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 (Internet Explorer or Safari) 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. Once complete, that machine will not need to download the plugin ever again. Administrative rights are not necessary unless one is un-installing an older version.

4. 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.

5. 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

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

7. If using Internet Explorer, adding https://*.factset.com to Internet Explorer’s Trusted Sites will enable faster logons. This is not necessary in Safari or other browsers.

8. You may close the Launch webpage at any time after Connect is launched – this will not shut down FactSet.

9. Closing down FactSet by clicking the ‘X’ in the top right corner of FactSet will end your FactSet Connect session.

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 Control Center and Preferences to ensure “Full Access” or “Read and write” is granted to Files. See Figure 5 for the proper settings.

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

*How to add https://*.factset.com to Internet Explorer’s Trusted Sites – see next page
How to add https://*.factset.com to Internet Explorer’s Trusted Sites

Factset often works best in IE. Step #7 of the instructions on the previous page states the need to add https://*.factset.com to the Trusted Sites in IE. Here is where you go in Internet Explorer to do this.

1. Go into IE in the upper right click on the gear icon.
2. Then from the menu, select “Internet options”.
3. Then in the window that appears click on the tab that says “Security” and then click on “Trusted sites”. Then click on the button that says “Sites” to go to the next window.
5. This will now be saved to your computer settings so you can use Factset in IE.