FactSet Quick Start Installation Guide

FACTSET

Installing FactSet Workstation

The FactSet installation can be downloaded by browsing to https://support.factset.com/workstation/ Once the MSI has finished downloading, double-click it and click through the Next, Install, and Finish buttons. The FactSet installation will need to be run by a Windows Administrator.

For details regarding packaging and deploying FactSet to many users, or deploying FactSet in a multiuser environment, please see the FactSet Installation Guide.

Launching FactSet Workstation for the first time

FactSet will prompt for the factset.net ID which is included in the FactSet welcome email. Enter the factset.net ID then click "Continue" to receive a passcode via email. Enter the passcode from the email and click "Continue". If you don't know your factset.net ID, click "Forgot factset.net ID?", enter your email address, and click "Continue".

FactSet Support

Email Support – support@factset.com
24/7 Phone Support – 1.877.FACTSET (877.322.8738)
Local Phone Support – http://www.factset.com/about/supportnumbers_list

FactSet Launch

FactSet Launch is a web portal to online services that FactSet offers, including FactSet Connect. Access FactSet Launch using your favorite browser at https://launch.factset.com/ and your factset.net ID. If you don't know your factset.net ID, click "Forgot Username", enter your email address, and click "Get Username". FactSet users will require the FactSet Workstation installation to use the entirety of FactSet's offerings.

Software Compatibility

FactSet is compatible with the most commonly used Windows OS, IE, and Office products. See the FactSet Framework Overview for details of the FactSet software requirements and compatibility.

Network Requirements

If you have difficulty connecting to FactSet, please contact FactSet Support so we can assist. Outbound-initiated TCP ports 6670 and 6672 should be opened on your Firewall to the destination subnets listed on page 9 of the FactSet Technology Overview. Also on your Firewall, please confirm TCP idle timeouts are 300 seconds or greater. Any HTTPS inspection points such as Firewalls or Web Proxies should add the URL *.factset.com to exception/white list.

www.factset.com