Navigating FactSet Web

You can now access FactSet anywhere -- view the same reports and applications available in FactSet workstation, directly on the web.

To get started, go to https://my.factset.com.

To learn more about using FactSet web, choose from the following featured topics:

- Using Search in FactSet Web
- Customizing the Layout
- Changing Preferences
- Setting Alerts
- Creating Watch Lists
- Accessing Help and Support

Note This page covers how to navigate and use FactSet Web. For similar information relevant to the FactSet Workstation, see Navigating FactSet.

Using Search in FactSet Web

FactSet Search is a powerful search tool that allows you to easily discover reports and applications without any prior knowledge of where to find them. Use FactSet Search as your main resource when navigating FactSet. For more information, see Using FactSet Search.
Customizing the Layout

Tabs provide access to all displays, reports, and applications. You can choose to add a series of default FactSet tabs or create a new tab to customize your display.

Adding FactSet Default Tabs

Click the Add/Edit Tab button in the main toolbar to select from an existing library of FactSet-curated tabs, which showcase the best content for each type of tab. Each tab is optimized to work best with the new search and provides a simplified way to access the most relevant data for a specific entity on FactSet. Also, the tab structure allows you to easily discover new and existing reports to help streamline your research on FactSet. Explore the Company/Security tab, Industry tab, and many more new FactSet tabs to see this featured content on FactSet.
Creating Custom Tabs

Click the **New Dashboard** button from within the Add Apps dialog to create a custom tab from scratch. Click on a component(s) (e.g., News or Full Quote) to add it to your tab's dashboard.

Once added to your tab, you can easily move components, resize, or remove them.

To rename or remove your custom tab, hover over the tab name and click the arrow that appears. You can also drag and drop any component into the desired location within the tab.

To resize the component, hover over the component borders to activate the resize pointer. You can then drag the pointer to make the component either larger or smaller.
**Note**  **Blasting Identifiers in Custom Tabs**: In FactSet Web, the Market Watch display is configured to allow you to double-click and blast the selected identifier to other components in your custom tab. All other components are set to receive identifiers only and will not send identifiers to other components.

**Managing Tabs**

To move a tab, select the tab and hold down the left mouse button. You can then move the tab to the desired location.

![FactSet Web interface with tabs and components](image)

**Changing Preferences**

Click the **Settings** button to set preferences for the various reports and components in FactSet Web.

- Database Order: Sets the database order FactSet will use when providing values within each report. FactSet will search the databases to which you subscribe to find financial data for the specified identifier. If the first database on the list does not contain information for the identifier, FactSet will move down the list of databases until information is found. You can use this dialog to change the search order of the databases based on your preferences.

**Setting Alerts**

Click the **Alerts** button to create email alerts that notify you of market news, report updates, and more. Alerts can be created for several FactSet components, such as **StreetAccount News**, **Filings**, and **Universal Screening**.

**Creating Watch Lists**

Click the **Create/Edit Watchlist** button to add a watch list. See **Managing Watchlists and Portfolios** for more information.

**Accessing Help and Support**

If you have questions, use the links to view help pages within Online Assistant.
Click the Help button to launch help pages in Online Assistant. Find help on FactSet products, learn about writing functions, view definitions for terms used throughout FactSet, and learn more about the various databases available.

Click the Contact Us button to learn how to receive help from a FactSet Consultant via phone, email, or chat. FactSet Support is available 24 hours a day, 7 days a week for application, project, and technical assistance.

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