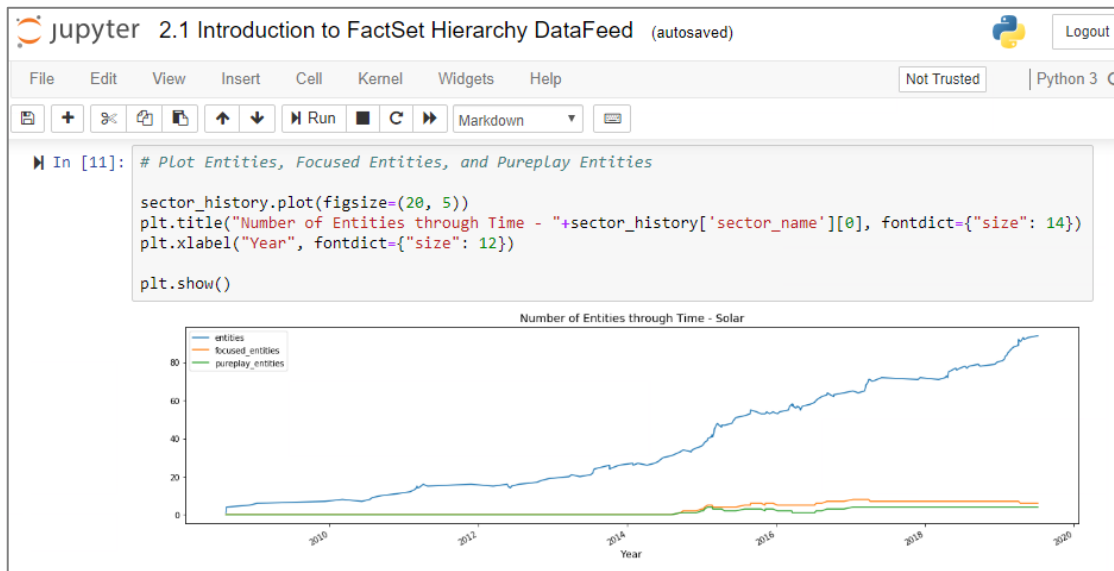


Open:FactSet Marketplace Starter Kits

Open:FactSet Marketplace Starter Kits introduce the content, provide example workflows & use-cases, and illustrate how to leverage FactSet Symbology through example codes and queries within Jupyter Notebooks and Microsoft SQL Server. This document includes instructions on how to use the Starter Kits in Data Exploration and in local environments for those without access to Data Exploration.

With Data Exploration and access to Open:FactSet Marketplace Starter Kits, everything you need to start evaluating a feed is readily available. This document will walk-through how to leverage this material.

As a local user, please follow the steps in the Local Users section which walk-through how to download and set up the Open:FactSet Marketplace Starter Kits to accelerate your Standard DataFeed evaluation.



Contents

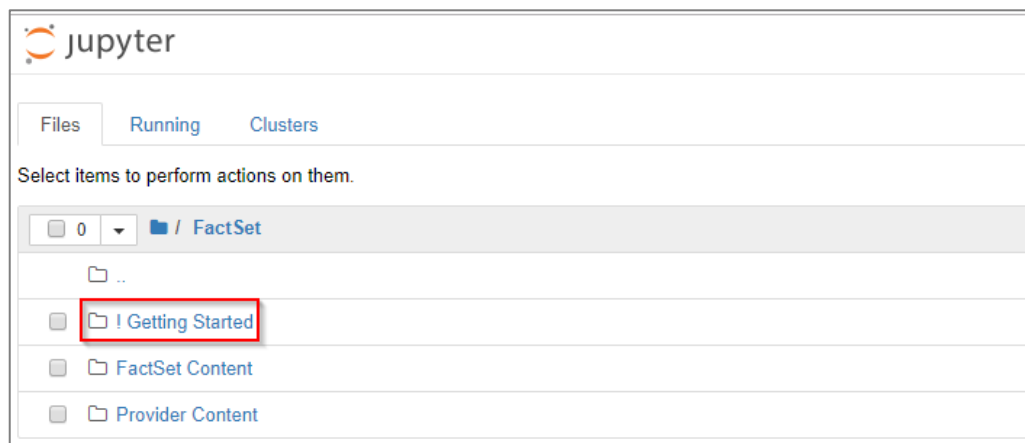
- Data Exploration 2
 - Beginning with FactSet Symbology 2
 - Understanding the folder structure to uncover FactSet and Provider data 2
 - Creating your own work 3
- Local Users 4
 - Setting up your environment 4
 - Beginning with FactSet Symbology 4
 - Navigating the collateral 5
 - Creating your own work 5

Data Exploration

FactSet's Data Exploration combines the power of the Microsoft Azure cloud with the content on the Open:FactSet Marketplace, offering a streamlined way to explore and evaluate new ideas. For more information on Data Exploration see the [product page](#).

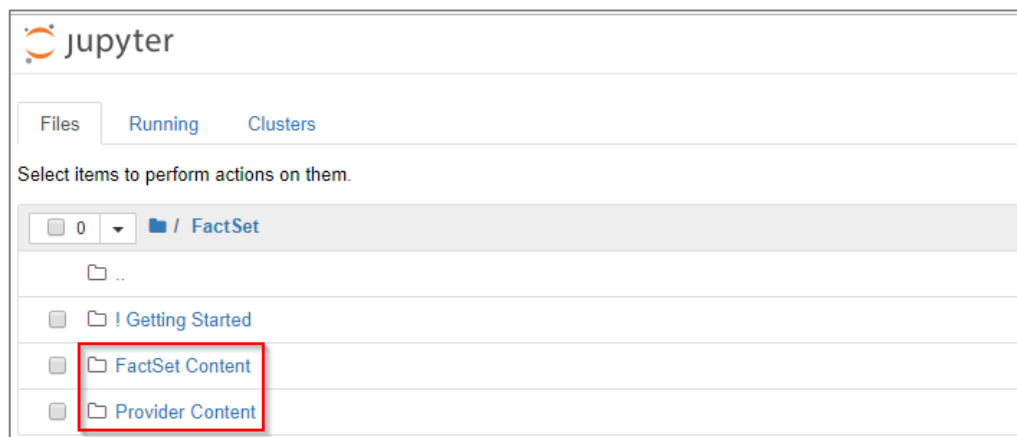
Beginning with FactSet Symbology

To begin exploring content, launch Jupyter Notebook in Data Exploration and open the **/FactSet/! Getting Started** folder to learn about FactSet's Symbology and data model.

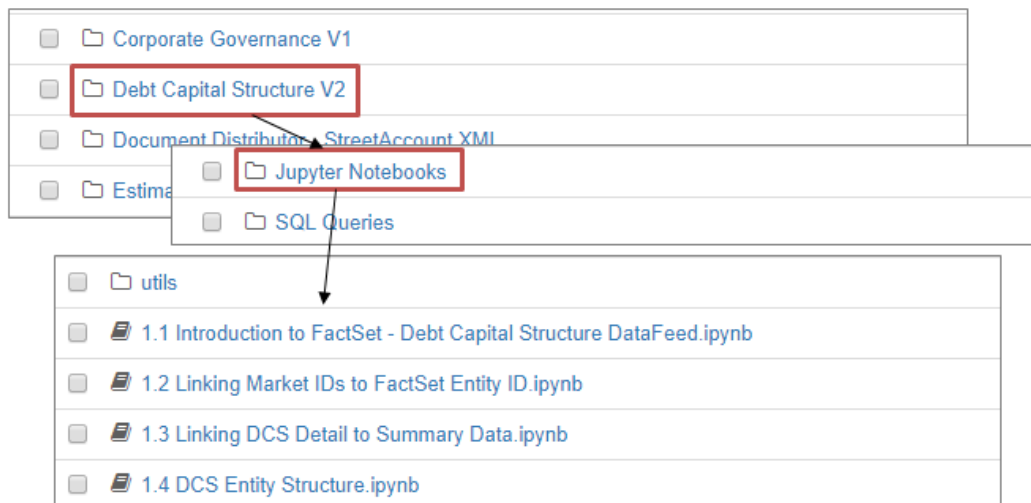


FactSet Symbology can be viewed as the hub of FactSet's DataFeeds, which includes security and entity level reference data items, and provides mappings from market identifiers to FactSet's symbols to allow for easy navigation between feeds. To better understand FactSet Symbology, walk-through the Jupyter Notebooks and SQL Queries available in the Symbology V1 folder.

Understanding the folder structure to uncover FactSet and Provider data



Opening either the **FactSet Content** or **Provider Content** folders uncovers a directory of DataFeeds with sample code that is further separated by **Jupyter Notebooks** and **SQL Queries**. The example below shows how to navigate to the Notebooks available for Debt Capital Structure DataFeed:



The Notebooks are separated into a consistent framework and tagged with a chapter and concept number. The chapter number is indicative of the content package being covered. In most kits, a single package is covered, and all Notebooks will have a chapter of 1 (ex.1.1, 1.2). In cases where multiple packages are reviewed (e.g. RBICS and Ownership), different chapter numbers will be utilized (1.x, 2.x et al.). The second number represents the concept:

- x.1: Introduction
- x.2: Linking a market identifier to a FactSet or Provider identifier
- x.3 et. al: Use-cases and workflows

SQL Queries, which are referenced throughout the Jupyter Notebooks, also serve as stand-alone examples of how to query the various DataFeeds. These can all be found in the SQL Queries directory.

Creating your own work

FactSet has created a Utils folder containing Python functions built to allow seamless use of .sql files with Pandas. To leverage this utility when creating your own work or building off the work already created, it is necessary to copy the Jupyter Notebooks, SQL Queries and Utils directory over to your Client folder. Maintaining the same folder structure ensures ease of use when switching out the SQL queries for your own.

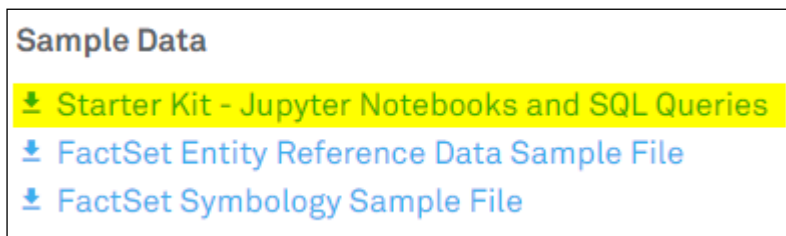
To help kickstart the process of creating your own work, a folder directory template is provided in the update:Getting Started!/Creating Your Own Work folder. The Creating Your Own Work folder includes a Jupyter Notebook and SQL Queries subfolder, just like each content folder in the FactSet Content and the Provider Content directories. The Jupyter Notebook folder includes a copy of the Utils subfolder and a sample Jupyter notebook to be used as a starting point.

Follow the steps below to create your own Jupyter notebook using this template:

1. Copy the entire Creating Your Own Work folder into your Client or Personal directory and rename the folder.
2. Open the Sample.sql file in the SQL Queries subfolder. Replace the existing SQL query with your query and rename the file.
3. Open the Sample Notebook.ipynb file in the Jupyter Notebooks folder. Replace 'Sample.sql' within the loadsql function with the new name of your SQL query.

Local Users

Open:FactSet Marketplace Starter Kits can be found within the Open:FactSet Marketplace cards under **Sample Data** while logged in to the Open:FactSet Marketplace with a FactSet .NET ID. After the .ZIP bundle has been downloaded, follow the steps below to get set up for consumption.



Setting up your environment

To ensure a successful experience with the Jupyter Notebooks it is important to ensure your local environment is set up properly to match the Notebook's expectations:

DSN Connection: To query a SQL database, each Notebook references a DSN named **SDF**. Confirm your local DSN that hits your FactSet DataFeeds shares this name. For instructions on setting up a DSN, see the DataFeed Loader [User Guide](#). Alternatively, it is necessary to make adjustments within the Notebook to accommodate for custom naming conventions.

Python Environment: It may be necessary to replicate the Python environment in which the Notebooks were created. The following step-by-step instructions that walk-through how to ensure the packages, and versions of those packages, align with what the Notebook expects.

Creating an Anaconda Environment

1. Save the environment.yml contained within [! Getting Started](#)/Environment Files directory to preferred local location
2. Create and activate new environment. The *path* represents the location of the environment.yml file on your computer:

```
conda env create -f "/path/environment.yml"  
conda activate ofenv  
jupyter notebook
```

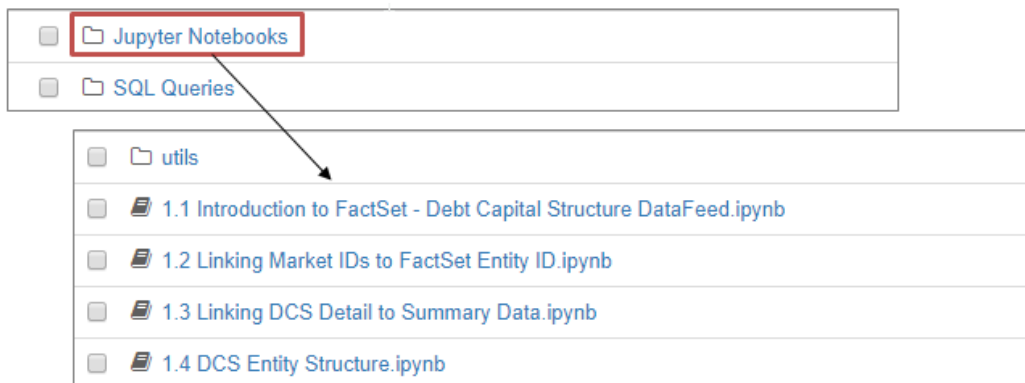
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To better understand FactSet Symbology, walk-through the Notebooks and queries available in the Symbology V1 folder in the [! Getting Started](#) Starter Kit.

Navigating the collateral

Sample code is separated by **Jupyter Notebooks** and **SQL Queries**. The example below looks at the Notebooks available for the Debt Capital Structure DataFeed:



The separate Notebooks and queries will introduce the content, include a walk-through of linking a market identifier to a FactSet ID or Provider ID when relevant, and provide example use-cases and workflows.

The Notebooks are separated into a consistent framework and tagged with a chapter and concept number. The chapter number is indicative of the content package being covered. In most kits, a single package is covered, and all Notebooks will have a chapter of 1 (ex.1.1, 1.2). In cases where multiple packages are reviewed (e.g. RBICS and Ownership), different chapter numbers will be utilized (1.x, 2.x et al.). The second number represents the concept:

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To help kickstart the process of creating your own work, a folder directory template is provided in the [! Getting Started/Creating Your Own Work](#) folder. The Creating Your Own Work folder includes a Jupyter Notebook and SQL Queries subfolder. The Jupyter Notebook folder includes a copy of the Utils subfolder and a sample Jupyter notebook to be used as a starting point. Follow the steps below to create your own Jupyter notebook using this template:

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2. Open the Sample.sql file in the SQL Queries subfolder. Replace the existing SQL query with your query and rename the file.
3. Open the Sample Notebook.ipynb file in the Jupyter Notebooks folder. Replace 'Sample.sql' within the loadsq function with the new name of your SQL query.