FactSet Excel Add-In

Getting FactSet 365 Page 23024

FactSet provides an add-in that allows accessing features through Microsoft Excel on the Web, called FactSet 365. There are several methods to access this feature which will be provided below.

Topics covered:

- Getting the FactSet 365 add-in
    - Browser
    - Microsoft Excel Desktop Application (PC or MAC)
    - Centralized Deployment

Getting the FactSet 365 add-in

Browser

FactSet 365 is best used on Google Chrome. The add-in can be downloaded by following these steps:

1. Go to www.office.com
2. Open a new or existing Excel File
3. Navigate to **Home** > **Add-ins** then click **More Add-ins**
4. Under **Store**, use the Search function to look for FactSet 365, then click **Add**

Microsoft Excel Desktop Application (PC or MAC)

1. Open the Excel Desktop Application
2. Navigate to **Home** (**Insert** in some Excel versions) > **Add-ins**
3. Click **More Add-ins**
4. Under **Store**, use the Search function to look for FactSet 365, then click **Add**

Centralized Deployment

If the Microsoft Office Add-ins Store is blocked at your firm, you can contact your internal IT team to request that Centralized Deployment of the add-in is set up. The following Microsoft documents provide additional information:

- Deploy add-ins in the Microsoft 365 admin center
- Determine if Centralized Deployment of add-ins works for your organization

Note If the FactSet Workstation Add-in (or the FactSet COM Add-in) is installed on the Excel Desktop Application, FactSet 365 download will not proceed and will cause an Add-in Error.