FactSet Connect Setup and Usage Instructions

1. To start using FactSet Connect, open a web browser (Internet Explorer, Safari, Firefox) and point to https://connect.factset.com

2. On the first run from any machine, download and run the Citrix client – links are on bottom of page. Once complete, that machine will not need to download the plugin ever again. Administrative rights are not necessary.

    Download the Citrix Client
    Windows | **Mac** | **Linux**

3. When prompted, enter the Connect ID found in your Connect Welcome email, then click the **Continue** button – see *Figure 1*.

4. An e-mail from **FactSetConnect@factset.com** will be sent to your corporate e-mail address on record with FactSet. It will contain an eight digit passcode. Type or copy the passcode in the box which says 'Passcode', then click the **Login** button – see *Figure 2*. When on the road, users often choose to use their BlackBerry, iPhone or Webmail to access their passcode. Every session requires a new Passcode.

5. On your first login from a machine you may be presented with a dialogue asking for access level. Select **Full Access** and **Never Ask Again** to enable saving files to your local hard drive. On a **Windows** machine - your local My Documents and Desktop locations are available in order to save Excel, Word, PowerPoint and PDF content.   On a **Macintosh** – please use the path **\\client\c$** in the Save dialogue to save files to your local machine's hard drive.

6. All **Windows**, **Macintosh** and **Linux** users may also print directly to local and network printers.

7. FactSet should automatically launch within 10-15 seconds after entering the passcode – see *Figure 4*.

8. If you are using Internet Explorer, then watch for a yellow ribbon at the top of the window, click on it and select 'Allow'.   Adding https://connect.factset.com to Internet Explorer's Trusted Sites will enable faster logons.

9. Future logons from the same machine will immediately launch FactSet once your Connect ID and Passcode are entered. You may close the web page shown in *Figure 3*, which confirms a successful launch, at any time during the session – this will not shut down FactSet.

10. If there are problems saving files or reports to your PC, right-click on the Connection Center in your System Tray and ensure Full Access is granted to Files.   See *Figure 5* for the proper settings.
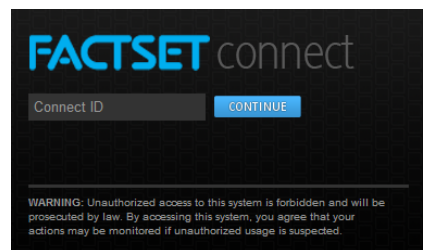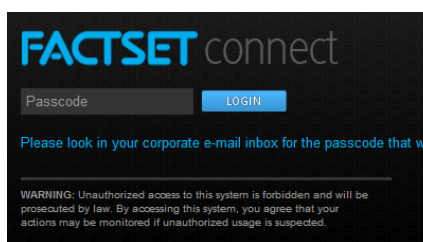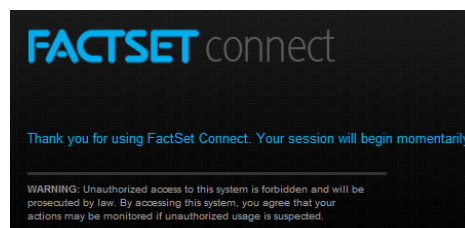
Figure 1: Enter Connect ID

Figure 2: Enter Passcode
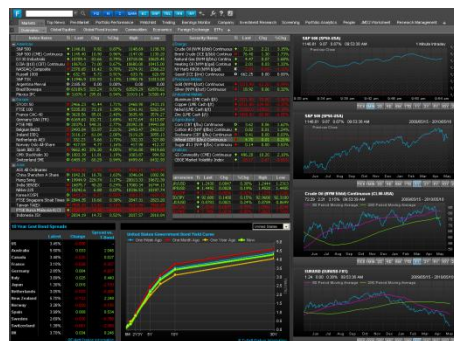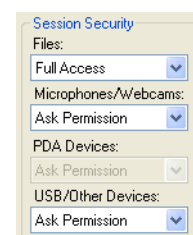

Figure 3: Successful launch

Figure 4: Use FactSet

Figure 5: Connection Center