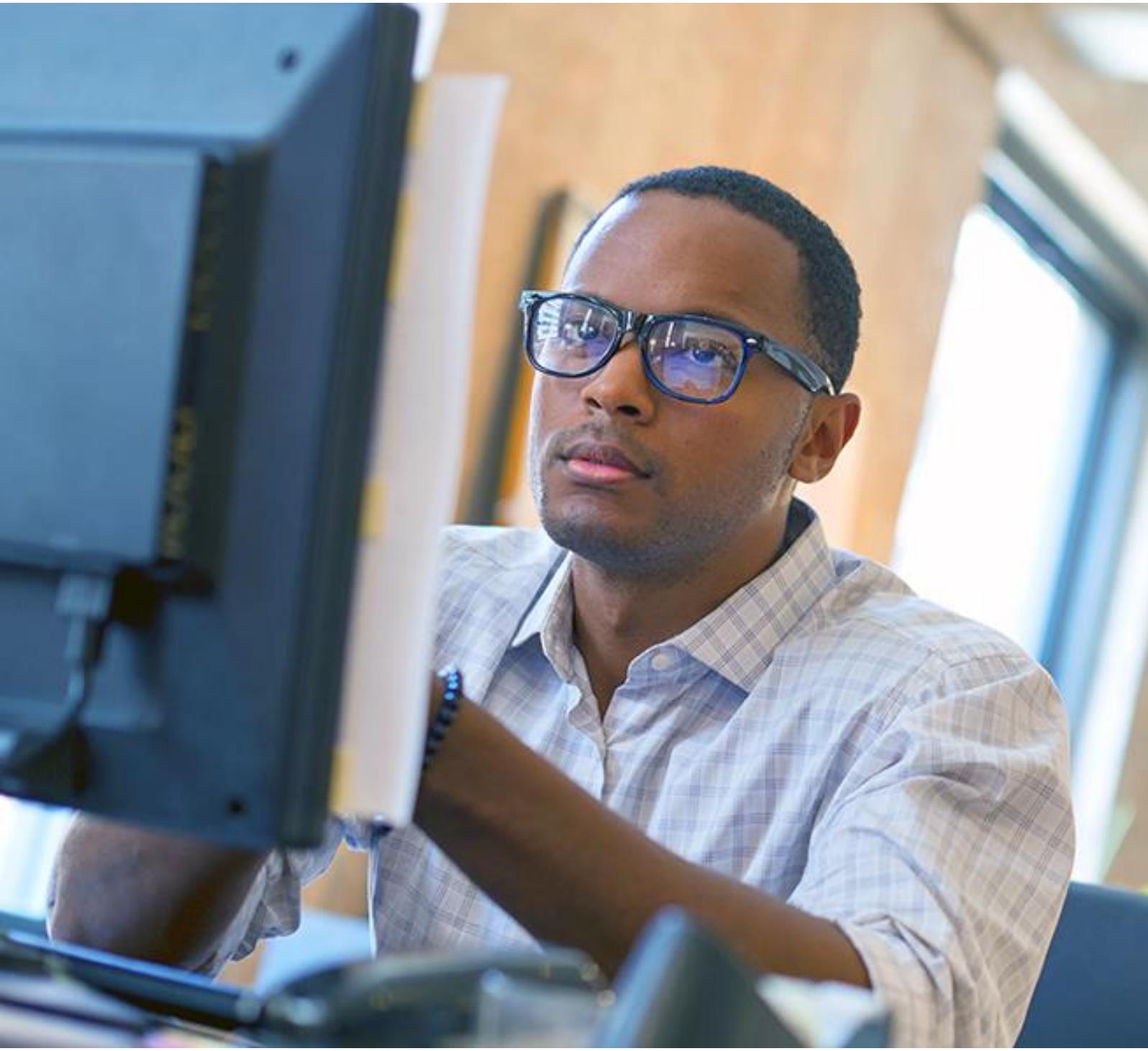


FACTSET › SEE THE ADVANTAGE

## FACTSET IN OPENFIN AND FDC3: QUICK START GUIDE



## Contents

Installing and Launching FactSet in OpenFin.....	3
Download Website .....	3
Installing FactSet in OpenFin.....	3
Logging in to FactSet .....	3
FactSet Single Sign-On .....	4
Launching FactSet in OpenFin .....	4
Pop Out Components and Applications .....	4
Workflow Example 1: .....	5
Workflow Example 2: .....	6
Saving Your Setup.....	6
Context Channels .....	6
Workflow Example 3: .....	6
FDC3 Context .....	7
Build Your Own.....	7

## Installing and Launching FactSet in OpenFin

This document shows you how to use the FactSet platform in OpenFin and make use of FDC3 interoperability. For details regarding packaging and deploying the FactSet Workstation, see the [FactSet Installation Guide](#) or contact your FactSet account team.

### Download Website

The FactSet download website contains the latest FactSet in OpenFin (Beta) installer: <https://www.factset.com/download>

#### FactSet in OpenFin (Beta)

Benefit from a full desktop experience including features like workspace saving, identifier and context channeling, tabs and docking to layout FactSet in the way that works best for you. Built using the OpenFin platform and leveraging FDC3 standards for interoperability, it's a light-weight installation using HTML5 components that will always be up-to-date with the latest enhancements and seamlessly work with other applications on your desktop.

[↓ Installer for Windows](#)

### Installing FactSet in OpenFin

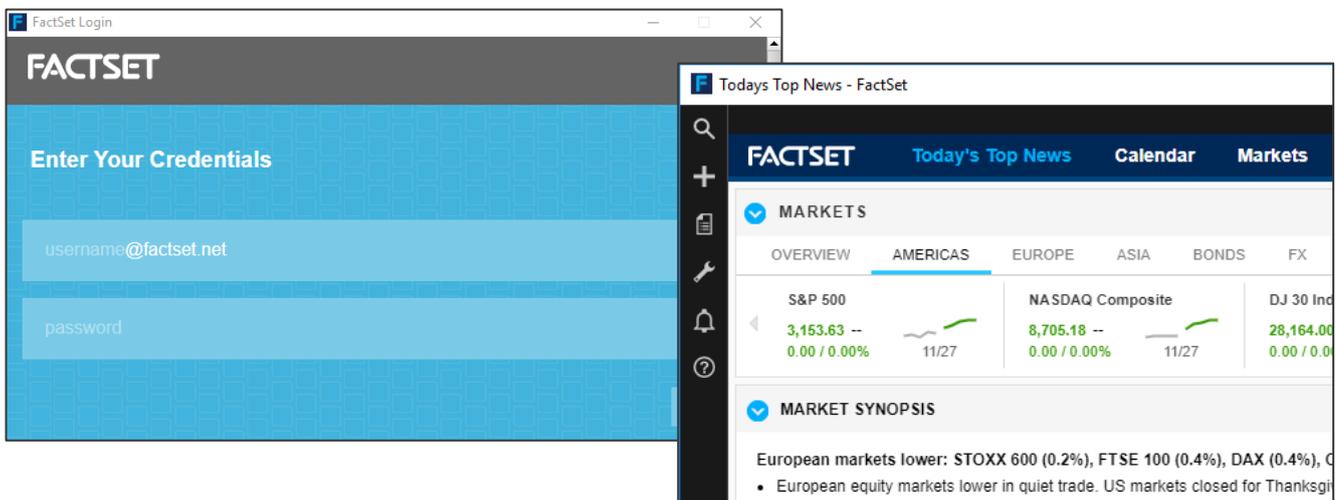
Download and double-click the “factset\_openfin\_<version>.exe” file.

The installer automatically downloads the OpenFin Runtime Version Manager and completes a per user install. (Administrator rights not required.)

The FactSet login screen is displayed once the installation is complete.

### Logging in to FactSet

1. Enter your FactSet credentials at the FactSet login screen. If you do not know your FactSet account credentials, scroll down for options to register your account or retrieve your credentials.
2. After entering your credentials, log in using FactSet’s two-factor authentication procedure. Once complete, FactSet web is displayed.



## FactSet Single Sign-On

If your firm is set up for single sign-on (SSO) with FactSet, close the login window and instead paste the URL below into a web browser using your firm's IDPID:

<fins://fin.factset.com/fin/config/prod/factset.json?idpid=<IDPID>>

If prompted, accept the "Open OpenFin RVM" dialog. Your installation will now be configured for SSO and FactSet web is displayed.

If you do not know the IDPID required to use the above fins:// link for SSO, contact your FactSet account team for additional information.

## Launching FactSet in OpenFin

The Installer will add a Desktop icon as well as a shortcut in the Start Menu.

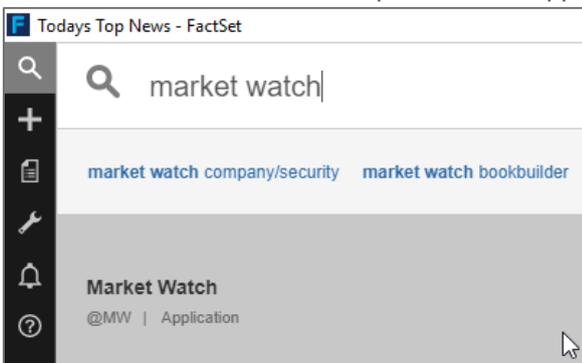


## Pop Out Components and Applications

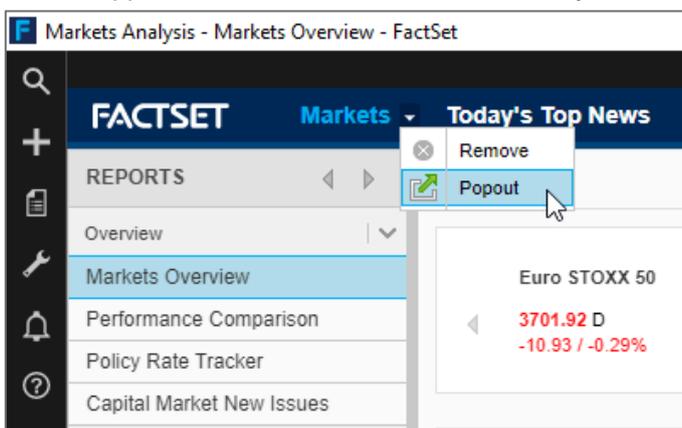
FactSet in OpenFin allows you to create desktop workflows by opening several windows and organizing them across multiple screens.

Components are generally smaller windows where multiple instances are useful (e.g., a chart), while an application is usually a larger window and limited to a single instance.

- Use FactSet Search to find components and applications that you can launch outside the main web interface



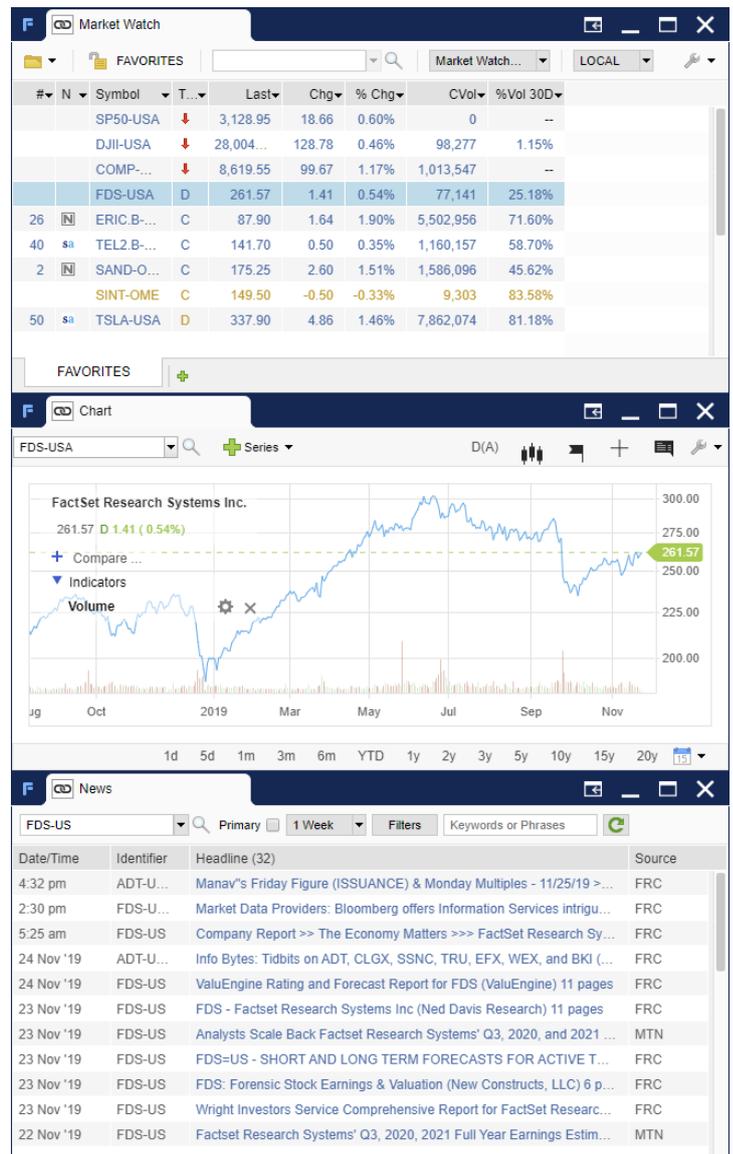
- Launch applications outside the main interface by selecting the "Popout" option from the tab's drop-down menu



**Workflow Example 1:**

Create a quick way to get the most relevant information for the companies you are following. Use FactSet web for deep-dive analysis, screening, or to free up some screen real estate for other applications like your CRM or trading platform.

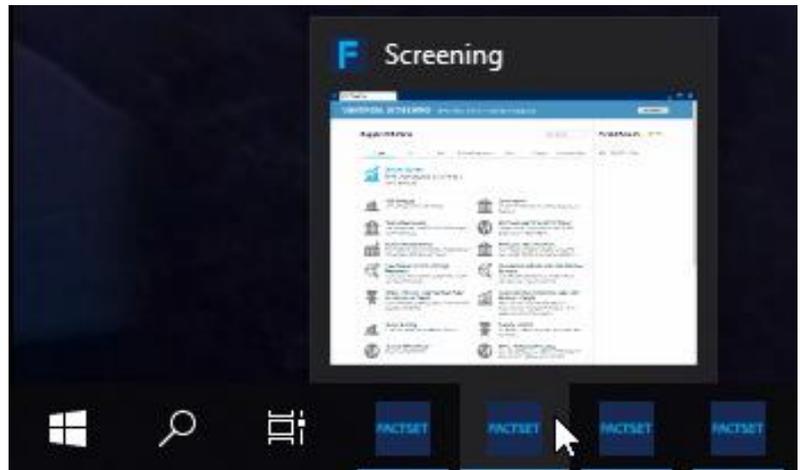
1. Open Market Watch (@MW) using FactSet Search.
2. Open News (@N).
3. Open Chart (@CC).
4. Enter the desired tickers into the Market Watch component.
5. Snap the windows together by moving them close to each other.
6. Double-click on a company in Market Watch. All components update to display data for that company.



### Workflow Example 2:

1. Pop out Screening.
2. Pop out Internal Research.
3. Pop out Portfolio Analysis.
4. Move the windows to the desired monitor. You can now see these applications separately or simultaneously, while also using FactSet web to quickly look up a specific company or industry.

Note: The Windows taskbar displays individual icons for each application.



### Saving Your Setup

When you close the main FactSet web site, your setup is saved and restored when you launch FactSet again.



### Context Channels

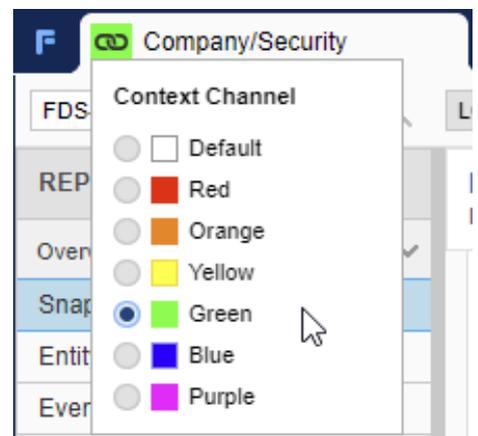
To further create the most efficient workflows, you can select context channels for each of the FactSet components.

### Workflow Example 3:

1. Click the link icon and select “Red” as the context channel for News, Chart, and Market Watch. Only the selected components will update when changing context while other components remain the same.
2. Pop out Company/Security and set it to “Green”.
3. Open a second News component and set it to “Purple”.

With these changes, your News component will not be affected by other applications and will show unfiltered real-time news. You can also change the Company/Security view separately from the “quick company update” created in Workflow Example 1.

Context channel configurations are also saved and restored together with layouts.

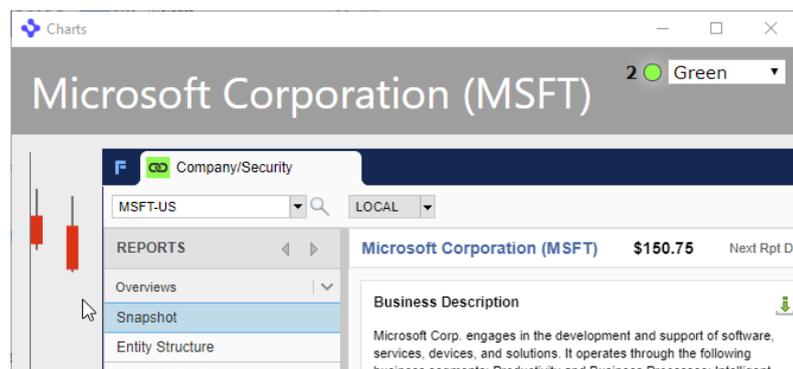


## FDC3 Context

FactSet is a key contributor to [FDC3](#) and all the previous workflow examples follow the current standards. Therefore, you can create similar workflows and add applications from other vendors and layouts, use context sharing, and have channels all seamlessly work together.

To see this in action, OpenFin has created a simple demo application that you can download from: [https://install.openfin.co/download/?os=win&config=http%3A%2F%2Fcdn.openfin.co%2Fdemos%2Ffdc3%2Fapp.json&fileName=fdc3\\_demo&unzipped=true](https://install.openfin.co/download/?os=win&config=http%3A%2F%2Fcdn.openfin.co%2Fdemos%2Ffdc3%2Fapp.json&fileName=fdc3_demo&unzipped=true)

1. Open the Blotter and a Chart. Note that the context channels are the same as in FactSet.
2. Select a company in the Blotter and you can see that FactSet is also updating.
3. Select a company in FactSet and see how the Chart Demo is also updating.



The following example shows the context that FactSet is sharing when you select “Microsoft” in Identifier Lookup:

```
{"exchangeMic": "XNAS", "exchangeMicFds": "NAS", "id": {"CUSIP": "594918104", "FDS_ID": "P8R3C2-R", "FDS_TICKER_EXCHANGE": "MSFT-USA", "FDS_TICKER_REGION": "MSFT-US", "ISIN": "US5949181045", "SEDOL": "2588173", "ticker": "MSFT"}, "name": "Microsoft Corporation", "type": "fdc3.instrument"}
```

This context object means it's possible to interoperate with applications that do not have the exact same data structure and FactSet will understand most basic instrument classifications from existing proprietary applications.

FactSet is one of the first vendors with an FDC3 compatible solution available to clients. FactSet is actively working on tools to simplify the adoption of the standard. Internal development teams are also working with several partners to promote the standard and prepare more applications for deployment.

For more information on FDC3, visit <https://fdc3.finos.org>.

## Build Your Own

In addition to the documentation and examples above, OpenFin has a quick start guide for using FDC3 within their framework. The following guide will help get you set up: <https://github.com/HadoukenIO/fdc3-service>.