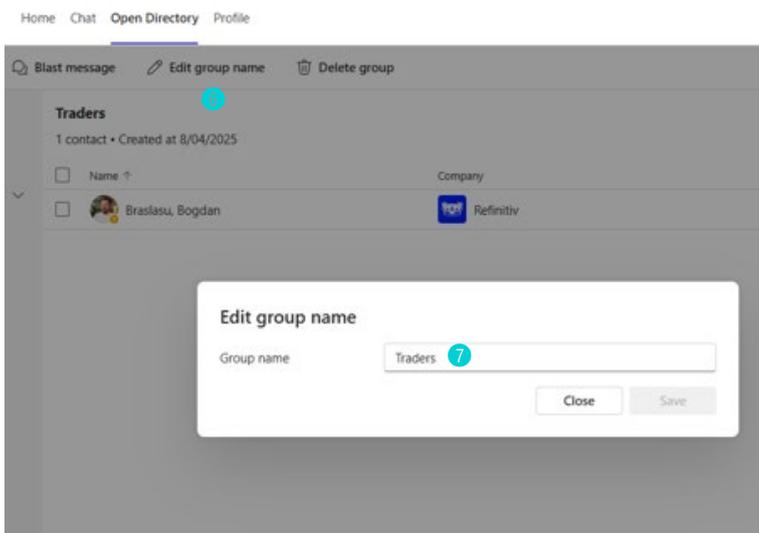


✦ Only existing contacts can be added, and only to existing groups.

## Editing group names

To edit a group name:

1. Navigate to the group you would like to edit.
2. Click **Edit group name** <sup>6</sup> in the top bar.
3. Type the new name that you would like to call this group <sup>7</sup>.

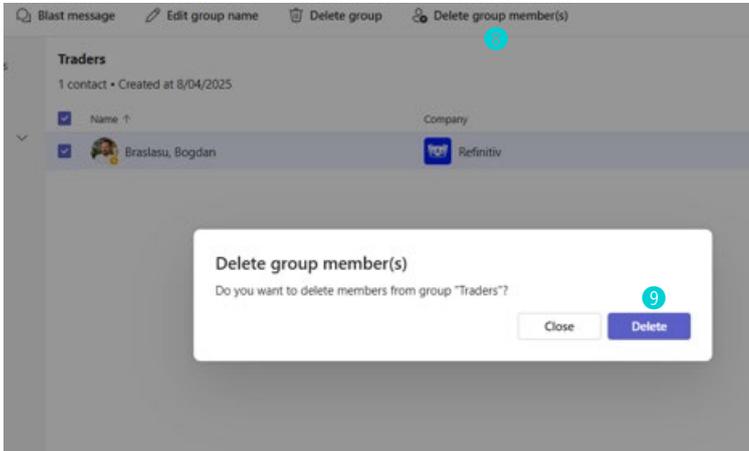


4. Click **Save**.

## 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** 8 in the top bar.
3. Confirm the deletion by clicking **Delete** 9.

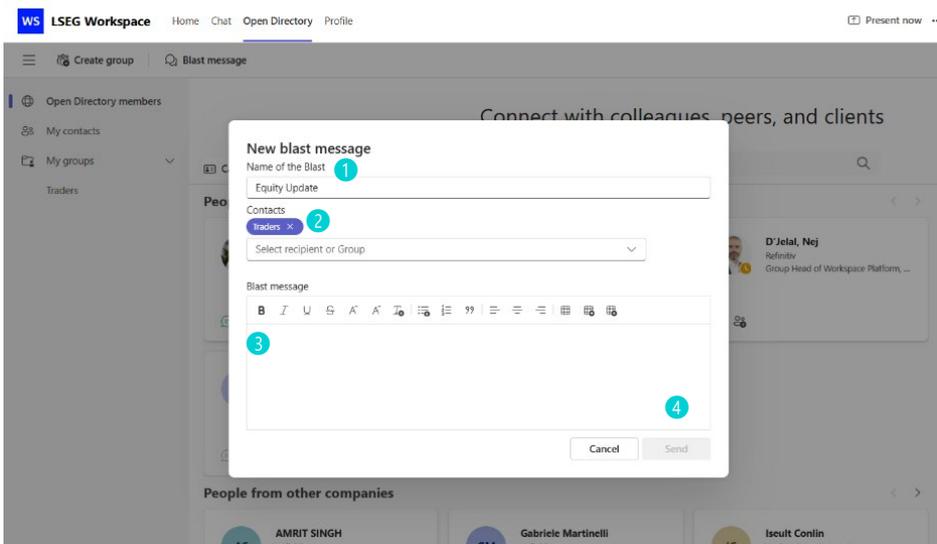


## Sending blast messages

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 2 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.

**Edit profile**

Microsoft profile  
**Howe, Bryan**  
 Product Manager, Collaborations Products  
 Managed from Microsoft account

LSEG Workspace profile  
**Bryan Howe**  
 Refinitiv Product Manager  
 Managed from LSEG Workspace

Location  
 New York - 28 Liberty Street

Email address  
 Bryan.Howe@lseg.com

Phone number  
 Not added yet

Work phone number  
 Not added yet

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.

**Add work experience**

Job title  
 Product Manager

Company  
 London Stock Exchange Group PLC

Country  
 United States

City  
 New York City

Currently working in this role

Start date  
 Month Year

End date  
 Month Year

Description (optional)  
 Type here

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