

# OnDemand API for Statistical Package v3.6

## Installation Guide

Doc version - 3.6.2

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## **Preface**

The purpose of this document is to fully describe the process to install APIs.

## **Intended Audience**

This document is intended for Data Analysts and Financial Analysts. This document is intended to guide you to set up OnDemand API within statistical packages such as MATLAB and R.

## 1. Introduction

The FactSet OnDemand API MATLAB/R integration allows you to interact with the statistical packages directly to retrieve data from FactSet. The FactSet plugin is installed via the MATLAB/R plugin installers and is available for Windows users only.

## 2. System Requirements

The prerequisites are:

- For **MATLAB** users: MATLAB version R20XXY or higher
- For **R** users: R version R 3.X.X or higher
- .NET framework 4.5 or higher for both MATLAB and R users
- Microsoft Visual C++ 2013 Redistributable for both MATLAB and R users

## 3. Pre-Installation Checklist

We recommend that you complete the following checklist before you proceed with the installation and setup of OnDemand API.

- Ensure to whitelist [https://\\*.factset.com](https://*.factset.com) on firewalls / URL inspectors / IPS / IDS.
- Ensure that <https://> (TCP 443) is allowed to FactSet's production destination subnets – 192.234.235.0 (255.255.255.0) and 64.209.89.0 (255.255.255.0).
- Installer does NOT remove previous versions (3.5.x or lower) of the plugin. You have to uninstall any previous versions of the FactSet OnDemand plugin before installing version 3.6. Uninstalling previous versions will NOT remove the old configuration file.
- For R users only: You must remove old versions of the rClr package before installing version 3.6. This is required due to compatibility issues with older versions of rClr and newer versions of R.
- Uninstalling previous versions will remove the "PathToConfig" file. If this was set to a custom path, for earlier versions, you have to edit the new file installed with version 3.6
- Admin rights are no longer required to install the plugin.

## 4. Setting up the Installer

The FactSet OnDemand installers can be accessed from <https://www.factset.com/download>.

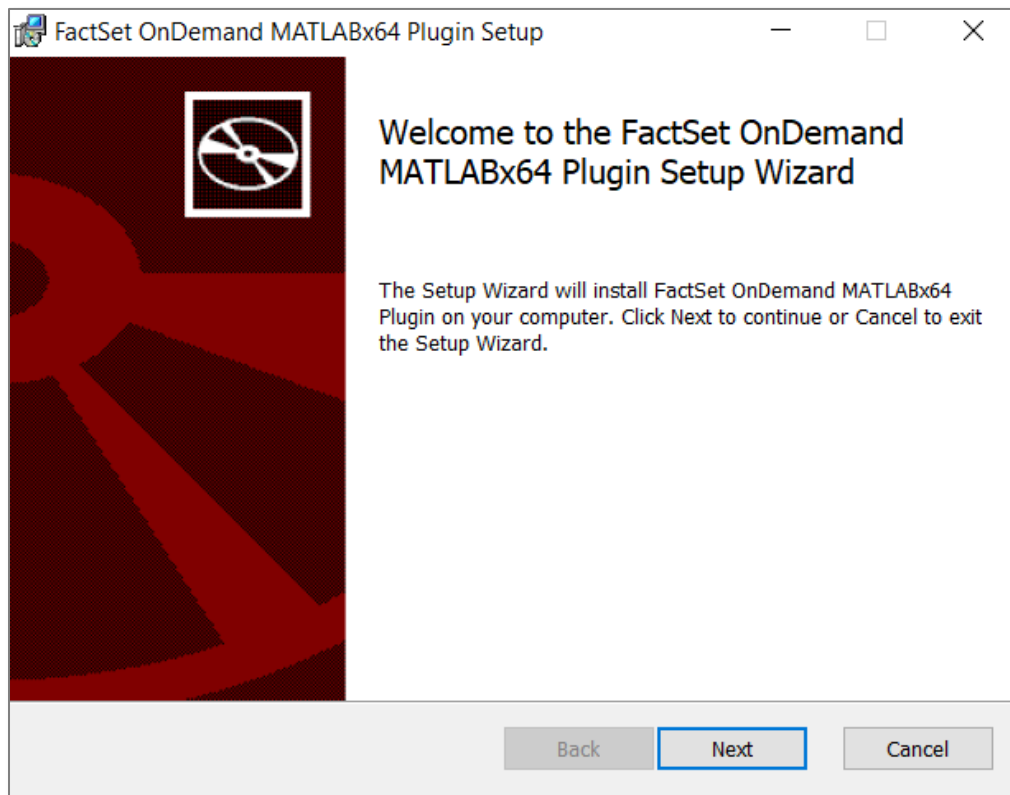
The installers are available under the **Statistical Package Integration** section. 32-bit and 64-bit versions of the installer for both MATLAB and R are available. User guides and installation guides are also available under this section.

## 5. Installing OnDemand MATLAB

To install OnDemand MATLAB Plugin on your computer, follow the steps given below.

1. Go to <https://www.factset.com/download> > **Statistical Package Integration** > **MATLAB Integration V3.6 Downloads / R Integration V3.6.1 Downloads**.
2. Click the link **Windows 64-bit** or **Windows 32-bit**, depending on your system. The location browser will open.
3. Save the installer(.msi) on your local machine.
4. Now, go to the location where you have saved the installer and double-click the installer.
5. The FactSet OnDemand **MATLAB / R** plugin setup wizard window will open.

(The screenshot depicts the MATLAB installer. Follow the same procedure for R installer.)



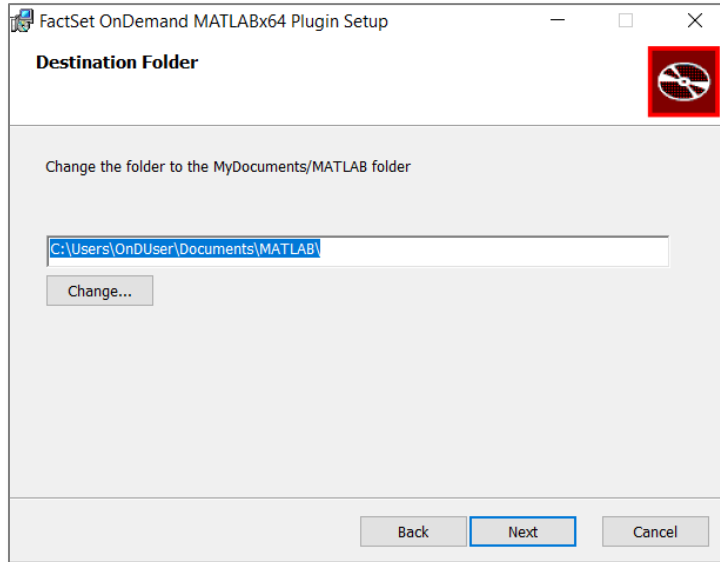
6. Click **Next**.

The next window prompts you to select the destination directory. By default, the installer selects the following directories:

- **MATLAB** - C:/Users/xxxx/Documents/MATLAB
- **R** - C:/Users/xxxx/Documents/R

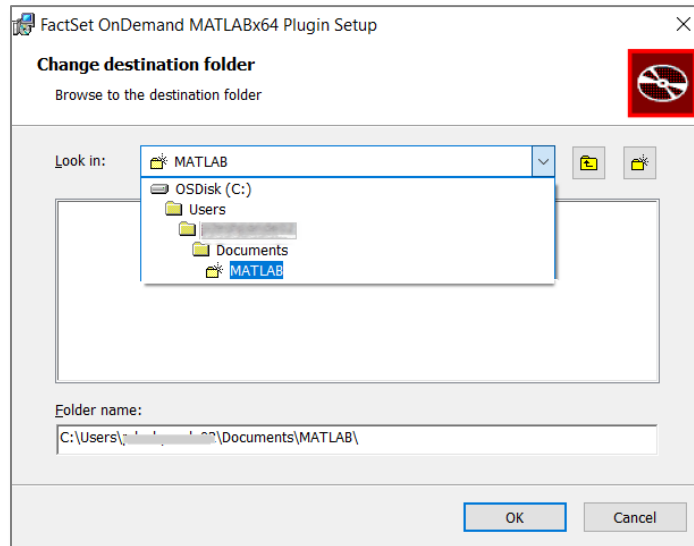
**Note1:** Some Windows version may name the folder as – **My Documents**.

**Note2:** Installer will ask for R version directory, in case of multiple R version available in system. Select appropriate version of R for Installation.



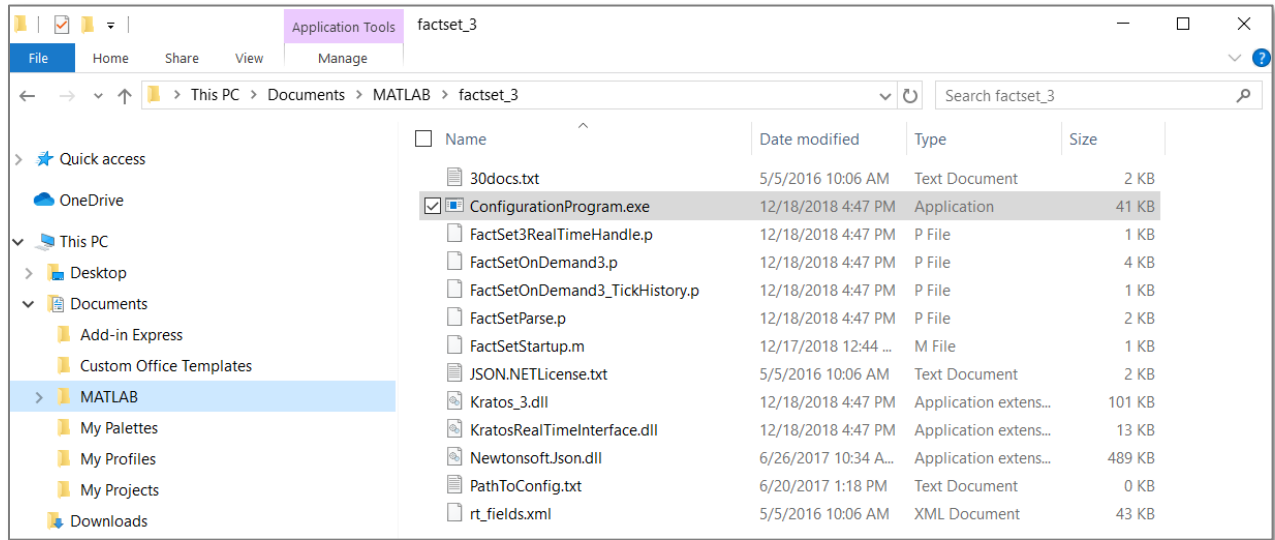
7. Click **Next**.

If the above-mentioned directory path is not displayed in the field by default, click **Change**. This will launch a browser window for you to select the recommended directory. Click **OK**.

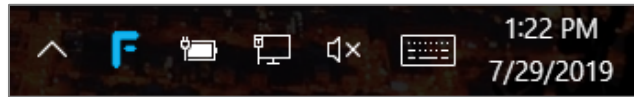




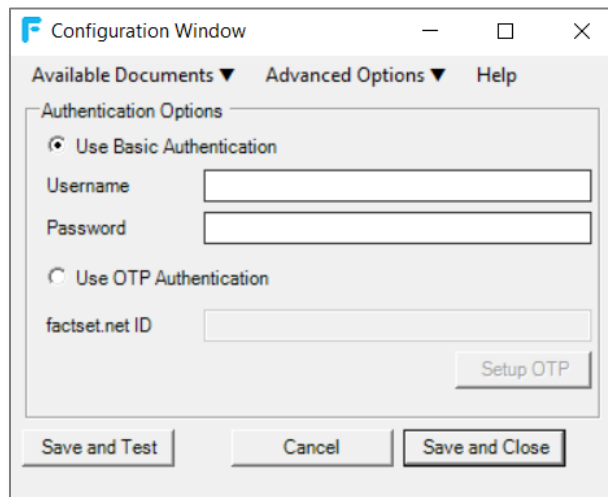
8. Click **Install** and then **Finish** on the subsequent windows to exit the setup wizard.
9. Now, go to **Documents > MATLAB / R > factset\_3**.
10. Double-click **ConfigurationProgram.exe** file.



This will launch the FactSet OnDemand Configuration icon in the notification area, at the far right of the taskbar as shown.



11. Double-click or right-click the icon and select **Open Window**. The configuration window is launched.



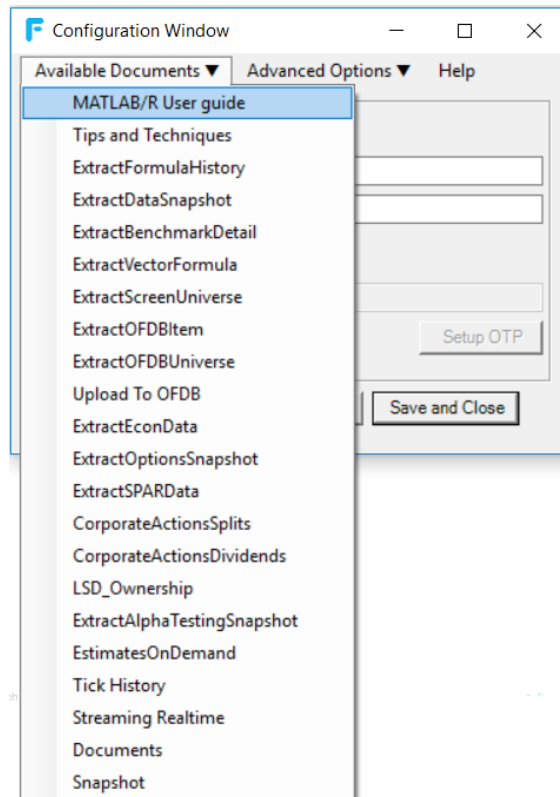
12. Enter your credentials provided by your FactSet representative and click **Save and Close**.

## 6. Configuring Options

Configure the settings of OnDemand API through the options given below.

### 6.1. Available Documents

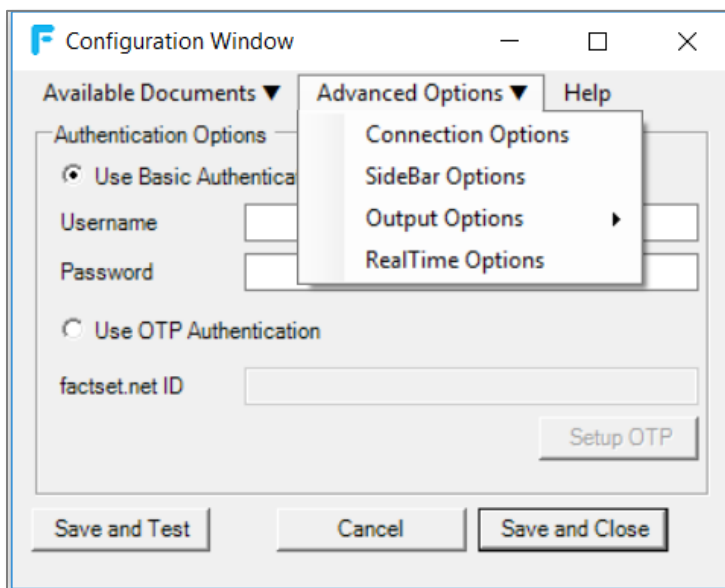
You can access all the documents through this option. Click the drop-down arrow to see the list of all available documents.



### 6.2. Advanced Options

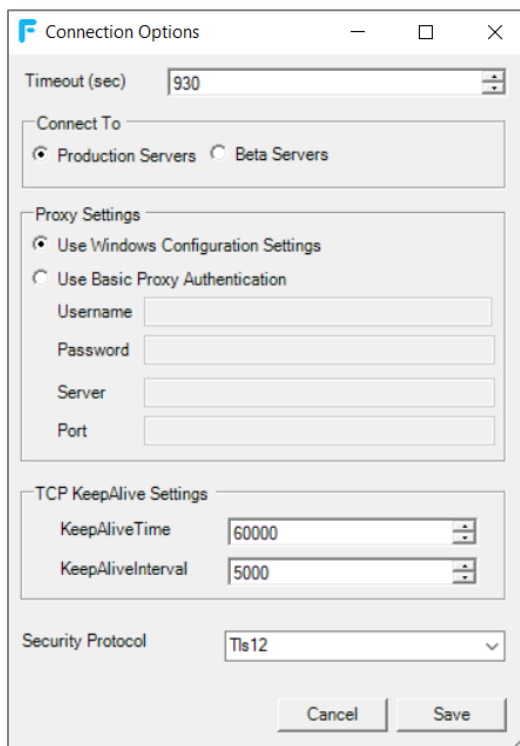
Advanced options for the following are available:

1. Connection Options
2. Sidebar options
3. Output options
4. Real Time options



### 6.2.1. Connection Options

You can configure the connections based on your requirements:



1. **Timeout (sec)** – the time duration between the request and the response through the API. The maximum allowed time duration is 15 minutes or 900 sec.

2. **Connect To** – You can connect to either of the following servers.

- **Production Servers** – the server which processes all the requests. By default, this option is selected.
- **Beta Servers** – the testing environment for newer features and functionalities.

3. **Proxy Settings**

If the network traffic is being routed through a proxy, then enable any one of the following settings:

- **Use Windows Configuration Settings** – By default, this is enabled.
- **Use Basic Proxy Authentication** – If your network traffic is being routed through a specific server, select this option. Provide your network's username and password and the necessary details.

4. **TCP KeepAlive Settings**

A KeepAlive signal is used to indicate to Internet infrastructure that the connection should be preserved. Without a KeepAlive signal, intermediate routers can drop the connection after timeout.

- **KeepAlive Time** – the duration between two KeepAlive transmissions in idle condition. TCP KeepAlive period is required to be configurable and by default is set to 60000.
- **KeepAliveInterval** – the duration between two successive KeepAlive retransmissions, if acknowledgement to the previous KeepAlive transmission is not received. By default, it is set to 5000.

5. **Security Protocol** – This should be set to TLS v1.2

## 6.2.2. SideBar Options

You can define the SideBar data variable under this option. Enter the data variable and click **Save**. When using SideBar, the extracted data is stored in the variable specified in the field.

## 6.2.3. Output Options

The output can be generated with or without the summary. Use the following options:

- **Generate Summary String** – Select this option if you want the summary of the output. Deselect the option if you do not want the summary. By default, the option is enabled, and you will get a summary of the output.
- **Generate Summary Description** – Select this option if you want to generate a detailed summary.

## 6.2.4. RealTime Options

To configure the Real time settings, enter your Exchange DataFeed credentials provided by your FactSet representative.

## 6.2.5. Save and Test

This option is used whenever you want to verify the subscription for OnDemand API and validate its credentials.