

FactSet Framework Overview - Compatibility Table

Current FactSet Framework **Matterhorn**

Framework Policy ¹	FactSet Framework ²	OnlineComponents Overlay ²	Framework Retirement ³	Windows 32 or 64-bit	Windows Server 32 or 64-bit	Citrix/XenApp	Office ^{4,5} 32-bit Only	IE 32-bit	Adobe Acrobat/Reader ⁶	Required .NET Framework
Optimal	Matterhorn	2012.5 2012.4 2012.3 2012.2 2012.1 EA	TBD	7 Vista XP	2008 R2 2008 2003 R2 2003	6.5 6.0 5.0 4.5 4.0	2010 SP0/SP1 2007 SP1/SP2 2003 SP3	9 8 7	10.1.3 9.5.1 8.3.1 7.1.4	2.0 and 3.5 SP1
Optimal	Olympus	2011.5 GR 2011.4 2011.3	July 9, 2013	7 Vista XP	2008 R2 2008 2003 R2 2003	6.5 6.0 5.0 4.5 4.0	2010 SP0/SP1 2007 SP1/SP2 2003 SP3	9 8 7	10.1.3 9.5.1 8.3.1 7.1.4	2.0 and 3.5 SP1
Acceptable	Sugarloaf	2011.2 2011.1 2010.5	Dec 3, 2012	7 Vista XP	2008 R2 2008 2003 R2 2003	6.5 6.0 5.0 4.5 4.0	2010 SP0/SP1 2007 SP1/SP2 2003 SP3 XP	9 8 7 6	10.1.3 9.5.1 8.3.1 7.1.4	2.0 and 3.5 SP1

¹ Further detail on the FactSet Framework Policy can be found below

² Further details on the FactSet Framework and OnlineComponents Overlay can be found below

³ For further details on the FactSet Framework Retirement dates, please go to <https://support.factset.com/>

⁴ FactSet Office Integration and Source Document Manger (SDM) require Microsoft Office Primary Interop Assemblies (PIA). PIA's can be downloaded for Office [2003](#), [2007](#), or [2010](#)

⁵ FactSet Office Integration require that Microsoft Office 2003 have [Service Pack 3](#) and [Microsoft Hotfix KB907417](#) installed

⁶ FactSet Adobe Acrobat/Reader plug-in functionality requires Protected Mode be disabled in Adobe Reader version 10

EA is Early Adopter Release. GR is General Release. See Page 3 for more details on the FactSet Release Policy.

FactSet Framework Overview - Framework Policy

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Together with OnlineComponents², the FactSet Framework Policy helps to ensure that all users are able to take advantage of the latest features and enhancements in FactSet.

The Framework Policy defines a life cycle for FactSet client releases. All FactSet Frameworks move through the different stages of this life cycle and are eventually retired. The current status of a particular Framework is displayed by clicking on User Profile () within FactSet. Once a FactSet Framework reaches retirement, users running that release are no longer able to logon to FactSet.

Each FactSet Framework’s retirement date is stated within the Compatibility Table above as well as on <https://support.factset.com/>. FactSet highly recommends that our clients install the latest FactSet Framework at least once per year. This will ensure that their users always receive the benefits of running an Optimal or Acceptable FactSet Framework.

Framework Policy	FactSet Frameworks	Benefits & Features
Optimal	Matterhorn Olympus	Access to the latest FactSet features, performance, and stability enhancements 24 x 7 phone, email, remote assistance, and on-site support Complete compatibility with recent Windows, Office, IE, Acrobat/Reader, Citrix, VMware Full market data and real-time exchange compliance
Acceptable	Sugarloaf	24 x 7 phone, email, remote assistance, and on-site support General compatibility with recent Microsoft and 3 rd party software - may encounter minor issues. Good market data and real-time exchange compliance Client-side features, bug fixes and performance enhancements are included in more recent releases
Marginal	-	May have incompatibilities with latest patches and releases from Microsoft and 3 rd party vendors With exchange rule changes, certain market data may have fallen out of compliance Major client-side features, bug fixes and performance enhancements are included in more recent releases Proactive calls from FactSet to IT department to assist with packaging and upgrades
Retired	Snowden and older	No longer able to logon to FactSet - FactSet must be upgraded to regain access If FactSet’s assistance is required to upgrade please visit - http://www.factset.com/services/supportnumbers_list

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FactSet Framework Overview - OnlineComponents

Current FactSet Framework **Matterhorn**



What are OnlineComponents?

'OnlineComponents' is a general term given to FactSet virtual machine technology. OnlineComponents consists of two parts; FactSet Frameworks and OnlineComponents Overlays. OnlineComponents enables flexibility in the behavior and functionality of the FactSet application. This approach allows new components within a given FactSet Framework to be delivered without requiring a FactSet installation.

What are FactSet Frameworks and OnlineComponents Overlays?

All FactSet releases belong to a FactSet Framework. Once the Framework has been installed on the computer, bug fixes, new features, and enhancements are delivered using OnlineComponents Overlays. OnlineComponents Overlays are used to ensure that FactSet maintains full compliance with real time exchanges as well as compatibility with Windows and other third party applications.

There are many OnlineComponents Overlays released for each FactSet Framework, however an OnlineComponents Overlay can only belong to one FactSet Framework. FactSet Frameworks are released every six to twelve months.

How is an OnlineComponents Overlay received?

Upon startup and every four to six hours thereafter the installed FactSet Framework queries our datacenters via SSL to determine if an appropriate OnlineComponents Overlay is available. Once an OnlineComponents Overlay has been identified, it will then be received in the background. Once fully received, the new OnlineComponents Overlay will be run by the installed FactSet Framework the next time the user logs into Windows.

Are there risks associated with OnlineComponents?

The FactSet Framework is installed locally on a users' computer or server. The use of OnlineComponents allows FactSet to proactively resolve vulnerabilities found in third party software without the need to run another FactSet installation. OnlineComponents protect the integrity of files within the OnlineComponents Overlay using MD5 hashes and certificate signing. The OnlineComponents Overlay is securely received from FactSet's datacenters using SSL.

Do clients still need to install FactSet releases?

Yes. FactSet Frameworks receive new OnlineComponents Overlays for a period of approximately six to twelve months from the time the Framework was released. Once a new FactSet Framework has been released, OnlineComponents will no longer be produced for previous FactSet Frameworks. To ensure users always have access to the latest features and enhancements, FactSet recommends that clients upgrade their entire user base when a new FactSet Framework is available.

Are Administrative Rights required to use OnlineComponents?

No. The OnlineComponents Overlay is placed within the FactSet OnlineComponents or cache directory. FactSet users must always have Modify or Full Control privileges to this directory.

Do OnlineComponents touch or change the initial FactSet installation?

No. An OnlineComponents Overlay is a virtual extension – nothing installed by a firm's IT administrator is changed. OnlineComponents Overlays are received and accessed from within the FactSet cache directory.

What is the difference between General Release and Early Adopter Release?

The Early Adopter Release is FactSet's latest OnlineComponents Overlay in a Framework which provides the most up-to-date features, enhancements, and bugfixes. The General Release is typically an OnlineComponents Overlay which is about 2-3 months older which has had time to mature in the field, and which has been through a few cycles of stability bugfixes. Individuals can choose to opt-in to be an Early Adopter candidate, or opt-out back to a General Release directly within the FactSet application. Your FactSet Account Team can also globally set your entire account to always receive the Early Adopter Release if you wish. Whether you are designated as a General Release or Early Adopter candidate, OnlineComponents will keep you on the proper OnlineComponents Overlay.

Can a firm turn off OnlineComponents?

No.