

**FACTSET** › SEE THE ADVANTAGE

# ANALYTICS TABLEAU WEB DATA CONNECTOR - VERSION 2.0

## User Guide

### December 2019

Document Version 1.0.0



## Analytics Tableau Web Data Connector – Version 2.0

### Contents

1. Background .....	2
2. Prerequisites.....	2
2.1 Download Tableau Desktop .....	2
2.2 Subscribe to FactSet’s products.....	2
3. Steps .....	3
3.1 Open Tableau Desktop.....	3
3.2 Connect to Tableau WDC.....	3
3.3 Use Data Source .....	13
4. Supported Versions.....	15

## 1. Background

The Tableau Web Data Connector (Tableau WDC) leverages the power of FactSet’s Analytics API to integrate Analytics engine computations into Tableau. This allows users the flexibility and control to customize how they consume FactSet’s Analytics 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](#).

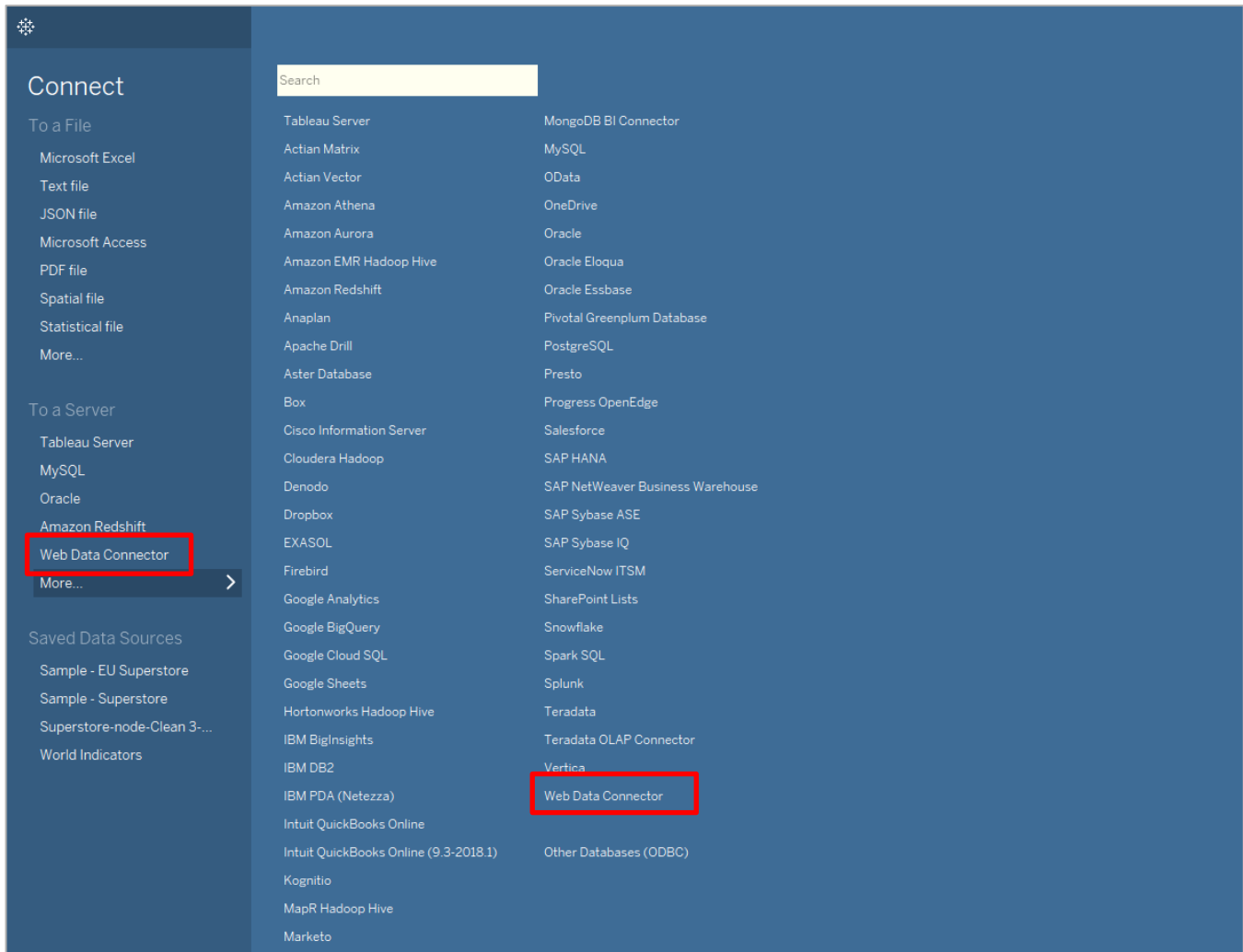
### 2.2 Subscribe to FactSet’s products

- 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 v1 documentation”.

### 3. Steps

#### 3.1 Open Tableau Desktop

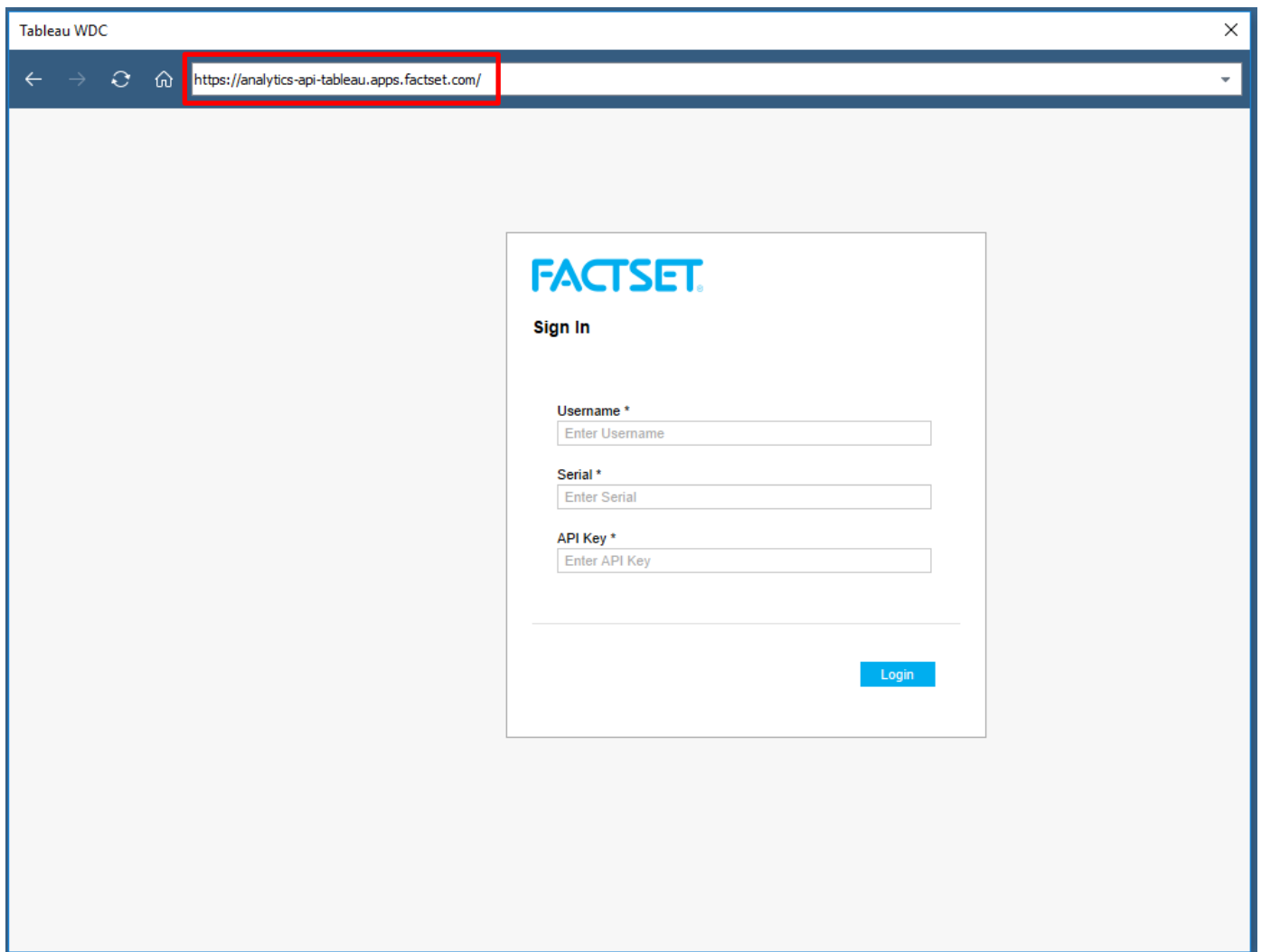
On the Tableau Desktop home page, under section “Connect” -> “To a Server” (left menu) select “Web Data Connector”. If it doesn’t appear in the list, click “More...” to display more options and then select “Web Data Connector”.



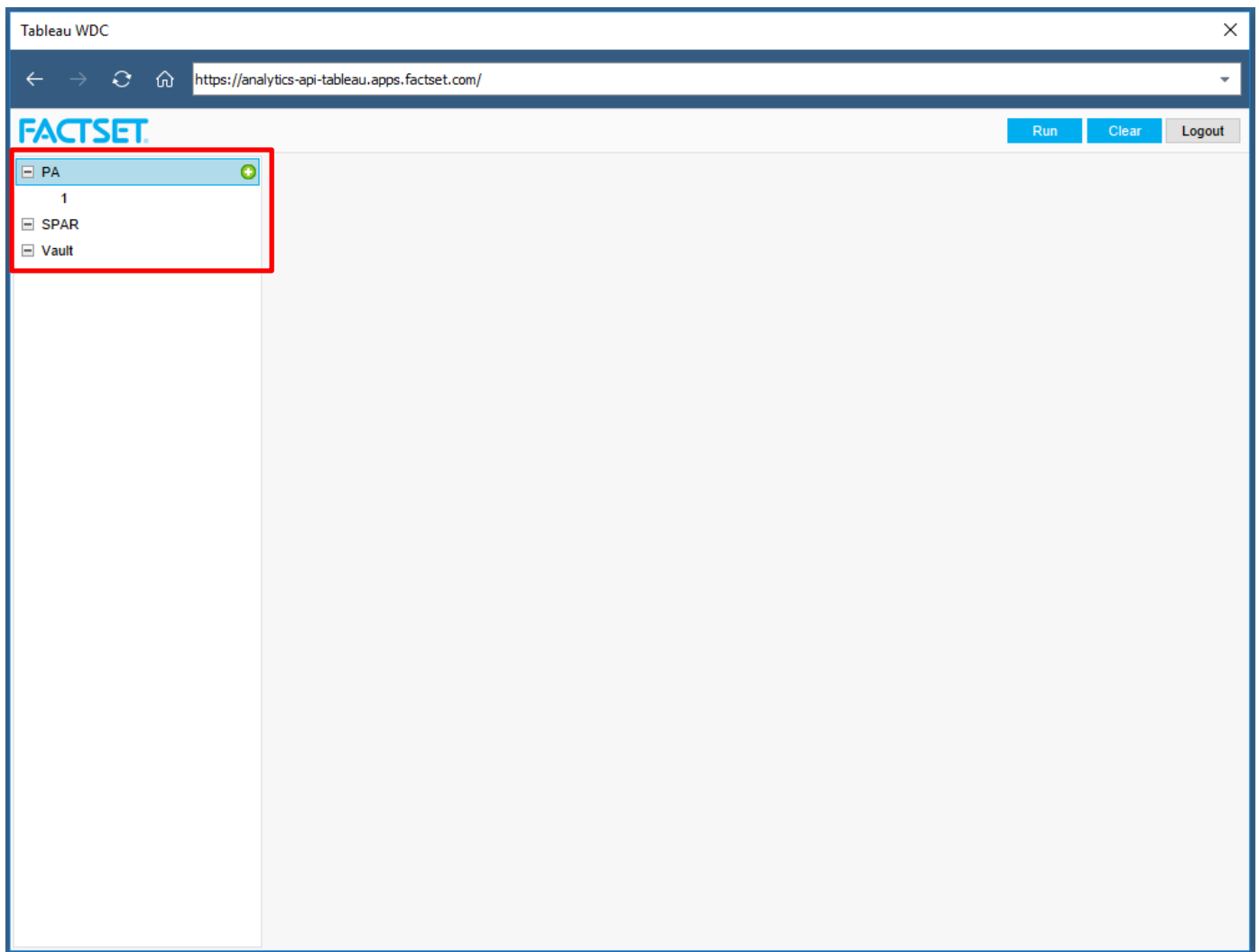
#### 3.2 Connect to Tableau WDC

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

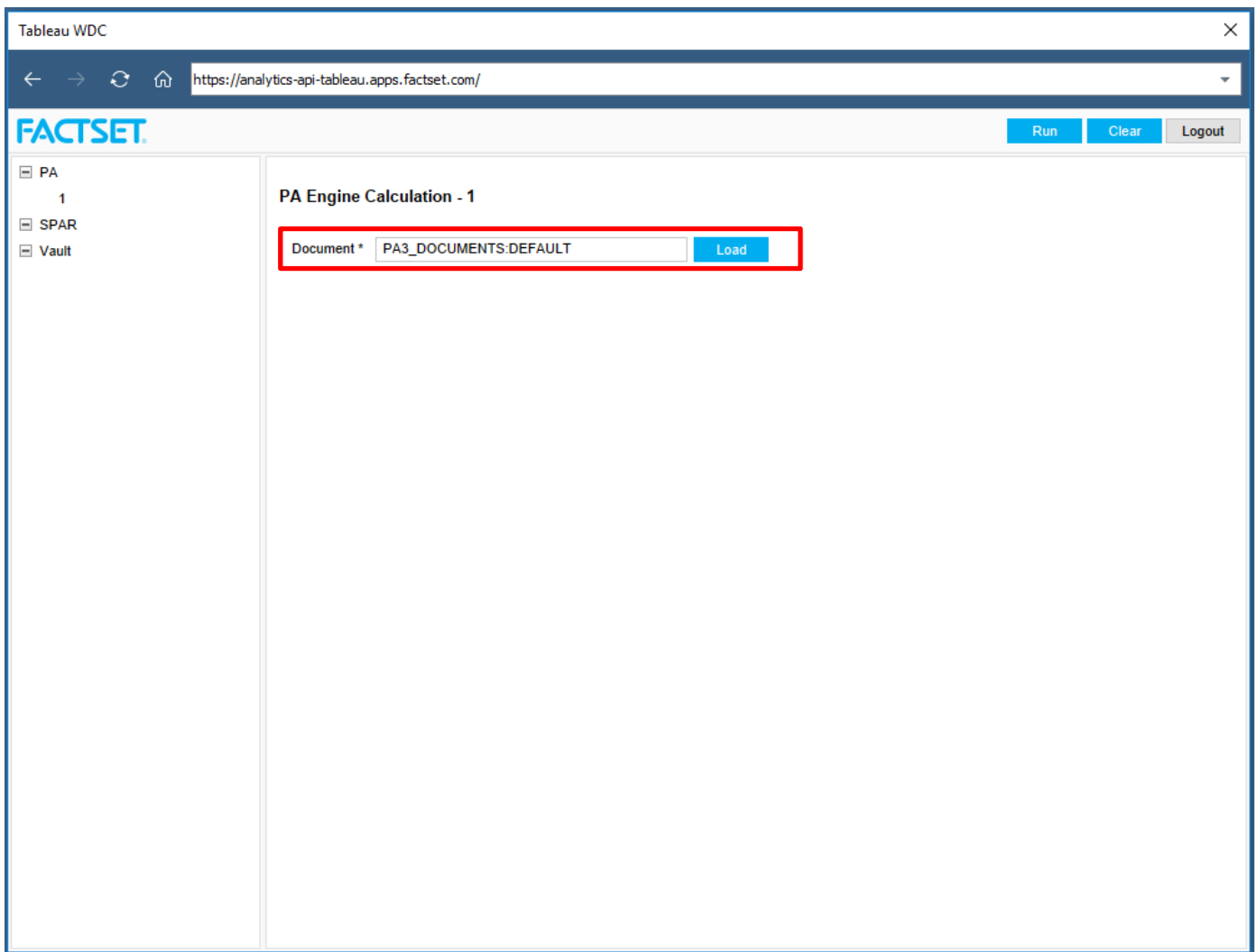
**Authentication page:** Enter the Username, Serial and the API key.



**Home page:** In the left menu, select the engine type and click the  button to add a calculation unit to the list.

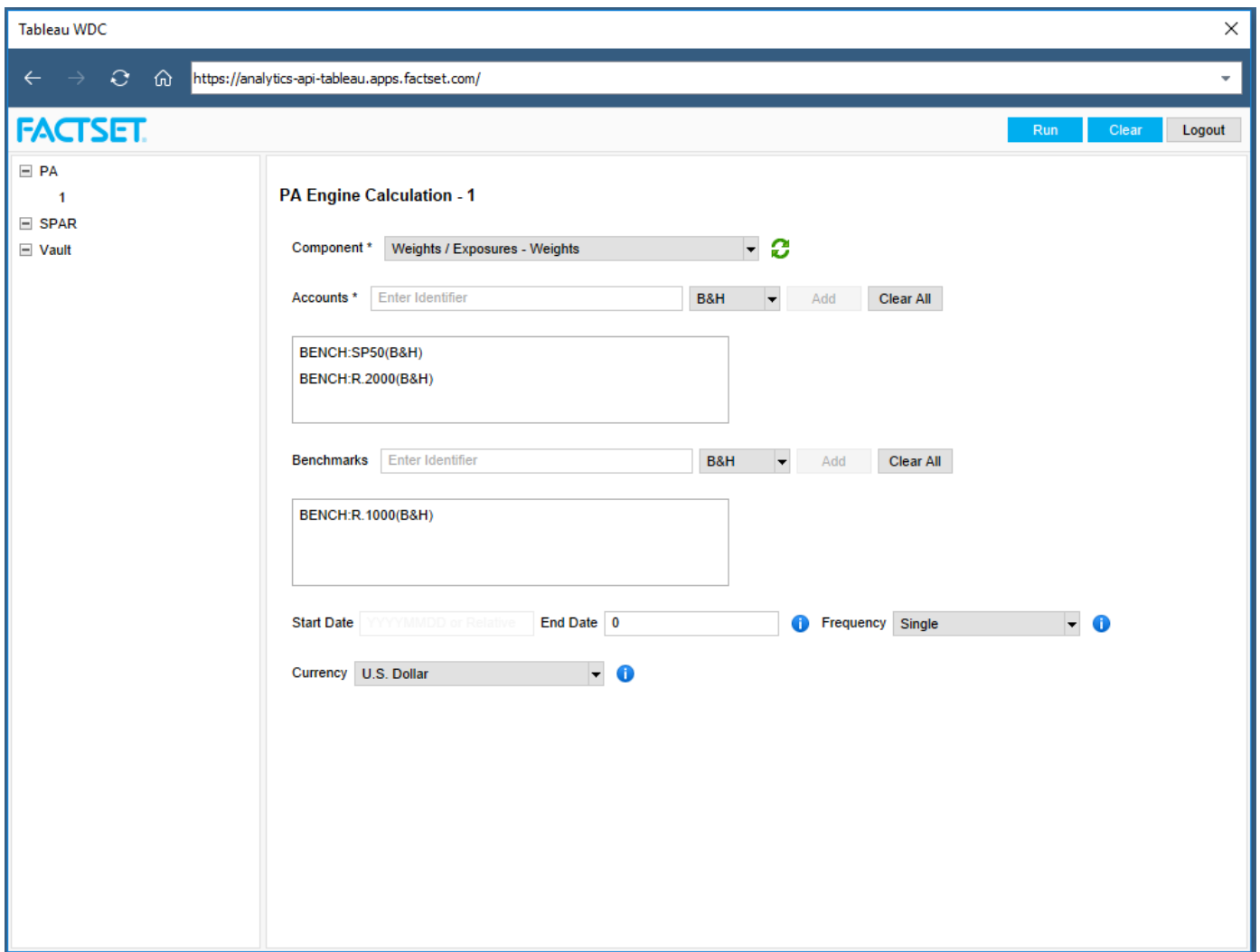


Selecting the unit in the left menu will bring up the Calculation Unit tile. Enter the Document Name and click “Load” to get all the components of the document.



Next, select the “Component” from the dropdown. This action loads the selected Component and pre-populates the default values saved with the component in the document. These default values can be edited by the user before running the calculation. When the user selects a different component from the “Component” drop-down, metadata related to the component gets loaded automatically.

The screenshot shows a web browser window titled 'Tableau WDC' with the URL 'https://analytics-api-tableau.apps.factset.com/'. The page features the 'FACTSET' logo in the top left and navigation buttons 'Run', 'Clear', and 'Logout' in the top right. On the left side, there is a sidebar menu with 'PA', '1', 'SPAR', and 'Vault' options. The main content area is titled 'PA Engine Calculation - 1' and contains several form fields: 'Component \*' (a dropdown menu with 'Select Component' and a refresh icon, highlighted with a red box), 'Accounts \*' (with an 'Enter Identifier' input, a 'B&H' dropdown, and 'Add'/'Clear All' buttons), a large empty text area, 'Benchmarks' (with an 'Enter Identifier' input, a 'B&H' dropdown, and 'Add'/'Clear All' buttons), another large empty text area, 'Start Date' and 'End Date' (both with 'YYYYMMDD or Relative' input), 'Frequency' (a dropdown menu), and 'Currency' (a 'Select Currency' dropdown menu).




All the default values can be viewed by clicking on the  icon present adjacent to each of the calculation parameters.



Tableau WDC

https://analytics-api-tableau.apps.factset.com/

FACTSET

Run Clear Logout

PA  
1  
SPAR  
Vault

PA Engine Calculation - 1

Component \* Weights / Exposures - Weights

Accounts \* Enter Identifier B&H Add Clear All

BENCH.SP50(B&H)  
BENCH.R.2000(B&H)

Benchmarks Enter Identifier B&H Add Clear All

BENCH.R.1000(B&H)

Start Date YYYYMMDD or Relative End Date 0 Frequency Single

Currency U.S. Dollar

Component defaults  
U.S. Dollar

For Snapshot reports, the “Start Date” textbox is disabled if Frequency selected is Single.

Tableau WDC

https://analytics-api-tableau.apps.factset.com/

FACTSET

Run Clear Logout

PA  
1  
SPAR  
Vault

PA Engine Calculation - 1

Component \* Weights / Exposures - Weights

Accounts \* Enter Identifier B&H Add Clear All

BENCH.SP50(B&H)  
BENCH.R.2000(B&H)

Benchmarks Enter Identifier B&H Add Clear All

BENCH.R.1000(B&H)

Start Date YYYYMMDD or Relative End Date 0 Frequency Single

Currency U.S. Dollar

User can restore metadata values to component defaults by clicking the  icon.

Tableau WDC

https://analytics-api-tableau.apps.factset.com/

FACTSET

Run Clear Logout

PA  
1  
SPAR  
Vault

PA Engine Calculation - 1

Component \* Weights / Exposures - Weights

Accounts \* Enter Identifier B&H Add Clear All

BENCH.SP50(B&H)  
BENCH.R.2000(B&H)

Benchmarks Enter Identifier B&H Add Clear All

BENCH.R.1000(B&H)

Start Date YYYYMMDD or Relative End Date 0 Frequency Single

Currency U.S. Dollar

Similarly, more calculation units can be added to the list as shown below.

Tableau WDC ✕

← → ↻ 🏠 <https://analytics-api-tableau.apps.factset.com/>

**FACTSET** Run Clear Logout

- [-] PA
  - 1
- [-] SPAR
  - 2
- [-] Vault

### SPAR Engine Calculation - 2

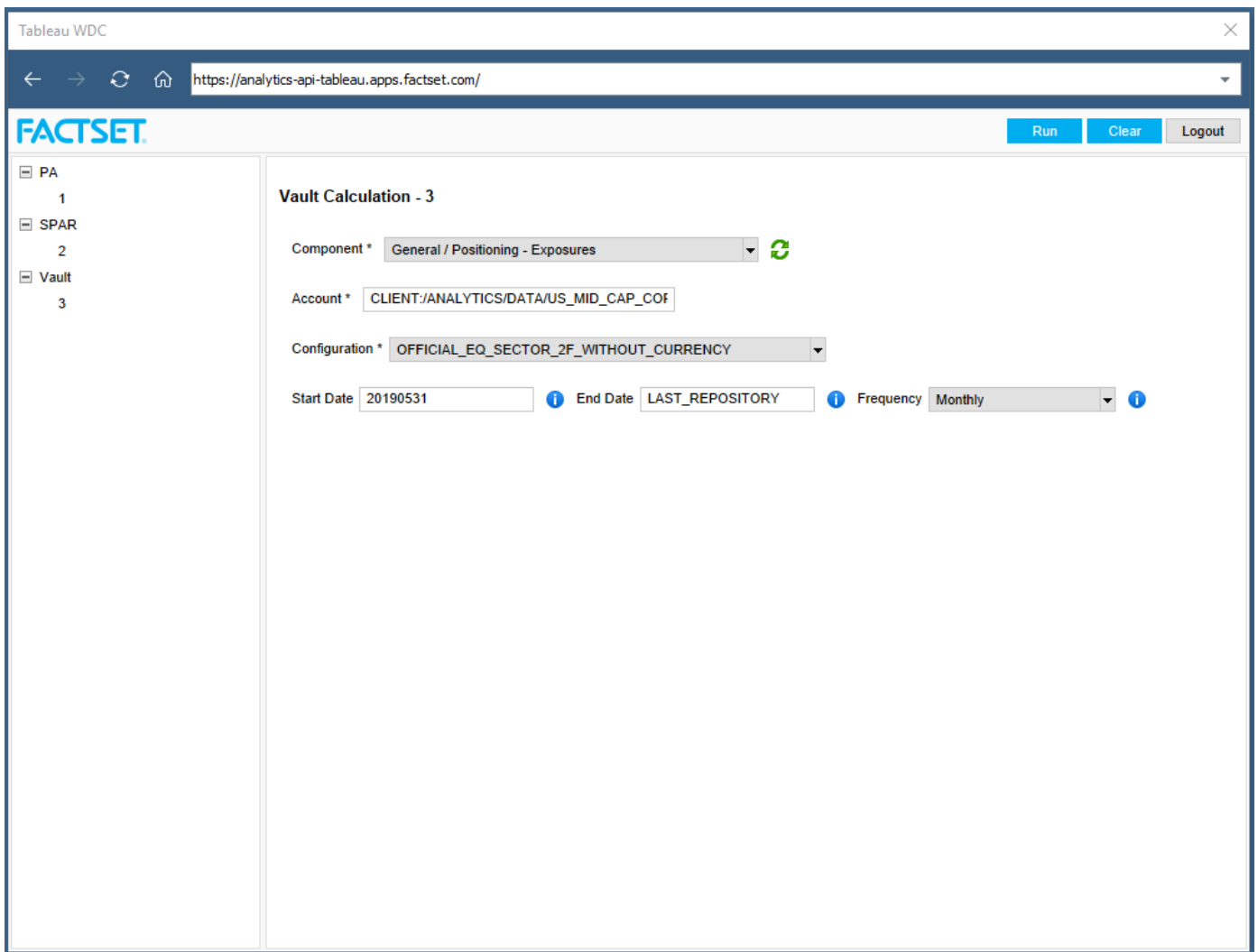
Component \* Raw Data / Returns - Returns Data

Accounts \* Enter Identifier Enter Return Type Enter Prefix Add Clear All

R.1000(GTR,RUSSELL)

Benchmark R.2000 GTR RUSSELL

Start Date -2M End Date 0 Frequency Monthly



Click “Run” to initiate the report calculation. The data load times may vary depending on the number of units and the complexity of the calculation.

### 3.3 Use Data Source

Once the loading completes, analytics data will be available as a Data Source and result of each calculation unit will be loaded as a separate table in Tableau. The same steps can be followed to create multiple Data Sources for other calculations. These sources can then be used to create Tableau Worksheets and Workbooks.

Tableau - Book1  
File Data Server Window Help

FactSet Web Data Connector

Connections Add  
FactSet Web Data Connector  
Web Data

Table PA1 SPAR2 Vault3

Sort fields Data source order

*Drag tables here*

Tableau - Book1  
File Data Server Window Help

FactSet Web Data Connector

PA1

Sort fields Data source order  Show all

Abc PA1 total0	Abc PA1 group1	Abc PA1 group2	# PA1 S&P 500 vs. Russ...	# PA1 S&P 500 vs. Russ...	# PA1 S&P 500 vs. Russ...	# PA1 Russell 2000 vs. R...	# PA1 Russell 2000 vs. R...	# PA1 Russell 2000 vs. R...
Total	null	null	100.0000	100.0000	null	100.0000	100.0000	null
Commercial Services	null	null	1.2207	1.4714	-0.25065	3.8636	1.4714	2.3923
Commercial Services	Advertising/Marketin...	null	0.1261	0.1474	-0.02128	0.2000	0.1474	0.0526
Commercial Services	Advertising/Marketin...	Boston Omaha Corp. ...	null	null	null	0.0106	null	0.0106
Commercial Services	Advertising/Marketin...	Clear Channel Outdoo...	null	null	null	0.0060	null	0.0060
Commercial Services	Advertising/Marketin...	eXp World Holdings, I...	null	null	null	0.0083	null	0.0083
Commercial Services	Advertising/Marketin...	Groupon, Inc.	null	null	null	0.0635	null	0.0635
Commercial Services	Advertising/Marketin...	InnerWorkings, Inc.	null	null	null	0.0103	null	0.0103
Commercial Services	Advertising/Marketin...	Interpublic Group of C...	0.0331	0.0296	0.00351	null	0.0296	-0.0296
Commercial Services	Advertising/Marketin...	MDC Partners Inc. Cla...	null	null	null	0.0064	null	0.0064
Commercial Services	Advertising/Marketin...	National CineMedia, I...	null	null	null	0.0197	null	0.0197

## 4. Supported Versions

Tableau Desktop 2018.2 or higher.