



FactSet Office Lite Add-in: Installation Guide

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Introduction

The FactSet Office Lite Add-in Installation Guide is aimed at individuals wishing to install or upgrade the FactSet Office Lite Add-in, and IT professionals looking to package and deploy the FactSet Office Lite Add-in to desktop or server environments. FactSet provides a single MSI which installs the FactSet Office Lite Add-in.

For more information about FactSet and our products, please see <https://www.factset.com/about-our-company>.

Support

If you have any questions on how to install, package, or deploy the FactSet Office Lite Add-in, please contact Technology Solutions Engineering.

Email: techsupport@factset.com

If you have questions or require assistance using the FactSet Office Lite Add-in application, please contact the FactSet Support Desk.

Email: support@factset.com

For a list of regional and country specific contact phone numbers, please visit:

<https://www.factset.com/support-numbers>

Download Website

The FactSet download website contains the latest FactSet technical documentation as well as the FactSet Office Lite Add-in installation files.

<https://www.factset.com/download>

FactSet Office Lite Add-in General Release installer.

[FactSet Office Lite Add-in General Release 64-bit](#)

The FactSet Technology Overview Guide details FactSet's software suite, networking configuration, security, and desktop deployment fundamentals.

[FactSet Technology Overview Guide](#)

The FactSet Allow List provides FactSet folders, processes, and connectivity requirements that need to be added to any allow list for optimal performance.

[FactSet Allow List](#)

PC Software Requirements / Compatibility

The FactSet Compatibility Table can be downloaded from the FactSet download website.
https://download.factset.com/documents/workstation/FactSet_Compatibility_Table.pdf

Technical Requirements

FactSet recommends the setup listed below for best performance.

Technical Requirements

Hardware / Software	Recommended PC Specs
CPU	Dual-Core + processor or 2 vCPU*
Memory	16 GB +
HDD	1 GB +
Operating System	Windows 10 or Windows Server 2019 64-bit
Office Versions	2016 or 365 (Semi-Annual) both 32-bit or 64bit
Internet Explorer	11

*RISC (e.g., ARM64) based processors are not supported by the FactSet Office Lite Add-in.

[https://.factset.com](https://*.factset.com) must be added to Trusted sites within the Internet Options Security tab.

Connectivity Requirements

The FactSet Office Lite Add-in is designed for FactSet Web clients and uses two separate connections, DF (Real Time Exchange Data Feed) and HS (HTTPS Services). DF connectivity requires outbound-initiated connections via api.df.factset.com on TCP port 6681*. HS connectivity must be able to communicate with https://*.factset.com on TCP 443. Both DF and HS connectivity is required for the FactSet Office Lite Add-in to function correctly. **Not web proxy aware and will need to be allowed on your edge firewall.*

The following IPs, subnets, and domains must be added to the allow list on all HTTPS inspection points, such as firewalls, web proxies, and VPN concentrators for optimal performance and to avoid FactSet traffic from being decrypted, scanned, or denied.). All traffic is outbound-initiated.

FactSet recommends companies with Palo Alto Next Generation Firewalls to enable the “FactSet” App-ID to allow FactSet traffic. Palo Alto Networks Applipedia (App-ID database): <https://applipedia.paloaltonetworks.com/>

FactSet Real Time Exchange DF – TCP 6681

URLs	Subnet	Subnet Mask	Port
api-syd.df.factset.com	164.55.240.0	255.255.240.0	6681
api.df.factset.com	192.234.235.0	255.255.255.0	6681
	64.209.89.0	255.255.255.0	6681

All FactSet HTTPS domains use the following Subnets/URLs

URLs	Subnet	Subnet Mask
https://*.factset.com	164.55.224.0	255.255.224.0
	192.234.235.0	255.255.255.0
	64.209.89.0	255.255.255.0

CRL & OCSP

Security certificates are used to secure both the integrity of the installed files and to encrypt FactSet's HTTPS traffic. Windows periodically confirms the authenticity of all certificates by completing CRL (Certificate Revocation List) and OCSP (Online Certificate Status Protocol) checks. If these requests are denied or delayed it will result in unnecessary delay or failure while using FactSet. For this reason, the below list of OCSP and CRL URLs should be added to the allow list on all HTTPS inspection points, such as firewalls, web proxies, and VPN concentrators.

Please note that DigiCert recommends using wildcards for their CRL and OCSP URLs. These URLs are outside of FactSet’s control and as such can and will change without notice. Please contact techsupport@factset.com for further information.

CRL & OCSP URLs

URLs
http://crl3.digicert.com
http://crl4.digicert.com
http://ocsp.digicert.com
http://*.thawte.com
http://crl1.windowsupdate.com

Installing the FactSet Office Lite Add-in

The FactSet Office Lite Add-in is contained in a single MSI which typically takes a few seconds to install.

FactSet Folder Defaults / Recommendations

FactSet Folder	Name	Default Folder Location	Recommendation
Application Folder	FdsAppDir	%ProgramFiles(x86)%\FactSetExcelAddin\	Contains FactSet Office Lite Add-in's installed application files. The Application Folder should reside on a local fixed drive
User Data Folder	FdsUserDataDir	%LOCALAPPDATA%\FactSetExcelAddin\UserData\	Individual user credentials and configuration files. In Multi-Server, Multi-VM, and non-persistent environments, this location should reside on a remote drive, unique to each user, such as a remote HOMESHARE or HOMEDRIVE.
Cache Folder	FdsCacheDir	%LOCALAPPDATA%\FactSetExcelAddin\Cache\	Contains FactSet diagnostic report. Fixed local drive recommend for optimal performance and persistence is not required.
Logs Folder	FdsLogsDir	%LOCALAPPDATA%\FactSetExcelAddin\Logs\	Contains FactSet logs and crash dump files. Fixed local drive recommend for optimal performance and persistence is not required.

FactSet recommends that the FactSet folders and files are added to the allow list on all endpoint security protection and user virtualization solutions for optimal performance and to avoid FactSet folders, processes, or traffic from being hook injected, decrypted, scanned, denied, quarantined, or deleted. Please see the FactSet Allow List (<https://support.factset.com/allowlist/>) for more information.

Important Notes

To ensure all users that access a machine can use the add-in, it is recommended that an administrator account be used to install the FactSet Office Lite Add-in. Unattended or silent installs of the FactSet Office Lite Add-in require the ALLUSERS=1 Public Property be set to ensure the FactSet Office Lite Add-in is installed in a per-machine context. See the [Packaging / Repackaging](#) section for more information.

The FactSet Office Lite Add-in leverages two authentication schemes:

- Interactive [FactSet Web Authentication](#) and SSO
 - It is highly recommended to federate with FactSet to minimize the number of times a user must login. Please review the Overview and Section 1 of [FactSet Single Sign On and Views API](#) for more information on how to federate with FactSet. Please contact techsupport@factset.com or your FactSet Account team for further information if you have any questions.
- Local one-time authentication where subsequent logins leverage tokens in the User Data folder to seamlessly authenticate to the FactSet DF (Real Time Exchange Data Feed).

FactSet Workstation cannot be installed on the same device as **FactSet Office Lite Add-in** (which is designed for FactSet Web clients only). You will first need to uninstall FactSet Workstation before installing FactSet Office Lite Add-in.

Packaging / Repackaging

FactSet Office Lite Add-in software is available in .MSI format for of deployment ease. FactSet offers a variety of MSI Public Properties to create and modify common deployment options and settings. When additional customizations are required, a Microsoft Transform (.MST) is recommended.

Installation Options

Msiexec.exe is the Windows install engine for the installation, maintenance, and removal of applications on Microsoft Windows devices.

Msiexec.exe can be executed in a variety of ways:

- Script or Batch file: This is often desirable for clients who deploy software via logon script, Microsoft System Center Configuration Manager, or similar deployment tools.
- Command line: This method usually applies in environments where IT staff manually runs the FactSet installation on users' machines.

Here are some common examples using msiexec.exe.

- msiexec.exe /i "FactSet_Office_Lite_Addin_x.x.x.xxx_x64.msi" ALLUSERS=1
- msiexec.exe /i "FactSet_Office_Lite_Addin_x.x.x.xxx_x64.msi" FDSIDPID=<idpid> ALLUSERS=1

Unattended or Silent Installations

Unattended or silent installations of FactSet Office Lite Add-in, using SCCM or similar deployment tools, must include the ALLUSERS=1 Public Property to ensure FactSet is installed in a per-machine context.

- msiexec.exe /q /i "FactSet_Office_Lite_Addin_x.x.x.xxx_x64.msi" ALLUSERS=1

[Public Properties](#) can be defined in a variety of ways:

- Transform file: FactSet recommends the use of a transform file (.MST) which can be created using an MSI editor. For instructions on how to create a transform file, please see the following [FactSet Transform File](#) section.
- Command line properties: Defines the Public Properties on the command line.
- Modify the MSI directly: We do not recommend modifying the provided MSI as this may complicate any future support troubleshooting.

The [Public Properties](#) section contains the available MSI Public Properties for the FactSet Office Lite Add-in installation.

FactSet Transform File

This section contains generic instructions on how to create a transform file (.MST) that defines a firm's IDP ID to configure Single-Sign On (SSO) within the FactSet Office Lite Add-in (public property = FDSIDPID).

1. Within your chosen MSI editor, create a transform file.
2. Navigate to the Property table within the MSI.
3. Add a new row within the Property table called FDSIDPID.
4. Configure the value of the FDSIDPID property to the firm's IDP ID which is provided by FactSet.
5. Ensure the transform containing the above change is saved.

An example of the syntax used to install the FactSet Office Lite Add-in using the generated transform file would be:

```
msiexec.exe /i FactSet_Office_Lite_Addin_x.x.x.xxx.msi /qn TRANSFORMS="<path to the transform file .mst>"
```

/i = installs or configures a product

/qn = Quiet mode with no User Interaction

Public Properties

Public Properties

Public Property Name	Description
ALLUSERS=1	Specifies installer to perform a per-machine context installation for all Windows accounts. When not defined, the installer will perform a per-user context installation for just the Windows account executing the installation.
FDSAPPDIR="<path>"	Specifies the FactSet Office Lite Add-in application folder location.
FDSUSERDATADIR="<path>"	Specifies the FactSet Office Lite Add-in User Data folder location.
FDSCACHEDIR="<path>"	Specifies the FactSet Office Lite Add-in Cache folder location.
FDSLOGSDIR="<path>"	Specifies the FactSet Office Lite Add-in Logs folder location.
FDSIDPID=<idpid>	Enables SSO by configuring Office Lite Add-in to use the defined IdPid for your federation with FactSet.

If you have any questions about the use of these Public Properties, please contact Technology Solutions Engineering techsupport@factset.com.