

FactSet



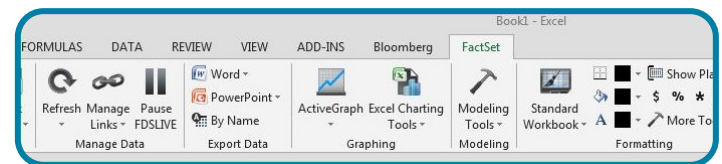
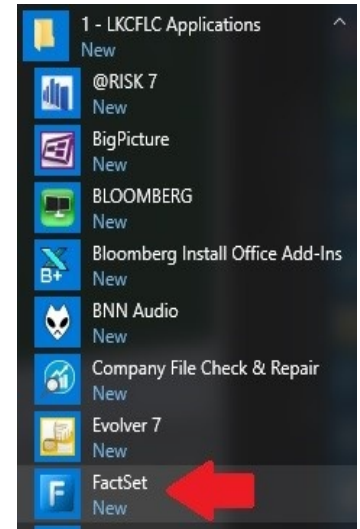
What is FactSet?

FactSet is a research database that monitors world market trends and provides extensive company and industry data, analytic tools, and data feeds. It is used by finance industry professionals globally.

Accessing FactSet

- FactSet can be accessed on all 44 workstations within the FLC.
- Log into the workstation using your UTORid credentials.
- From the start menu, navigate to the 1-LKCFLC Applications folder, and select FactSet.

Each FLC workstation uses a generic FactSet account, so there is no need to log into FactSet once it is open. The workstation client also grants access to FactSet's Excel API for use within Microsoft Excel. When launching Excel from the Start Menu, please be patient as the FactSet Add-in installs for your user login.



Creating a Personal FactSet Account

Students, staff and faculty with a valid UTORid can request a FactSet account for off-campus use on a personal computer (Mac or PC). A FactSet Connect account uses Citrix Receiver Client software, available as a free download. Note that this version of FactSet does not include the Excel add-in.

A personal FactSet account is also needed for individuals interested in completing FactSet's Financial Modelling certification program. Details about this certification can be found on the reverse.

To request a FactSet account

Email us at utm.lkcflc@utoronto.ca with the following information:

- First & Last Name
- Student Number
- UofT Email Address (@mail.utoronto.ca)
- Program & Major (ex. Commerce – Finance)
- Expected Month & Year of Graduation (ex. June 2015)

Accessing FactSet outside of the FLC

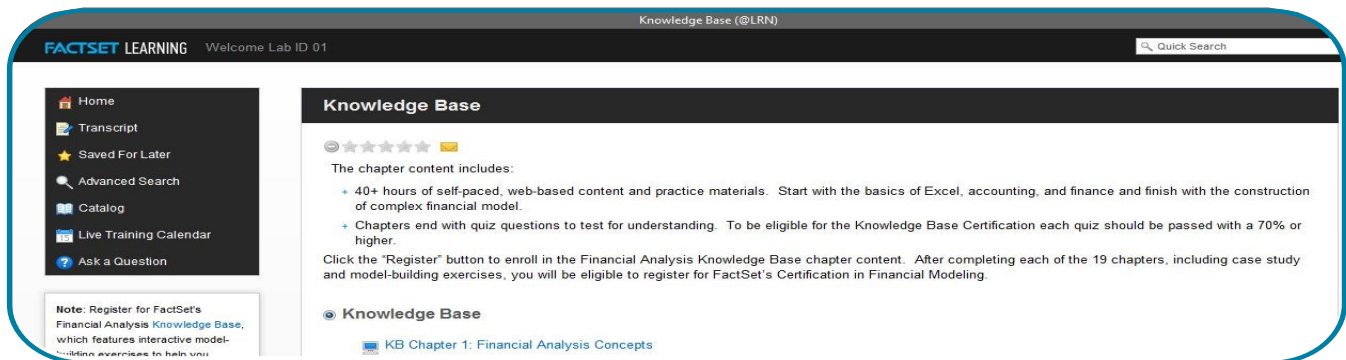
Once a FactSet Connect account has been created, you can access FactSet by using Internet Explorer or Mozilla Firefox (**Google Chrome is not recommended**) and navigating to 'launch.factset.com'. After logging in, select 'FactSet Connect'. In order to run FactSet from your personal computer, the Citrix Receiver Client must be installed and open on your computer prior to clicking 'Launch'.



FactSet Financial Modelling Certification

FactSet offers a certification in financial modelling through their Financial Analysis Knowledge Base, a 19-chapter program which features interactive model-building exercises to develop **financial analysis and Microsoft Excel skills**. Interested students must first complete the Knowledge Base's 19 chapters (~40+ hours of material) with a score of 70% or higher per chapter quiz before they are eligible for certification.

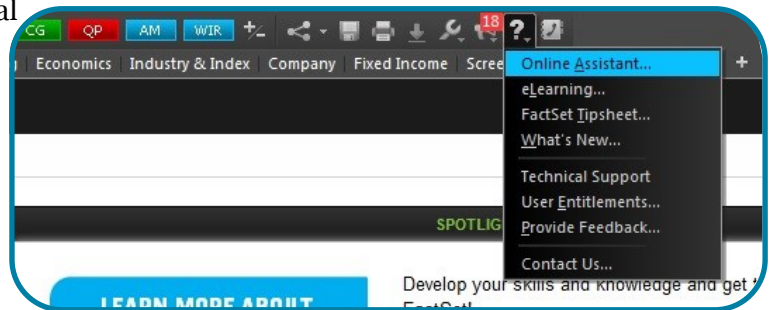
To access and register for the Knowledge Base, open the Learning Portal (@LRN) component within FactSet and click on the Knowledge Base link below the left toolbar. The Learning Portal can also be accessed from FactSet Launch online after logging in under the Web Applications section > Client Learning.



Need More Help?

For assistance with a FactSet Component, click on the ? icon on the top toolbar and select **Online Assistant**. The Online Assistant provides users with answers to FAQs, detailed help guides for all components of FactSet, and video tutorials for new users. To look for material regarding a specific component, use the search toolbar located on the top right corner of the page.

If you are unable to find the help you need, the home page of the Online Assistant (page ID 1) also provides a link near the bottom labeled Ask a Question to FactSet Support, where you can submit your question to a FactSet consultant and they will respond via email.



Workshops

The FLC hosts the FLC Tools Workshop series. There are two FactSet-focused workshops: FactSet Basics and FactSet Intermediate. Check our website and our social media for updates. Attendees can earn 1 Management PSDP point for each workshop attended and attendees can also earn 1 Library 101 certification credit.

Need Assistance?

For help, please email us or see our online resources available on our website. FLC staff are also available during open lab hours.

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