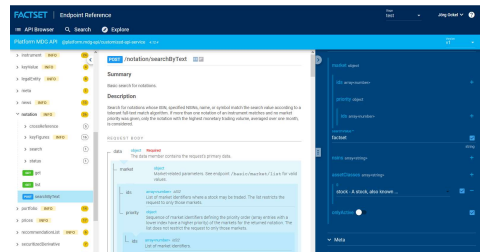


# Getting started with Digital APIs.

## Explore FactSet's Digital APIs, from Trial to Production.

In this recipe, we will show you how to explore the Digital APIs and integrate them into your application environment.

All Digital APIs can be tried and tested for a limited time on a shared trial installation, which is separate from the actual production API deployments. As this trial includes selected exchange data content, special conditions apply.



**Time Required:** <2 hours    **Difficulty:** Easy

## STEPS

### 1 REQUEST TRIAL AND INDICATE TARGET PROGRAMMING LANGUAGE

File your Trial API request via our contact form. Benefit from FactSet's language-specific client libraries for authentication and caching.

### 2 RECEIVE TRIAL INFORMATION AND API CLIENT LIBRARY

FactSet will get in touch with you to provide all relevant information and support.

### 3 USE API BROWSER TO ACCESS ENDPOINTS AND DOCUMENTATION

Make yourself familiar with our API browser and easily run your request using the integrated request-builder.

### 4 UNPACK AND CONFIGURE CLIENT LIBRARY FILES

Prepare your access to our production API gateway.

#### Ingredients

Your application IDE

#### Similar Recipes

Enrich your digital portal's watchlist or virtual portfolio offering with FactSet's StreetAccount news.

Enrich your digital portal with custom stock screening for self-directed value investors.

## 1 REQUEST TRIAL AND INDICATE TARGET PROGRAMMING LANGUAGE

When requesting API trial access, please indicate your preferred programming language. FactSet provides dedicated client libraries for JavaScript, PHP, Java, .NET.

A FactSet Sales representative will then coordinate the trial setup with our Developer Services team.

## 2 RECEIVE TRIAL INFORMATION AND API CLIENT LIBRARY

A FactSet Sales representative will contact you and send details via e-mail:

- Terms and Conditions for the trial access
- User accounts to detailed documentation
- Credentials for your application to authenticate with the FactSet platform

API client libraries (SDKs) can be downloaded in the “Documentation & SDKs” section of the API browser.

For the trial, only generic user accounts are created. Please see the table in the appendix for details.

Credentials are personalized to your trial and must not be shared.

**CONTACT US**

Please fill out the form below if you would like more information or would like to get a free trial to our APIs!

First Name\*  Last Name\*

Company\*

Firm Description\*  
- Select Firm Description -

Business Card Title\*  Phone Number\*

Business Email\*

Country\*  
- Select Country -

City\*

Tell us more about your business challenges, including what APIs you are interested in:

Please find below the login details to our market data API. You will also receive a separate email with a link to the authentication token. This link is only valid for 3 hours. Once logged in I shall follow up with further details on how to get started. Standard T&Cs for the API also attached.

URL: <https://endpointreference.mdgms.com>

CUSTOMER: PrimeDeveloper Trial Account

USERNAME: <...>

PASSWORD: <...>

Login credentials for the API Extension Module:

ID\_APPLICATION: <...>

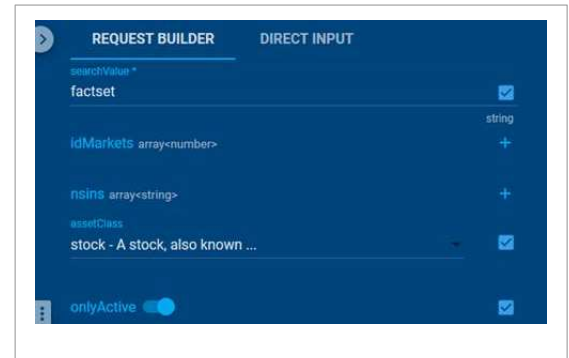
ID\_USER: <...>

User LOGIN: <...>

### 3 USE API BROWSER TO ACCESS ENDPOINTS AND DOCUMENTATION

Use the Digital API Browser located at <https://endpointreference.mdgms.com/> and the Documentation Browser located at <https://apidocs.factsetdigitalsolutions.com/> to test drive the APIs.

The Endpoint Reference includes a request builder in the right pane to quickly construct API calls. A few examples see below:



#### Google-like search

Just use `/notation/search/basic` to retrieve ids based on text input, for example with `searchValue="factset"` `assetClass=stock`.

Or try

- searchValue = "alphabet"
- assetClass = "stock"
- onlyActive = selected

This brings up a result with 2 entries: 2 listings ("notations") of 2 securities ("instruments")

- notation id 10390991 for instrument id 11288971 (US02079K3059) at Nasdaq
- notation id 99589142 for instrument id 73329228 (US02079K1079) at Nasdaq

#### Prices and price histories

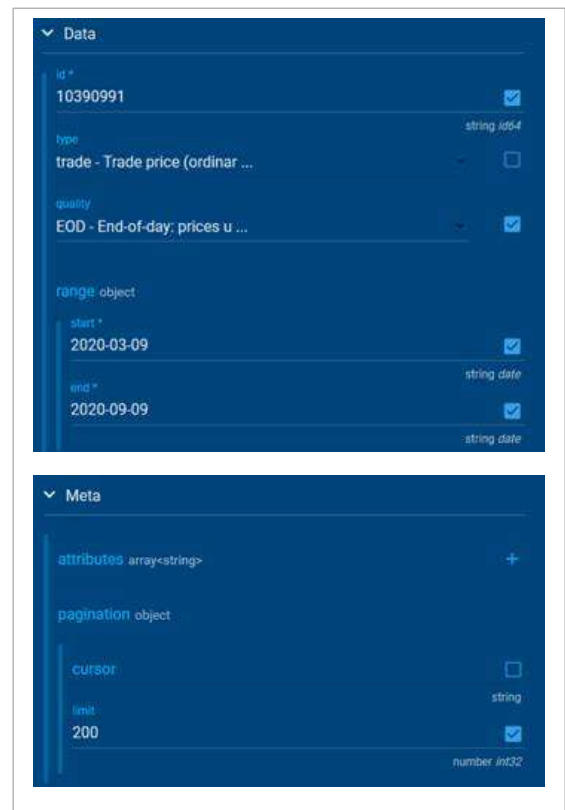
The `/prices` endpoints return single quotes and also historical prices via the `/prices/timeSeries` endpoints. Use `/prices/timeSeries/eod/list` with parameters

- id = 10390991
- quality = EOD
- range/start = 2020-03-09
- range/end = 2020-09-09

and add the pagination/limit = 200 to get all results in one array.

For charting purposes, there are specialized versions available, adapted to the ChartIQ libraries:

`/vendor/chartIQ/timeSeries/eod/list`



## **4 UNPACK AND CONFIGURE CLIENT LIBRARY FILES**

In the previous step you have already explored different APIs and endpoints. For a production environment, FactSet recommends using language-specific client libraries, which encapsulate the binary transport protocol of the API communication and provide a powerful cache.

The Client Library comes as one zipped download package. The package contains three main folders:

- `\doc`: This folder contains the documentation of protocol messages and thereby valuable information about the classes provided inside the library.
- `\example`: This folder contains an example program that demonstrates the basic use of the classes provided in the Client Library.
- `\lib`: This folder contains the Client Library's files.

Please see the installation guide that is provided with the package, as the steps depend on the programming language.

Depending on the programming language, the authentication credentials need to be stored in the configuration file of the application.

## APPENDIX: DIGITAL API TRIAL DOCUMENTATION

Feature	Trial	Production
Functionality	Fixed set of APIs: <ul style="list-style-type: none"> <li>• Quote API</li> <li>• Price Alerting API</li> <li>• Company API</li> <li>• Bond API</li> <li>• ETF API</li> <li>• News API</li> <li>• Securitized Derivative API</li> <li>• Stock API</li> </ul>	Custom deployment of contractually agreed APIs
Content	Fixed content universe, suitable to explore the available functionality: <ul style="list-style-type: none"> <li>• FactSet company data</li> <li>• FactSet estimates key figures</li> <li>• FactSet broker recommendations</li> <li>• Selected US, CA exchange prices</li> <li>• Selected index data</li> <li>• Selected news contributors</li> <li>• Selected FX data</li> </ul>	Customized set of contractually agreed entitlements
License period	2 months trial	As contractually agreed
Access to the API Endpoint Reference	1 test user account	Unlimited user accounts
Access to the API Documentation Browser	1 test user account	Unlimited user accounts
Client libraries / SDKs	<ul style="list-style-type: none"> <li>• PHP</li> <li>• C#</li> <li>• Java</li> <li>• JavaScript / TypeScript</li> </ul>	<ul style="list-style-type: none"> <li>• PHP</li> <li>• C#</li> <li>• Java</li> <li>• JavaScript / TypeScript</li> </ul>
Application authentication	1 technical user, supporting: <ul style="list-style-type: none"> <li>• user-based authentication</li> </ul>	Supports multiple connectivity scenarios: <ul style="list-style-type: none"> <li>• application-based authentication</li> <li>• user-based authentication</li> </ul>
Access method	<ul style="list-style-type: none"> <li>• request/response</li> <li>• subscription (streamed updates)</li> </ul>	<ul style="list-style-type: none"> <li>• request/response</li> <li>• subscription (streamed updates)</li> </ul>
Time to set up	Please allow 3 working days to configure access to the trial setup.	Please allow 7 working days to deploy your customized API service with a basic set of endpoints. Please note that the production setup and configuration is separate from the trial environment and depending on the level of customization, some endpoints might require additional time to set up.
Your contribution	At least one named contact person.	Please note that certain exchanges and data providers require direct agreements. Please allow suitable time for these approvals.