

LSEG WORKSPACE ADD-IN FOR MICROSOFT OFFICE SUITE

USER GUIDE

The LSEG Workspace Lite add-in for Microsoft Office suite lets you harness the power of LSEG data using Office 365.



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Installing the add-in

You can use the LSEG Workspace Lite add-in for Microsoft Office suite in both Excel Online and Word Online. Follow the instructions below to install it into Excel, where you'll find the key features. To export data from Excel into a Word document, you'll need to install it in Word Online too. Follow the same steps but in a Word document.

How to install the add-in

1. Log in to Office 365 and open an Excel Online workbook.
2. Click the **Home** tab and select **Add-ins > Add-ins**.
The Office Add-ins pop-up window displays.
3. Select **Workspace Lite Add-in** from the My Add-ins section. The add-in installs. When it is done, the Workspace Lite tab displays in the navigation bar.

Add-in access troubleshooting

If you cannot access the Store, your administrator may have blocked third-party add-ins. Contact your administrator to request access to the Office Store. This is where you can download the add-in from.

Go to the **My Add-ins** and **Admin Managed** tabs to see if the Workspace Lite add-in is available there for download. If not, share the following link with your IT department and ask them to whitelist the add-in:

<https://appssource.microsoft.com/en-us/product/office/wa200000565?tab=overview>

Getting started

To launch the add-in, open an Excel Online workbook and click Workspace Lite on the navigation bar to access the tools.

The Workspace Lite ribbon

Get LSEG data
Formula Builder lets you pull data from LSEG sources into your Excel worksheet.

Trace a formula Track up to five levels of precedents or dependents for an active cell.

Identify significant events
Add annotations affecting a target company and comps.

Audit data Audit fundamental data items.

Run a scenario See how the data output changes when you alter a value.



Refresh

Select the Refresh button to refresh all LSEG data at once.



Settings

Select Settings to change the default layout for Formula Builder and to edit the list separator symbol.



Help

Go to Help to search our articles, get support, or send feedback about the add-in.

Using the Workspace Lite tools

Build formula

The Formula Builder tool lets you pull data from LSEG sources into your Excel Online workbook using the RDP.DATA function.

As you build your formula, the data appears in the worksheet as a preview. This means you can check the layout of your sheet as you add instruments and data items, and you can make sure it does not interfere with any existing data as you go. The task pane is always connected to the sheet, so you can go back and edit the formula at any time.

How to use Formula Builder

1. Click the **Workspace Lite** tab and select **Build Formula**. A task pane displays on the right-hand side.
2. Select your instruments. To do this, type in a known code or search using auto-suggest. To delete an instrument, hover over it and select **x**.
3. Add your data items in the same way.
4. Edit the parameters to control the output data. The options you see automatically update to match the selected data item. To switch between the data items' parameters, select the data item itself.
5. When you are finished, select any cell in the worksheet. Select **Get Data** to confirm.

TIP

You can also get data by typing a custom function directly into the worksheet. Enter **=RDP.DATA**(in a cell and the possible parameters will pop up. For example, to see the latest closing price for Google, enter **=RDP.DATA("GOOGL.O","TR.PriceClose")**. The cell connects with the task pane so you can easily add data items and set more parameters afterwards.

Analyze scenarios

The scenario analysis tool lets you run a scenario to see how the data output changes when you alter an input value. The results will show temporarily in your worksheet.

How to run a scenario

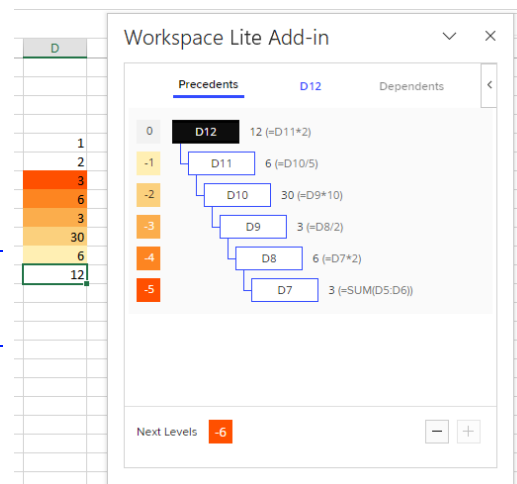
1. Go to the **Workspace Lite** ribbon and select **Scenario Analysis**.
2. Select the cell on which you want to run a scenario.
3. Go to the right-hand panel and choose a preset percentage change or enter a custom percentage change.
4. Select **Final** to see the final values or select **Difference** to see the difference after a percentage change. All affected output data is highlighted in the worksheet.
5. Select **Clear** to return to your original data.

Trace precedents and dependencies

You can track up to five levels of precedents or dependents for an active cell to audit and track the hierarchy between cells within complex models.

How to trace a cell

1. Go to the **Workspace Lite** ribbon and select **Traces**.
2. Choose an active cell to see precedents and dependents.
3. Go to the task pane on the right-hand side and select a level of tracing from 1 to 5. Precedents are on the left and dependents on the right. The dependencies are mapped in the task pane, illustrating the hierarchy, with relevant cells color-coded to match the tracing level.



TIP

For longer formulas shown in the task pane, hover over the box to see the full formula.

How to edit a formula

1. Go to the task pane and double-click the formula you want to edit. The corresponding cell is highlighted in the worksheet.
2. Edit the formula in the sheet as you normally would.
3. Return to the task pane and select **Submit**. The task pane shows the updated dependencies.

Audit data

When you audit fundamental data items, the add-in displays how each item is calculated, level by level, up to the source filing with the underlying figure.

How to audit data

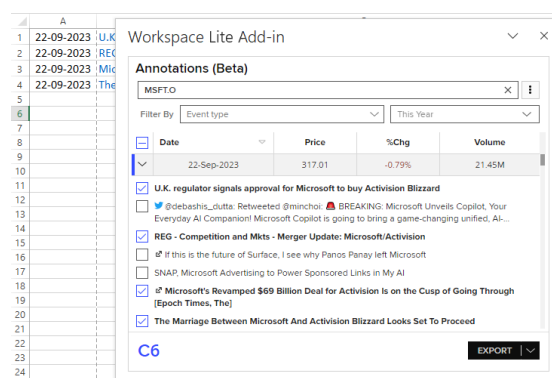
1. Select the cell on which you want to run the data audit.
2. Select the **Data Audit** option on the toolbar.
3. In the Company Fundamentals window, click the blue text you want to audit and make the changes you want.
4. Click the **Exit (X)** icon to close the window and return to the spreadsheet.

Add annotations

You can import news annotations to your Excel spreadsheet.

How to import annotations

1. Select the **Annotations** icon on the top panel.
2. Enter the company name or a short code in the search bar and select from the autosuggest list.
3. Expand the **Event type** dropdown menu and select the checkbox beside the event type.
4. Select the period dropdown menu and select a period from the list. If you choose **Custom**, select the **From** and **To** fields and select initial and final dates for the period.
5. Select the right-pointing arrow next to the date in the list of results and select the checkbox for the annotation you want.
6. Select **Export**.
7. Select the required options and then click **Export**.



Need more help?

To open the Help & Support app in Workspace, press **F1** or select the **Help** icon and select **Get Help & Support**. You can contact us directly through the Help & Support app via the **Contact Us** section. And to access learning content on the training site, go to training.lseg.com/workspace-training/.



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