

LSEG WORKSPACE

ADMINISTRATION PANEL CONFIGURATION GUIDE



LSEG DATA &
ANALYTICS

Version history

Document version	Summary of Changes
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	<ul style="list-style-type: none">– Added the Configurations and File Version Management sections.– Minor textual changes throughout.– Updated the illustrations.
111.01	Initial version of the LSEG Workspace Administration Panel Configuration Guide

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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.

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:

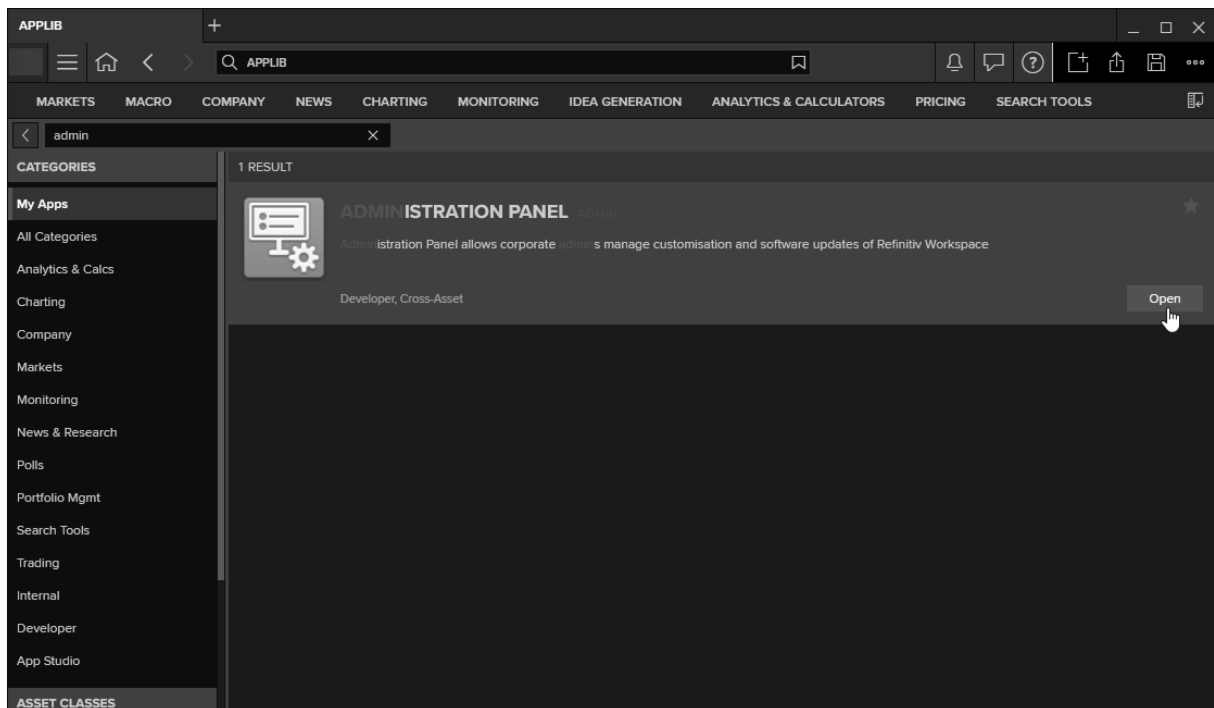
- Have multiple administrators within your organization, or
- Request LSEG to perform this role on your behalf.

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:

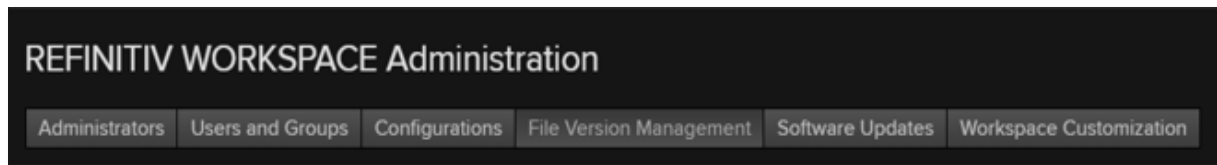
1. Select the App Library icon in the Workspace browser.
2. In the search box, type admin.
3. Click **Open** in the Administration Panel app block.



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:



Roles and groups matrix

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

Function	Customer	Refinitiv
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		

Where:

UP Ultimate Parent account

NLE Nearest Legal Entity

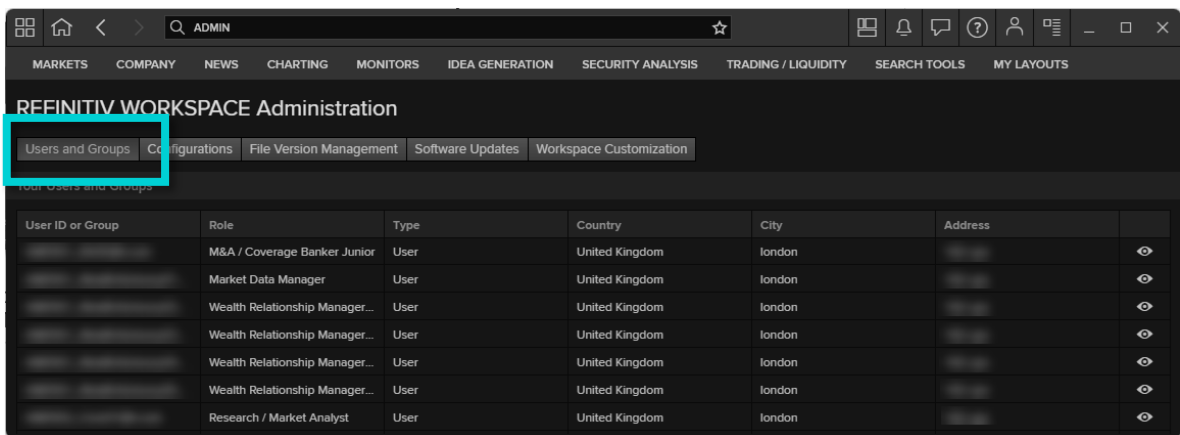
LA Location Account

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.

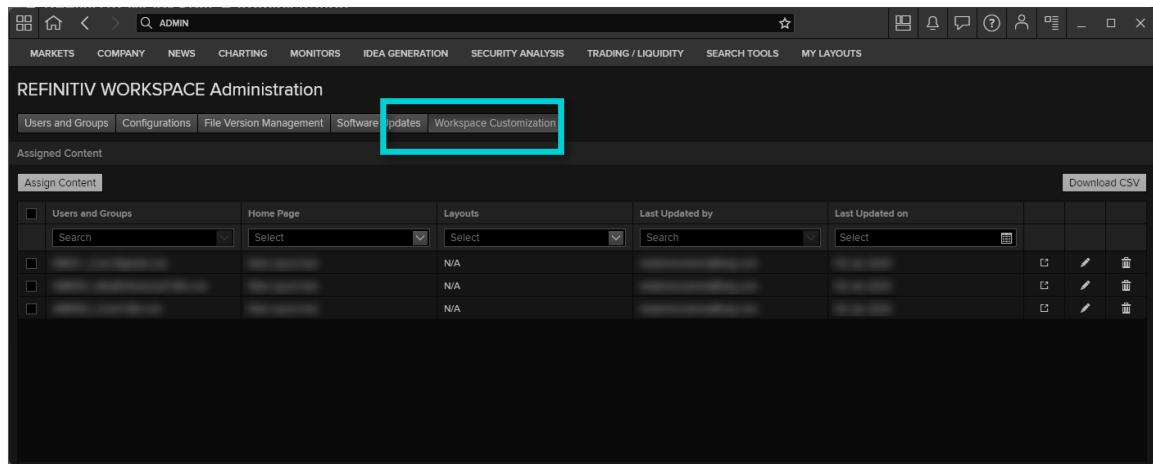
Users can change their home page at any time. However, they can revert to their administrator-set home page using the **My Layouts** menu.

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:

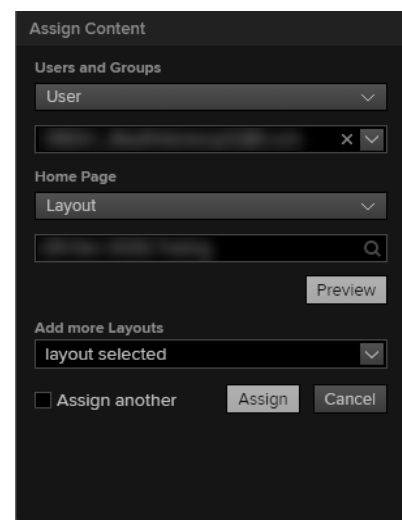
1. Click **Workspace Customization**.



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** or **Group**.
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. From 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 user or group can access from their My Layouts menu.
8. 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

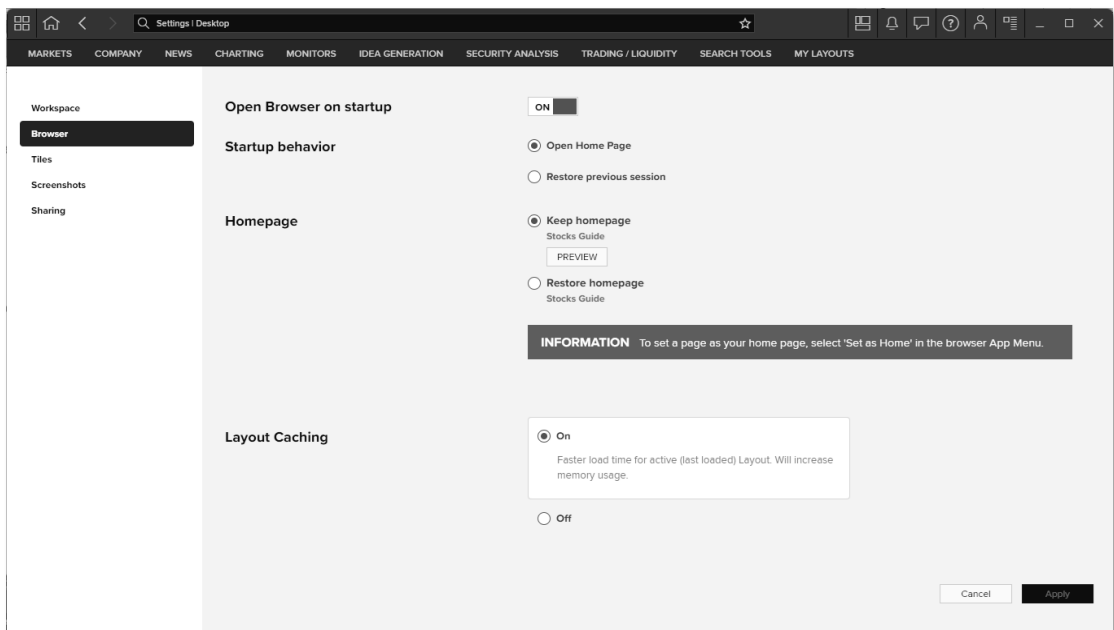
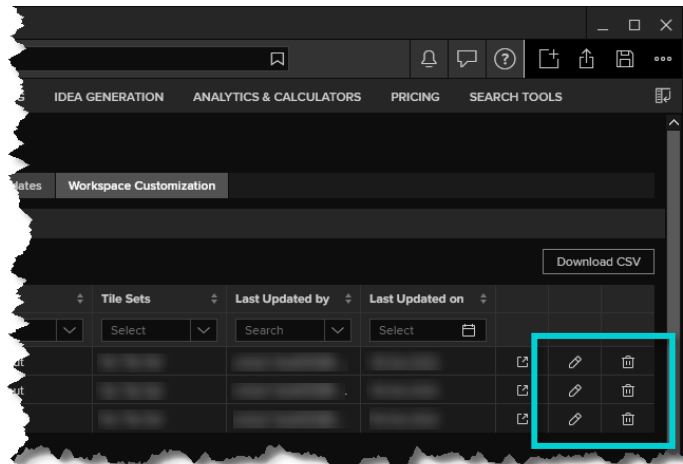
To remove or edit a user or group's home page:

- On the **Workspace Customization** screen, use the edit or delete icons adjacent to the user or group.

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

To revert to the administrator-defined home page, do the following:

1. Click the avatar menu icon.
2. For:
 - Workspace desktop access (see illustration below):
 - a. Under the **Settings** option, select the **Desktop** icon.
 - b. Click the **Browser** menu.
 - c. Under Homepage, select **Restore homepage**.
 - d. Click **Apply**.



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, ClientUId, UP	
Location, ClientNLEId, NLE	
LocationByEmail, john.doe@lseg.com, LA	DATA
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, ClientUId, UP	
Location, ClientNLEId, NLE	
LocationByEmail, john.doe@lseg.com, LA	DATA
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 x	
– Layouts x	
– Home_And_Layouts x	
Action	
Options:	The operation to be executed.
– CreateOrUpdate	For example, if the Action is Delete, the defined data is omitted.

Component	Description
– Delete x	
Data	
Options:	See below. Data may have more than one field, dependent on the Module option.
– Depends on module and action	

Modules

Module and options	Description									
Home	Set default starting page layout for the home button									
Options:										
– HomeType										
– HomeValue										
	<table border="1"> <thead> <tr> <th>App</th> <th>App Symbol on Eikon Library</th> <th>CHT, OV, MON, and so on</th> </tr> </thead> <tbody> <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> </tbody> </table>	App	App Symbol on Eikon Library	CHT, OV, MON, and so on	Layout	File name under the firm folder and scope. Possible values for ScopeType: UP, NLE, LA	LayoutName, ScopeType, ScopeId Trader1, UP, ScopeId01 Trader2, NLE, ScopeId02 Trader3, LA, ScopeId03	URL	Any URL	https://www.google.com
App	App Symbol on Eikon Library	CHT, OV, MON, and so on								
Layout	File name under the firm folder and scope. Possible values for ScopeType: UP, NLE, LA	LayoutName, ScopeType, ScopeId Trader1, UP, ScopeId01 Trader2, NLE, ScopeId02 Trader3, LA, ScopeId03								
URL	Any URL	https://www.google.com								
	<p>Examples:</p> <p>User's home page URL is set to https://google.com: # Example for Header row only Home,CreateOrUpdate,URL,https://google.com</p> <p>User's homepage App is set to Chart: # Example for Header row only Home,CreateOrUpdate,App,CHT</p> <p>User's homepage set to layout Trader1 from UP folder: # Example for Header row only Home,CreateOrUpdate,Layout,Trader1,UP,ScopeId01</p> <p>Customer's admin wants to delete admin assigned homepage from users in the list # Example for Header row only Home>Delete</p>									
Layouts	Set the default multiple layout templates.									
Options:	Where:									
– NumberOfLayout	– NumberOfLayout is the number of layouts that you want to assign. The maximum is 9. Valid values: 0-9									
– LayoutList	– LayoutList is a key/value pair, consisting of: LayoutName (optional) – name of the layout. Scope (required) – 46-character free text field, normally composed of the company name and/or layout. For example, LSEGBondLayout1 LayoutList depends on number of layouts. For example, if the number of layouts is 2, the LayoutList could be defined as: LayoutName,ScopeType, ScopeId,LayoutName,ScopeType, ScopeId There can be multiple layouts with the same name, where each has a different scope: NumberOfLayout is 1 Trader1, NLE, ScopeId01 NumberOfLayout is 3 Trader1,UP, ScopeId01, Trader2,NLE, ScopeId02, Trader3,UP, ScopeId03									
	<p>Examples:</p> <p>A user is to be assigned three layout templates, where the layouts are:</p> <ul style="list-style-type: none"> – Trader1 – Ultimate Parent Scope, ScopeId01 – Trader2 – Location Account Scope, ScopeId02 – Trader3 – NearestLegalEntity Scope, ScopeId03 <p>Layouts,CreateOrUpdate,3,Trader1,UP,ScopeId01, Trader2,LA,ScopeId02, Trader3,NLE,ScopeId03</p>									

Module and options	Description
	Location,LSEGLocation1 Email, john.doe@lseg.com The administrator wants to delete layout templates of listed users Layouts,Delete Location,LSEGLocation1 Email, john.doe@lseg.com
Home_and_Layouts Options: – HomeType – HomeValue – NumberOfLayout – LayoutList	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: 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 <code>DataType</code> is one of the three <code>LocationBy</code> options, the Admin service started by the Administration Panel app) finds the user's hierarchy and uses the <code>Scope</code> field when creating a rule.
DataValue Options: – Valid email – Valid UUID	
ScopeType (optional) Options: – UP – NLE – LA	This field is used if the <code>DataType</code> is set to <code>Location</code> or one of the three <code>LocationBy</code> options. If this field is omitted, the default value is LA UP Ultimate Parent NLE NearestLegalEntity LA LocationAccount

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.

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

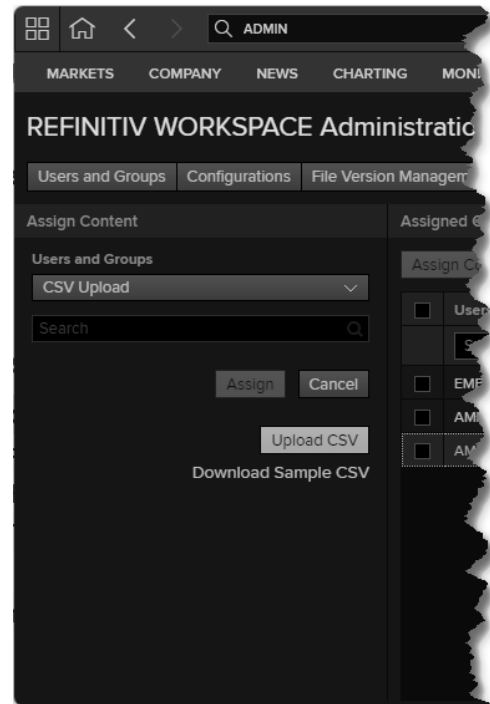
1. In **Workspace Customization**, click the **Assign Content** button.

The **Assign Content** panel is displayed.

2. From the Users and Groups dropdown, choose **Upload CSV**.
3. Select your CSV file².
4. Click **OK** to upload the chosen file.

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
'upld' 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

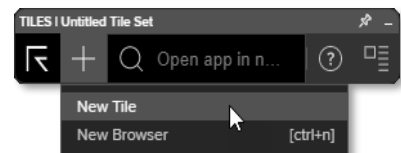
Managing tile sets

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 **+** button and select **New Tile**.
A search dialog is displayed.

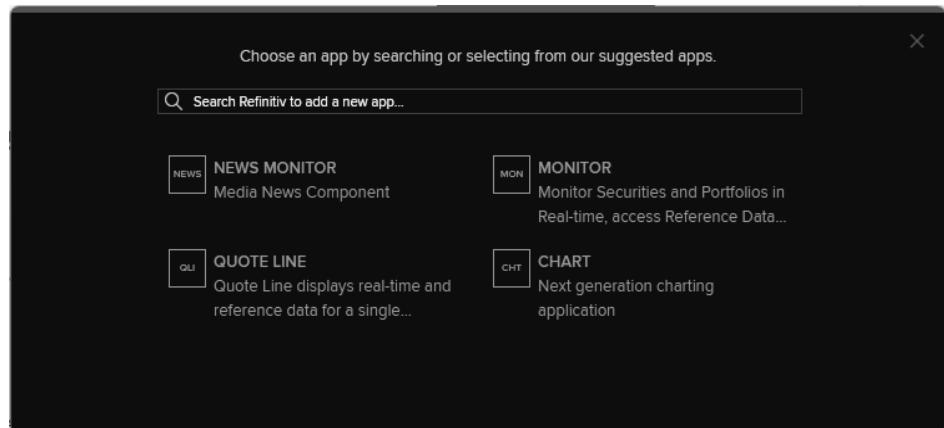


² A CSV file can have multiple `Data` components defined in the data rows.

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

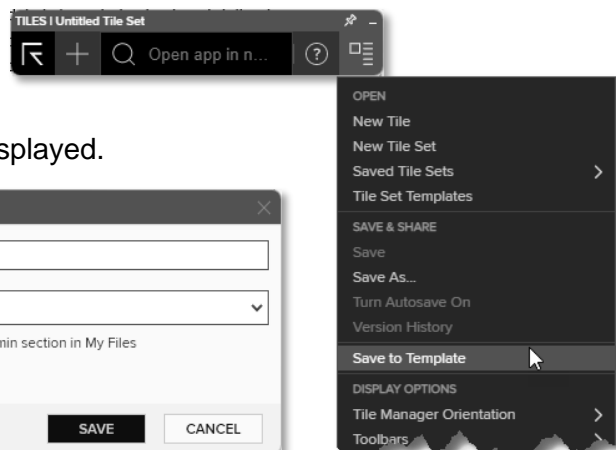
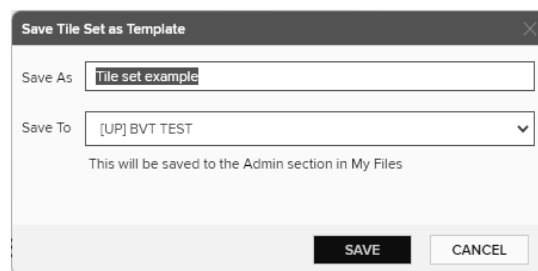
To save a tile set as a template:

1. In Tile Manager, click the  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**.



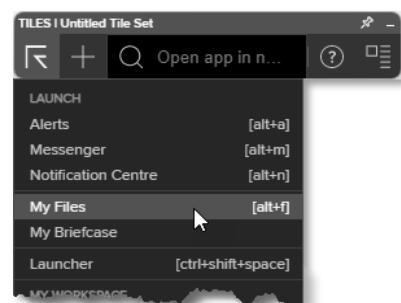
Viewing saved tile sets

You can find the tile sets you create and those created by other administrators under the **My Files** option.

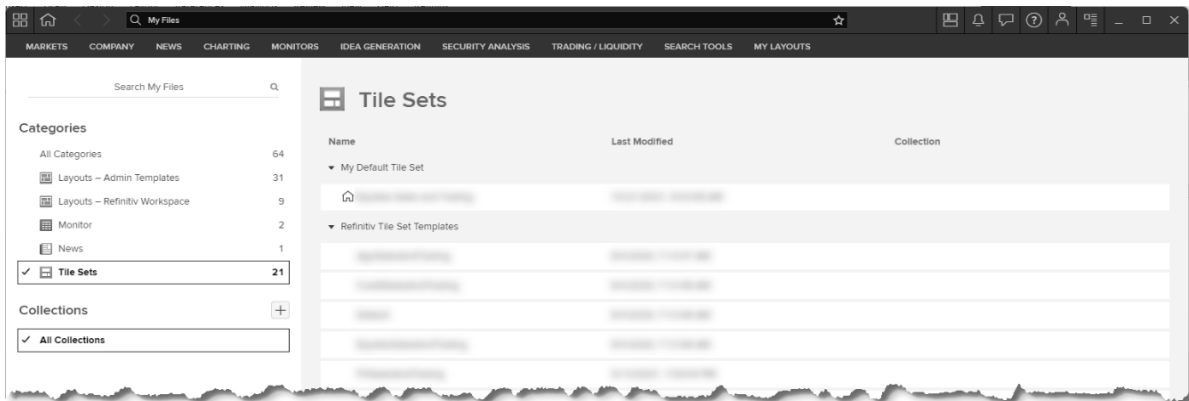
To do so:

1. Click the Refinitiv logo menu and choose **My Files**.

The categories panel is displayed in a Workspace browser.



2. Click the **Tile Sets** category.

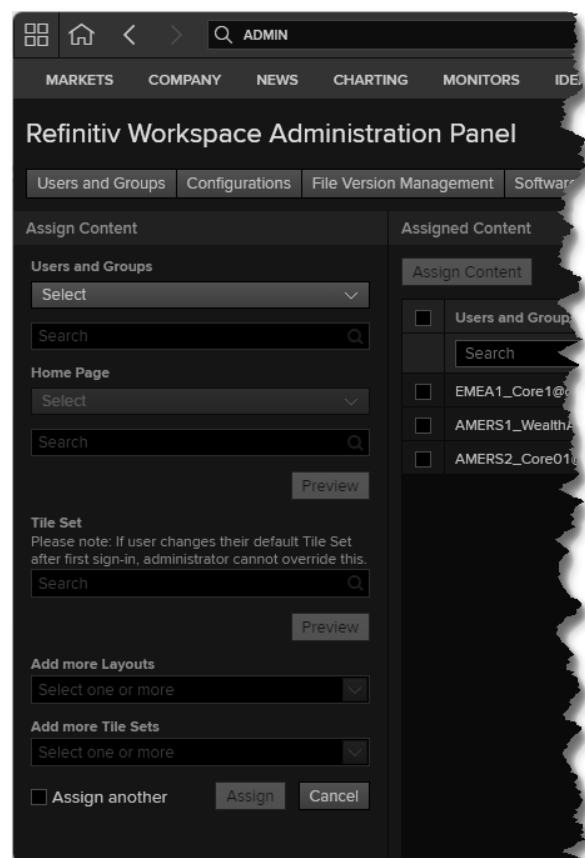


Assigning tile sets

Using the Administration Panel app, you can assign saved tile sets to individual users, groups of users, or roles.

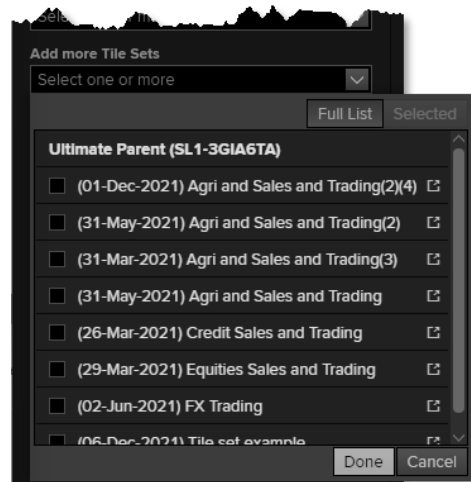
To do so:

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 set³ for the chosen user or group:
 - a. Click the **Tile Set** search field, and
 - b. Search for a specific tile set by name, or
Scroll through and choose from the list of tile sets.



³ 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.

7. Optional steps to define additional tile sets:
 - a. 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 or group using their local **Desktop** settings option. See [Choosing a tile set to display locally](#).
 - a. Click **Done**.
8. Click the **Assign** button.

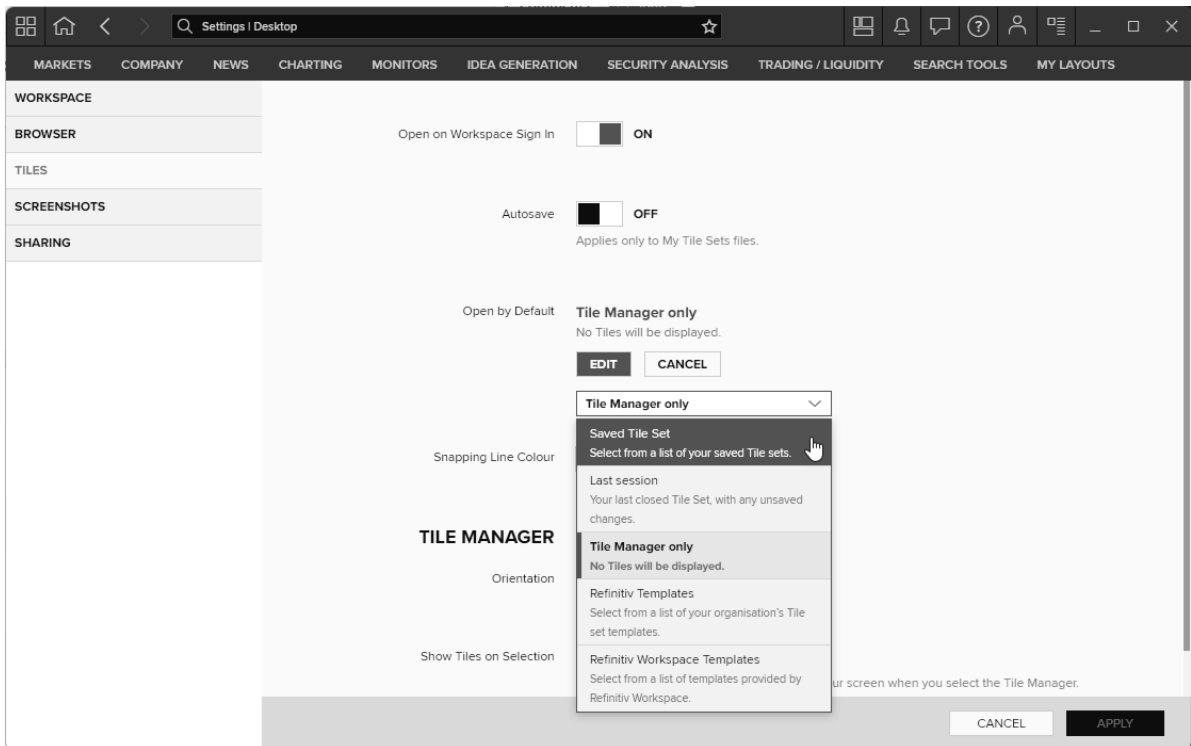
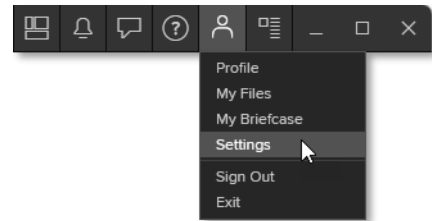


Choosing a tile set to display locally

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

To do so:

1. Click the profile button and choose the **Settings** option.
 The settings panel is displayed.
2. Click the **Desktop** option.
3. Select the **Tiles** option from the left column menu.
4. Under the **Open by Default** option, click the **Edit** button.
5. Click the dropdown list that appears and choose the **Saved Tile Set** option.



6. 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.

- Click the **Apply** button.

Assigning multiple layouts

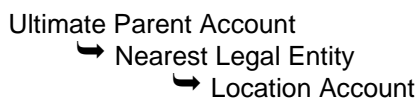
You can assign up to nine layouts, in total, to users and groups. To do this:

- Under the **Workspace Customization** screen, click the **Assign Content** button.
The **Assign Content** panel is displayed.
- From the first dropdown, select whether you are assigning layouts to a **User** or **Group** of users.
- [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.
- Click the **Layouts** dropdown (shown opposite).
The layouts panel is displayed.
- Choose up to nine layouts from the list that the selected user or group can access.

① You can only use Admin Layouts.

Assigning home pages and software policies to multiple users and groups

All Workspace user IDs belong to organization-level accounts that can be organized in the following hierarchy:



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.

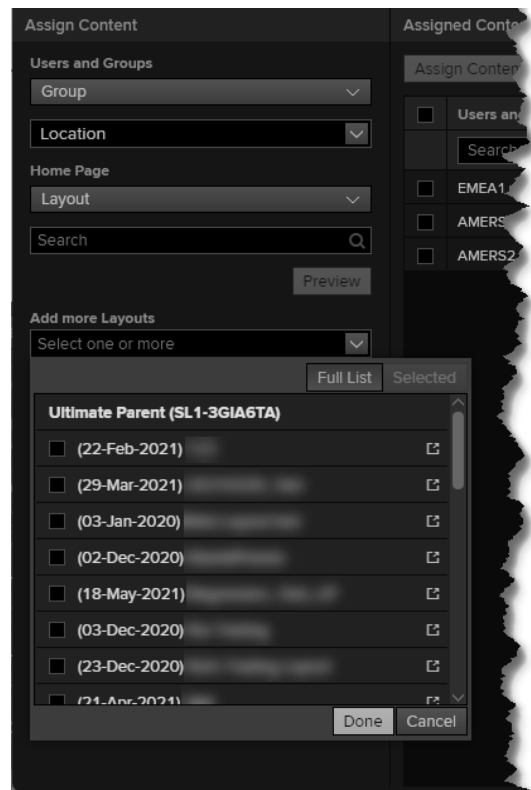
For example: User #1 and User #2 both belong to the same groups in the Ultimate Parent Account and Location Account:

User #1 has been assigned an individual home page and software policy.

User #2 has not been assigned an individual home page or software policy.

User #1 receives the individual home page and 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.

REFINITIV WORKSPACE Administration

Users and Groups | Configurations | File Version Management | Software Updates | Workspace Customization

Active File Versions

[UP] BVT TEST

Name	Content Type	Parent Account	Date			
123	Layout	[UP] BVT TEST	22-Feb-2021 17:00:54	🗑️	🔄	👁️
20210329_Test	Layout	[UP] BVT TEST	29-Mar-2021 17:47:22	🗑️	🔄	👁️
Beta Layout test	Layout	[UP] BVT TEST	03-Jan-2020 19:52:03	🗑️	🔄	👁️
Blank6Panels	Layout	[UP] BVT TEST	02-Dec-2020 09:39:52	🗑️	🔄	👁️
Local	Layout	[UP] BVT TEST	23-May-2021 11:28:37	🗑️	🔄	👁️
NK_Regression_UP	Layout	[UP] BVT TEST	18-May-2021 09:58:56	🗑️	🔄	👁️
Regression_Test_UP	Layout	[UP] BVT TEST	18-May-2021 12:09:00	🗑️	🔄	👁️
Regression_test_UP_Edge	Layout	[UP] BVT TEST	19-May-2021 12:19:22	🗑️	🔄	👁️
Regression_test_UP_Edge2	Layout	[UP] BVT TEST	19-May-2021 12:58:48	🗑️	🔄	👁️
Rui Trading	Layout	[UP] BVT TEST	03-Dec-2020 15:20:36	🗑️	🔄	👁️
Ru's Trading Layout	Layout	[UP] BVT TEST	23-Dec-2020 15:01:19	🗑️	🔄	👁️
Test	Layout	[UP] BVT TEST	21-Apr-2021 15:43:03	🗑️	🔄	👁️
Test3	Layout	[UP] BVT TEST	06-Nov-2020 19:57:29	🗑️	🔄	👁️
Test444	Layout	[UP] BVT TEST	02-Nov-2020 07:23:05	🗑️	🔄	👁️

If you are responsible for multiple locations, you can select a location from the location dropdown.

[UP] BVT TEST

- [LA] Ciudad De Mexico, Ciudad De Mexico
- ▼ [NLE] China, BVT-APAC
 - [LA] Beijing, Beijing
- ▼ [NLE] United Kingdom, BVT-EMEA
 - [LA] London, London
- [LA] St Helier, St Helier
- [NLE] United States, BVT-LE

The icons at the end of each file row allow you to perform the actions, specified in the table opposite, on a chosen layout or tile set.

	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:

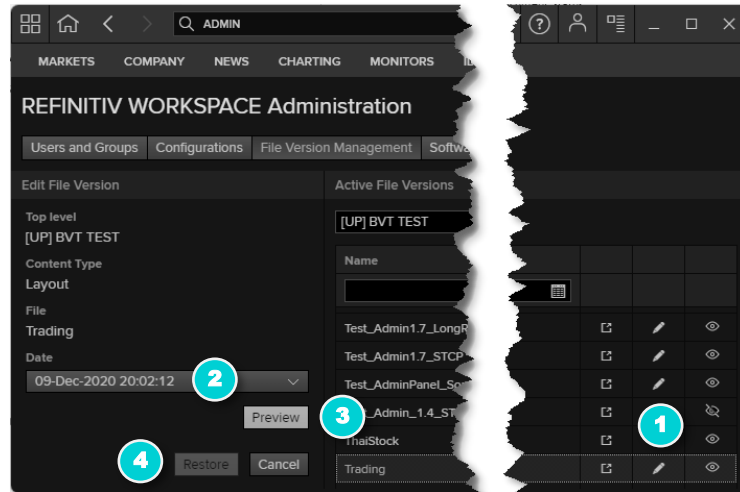
1. Click the edit icon **1**.

The Edit File Version panel is displayed.

2. From the **Date** dropdown **2**, 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** **3**, which opens the file in a new window.

3. Click **Restore** **4** to confirm your selection.

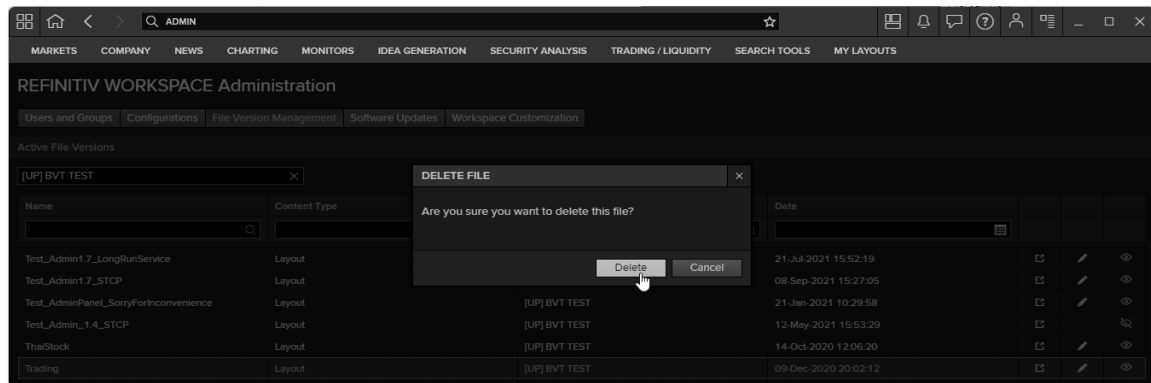


Deleting and restoring files

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 one that is struck through.

To restore a file⁴, do the following:

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

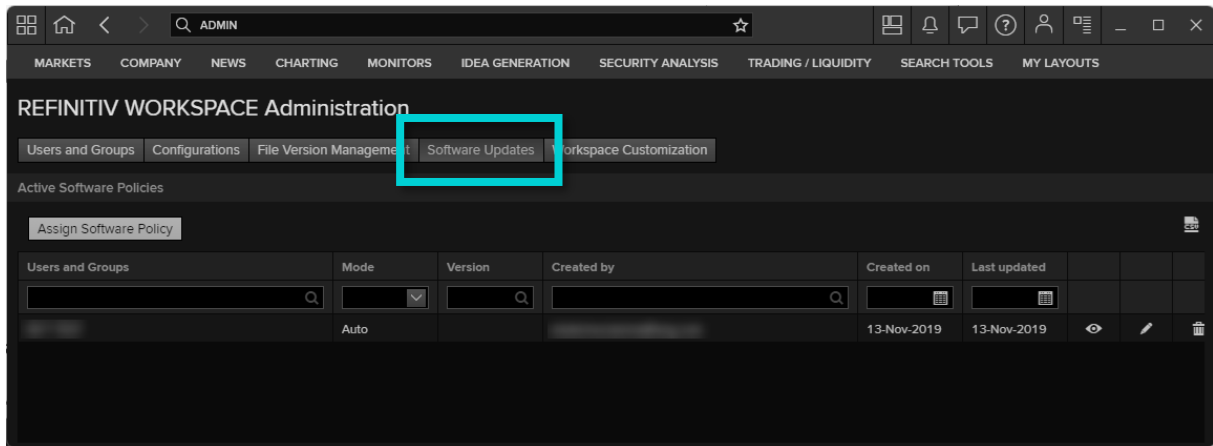
The Restore File confirmation dialog is displayed.

2. Click **Restore**.

⁴ 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.



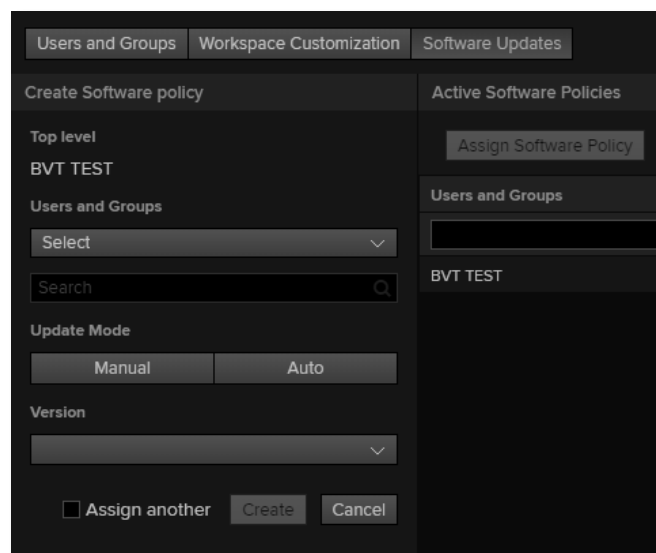
You can determine whether users receive automatic updates or must use a specific supported version of Workspace. You can determine the version used, based on User ID. This means the specified user(s) use the defined version, regardless of what device they use and version they have installed.

Important: LSEG supports the current and previous two desktop versions only. For further information, refer to the [Workspace Support Policy](#).

Creating software update policies for users

To create a software policy:

1. Select the **Software Updates** function.
2. Click the **Assign Software Policy** button.
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.
4. Click the Search box 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:
 - If **Manual** is selected, use the dropdown menu to choose the version the user or group should use.
6. When you are finished, click:
 - **Create**, or
 - **Assign Another**, 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

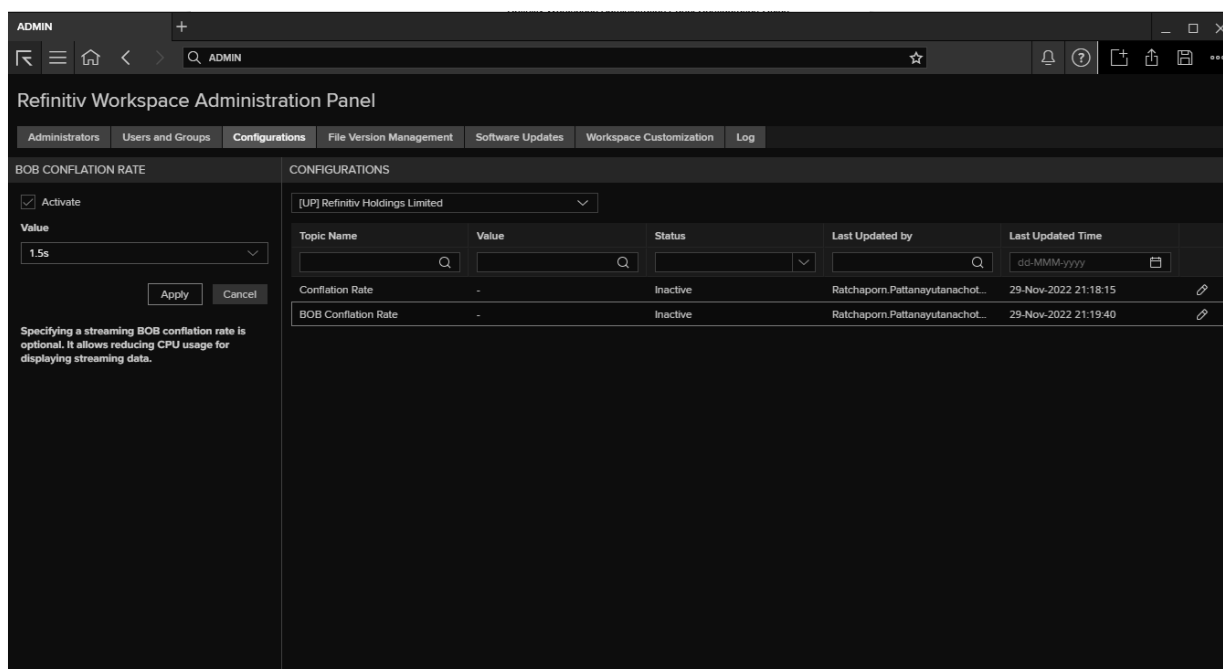
Viewing software versions across accounts

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

Configurations

The Configurations⁵ 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: <ul style="list-style-type: none"> – 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.

⁵ 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 rate⁶ for a service, select **Configurations** and do the following:

1. Click the edit icon of the conflation rate item you want to amend **1**:
 - **Conflation Rate** for Workspace⁷, or
 - **BOB Conflation Rate** for the Blended Order Book

The Conflation Rate panel opens.

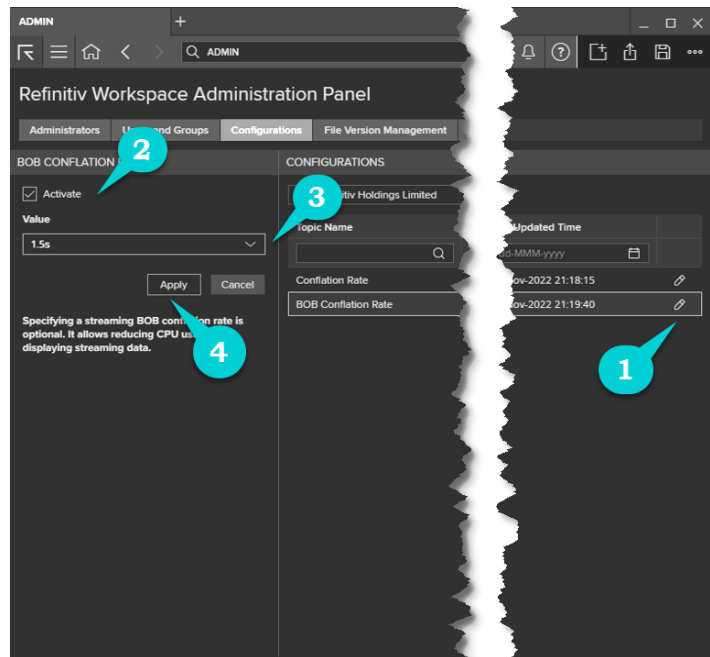
2. Select the **Activate** checkbox **2**. This allows you to access the **Value** dropdown.
3. From the **Value** dropdown **3**, select conflation rate to be applied.

The following options are available:

- 1.5 seconds
- 3 seconds
- 6 seconds

4. Click **Apply** **4**.
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

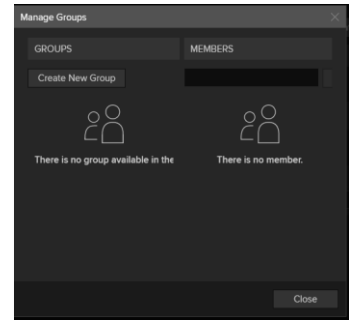
To revert to the default conflation rate from a custom rate, do the following:

1. Click the edit icon **1**. The Conflation Rate panel opens.
2. Select the **Activate** checkbox **2**. This will untick the checkbox.
3. Click **Apply** **4**.


⁶ The default conflation rate for desktop and Web access is ~3ms.

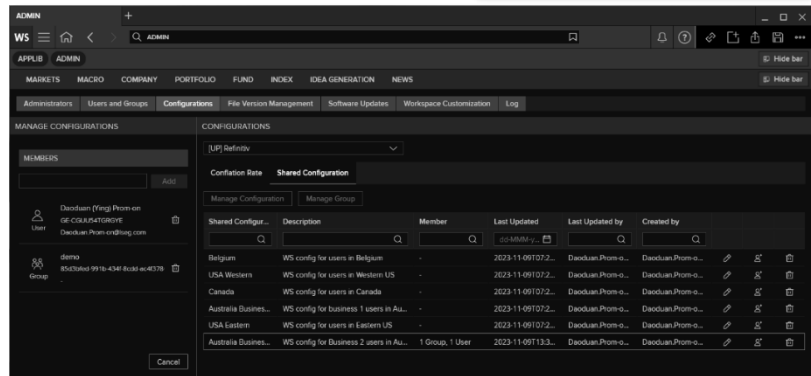
⁷ This setting can be overridden at individual user level in Workspace desktop using the Configuration Manager. However, there is no such facility in Workspace web access. As such, the conflation rate set using this facility overrides the default configuration for all Workspace web access users.

- To create a group of users, Nearest Location Accounts (NLE), or Location Accounts (LA), click **Manage Group**.



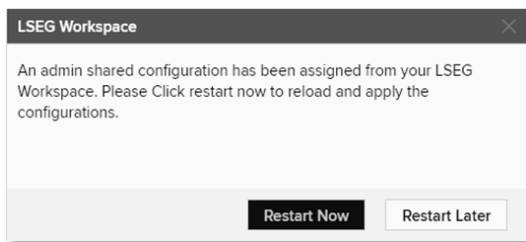
Stage 3: Assign a shared configuration to group

Assign the shared configuration to a group by clicking the  icon at the end of each configuration record.



Stage 4: Restart Workspace to reload the assigned configuration

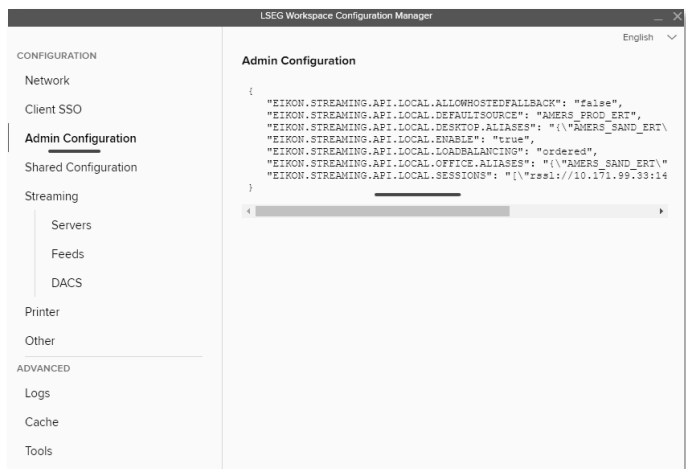
After assigning the shared configuration to a group or individual, within 5 – 15 minutes, a notification dialog appears on the site of each impacted Workspace user. This instructs the user to restart Workspace to load the newly assigned configuration. They can also choose to postpone the restart until a later time.



Upon restarting, the user will be running Workspace with the assigned configuration.

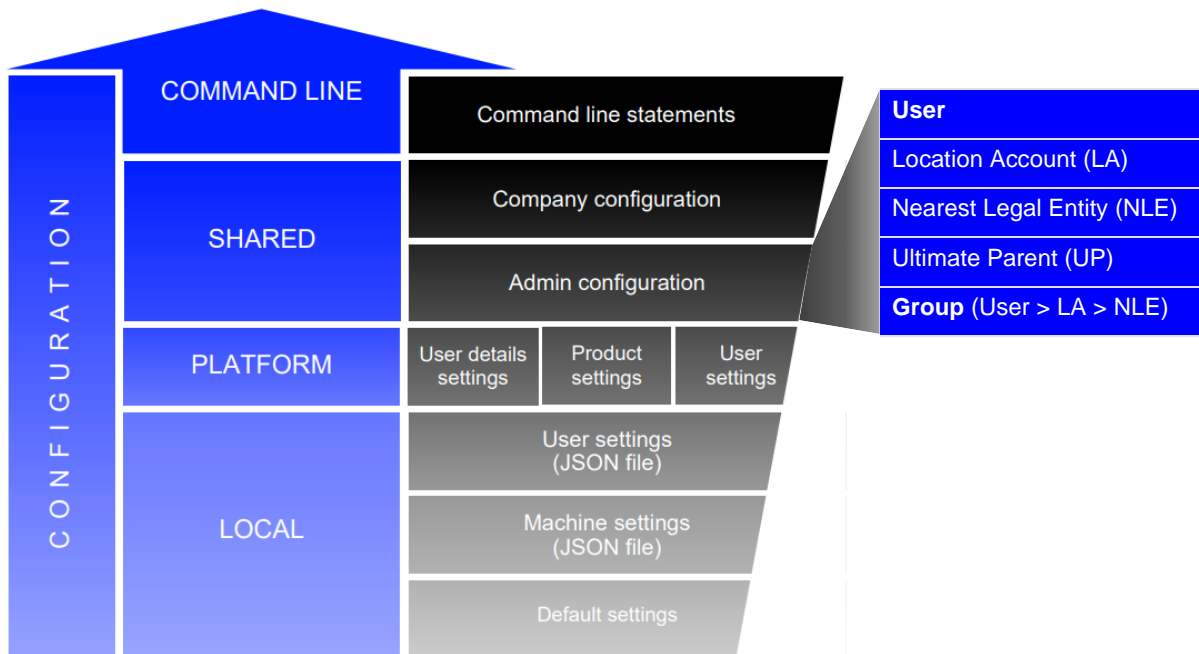
Viewing the shared configuration

From LSEG Workspace 1.23 onwards, customers will be able to view their shared configuration in the Configuration Manager.



Configuration override order

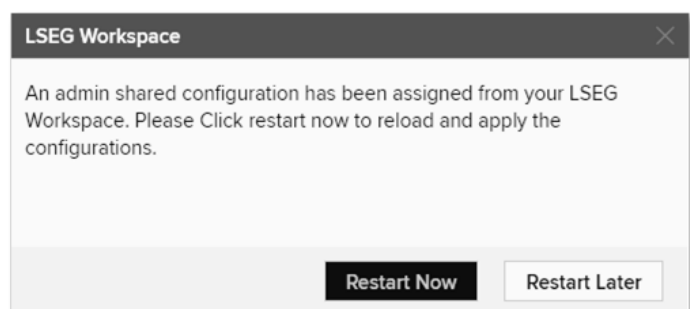
The illustration below shows the override order for configuration settings. Within the Admin configuration, there is a sub-level of prioritization, where individual user accounts (user, location account, nearest legal entity) have a higher level of priority compared to a configuration assigned to group.



Managing configurations for enterprise

The most effective way to manage a shared configuration is to create and assign the configuration to location-based accounts. By doing so, Workspace users that are created under a location account will automatically receive the configuration that is assigned to that account, without additional maintenance effort for the IT team.

Users will be notified of a newly assigned configuration within 15 minutes of logging in to Workspace. They are directed to restart Workspace so that the configuration is applied.



Assigning a configuration

To assign a configuration to location-based accounts, do the following:

1. Prepare a list of accounts under your ultimate parent account and group the location accounts according to your ADS server locations.

You can contact LSEG representatives to provide the list of accounts for your company.

2. Prepare configurations based on your local ADS server locations. These could be countries or cities.

To ensure availability of streaming services, you should add multiple ADS servers in the streaming section of the shared configuration file for each location.

3. Assign the location accounts to their respective configuration file.

Users that move between locations can be added to another location-specific configuration. This can be revoked later when they are returned to their original configuration file.

Example configurations

Company A scenario #1

- Company A, a global financial firm, operates in several countries.
- LSEG Workspace is installed, as a built-in application, for all members of staff of Company A.
- When staff log in to Workspace, it connects to the local streaming server location for the staff member.
- John is based in Sydney branch 1 and connects to their ADS servers.

Company A configuration #1

This configuration requires minimal effort from your IT Admin to update and maintain the assignment of accounts:

Recommended configuration

Shared Configuration	Description
Australia Business 1	WS config for business 1 users in Australia
Australia Business 2	WS config for Business 2 users in Australia
Belgium	WS config for users in Belgium
Canada	WS config for users in Canada
USA Eastern	WS config for users in Eastern US
USA Western	WS config for users in Western US

Company A Workspace account structure

[Ultimate Parent] Company A Group Inc

- ▶ [Nearest Legal Entity] Australia, business 1
 - [Location Account] Melbourne, business 1
 - [Location Account] Sydney, branch 1
 - [User] john@company-a.com
 - [Location Account] Sydney, branch 2
 - [Location Account] Sydney, branch 3
- ▶ [Nearest Legal Entity] Australia, business 2
 - [Location Account] Melbourne, business 2
 - [Location Account] Sydney, business 2
- ▶ [Nearest Legal Entity] Belgium, Company A
- ▶ [Nearest Legal Entity] Canada, Company A
 - [Location Account] Toronto, Company A branch 1
 - [Location Account] Toronto, Company A branch 2
 - [Location Account] Calgary, Company A

For John, an example of the shared configuration code for ADS servers and local feeds is below:

```
{
  "REFINITIV.WORKSPACE.TRADING.PRINTER_NAME": "Microsoft Print to PDF",
  "EIKON.STREAMING.API.LOCAL.ENABLE": "true",
  "EIKON.STREAMING.API.LOCAL.SESIONS": "[\"ws://ep-streams-2.int.thomsonreuters.com:15000/WebSocket\"]",
  "EIKON.STREAMING.API.LOCAL.DACS.USERNAME": "permit_a1_exchanges",
  "EIKON.STREAMING.API.LOCAL.DACS.POSITION": "%USERDETAILS.LASTNAME%_%USERDETAILS.UUID%",
  "EIKON.STREAMING.API.LOCAL.DESKTOP.ALIASES": "{\"IDN_RDF_1\": [\"F\"], \"ATS_GLOBAL_1\": [\"A\"]}",
  "EIKON.STREAMING.API.LOCAL.OFFICE.ALIASES": "{\"IDN_RDF_1\": [\"F\"], \"ATS_GLOBAL_1\": [\"A\"]}",
  "EIKON.STREAMING.API.LOCAL.LOADBALANCING": "ordered",
  "EIKONPROTOCOL.ISDEFAULTAPPLICATION": "true"
}
```

Company A scenario #2

As above, except:

- John, who is normally based in Sydney, has made a business trip to the Toronto office and, to use Workspace, will connect to their ADS servers.

Company A configuration #2

In this scenario, for John, the shared configuration changes to the following:

```
{
  "REFINITIV.WORKSPACE.TRADING.PRINTER_NAME": "Microsoft Print to PDF",
  "EIKON.STREAMING.API.LOCAL.ENABLE": "true",
  "EIKON.STREAMING.API.LOCAL.SESIONS": "[\"ws://tor-streams-2.int.thomsonreuters.com:15000/webSocket\"]",
  "EIKON.STREAMING.API.LOCAL.DACS.USERNAME": "permit_all_exchanges",
  "EIKON.STREAMING.API.LOCAL.DACS.POSITION": "%USERDETAILS.LASTNAME%_%USERDETAILS.UUID%",
  "EIKON.STREAMING.API.LOCAL.DESKTOP.ALIASES": "{\"IDN_TOR_1\": [\"F\"], \"ATS_GLOBAL_1\": [\"A\"]}",
  "EIKON.STREAMING.API.LOCAL.OFFICE.ALIASES": "{\"IDN_TOR_1\": [\"F\"], \"ATS_GLOBAL_1\": [\"A\"]}",
  "EIKON.STREAMING.API.LOCAL.LOADBALANCING": "ordered",
  "EIKONPROTOCOL.ISDEFAULTAPPLICATION": "true"
}
```

Troubleshooting

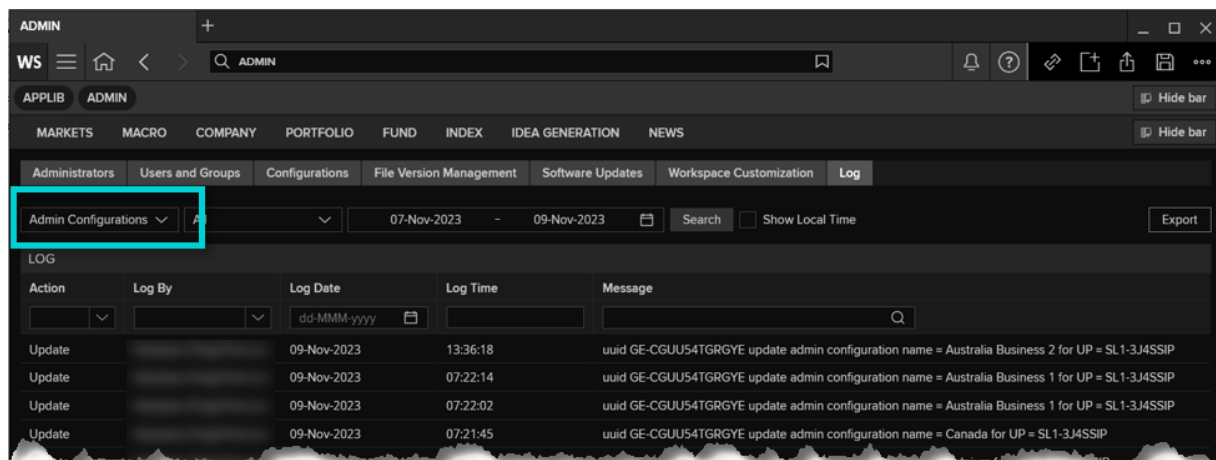
Settings file location

The location of the Admin-managed settings.json is dependent on the installation mode:

Installation mode	Settings location
--user	%APPDATA%\Refinitiv\Refinitiv Workspace\Cache\Config\admin-managed-settings.json
--machine-autoupdate-service	%PROGRAMDATA%\Refinitiv\Refinitiv Workspace\Cache\Config\admin-managed-settings.json
--machine-autoupdate-no	
--machine-autoupdate-peruser	

Activity logs

The activity log is used to track Admin activities. To access this log:



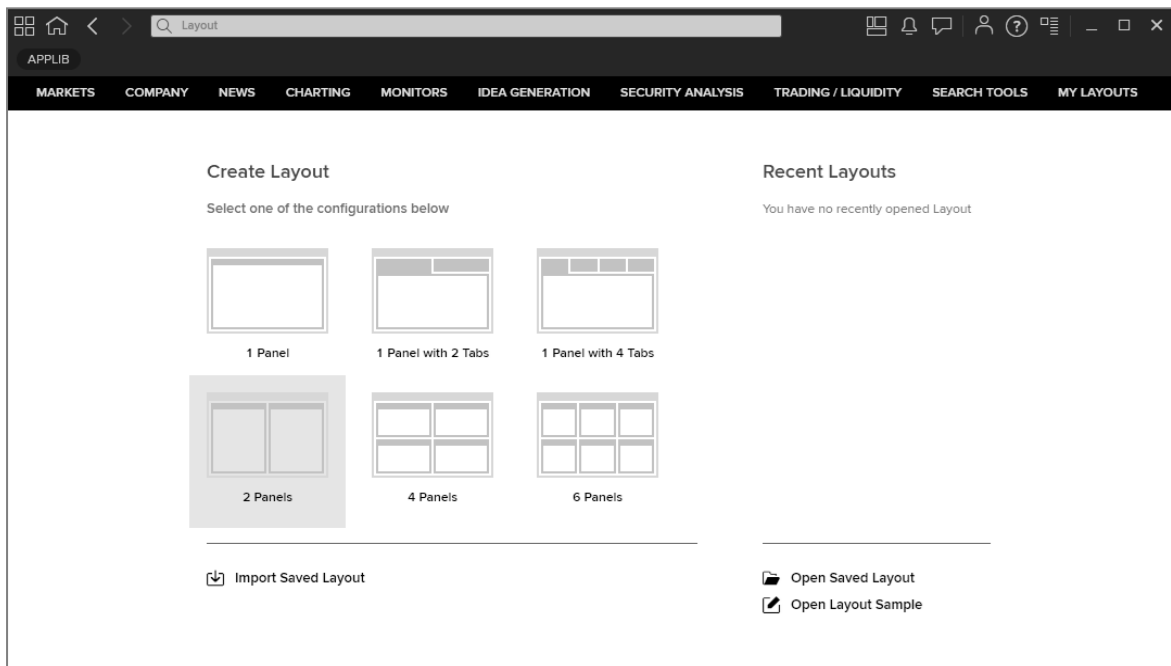
Select **Admin Configurations**, under the **Log** function.


Appendix 1: Creating administrator layouts

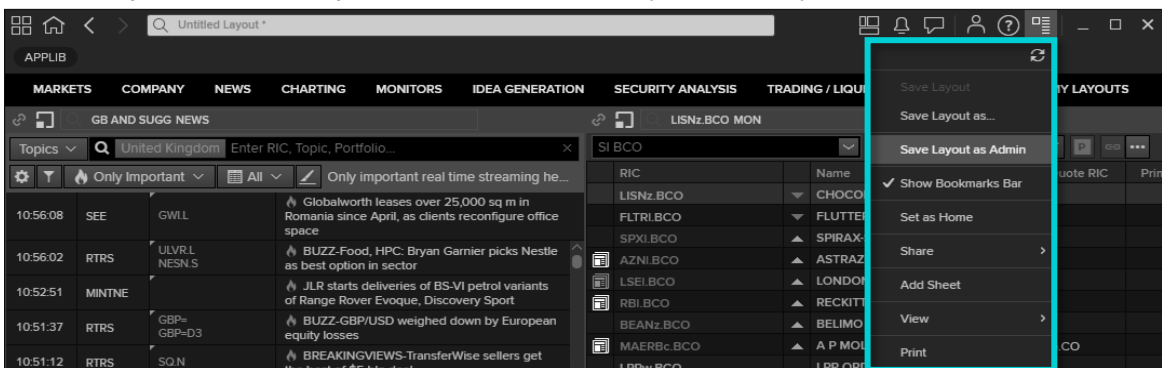
A layout is a collection of panels that you can customize to meet the specific interests and needs of a group or individual user. You can use the Administration Panel to create and save layouts and assign them to users or groups.

To create a layout:

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



2. In the new window, select the layout you want to use.
3. Populate the layout with your chosen apps.
4. In the Workspace toolbar, click the App Menu  icon.
5. Select **Layout > Save Layout as Admin** to save your new layout.



If you want to save any further changes, select **Save Layout as an Admin** again and save the layout using its original name.