

## FactSet Connect Instructions

FactSet Connect is a web-based Citrix site (<https://launch.factset.com>) that allows access to the FactSet platform, including the user's custom workspace, from any private or public Windows, Macintosh, or Linux machine, securely using two factor authentication. FactSet Connect does not integrate with Microsoft Office.

1. Open a web browser and point to <https://launch.factset.com>
2. Logon with your factset.net ID and password. If you've forgotten your password, you can self-service reset. If you've forgotten your factset.net ID, please contact your FactSet account team.
3. Click Launch under the FactSet Connect icon to start your Connect session – see [Figure 2](#). On the first run from any machine, you will need to install the Citrix plugin – see [Figure 3](#). When prompted, click **Download** to install the Citrix plugin. Administrative rights are not necessary unless one is un-installing an older version. If the Citrix plugin is already installed, then click on Already installed.

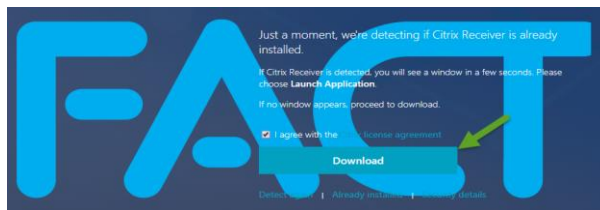




Figure 3: Download and Install Citrix

4. Under **All Apps**, click on FactSet –see [Figure 4](#).
5. On your first login from a machine you may be presented with a dialogue asking for access level. Select **Permit all access** and **Do not ask me again for this site** to enable saving files to your local hard drive.
6. 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$\` in the Save dialogue to save files to your local machine's hard drive – example `\\client\c$\financials.xls`
7. All **Windows**, **Macintosh** and **Linux** users may also print directly to local and network printers.
8. You may close both the Launch and the Connect webpages at any time after FactSet is launched – this will not end your Connect Citrix session.
9. To end your Connect Citrix session, click the 'X' in the top right corner of FactSet.
10. If there are problems saving files or reports to your PC, right-click on the Citrix Receiver in your System Tray  or , go to **Connection Center** and **Preferences** to ensure **Read and write** is granted to Files –See [Figure 6](#) for the proper settings.

FactSet Connect uses XenApp™ (Citrix) ICA technology for high-performance, secure, remote access to FactSet running in FactSet's datacenters

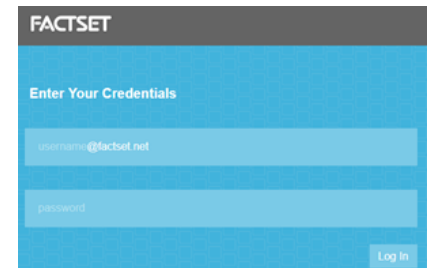


Figure 1: Logon with factset.net ID

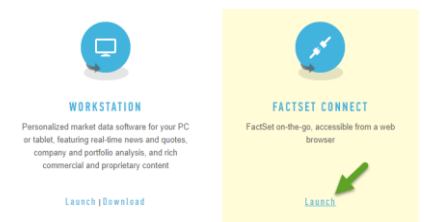


Figure 2: Launch FactSet Connect

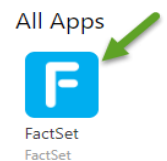


Figure 4: Open FactSet

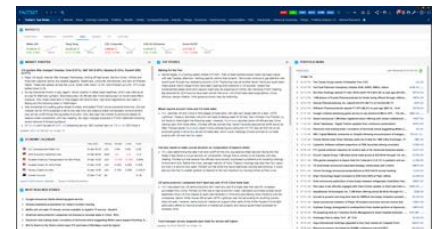


Figure 5: Use FactSet

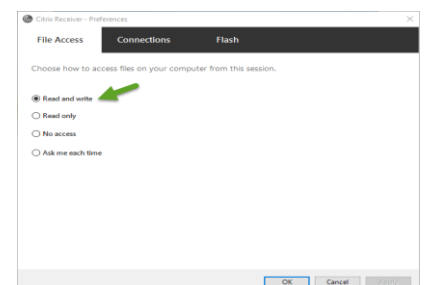


Figure 6: Connection Center