FACTSET) SEE THE ADVANTAGE

IRN POWER BI DATA CONNECTOR - VERSION 1 User Guide April 2022 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.

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3. Steps

3.1 Open Power BI Desktop

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

B 9 9				Untitle	l - Power Bl Desktop			
File Home Insert	t Modeling View	Help						
Paste S Format painter	Get tata v workbook datasets Server	Enter Dataverse Recent data	Transform Refresh data v	New Text More visual box visuals	New Quick measure measure	Sensitivity *	Publish	
Clipboard	Common data sources		Queries	Insert	Calculations	Sensitivity	Share	
<u>UaU</u>	Excel workbook							
⊞	Power BI datasets							
63	Power BI dataflows							
	Dataverse							
	SQL Server							
	Analysis Services							
	Text/CSV			Add data to	your report			
	🔓 Web		Once loade	d, your data will	appear in the Fie	elds pane		
	DData feed							
	Blank query	1			伫		9	
1	Power BI Template Apps			•••	L		L4	
	More	Connect to data from mult	iple sources. port da	ta from SQL Server	Paste data into a blank tab	ole Try	a sample dataset	
				Get data from an	other source \rightarrow			

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 righthand list.

FactSet	× All	
All	FactSet RMS (Beta)	
Online Services	FactSet RMS (Beta)	
Other		
Certified Connectors	Template Apps	Connect Cancel

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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.

	FactSetRMS	\times
Using API key	✤ FactSetRMS	
	User name	
	Connect Cancel	

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.

Navigator				×
	Q			
Display Options 🔹	C2			
🖌 🗾 FactSet RMS [17]				
Authors				
CustomFields				
CustomSymbols				
CustomSymbolsCustomFields				
CustomSymbolsTypes				
Meetings				
🗆 🏥 Notes				
Recommendations		No itoms selected for proview		
Sentiments		No items selected for preview		
🔲 🎫 Subjects				
SymbolsRelationships				
$\Box f_x$ GetCustomSymbol				
$\Box f_x$ GetCustomSymbols				
$\Box f_x$ GetMeeting				
$\Box f_x$ GetMeetings				
$\Box f_X$ GetNote				
$\Box f_X$ GetNotes				
		Load Transform Data Can	icel	

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.

Queries [1] <	× √ f _X = Source{[Key="GetNotes"]}[Data]	~
∫x GetNotes	This function returns the Notes with Subject, Authors, Recommendations, Sentiments and Dates	
	Enter Parameters	
	subjectid (optional) Example: c77b269c-840a-47b7-84e9-1e873 authorld (optional) Example: c77b269c-840a-47b7-84e9-1e873 recommendationlds (optional) Example: c77b269c-840a-47b7-84e9-1e873 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 Invoke Clear	
	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.

x GetNotes		*	ABC 123 date	 ABC 123 createdAt 	 ABC 123 contributorId 	ABC 123 title	ABC 123 identifier	 ABC 123 isPersonal 	 ABC 123 state 	 ABC 123 approvalStatus 	 A^B_C author
Invoked Function	1 00c892a4-17b3-42f7-a94	e-19b8c261df91	2021-05-20	2021-05-20T19:13:29Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for Assoc.	AC-US		FALSE Published		null Paul Casillo
	2 01a43684-3adb-4f5d-bcf	4-798147f1c918	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for Boein	BA-US		FALSE Published		null Paul Casillo
	3 022453e2-472d-43b2-8d	a7-f79a1e5d05dd	2021-12-20	2022-02-02T22:41:19Z	181169b0-93c4-4081-aea9-c9d362b3edd3	Amazon ESG Review - Needs	AMZN-US		FALSE Published		null Jhankhana Kapadia
	4 0229e31a-f4a1-4af4-b0b	d-fed59a24bc10	2021-05-25	2021-05-25T18:20:15Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for ACM	ACMR-US		FALSE Published		null Paul Casillo
	5 0249e926-37ea-4e1b-b9	d-77d7fd70b306	2021-04-25	2021-04-26T19:13:02Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for OTIS	OTIS-US		FALSE Published		null Paul Casillo
	6 026d3940-760b-4b13-88	b1-6fe10bc4fa33	2018-08-23	2018-09-20T13:26:31Z	2f481f7c-2d7b-4b3a-89a4-45f9df9c5619	Model Update	AMZN-US		FALSE Published		null Austin McLaughlin
	7 03d63e8b-9172-40f8-98	01-6f5f626d3551	2021-07-16	2021-07-16T17:20:30Z	b446732b-a547-4f4d-9b74-a4fa46fba687	STT-US Price Target	STT-US		FALSE Published		null Paul Casillo
	8 03f469ab-45ab-4a99-ab	e-7c72cdefb426	2018-09-05	2018-09-20T16:25:10Z	2f481f7c-2d7b-4b3a-89a4-45f9df9c5619	TWTR Equity	TWTR-US		FALSE Published		null Austin McLaughlin
	9 048b198c-3299-4e16-b8	53-31bffc5db9ce	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for Union .	UNP-US		FALSE Published		null Paul Casillo
	10 04921336-d8d9-4c90-ab	:0-cb2fa0b2e42b	2021-02-23	2021-07-09T21:31:01Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for AXS	AXSM-US		FALSE Published		null Paul Casillo
	11 0548fc7f-3cda-4666-a6e	3-279e750355f5	2021-04-19	2021-04-19T20:29:41Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for XELB	XELB-US		FALSE Published		null Paul Casillo
	12 05f45e4a-98d1-44a2-b5	5-5e28151cb417	2021-06-08	2021-06-08T14:58:30Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for AXS	AXSM-US		FALSE Published		null Paul Casillo
	13 069173db-c7b4-4430-a7	d1-7df543fd8de6	2019-11-30	2019-11-30T15:00:34Z	181169b0-93c4-4081-aea9-c9d362b3edd3	H&S document	FDS-US		FALSE Published		null Jhankhana Kapadia
	14 06c2a19e-2e20-42d9-91	8-58d5ec535e91	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for salesf	CRM-US		FALSE Published		null Paul Casillo
	15 070e38b9-1b0b-4b81-aa	78-d7de826b54	2021-04-07	2021-04-07T18:37:33Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for Amaz.	. AMZN-US		FALSE Published		null Paul Casillo
	16 07202f47-eaf0-45ed-8b5	d-5a5488fea31a	2021-03-09	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for Tesla I.	TSLA-US		FALSE Published		null Paul Casillo
	17 07356247-09fd-493a-86	3-3cee91700992	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for Morga.	MS-US		FALSE Published		null Paul Casillo
	18 0772bec3-ab73-4bc4-96	9-3b054f661b9a	2021-05-05	2021-05-06T14:19:29Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for MGA	MGA-US		FALSE Published		null Paul Casillo
	19 079bcffb-f2ae-496e-bbb	8-016e504d4585	2021-04-27	2021-04-27T16:51:06Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Engagment Notes for FDS-US	FDS-US		FALSE Published		null Paul Casillo
	20 07f1f793-8de8-46ca-8de	5-1730cbdc19ad	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for Cater	CAT-US		FALSE Published		null Paul Casillo
	21 0843770b-7a9c-405e-ba	18-36141b0af302	2021-07-09	2021-07-09T15:20:00Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target for NTIC-US	NTIC-US		FALSE Published		null Paul Casillo
	22 097442c3-d5f6-4dbc-a0	b-052bba8d360c	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for Home .	HD-US		FALSE Published		null Paul Casillo
	23 097443ef-bea7-4f81-8f6	-122aeca65750	2021-05-10	2021-05-10T00:19:41Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for Incyt	INCY-US		FALSE Published		null Paul Casillo
	24 0a17c80d-4fc3-48d1-953	4-29bf02711187	2020-08-03	2020-09-16T18:09:11Z	a2e2f761-c0fd-4ae8-971e-e81c18c2e55f	Annual Report	ATLANTAINFRASTRUCTURE		FALSE Published		null Rachna Nirudu
	25 Oaf33cb4-08ce-4ed2-bab	3-72c899603235	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for Adobe.	ADBE-US		FALSE Published		null Paul Casillo
	26 0af54380-079d-4164-89	8-314df4986684	2021-06-08	2021-06-08T14:58:30Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for AGO	AGO-US		FALSE Published		null Paul Casillo
	27 0b8203c3-6833-457d-93	ba-8f458d4feb2c	2019-02-05	2019-02-07T07:15:48Z	9e6d4422-b96f-497e-862d-4e31865934ae	Hold Amazon?	WMT-US		FALSE Published		null Padmini Purushotham
	28 0bd4a5ca-c78a-4722-b5	14-558ce6a72df4	2021-04-12	2021-04-13T02:25:41Z	297a7716-fbfe-40e0-b82c-da803d6274c8	Latest on IBM	IBM-US		FALSE Published		null Anne Smith
	29 0cb8af20-9c6f-4e1b-b96	2-1aee71a6c24e	2021-01-04	2021-07-08T20:39:55Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Stock Commentary for Apple	. AAPL-US		FALSE Published		null Paul Casillo
	30 Ocfadecd-49ae-4602-b8a	b-d784a52c3a19	2021-04-12	2021-04-13T02:22:35Z	d3f165be-2bfb-4f4c-9c1e-afe45349eaac	Apple Update	AAPL-US		FALSE Published		null Janine Farah
	31 0d11cd18-4299-4e43-bf	9-4b90310cc89d	2021-04-06	2021-04-06T15:06:21Z	b446732b-a547-4f4d-9b74-a4fa46fba687	Price Target Update for AMS	AMS-US		FALSE Published		null Paul Casillo
	32 0e5d4407-ddff-4f24-b1b	c-2ff4e779112f	2021-07-28	2021-07-28T10:29:50Z	181169b0-93c4-4081-aea9-c9d362b3edd3	Facebook - Business Poised t	FB-US		FALSE Published		null Jhankhana Kapadia