

FACTSET › SEE THE ADVANTAGE

OPEN:FACTSET MARKETPLACE PROVIDER ONBOARDING INFORMATION



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Welcome to the Open:FactSet Marketplace

This document provides an overview of the Marketplace, including a summary of both client and provider benefits, as well as an outline of the provider onboarding process and frequently asked questions. Please don't hesitate to reach out to OFSupport@FactSet.com for additional information.

What is the Open:FactSet Marketplace?

The [Open:FactSet Marketplace](#) (OFM) is an open data exchange designed exclusively for the investment community. Built on FactSet's four decades of integrating financial data and analytics, OFM allows financial institutions seeking investment insights to find premium data, applications and workflow solutions on a single platform.

All providers on the Marketplace are carefully screened by FactSet so that our clients can be assured of a high standard of content and data quality. FactSet works with selected providers to vet and integrate unique data with our market-leading symbology.

Client Benefits

Discover High Quality and Impactful Data Providers

- Understand the data landscape with hands-on access to a variety of datasets. Detailed documentation such as research white papers, overviews, technical and content methodology documents allow for deeper analysis.
- Gain additional insights from new and upcoming datasets as well as Candidate provider products. Help shape FactSet's pipeline by suggesting, or registering interest in, content for the Marketplace.

Evaluate New Ideas and Content Sets with a Simple Login

- Explore new ideas faster. Data Exploration, FactSet's cloud-based environment built on Microsoft Azure, allows users to evaluate content with just a username and password instead of costly infrastructure and IT.
- Leverage FactSet's connected data model and standardized symbology to allow more time evaluating new ideas rather than integrating and connecting data.

Streamline Implementation

- Consolidate contracts and centralize billing to reduce administrative burden.
- Consume content in the cloud or take a copy of the feed locally. All data, whether FactSet's or Provider's, is delivered by FactSet.

Provider Benefits

Greater Discoverability

- Generate new leads from various industries as clients browse, search and discover your products within the Marketplace. FactSet will work with you to create unique Provider and Product pages that highlight your key selling points and feature marketing materials, white papers, case studies & sample data. Additional collateral such as product specific videos and FactSet hosted webcasts can also be created to increase awareness.

- Allow FactSet's Data Exploration to jump start your sales cycle. Within Data Exploration users can quickly, easily, and cost effectively access your data in a fully hosted environment that includes industry-standard databases, programming languages (Python and R), and data visualization tools. Data Exploration eliminates the cost of trialing data locally by providing everything needed to analyze new content with a simple log in.

Enhanced Data Integrity

- Benefit from FactSet's connected data model. FactSet will fully concord your data to our industry-leading FactSet Symbology, addressing the most challenging and time-consuming hurdle clients face when taking on a new product.
- Leverage FactSet's 40+ years in data management to improve your content. FactSet will conduct an in-depth analysis of your data to ensure the highest possible quality & reliability.

Improved Usability

- Rely on FactSet to help you prepare and document your data for client consumption. Our team will apply data standards and modeling transformation to promote ease of use.
- Receive additional value-added collateral and use case examples. FactSet will create Jupyter Notebooks, Tableau dashboards, sample Python code, and SQL queries to highlight the value of your content.

Expanded Distribution Channels and Administrative Assistance

- Take advantage of FactSet's extensive network of clients and prospects. FactSet creates custom data solutions for each client so our sales team can often find unique pairings of your data with other complementary offerings.
- Ease your administrative burden. FactSet will manage delivery, contracting and billing details.

Product Stages on the Open:FactSet Marketplace

Candidate Products

- Have been screened and have a Candidate Provider Agreement with FactSet
- Data is available for discovery with up to 3 product pages and materials on the Marketplace
- Though data is not yet available for evaluation in Data Exploration, Candidate Providers may post sample data on the Marketplace
- During this phase, any incoming leads from the Marketplace will be referred directly to the Provider

Available Products

- Data is available to all FactSet clients for purchase and is actively pitched by the FactSet sales team
- All current FactSet clients may trial data in Data Exploration at no additional cost to them
- FactSet creates collateral (Jupyter Notebooks, Tableau dashboards, etc.) to demonstrate use cases for the data
- FactSet handles contracting and billing with client and manages distribution of the data to the client

How do I become a provider?

Step 1: Initial Registration

1. Navigate to the [Open:FactSet Become a Provider](#) page, and select “Create Account”
2. Fill in forms requesting information on your company and datasets. Upload sample data for review.
3. You will receive a welcome email with links to some helpful information, including this onboarding guide and a [data survey](#)
4. Complete and submit the survey

Step 2: FactSet Review Process

1. Once you submit your initial company/data registration, FactSet will commence its own review of your firm and content
2. FactSet will contact you with questions and potentially request additional information
3. FactSet will discuss the contractual terms of Candidate and Available Providers
4. FactSet will get back to you within 1-3 weeks with an acceptance or rejection notice. If rejected, we will provide you with rationale and what steps might be followed if you would like to come back for future consideration

Step 3: Acceptance and Contract

Upon acceptance:

1. You will receive a FactSet .NET ID login that will grant you credentials to the Open:FactSet Marketplace. It is here that you will be able to create and maintain your company and product pages
2. Upon initially logging into your account, you must digitally sign the Open:FactSet Provider Agreement
3. Once the contract is executed, you can commence the creation of your company/product pages FactSet will contact

Step 4: Catalog Page Creation

1. Create your company and product pages for the Marketplace. Please reference these [instructions](#) for details on how to access your dedicated pages within our partner CMS
2. Submit your pages for review to FactSet
3. Pages published to the Marketplace!
4. Edit and update your pages as necessary (pursuant to review)

FAQs

What if I am not approved for the Marketplace?

FactSet will provide you with feedback as to why we chose not to include your content within the Marketplace. Typical reasons include: data quality/completeness, concerns around data sourcing, ongoing company concerns, or interest of the data to our clients. If you felt you have addressed the concern(s) at a future date, we welcome the opportunity to rekindle discussions.

How can I make changes to company/product pages once they are published?

To log into your account on Open:FactSet, navigate to the “My Account” option under your name. Use the “Create a New Version” button on your provider or product page to edit the latest version of your page. When complete, save and submit your changes to FactSet. Upon review by FactSet, we will publish your updates. You may always email OFSupport@factset.com (or your direct contact) with the changes you wish to be made and we can assist you.

How will I be notified of any incoming leads?

If you are a Candidate Provider, you will receive an email from FactSet with the firm and contact details of individuals who make inquiries regarding your data set. **Please respond back to the inquiring firm within 2-3 business days.** From time to time, our sales people may reach out to you directly if our clients expressed interest in your product during their regular interactions.

If you are an Available Provider, our sales team may reach out to you for assistance during a trial or the sales period. Otherwise you will be made aware of a sale as per the terms of your Agreement and Royalty Report.

I am a Candidate Provider. How can I progress to Available Provider?

We perform regular reviews of all Candidate Providers, analyzing both interest level from our clients as well as the quality and timeliness of the Provider’s data. When we believe the interest has crossed a threshold, we will then work with the Provider to move them into the Available state. Encourage your clients/prospects to hit the “Register Interest” button on your product card in the Marketplace.

Though client demand is the primary driver for progressing to Available Provider, data quality is also an important aspect. Throughout the onboarding process, FactSet will perform analysis on your data, measuring a number of different quality dimensions (see the Open:FactSet Data Quality Categories table below). We will then consult with you on these findings and work with you to adopt standards, understand data anomalies, and document behavior to streamline client experience with your content. Taking these steps will best position your product to be evaluated by clients and progress to fully available for purchase in the Marketplace.

Will you share with me statistics? (e.g. How many people looked at my product pages, how many people downloaded my sample data, how many times the sales team discussed my products, etc.)

FactSet does not share any statistics with any Providers, nor any ongoing conversations with clients regarding a Provider, unless specifically requested by the client. We do this in order to protect the confidentiality of our clients. However, if a client expresses interest in your dataset, we will absolutely be reaching out to you to make the connection with the client as you are the expert on your own data. We will do our best to help facilitate any sale.

Can I post on the [User Forum](#)?

Yes! Once we furnish you with your FactSet .NET ID credentials you will be able to log into our User Forum and post. We have found that the Providers who post regularly see more traffic on their content pages. If you post on the forum, we encourage you to post items that our clients will find interesting rather than something that is more “marketing” or “sales” related. Our users are looking for unique ideas or even sample code (e.g. SQL/python/Jupyter Notebooks) that helps them discover new insights. Resist the temptation to post anything too sales related.

Open:FactSet Data Quality Categories

Category	Definition	Example
Open:FactSet Data Standards	Data and structure conform to industry best practices and requirements	Date ISO 8601
Completeness	Verify population of mandatory fields and profile availability of key data items	Percentage of NULLs Through Time
Quality	The data is valid and correct	Outlier Identification
Timeliness	Measure and preserve data time to market	Lag between event and publication
Connectivity	Establishing connections to other Open:FactSet Data	Symbology Concordance
Dependability	Ability to consistently deliver accurate and timely data	Delivery Time