



## { Introducing Online Assistant }

### Online Assistant Features

**Online Help:** Find detailed documentation on all FactSet applications, along with hyperlinks to related information, including calculations and report methodologies.

**Learning FactSet:** FactSet provides free hands-on instruction through live seminars and Web-based training sessions. The Learning FactSet section gives you access to a list of FactSet seminars held in cities worldwide, interactive tutorials, and online seminars.

**Print Materials:** Visit the Print Materials section for downloadable (PDF) materials, including manuals, quick reference cards, and tipsheets describing the databases and applications on FactSet. You can also view copies of *Query*, FactSet's quarterly newsletter.

**Template Library:** FactSet's Template Library provides a variety of Excel, PowerPoint, and Word templates that you can use as building blocks to quickly create custom models, presentations, and reports.

**Quick Answers:** For answers to frequently asked questions, tips, troubleshooting, and factsheets on a variety of subjects, go to the Quick Answers section.

**Reference:** Browse supplemental FactSet material, including function definitions, international exchanges, sector and industry listings, descriptions of data items, and a glossary of FactSet terms, in the Reference section.

For phone support, call 1.877.FACTSET.

[www.factset.com](http://www.factset.com)

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FactSet Online Assistant<sup>®</sup> is a rich information network that brings you comprehensive documentation on all of FactSet's applications and databases.

Using the latest Web technologies to deliver content directly to your desktop, Online Assistant incorporates multimedia tutorials, detailed instructions, graphics, PDFs, spreadsheets, links, and search capabilities into one browsable, searchable library of information. Content is divided into six sections to help you quickly find what you need: Online Help, Learning FactSet, Print Materials, Template Library, Quick Answers, and Reference.

### Learning FactSet

In the Learning FactSet section of Online Assistant, you can learn FactSet whenever it's convenient. Personal online training is always ready when you are with Webinars, online seminars led by specialized FactSet trainers. Interact directly with trainers during a live broadcast, or watch recorded Webinars whenever you want. You can also find live training seminars in your area by checking out the schedule on page 4719.

Learning FactSet tutorials guide you through a series of steps to help you accomplish a goal. Each lesson is self-contained and takes about 10 minutes to complete.

With tutorials, you can become familiar with everything from the basics of navigating FactSet to advanced tasks and projects. Because tutorials don't affect your FactSet applications, you can do all or part of a tutorial as your schedule allows.

Your training always matches your needs because you select which topics to study. Get started by searching the list of available Learning FactSet tutorials on Online Assistant page 5889, and choose one that's right for you.



Transforming Information Into Intelligence

FACTSET

## { Navigating Online Assistant }

### Launching Online Assistant

You can access Online Assistant in several ways:

- Click the Online Assistant link on the DIRECTIONS homepage.
- Click the MENU button on the DIRECTIONS homepage, then select Utilities > Online Assistant.
- In Microsoft Excel, select FactSet > Help > Online Assistant.
- Click any Help button in FactSet. ?

By clicking the Help button in any FactSet application, you will launch context-sensitive Online Assistant help. For example, if you're in the Price tab of the Company Explorer application and click the Help button, Online Assistant's Company Explorer Price tab help page will appear.

### Finding Online Assistant Pages

Find a page or topic in Online Assistant using any of the following methods:

- Page ID Number:** Type the page ID number in the Enter Page ID box at the top of any Online Assistant page. Then, click the GO button (G) to navigate directly to that page.
- Index Tab:** In the Site Tools pane, select the topic that most closely matches the subject you want to find, then click the Display button at the bottom of the Site Tools pane.
- Search:** Enter a topic into the Search box at the top of any Online Assistant page, then click Search. Or, click the Advanced link to perform a more detailed or Boolean search.

**System Requirements** Online Assistant is accessible through a connection to FactSet. Microsoft Internet Explorer 4.0 or higher is necessary, but a separate Internet connection is not required. The Flash Player and Adobe Acrobat Reader are required to view Online Assistant's Learning FactSet tutorials and display PDF documents, respectively.  
**FactSet Software Version Requirements** 9.01D or higher - Required to perform text searches, provide feedback on specific pages, and search by Page ID. 9.03G or higher - Required to run multimedia tutorials and view PDF documents. 9.300 or higher - Required to launch Microsoft Office documents from Online Assistant. To upgrade your FactSet software, see Online Assistant page 3961 or contact your FactSet

- 1 Banner**  
Use the banner to navigate to the six major areas of Online Assistant: Online Help, Learning FactSet, Print Materials, Template Library, Quick Answers, and Reference.
  - 2 Orientation bar**  
Navigate through pages related to the topic you're currently viewing.
  - 3 Clickpath**  
Confirm which FactSet application, dialog box, or option the current topic is describing.
  - 4 Mini-site**  
View all pages related to a specific FactSet application. For example, if you're viewing a page on Security Prices, all the topics in the mini-site will contain information on Security Prices. Print the entire mini-site by clicking the **Print Mini-Site** button (P) from the main page of the site.
  - 5 Search**  
Find pages containing a specific word or phrase. Click Advanced to select search criteria, use a logical operator, or search specific content areas.
- On some Online Assistant pages, you may also see:**
- Related Topics**  
Click these links to navigate to pages that provide more information on the topic you're viewing. To return to the page you were originally viewing, click the **Back** button (B) on the toolbar.
  - Language Toggle Buttons**  
Some Online Assistant pages are also available in Japanese. Click the toggle buttons at the top of the page to switch between languages.

**CE Launch Applications** **Language: English | Japanese**  
On certain pages you can launch FactSet applications by clicking the shortcut buttons that appear in the toolbar at the top of the screen.