

Goizueta Business Library

Creating Bridges to Knowledge

Factset FAQ

How do I contact Factset Customer Support

- 1-877-Factset
- Available 24x7

How do I access Factset?

You have two choices: for remote access, you must register and create an individual username/password that remains active until your graduation; or you can use 2 workstations within GBL, which does not require registration:

a. Remote, web access (“Factset Connect”)

- Register by clicking on the On-Campus or Off-Campus links on GBL’s Factset databases page <http://business.library.emory.edu/research-learning/databases/factset.php>
- You will receive a confirmation email from Factset within 24-48 hrs with additional instructions for connecting to Factset.

b. In the Goizueta Business Library

- Factset is installed on 2 desktop computers in the Goizueta Business Library, Sao Paulo and La Paz. Both are located to the far right of the GBL entrance, beneath the Factset sign hanging from the ceiling.
- Click on the Factset icon on the desktop and online access will immediately launch; you do not use the username/password that you created for remote registration.

Are there any differences between access on the GBL installed workstations and remote access via Factset Connect?

- Only the GBL installed workstations include Excel Add-ins. The add-ins allow you to pull data from FactSet using its FDS codes to create custom templates and models. If you need to pull multiple data points across multiple entities, you must use the Excel Add-ins.
- Remote access via Factset Connect is exactly the same as the GBL installed workstation except for the Excel add-in function. You can pull multiple data points for a single entity using the Excel functionality built into the remote web access.

What do I do if I have trouble logging into Factset Connect?

Go to <http://solutions.factset.com/academicstudentsupport> for help.

Will I continue to have access to Factset after I graduate?

Within a few weeks after graduation, Factset will deactivate your username/password. It will not be possible to reactivate it.

After graduation, can I pay for an individual subscription to Factset?

Currently Factset does not provide individual licenses.

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Can I get certified in Factset, just like I can in Bloomberg?

No, at this time Factset does not have an online certification program. However, it does offer a number of elearning tutorials that you can take to learn more about using Factset. Factset also offers an in-depth financial modeling learning series called Knowledge Base Financial Modeling; this is a self-paced interactive training program for financial modeling in Excel. Beginning with the basics of Excel, you progress through a series of complex model-building exercises and assessment questions.

NOTE: The Financial Modeling series used to be part of a certification program that has now been discontinued. The learning content is still available but there is no longer an option for getting certified.

Go to the Factset databases page for more information about the Financial Modeling content.

<http://business.library.emory.edu/research-learning/databases/factset.php>.

How long does it take to complete the Knowledge Base Financial Modeling series?

There are 19 chapters and a short quiz following each section; you can re-take any of these quizzes as often as you need in order to pass and move on to the next chapter. Each chapter varies in length but it takes approximately 40 hours to complete them all.

If I successfully complete all of the Knowledge Base Financial Modeling modules, can I put this on my resume?

Yes, if you complete all 19 modules and pass the exams with a grade of 70% or higher, you can notate “Factset Knowledge Base Certified” on your resume. If your employer contacts Factset, they can look you up in their system and verify that you did complete all of the modules.

How do I get started taking the Financial Modeling series?

You must log into Factset in order to take any of the elearning tutorials. Click on the Learning Portal tab on the top left, then click on Catalog on the left. Within the Academics tab, click on Financial Modeling Certification, then follow the steps.

Can I take Factset’s elearning tutorials using my remote access or do I need to use the GBL installed workstations?

You can access these remotely or using the GBL’s installed workstations.

Tell me more about Factset’s elearning tutorials.

Click on the Academics and Getting Started tabs to see the breakdown of content. A 12-minute Academic Training tutorial gives an overview of the workspace. The other courses listed on this Academics tab are suggested eLearning videos for the other reports/tabs in the academic workstation.

Can I use the Factset app on my phone or table?

Yes, you can now download the Factset app for your Apple, Android or Windows smartphone and/or tablet

- The app is useful for following a stock's price, chart, news, SEC filings, and looking up its snapshot, capitalization, estimates, ownership, M&A activity, debt, management, and insider activity.
 - You can track individual stocks, stocks in your portfolio and watchlist – BUT you must set up your portfolio and watchlist within Factset Connect; you cannot set these up from within the app.
1. In order to use the free Factset app, you must first register for Factset via the Business Library's [Factset database page](#).
 2. Once you are registered, download and install the app for your smartphone or tablet
 3. Once installed, you will be requested to enter your "Email or Factset.net account" – just type your emory email address (must be the same one used to register on Factset)
 4. Click the "Request Passcode" button
 5. You will immediately receive an email from Factset Authentication Service which includes a 6-7 digit passcode.
 6. Enter the passcode into your phone/tablet to begin using Factset

