FactSet

**What is FactSet?**

FactSet is a research database that monitors world market trends, 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 38 workstations within the FLC.
- Log into the workstation using your UTORid credentials.
- From the start menu, navigate to All Programs > 1-LKCFLC Applications, 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**

A personal FactSet account can be requested for students and faculty with a valid UTORid. These accounts can be used to access FactSet on a personal computer off-campus (Windows & Mac) using Citrix Receiver Client software, available as a free download. (Note that this version 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 the certification can be found on the next page.

**To request a FactSet account**

Email us at utm.lkcflic@utoronto.ca with the following information:
- First & Last Name
- Student Number
- UofT email address
- Program & major (ex. Commerce – Finance)
- Expected month & year of graduation (ex. June 2015)
**Accessing FactSet outside of the FLC**

Once a personal FactSet 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 running or opened 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 skills and Microsoft Excel skills. Interested students must first complete the Knowledge Base’s 19 chapters (around 40+ hours of material) with a score of 70% or higher per chapter quiz before they are eligible to register and complete the certification content.

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 an answer, the home page of the Online Assistant (page ID 1) also provides a link near the bottom labeled Ask a Question, where you can submit your question to a FactSet Consultant and they will respond via email.