

FACTSET › SEE THE ADVANTAGE

FRAMEWORK LIFECYCLE POLICY AND FACTSET ONLINECOMPONENTS



Framework Lifecycle Policy and FactSet OnlineComponents

In 2016, FactSet introduced a revised lifecycle policy for the FactSet Workstation. This policy helps to ensure FactSet clients run the most appropriate FactSet release and therefore enjoy the best features and stability available.

This white paper goes into detail on both the Framework Lifecycle Policy and OnlineComponents, which is the technology used to update the FactSet Workstation without requiring a manual installation.

Contents

Framework Lifecycle Policy and FactSet OnlineComponents	2
Why is the Framework Lifecycle Policy important?	3
Frameworks and OnlineComponents	3
Installed Version vs FactSet Version.....	4
Early Adopter (EA) vs General Release (GR)	4
Framework Lifecycle Policy	5
Launching a Retired Version	5
Recommendations.....	6
Upgrading Underlying Installation	6
OnlineComponents Cache Folder.....	6
Questions.....	6

Why is the Framework Lifecycle Policy important?

Ensuring FactSet clients have the best experience possible using the FactSet Workstation is of paramount importance. Clients that are running older releases of the FactSet Workstation will use old, outdated versions of FactSet components, plus they will hit known bugs that have been fixed in later releases.

The Framework Lifecycle Policy establishes a reasonable and enforceable policy to retire older versions of FactSet, therefore helping to ensure clients move to more recent FactSet Workstation releases.

Before we can talk about the Framework Lifecycle Policy, we must first explain OnlineComponents. OnlineComponents is a FactSet technology designed to help clients receive the latest features, enhancements and bug fixes without the need to package and deploy a new version manually.

Frameworks and OnlineComponents

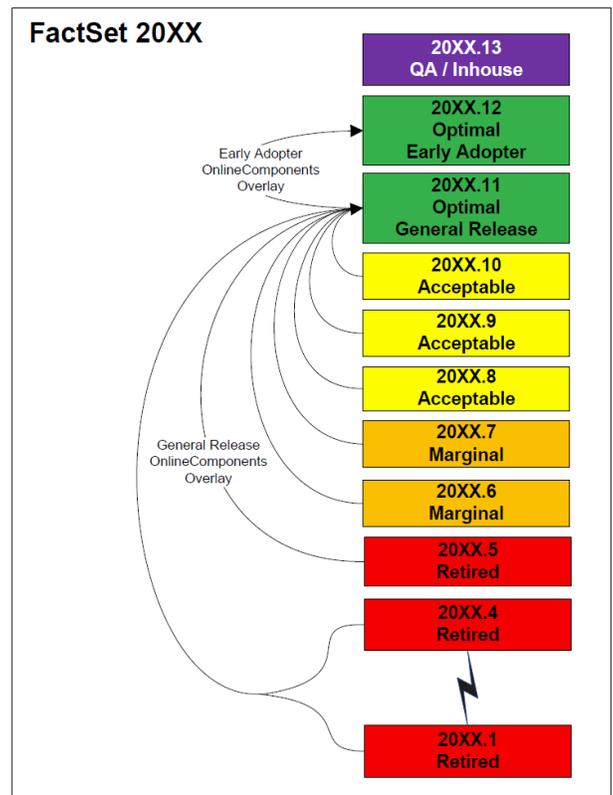
Once a client has installed a version of FactSet, OnlineComponents allows that client to move to any release within the FactSet Framework without needing to install a new version of the FactSet Workstation.

Frameworks are collections of numbered releases that use common base files. OnlineComponents allows clients to move to releases that are contained within the same Framework as the originally installed version. To move from one Framework to another, it is necessary to install a new version.

OnlineComponents updates are secured using a Code Signing Certificate and MD5 hashes. OnlineComponents update files are received from FactSet’s datacenters secured using certificates and TLS 1.2+ encryption.

For example, 20XX is a Framework; this means that if a client installs any 20XX release (20XX.2, 20XX.3, etc.) then OnlineComponents can be used to move that client to the latest release. This process keeps clients on the most up to date version of FactSet, even if the version originally installed is many months old.

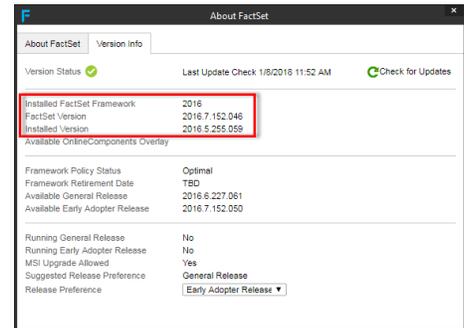
OnlineComponents has been designed to work in most client environments and does not require the person using FactSet to have administrative privileges on the machine.



Installed Version vs FactSet Version

OnlineComponents does not alter any of the originally installed FactSet Workstation files or registry keys. Instead, update files are downloaded and the FactSet Workstation redirects and overlays these files alongside the original installation.

Because of this, it is important to consider both versions when talking about OnlineComponents and the Framework Lifecycle Policy. The installed version is the base version of FactSet originally installed on the machine, whereas the FactSet version is the version currently being used, delivered via OnlineComponents.



Early Adopter (EA) vs General Release (GR)

FactSet understands that many clients are apprehensive about vendors delivering updates automatically without any opportunity to first test the latest version against other internal applications. To address this concern, FactSet has two OnlineComponents release schedules, Early Adopter (EA) and General Release (GR).

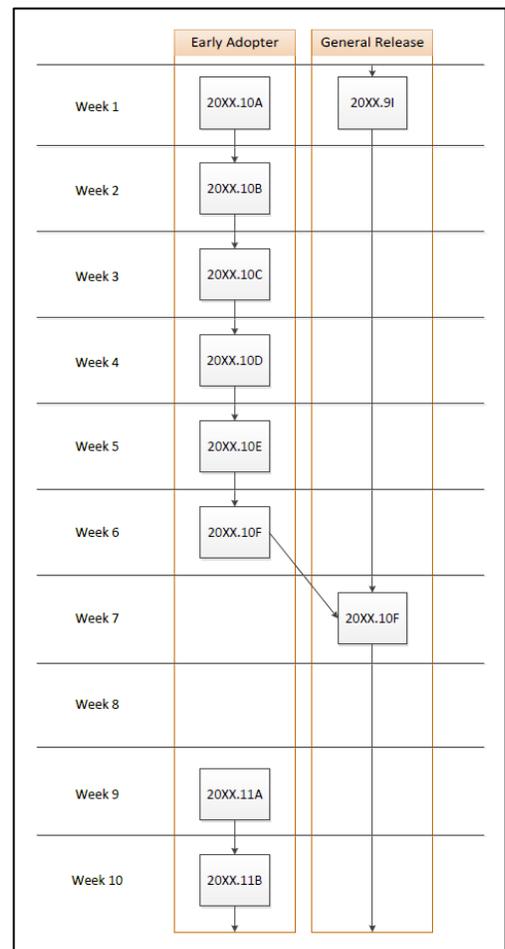
EA clients receive the latest release via OnlineComponents before GR clients. This gives clients the opportunity to test the latest release on a subset of their user base prior to the general roll out.

We recommend clients have a subset of their user base set as EA to ensure exposure to the latest release prior to it being made available to GR clients.

Once a new EA version has matured and proven to be stable/reliable, it is promoted to GR, resulting in all clients receiving the release via OnlineComponents.

While a version is classified as EA, new releases are made available once per week (typically on Tuesday's during the US business day). Once a version has been promoted to GR, updates are only released if absolutely necessary. Therefore, clients classified as EA can expect to download multiple OnlineComponents downloads per release while GR users should expect far fewer OnlineComponents downloads within the same time frame.

The diagram to the right shows a typical release cycle. During weeks 1-6, EA users download a new version each week. Then on week 7, the latest EA version is promoted to GR, resulting in all GR users downloading that release. The process starts again on week 9 with the release of a new EA version.



Framework Lifecycle Policy

There are 4 stages within the Framework Lifecycle Policy; Optimal, Acceptable, Marginal and Retired. As new releases are made available, they are classified as 'Optimal', overtime they move through the intermediate stages of the lifecycle and are eventually retired. Retirement usually occurs approximately 15 months after the original promotion from Early Adopter to General Release.

As an example, if a release was made available to EA clients in September 2016, then promoted to GR clients in November 2016, the retirement date would be set to March 2018, approximately 15 months after the GR promotion and 17 months after the initial release.

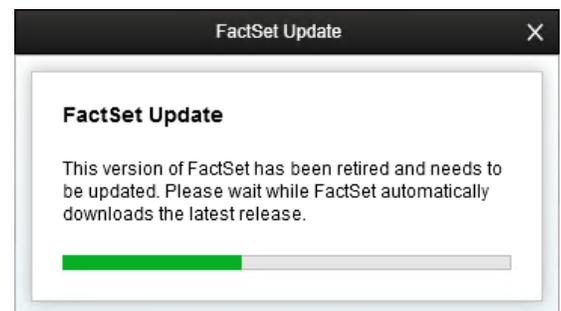
An important point, we are not forcing clients who originally installed a version that is now retired to manually upgrade FactSet on their machine. Clients in this position can continue to use the Workstation if they have downloaded and are using a supported version of FactSet via OnlineComponents. If the FactSet version supplied via OnlineComponents is supported, then the originally installed base version is not relevant.

For more information on the status of a FactSet release and the predicted retirement date, please refer to <https://support.factset.com/>

Launching a Retired Version

In theory, any client that uses OnlineComponents will not see a retirement message. However, if a client is new to FactSet, receives a new machine, or resets OnlineComponents overlay files while troubleshooting an issue, they might attempt to login with a retired version. If this happens, the following message is displayed.

When FactSet recognizes a retired version, the FactSet Workstation immediately attempts to download the latest release via OnlineComponents. This download will either occur from the OnlineComponents cache folder if it exists (further details in the document linked at the end of this White Paper), or directly from FactSet over the Internet. Downloads from the OnlineComponents cache folder typically take a couple of minutes, while downloads from FactSet over the Internet may take 10 minutes or more (depending upon available Internet bandwidth).



Once the download has been completed the client will be prompted to close any dependent applications and restart FactSet. This will restart FactSet using the latest version and allow the client to login and use the Workstation.

Recommendations

Upgrading Underlying Installation

FactSet recommends clients upgrade the base FactSet installation every 12 months. Upgrading the base installation has the following advantages:

- Occasionally, some improvements cannot be delivered via OnlineComponents, these enhancements require the base installation to be updated.
- Upgrading the base installation ensures that FactSet users can login quickly, even if the OnlineComponents containing the latest release have been removed (for example, while troubleshooting a technical issue).
- For clients that package and deploy a common version across all FactSet users, upgrading the FactSet package once per year ensures that new users, or rebuilt machines, are running a supported release from the first login. This allows clients to login and use FactSet with the minimum of disruption.

OnlineComponents Cache Folder

OnlineComponents cache folder is an optional feature that allows the caching of OnlineComponents updates on a network share within a client's environment. Caching an update on a network share enables FactSet users to retrieve the update from a local resource, rather than over the Internet. This reduces both the time it takes to receive a new release via OnlineComponents and the total amount of data downloaded over the Internet from FactSet's OnlineComponents servers.

Further details on the OnlineComponents cache folder can be found here ->

https://www.factset.com/files/download/files/pdf/FactSet_OnlineComponents_Cache_Folder.pdf

Questions

Please contact techsolutions@factset.com if you have any further questions on the Framework Lifecycle Policy or FactSet OnlineComponents.