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ANALYTICS QLIK SENSE CONNECTOR – VERSION 0.1.0
User Guide
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Analytics Qlik Sense Connector – Version 0.1.0

1. Contents

2. Background

The Qlik Sense Connector leverages the power of FactSet's Analytics API to integrate Analytics engine computations into Qlik Sense. This allows users the flexibility and control to customize how they consume FactSet's Analytics using Qlik Sense application.

3. Prerequisites

To start using the Qlik Sense Connector, the following prerequisite steps need to be completed.

3.1 Download Qlik Sense Application

Download the Qlik Sense application from this link.

3.2 Subscribe to FactSet's products

- To access FactSet's Analytics, 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 documentation".

# 4. Steps

4.1 Download and Install Qlik connector

1. Download the connector zip file from the FactSet developer portal.

2. Place it in the below location based on the product

   a. **Qlik Sense Desktop**: *C:\Users\{username}\AppData\Local\Programs\Common Files\Qlik\Custom Data*

   b. **Qlik Sense Enterprise**: *C:\Program Files\Common Files\Qlik\Custom Data*

3. Unzip the file

4.2 Launching the Qlik Connector

Create a new Qlik Sense application and navigate to the **Data load editor** to create a new connection by clicking on '**Create new Connection'** button.
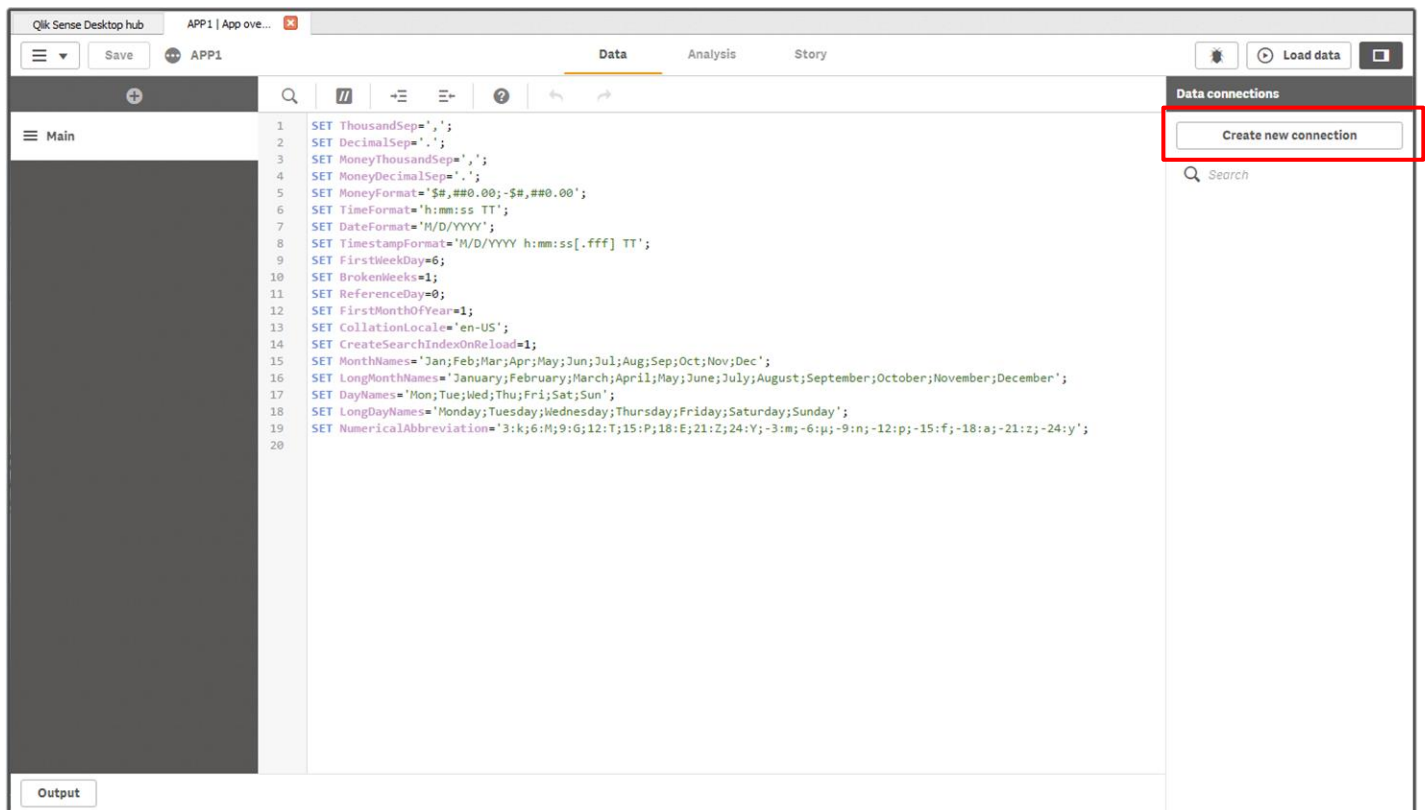
Pick '**FactSet Analytics'** from the displayed popup as shown below.
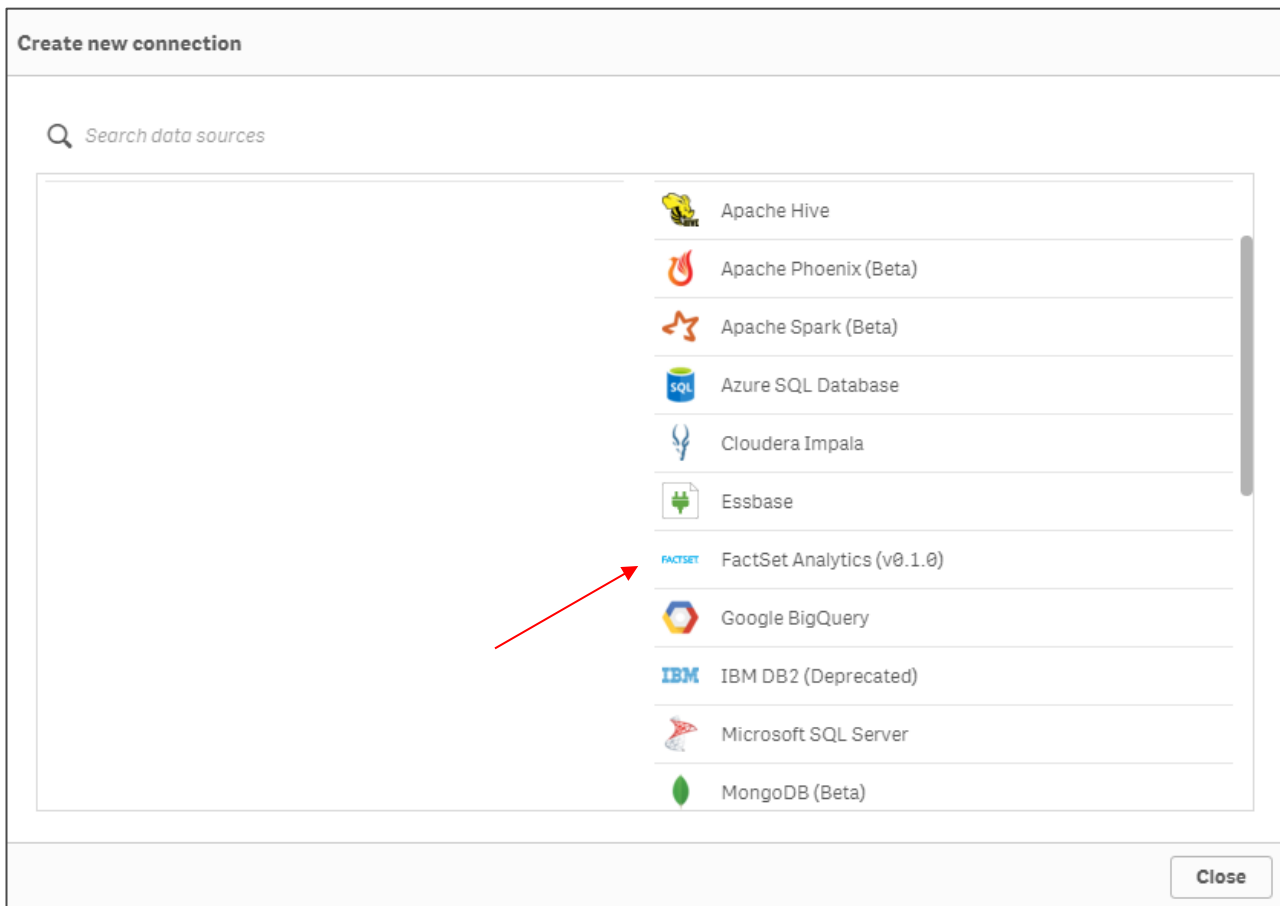
4.3 Creating Connection

FactSet – Analytics Connector popup will be displayed. Enter connection name, username, serial and API key.

Click on 'Validate Credentials' button after entering the details. On successful validation, the user will be prompted with a connector screen with tabs to add calculation inputs for PA, Vault and/or SPAR engines, as shown below.

FactSet Analytics Connector

| PA | Vault | SPAR | | Calculations |

Id : 1

Document Name *

| Enter PA Document Name | Get |

Cancel Create Connection

Enter the document name and click on '**Get**' button to proceed. On successful operation, the user will be prompted to specify calculation details for their PA calculation as shown below.

FactSet Analytics Connector

| PA | Vault | SPAR | | Calculations |

Id : 1

Document Name *

| PA_DOCUMENTS:DEFAULT | Get |

Select Component *

| Weights Difference - Weights / Exposures ▼ |

Accounts *

| Enter Account | Holdings ▼ | Add |

BENCH:SP50 ⊗

Benchmarks

| Enter Benchmark | Holdings ▼ | Add |

BENCH:SML ⊗

Start Date

| Enter start date |

End Date

| 0 |

Frequency

| Single |

Add PA Calculation

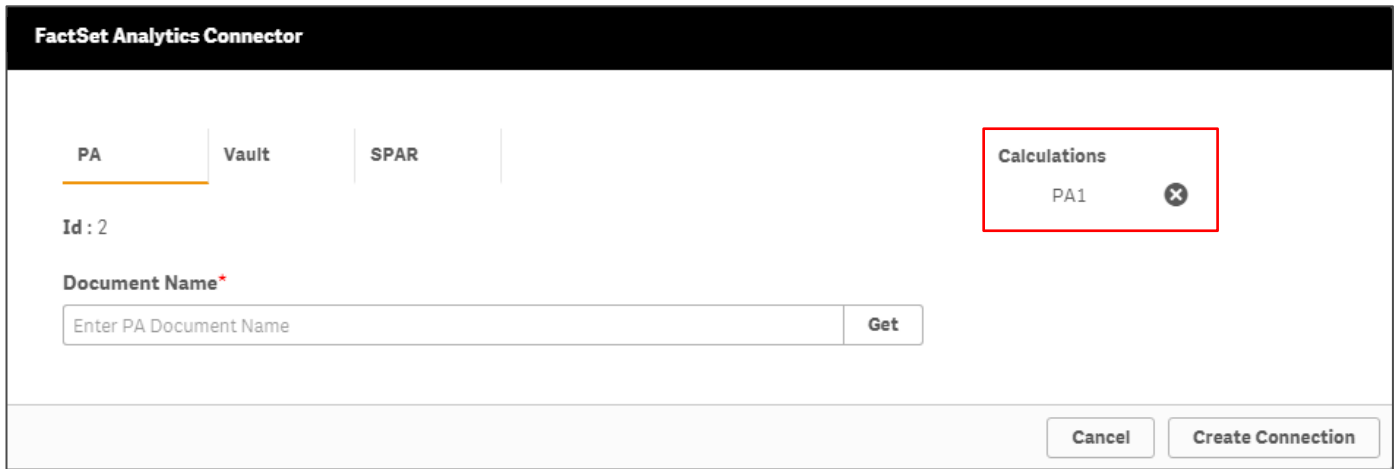Cancel Create Connection

Click the '**Add PA Calculation**' button from the above screen, so that the given PA calculation gets added and displayed under the Calculations section on the right side of the screen as highlighted in the screenshot below.

Multiple calculations and/or calculations of multiple engines can be added within a single connection. Once the user adds all their calculations, click on '**Create Connection'** button to trigger the calculations. The connector will be added to the list of existing connections as shown below.

Select data

Edit connection
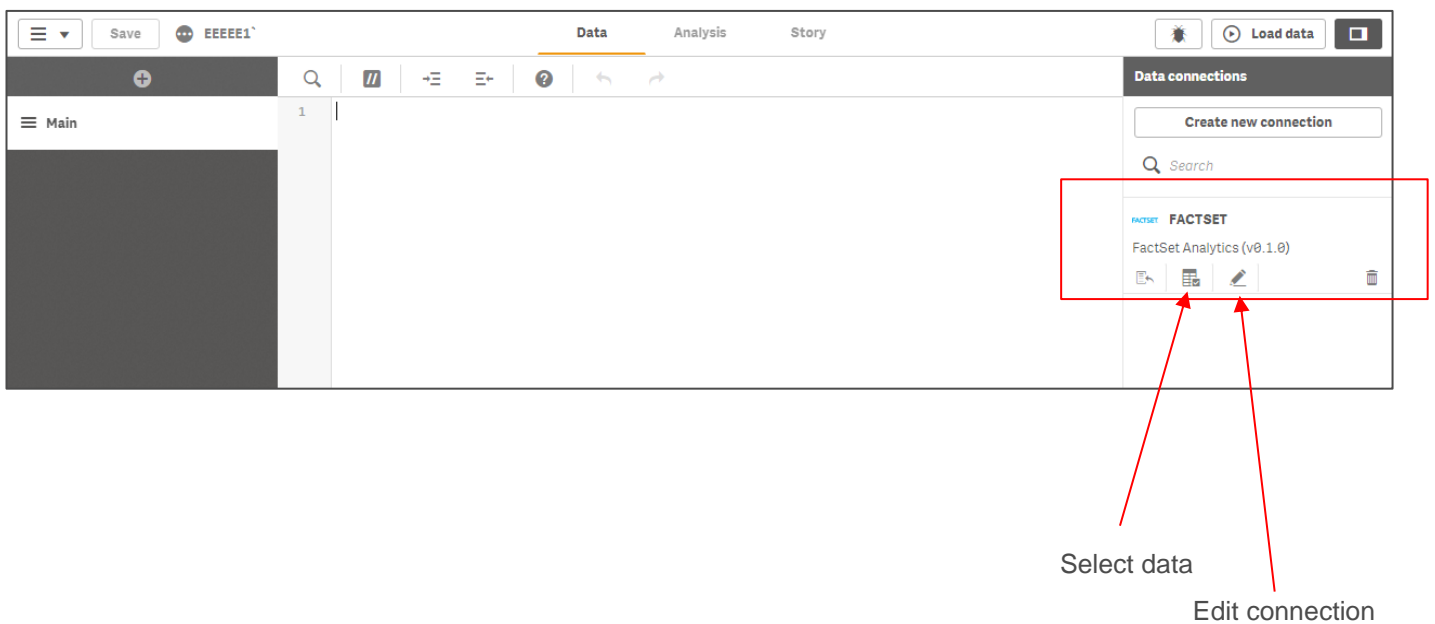
Click the '**Select data'** icon to proceed to the next step. Select the tables and columns from the '**Select data to load'** screen and click on '**Insert Script'** button on the bottom right corner of the screen to insert the generated query in the query section of the data load editor.

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The generated script will be placed in the query section as shown below.

Click on **'Load Data'** button on the top right corner of the screen to load the data tables in the application.

On successful loading of data, user can navigate to the Analysis tab and build visualizations and analysis on the calculated data.

4.4 Rerunning Calculation

Calculation(s) can be retriggered to get updated data from FactSet. To rerun the calculation(s), navigate to the '**Data load editor**' screen and click on the pencil icon to edit the connection. A pop will be displayed, with provision to either rerun the calculation(s) or edit the calculation(s) associated with the connection.

FactSet Analytics Connector

Do you want to re-run the calculation or edit the calculation input?

Re-Run   Edit   Cancel
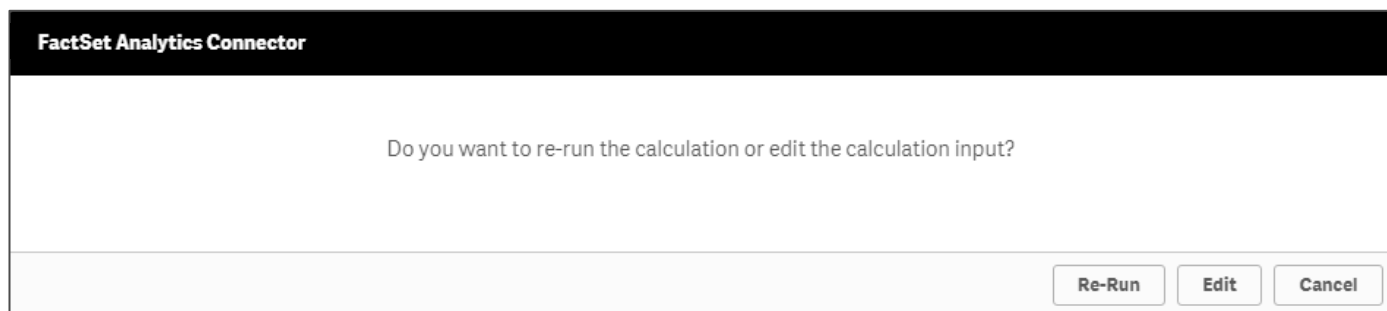
- On selecting '**Re-Run'** option, the calculation(s) will be triggered again with the same inputs and the connection will be updated with new data.
- On selecting '**Edit'** option, the calculation input(s) will be displayed in the JSON format and the user can edit the inputs and rerun the calculation(s).

5. Supported Applications

Qlik Sense Desktop

Qlik Sense Enterprise