

FACTSET › SEE THE ADVANTAGE

IRN TABLEAU WEB DATA CONNECTOR

Document Version 1.0
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IRN TABLEAU WEB DATA CONNECTOR – VERSION 1.0

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1. Background

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

2. Prerequisites

To start using the Tableau WDC, the following prerequisite steps need to be completed.

2.1 Download Tableau Desktop

Download the version of Tableau Desktop listed in Supported Versions.

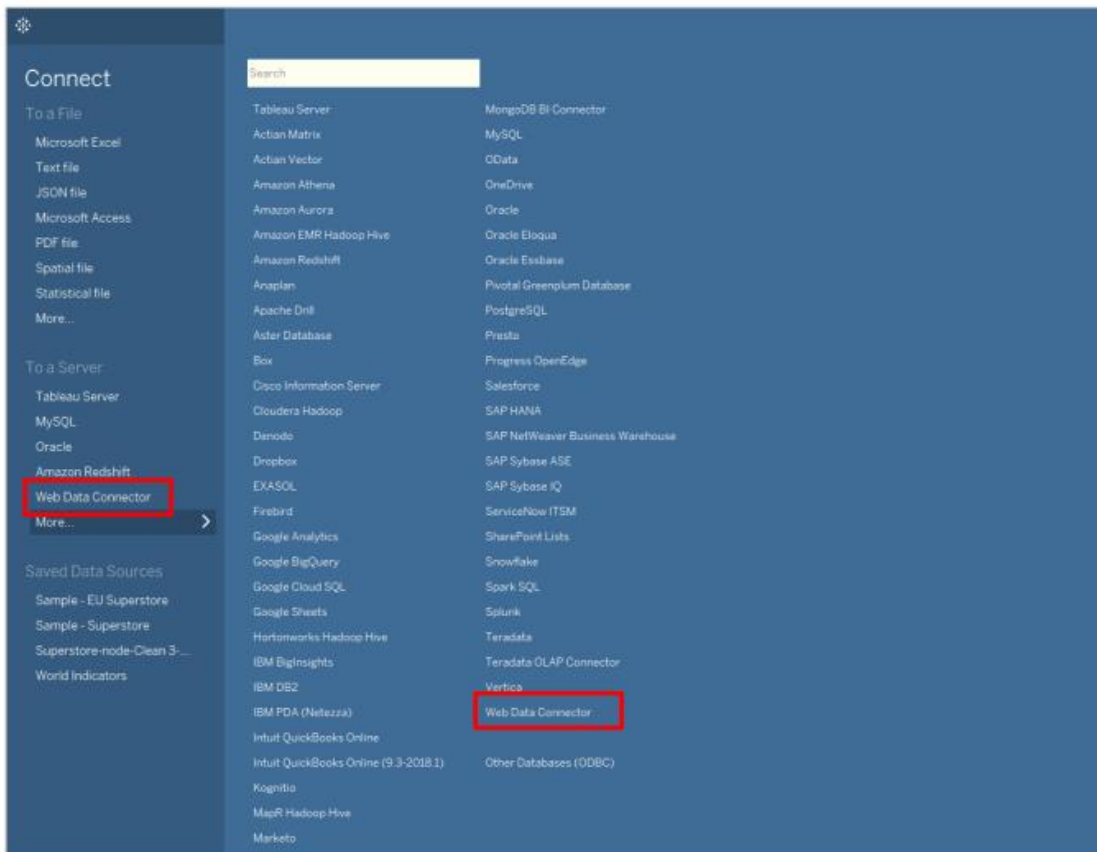
2.2 Authenticate

Generate the API key from the [Developer Portal](#). Please follow the steps outlined in the “[FactSet API keys Authentication v1 documentation](#)”.

3. Steps

3.1 Open Tableau Desktop

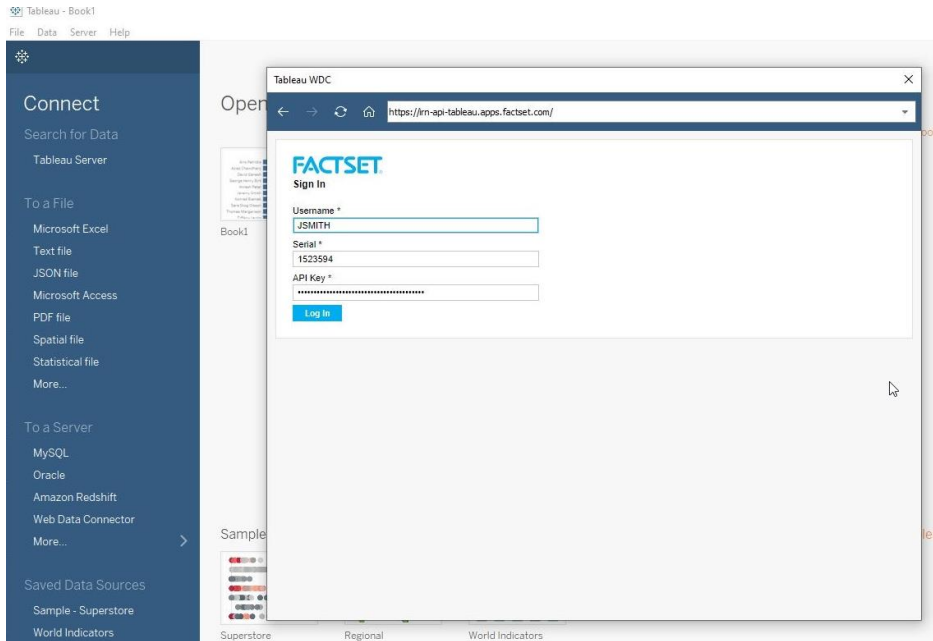
On the Tableau Desktop home page, under section “Connect” -> “To a Server” (left menu) select “Web Data Connector”. If it doesn’t appear in the list, click “More...” to display more options and then select “Web Data Connector”.



3.2 Connect to Tableau WDC

Clicking on “Web Data Connector” will launch a web browser pop-up window. In the address bar, provide the Tableau WDC URL “<https://irn-api-tableau.apps.factset.com>”.

Authentication page: Enter the Username, Serial and the API.



3.3 User Data Source

FactSet’s IRN Web Connector has several configurable arguments to narrow your universe and return additional columns.

DATE RANGE (required)- A relative or absolute date range that limits the universe based on the Date field.

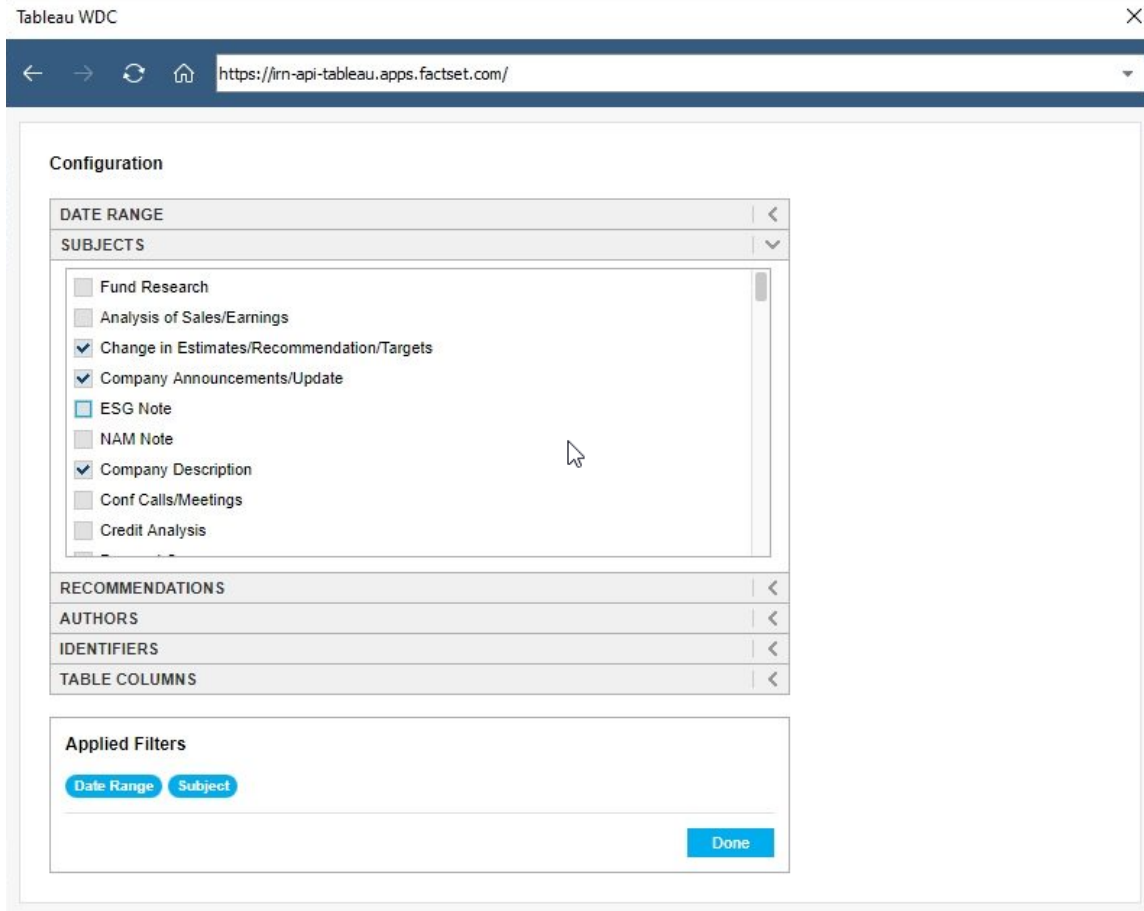
SUBJECTS (optional) - Limit the universe to specific subjects or categories. Subjects are custom categories maintained within the RMS Control Panel Application (@RCP).

RECOMMENDATIONS (optional) – Limit the note universe to only include specific recommendation types.

AUTHORS (optional) – Limit the note universe to individual contributors from your firm.

IDENTIFIERS (optional) – Limit the universe to a specific set of entities. FactSet accepts all market identifiers (symbol, cusip, isin) and the FactSet Symbol ID. All returned notes’ identifiers are in Symbol-Region format.

Table Columns (optional) – Select additional custom fields to include in the response. Custom fields are meta data tagged to one or more RMS Subjects.



Click Done to continue, once the loading completes, IRN data will be available as a Data Source and result research data will be available as table in Tableau.

These sources can then be used to create Tableau Worksheets and Workbooks. Detailed recipe can be found [here](#).

4. Supported Version

Tableau Desktop 2018.2 or higher