

IRN POWER BI DATA CONNECTOR - VERSION 1

User Guide

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Document Version 1.0

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1. Background

The Power BI Data Connector leverages the power of FactSet’s IRN API to integrate research data into Power BI. This allows users the flexibility and control to customize how they consume FactSet’s IRN using Power BI’s data visualizations. Other data sources can also be integrated to further enhance the Power BI experience.

2. Prerequisites

To start using the Power BI Data Connector, the following prerequisite steps need to be completed.

2.1 Download Power BI

- Please ensure that you are using latest version of Power BI , as latest major update to FactSet Power BI Data connector will only be available there. Any subsequent major or minor version updates will only be available by upgrading Power BI.

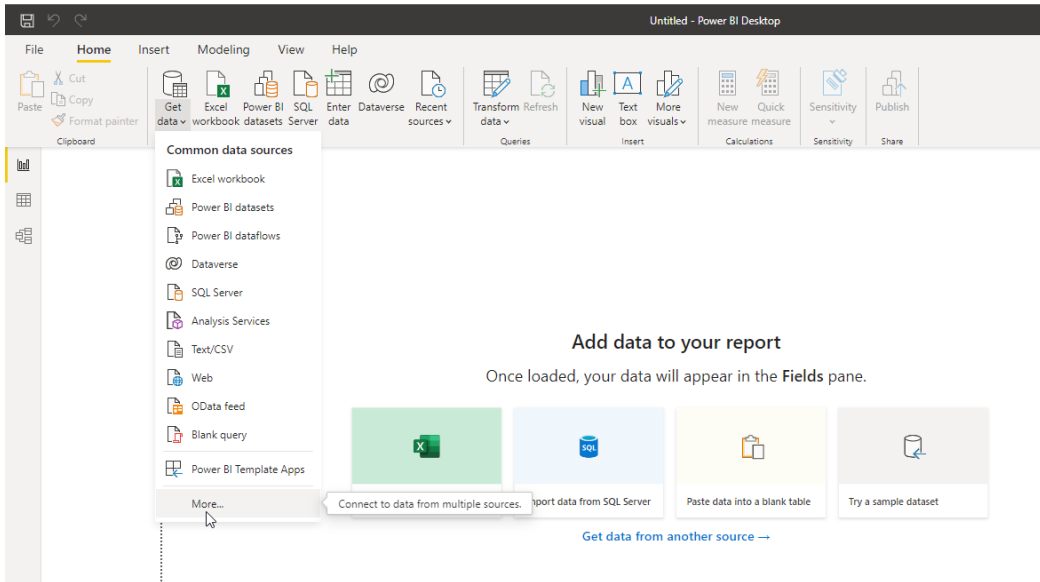
2.2 Subscription & Authentication

- To access FactSet’s IRN, the appropriate subscription is required. Please refer to the Client Assistance page for more details.
- With the subscription in place, the next step is to generate the API key from the Developer Portal. Please follow the steps outlined in the “FactSet API keys Authentication v1 documentation” under ‘Authentication’ in the ‘Support’ dropdown.

3. Steps

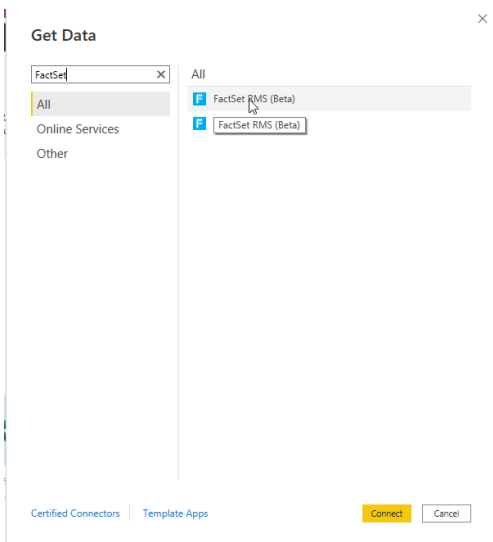
3.1 Open Power BI Desktop

On the Power BI Desktop home page, under section “Get Data” -> “More...”

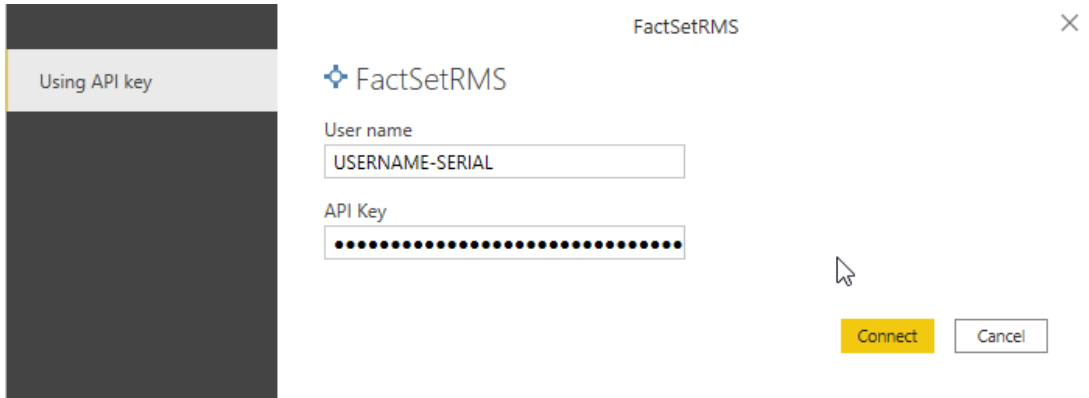


3.2 Connect to RMS Power BI Data Connector

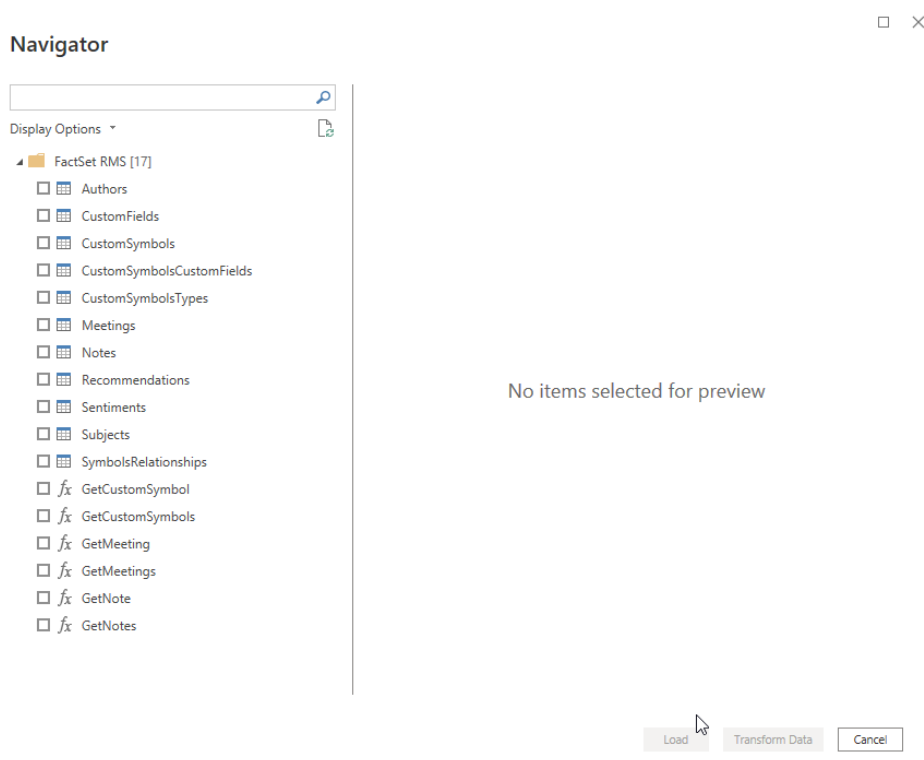
Search for 'FactSet' in the 'Get Data' pop-up and select the FactSet RMS (Beta) Connector from the right-hand list.



Authentication page: You will be prompted to enter the Username, Serial and the API key. Please see the FactSet Developer Portal for additional instructions on setting up an API Key.



Connector Navigator: The Connector will open Navigator with a list of all functions provided. Please note that all functions may not be available depending on your available subscriptions, your account team can assist with requirements for access to additional products.



3.3 Use Get Functions in the Connector

Use the Get * Queries to look up parameters for your Notes and create new queries. A form will populate in the query window with parameter fields to narrow your universe and return the relevant data set of interest based on IRN Subject , Author , Date Range , Recommendations and/or Sentiments. Note that the functions contain Get* queries that are common for IRN Notes, Custom Symbols and Meetings APIs.

The screenshot shows a configuration window for the 'GetNotes' function. At the top, there is a search bar with the text '= Source{[Key="GetNotes"]}[Data]'. Below this, a description states: 'This function returns the Notes with Subject, Authors, Recommendations, Sentiments and Dates'. The main section is titled 'Enter Parameters' and contains several input fields with example values:

- subjectId (optional): Example: c77b269c-840a-47b7-84e9-1e875
- authorId (optional): Example: c77b269c-840a-47b7-84e9-1e875
- recommendationIds (optional): Example: c77b269c-840a-47b7-84e9-1e875
- sentimentIds (optional): Example: c77b269c-840a-47b7-84e9-1e875
- startDate (optional): Example: 2022-01-27
- endDate (optional): Example: 2022-01-27
- modifiedSince (optional): Example: 2022-01-27

 At the bottom of the form are 'Invoke' and 'Clear' buttons. Below the form, a function signature is provided: 'function (optional subjectId as nullable text, optional authorId as nullable text, optional recommendationIds as nullable text, optional sentimentIds as nullable text, optional startDate as nullable text, optional endDate as nullable text, optional modifiedSince as nullable text) as text'.

	Function Name	Function Description
1	GetNotes	Gets all the notes including non-extended text custom fields in the specified date(startDate and endDate) range and can be filtered on subjectId, authorId, recommendationId, sentimentId and modifiedSince.
2	GetNote	Gets Details of a note including note body and extended text custom fields.
3	GetMeetings	Gets all the meetings including non-extended text custom fields in the specified date(startDate and endDate) range and can be filtered on modifiedSince.
4	GetMeeting	Gets Details of a meeting including meeting body and extended text custom fields.
5	GetCustomSymbols	Get list of all custom symbols in your IRN database along with standard field data and non-extended text custom fields data and can be filtered on CustomSymbolTypeName.
6	GetCustomSymbol	Gets details of a custom symbol including symbol description and extended text custom fields.

3.4 Result Format

Results will be returned as a table with notes and custom field data as seen below.

id	date	createdAt	contributorId	title	identifier	isPersonal	state	approvalStatus	author
1	2021-05-20	2021-05-20T19:13:29Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for Assoc...	AC-US	FALSE	Published		Paul Casillo
2	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for Boein...	BA-US	FALSE	Published		Paul Casillo
3	2021-12-20	2022-02-02T22:41:19Z	1811690d-93c4-4081-aea9-c9d362b3edd3	Amazon ESG Review - Needs ...	AMZN-US	FALSE	Published		Jhankhana Kapadia
4	2021-05-25	2021-05-25T18:20:15Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for ACM...	ACMR-US	FALSE	Published		Paul Casillo
5	2021-04-25	2021-04-26T19:13:02Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for OTIS...	OTIS-US	FALSE	Published		Paul Casillo
6	2018-08-23	2018-09-20T13:26:31Z	2f481f7c-2d7b-4b3a-89a4-43f9d9f9c5619	Model Update	AMZN-US	FALSE	Published		Austin McLaughlin
7	2021-07-16	2021-07-16T17:20:30Z	b446732b-a547-4f4d-9b74-a4f446fba687	STT-US Price Target	STT-US	FALSE	Published		Paul Casillo
8	2018-09-05	2018-09-20T16:25:10Z	2f481f7c-2d7b-4b3a-89a4-43f9d9f9c5619	TWTR Equity	TWTR-US	FALSE	Published		Austin McLaughlin
9	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for Union ...	UNP-US	FALSE	Published		Paul Casillo
10	2021-02-23	2021-07-09T21:51:01Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for AXS...	AXSM-US	FALSE	Published		Paul Casillo
11	2021-04-19	2021-04-19T20:29:41Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for XELB...	XELB-US	FALSE	Published		Paul Casillo
12	2021-06-08	2021-06-08T14:58:30Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for AXS...	AXSM-US	FALSE	Published		Paul Casillo
13	2019-11-30	2019-11-30T15:00:34Z	1811690d-93c4-4081-aea9-c9d362b3edd3	H&S document	FDS-US	FALSE	Published		Jhankhana Kapadia
14	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for sale...	CRM-US	FALSE	Published		Paul Casillo
15	2021-04-07	2021-04-07T18:37:33Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for Ama...	AMZN-US	FALSE	Published		Paul Casillo
16	2021-03-09	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for Tesla ...	TSLA-US	FALSE	Published		Paul Casillo
17	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for Morga...	MORG-US	FALSE	Published		Paul Casillo
18	2021-05-05	2021-05-06T14:19:29Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for MGA...	MGA-US	FALSE	Published		Paul Casillo
19	2021-04-27	2021-04-27T16:51:06Z	b446732b-a547-4f4d-9b74-a4f446fba687	Engagement Notes for FDS-U...	FDS-US	FALSE	Published		Paul Casillo
20	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for Cater...	CAT-US	FALSE	Published		Paul Casillo
21	2021-07-09	2021-07-09T15:20:00Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target for NTIC-US	NTIC-US	FALSE	Published		Paul Casillo
22	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for Home...	HD-US	FALSE	Published		Paul Casillo
23	2021-05-10	2021-05-10T00:19:41Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for Incy...	INCY-US	FALSE	Published		Paul Casillo
24	2020-08-03	2020-09-16T18:09:11Z	a2c27f61-c0f9-4ae8-971e-e81c18c2e55f	Annual Report	ATLANTAINFRAS	FALSE	Published		Rachna Nirudu
25	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for Adobe...	ADBE-US	FALSE	Published		Paul Casillo
26	2021-06-08	2021-06-08T14:58:30Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for AGO...	AGO-US	FALSE	Published		Paul Casillo
27	2019-02-05	2019-02-07T07:15:48Z	9e6d4422-b96f-497e-862d-4e31865934ae	Hold Amazon?	WMT-US	FALSE	Published		Padmini Purushothaman
28	2021-04-12	2021-04-13T02:25:41Z	29747716-fbfe-40e0-862d-4e31865934ae	Latest on IBM	IBM-US	FALSE	Published		Anne Smith
29	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4f446fba687	Stock Commentary for Applie...	AAPL-US	FALSE	Published		Paul Casillo
30	2021-04-12	2021-04-13T02:25:41Z	d3f165be-29fb-4f4c-9c1e-afe5349eaac	Apple Update	AAPL-US	FALSE	Published		Janine Farah
31	2021-04-06	2021-04-06T15:06:21Z	b446732b-a547-4f4d-9b74-a4f446fba687	Price Target Update for AMS...	AMS-US	FALSE	Published		Paul Casillo
32	2021-07-28	2021-07-28T10:29:50Z	1811690d-93c4-4081-aea9-c9d362b3edd3	Facebook - Business Policed...	FB-US	FALSE	Published		Jhankhana Kapadia