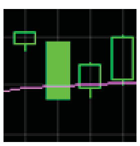
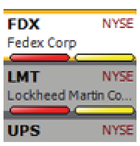
StockFinder Manual

revised Jul 27, 2009



Charting with the largest selection of indicators available



Fast and flexible sorting and rule-based scanning

Everything you need to make your own decisions

StockFinder Manual

by Craig Shipman

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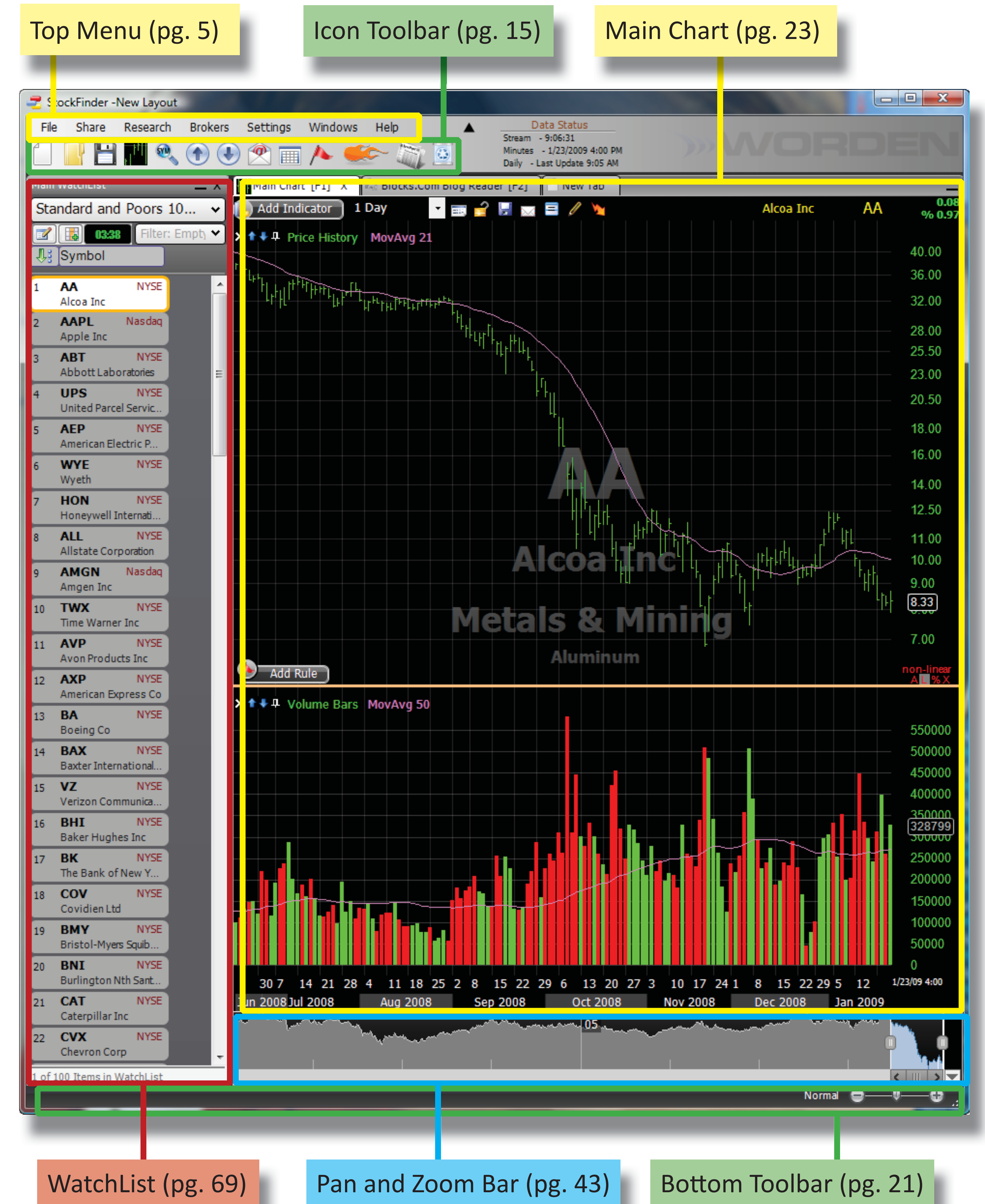

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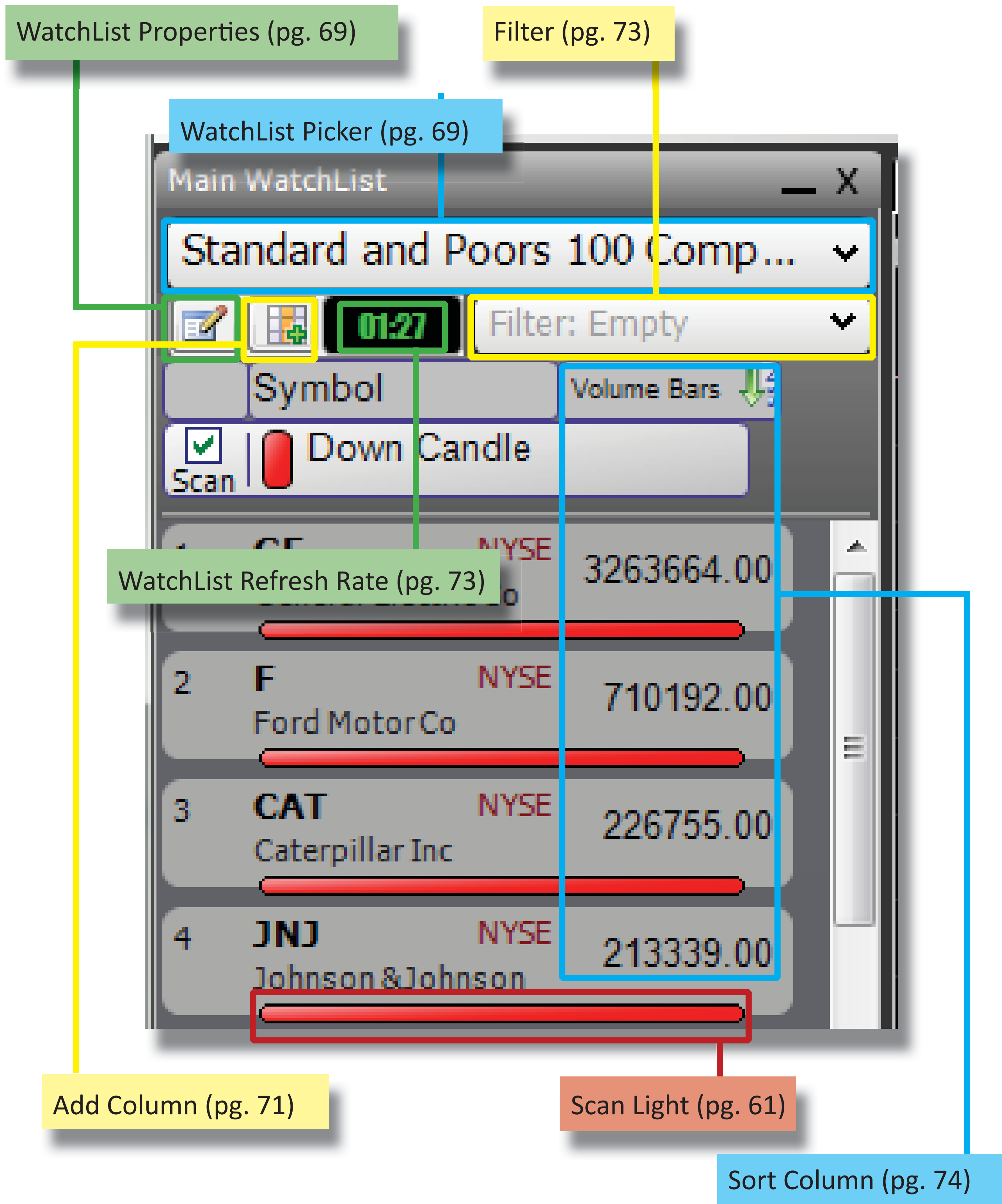

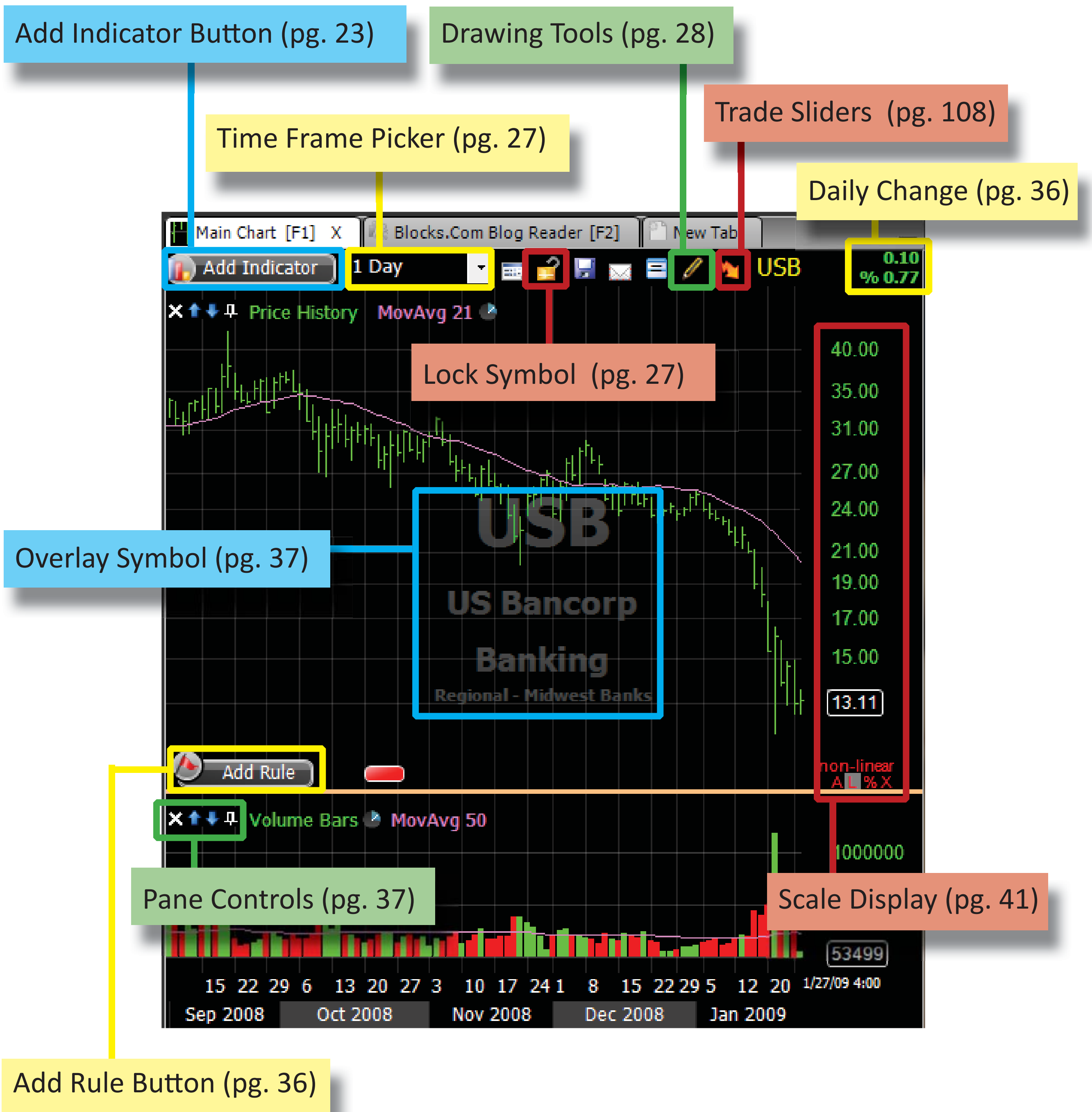
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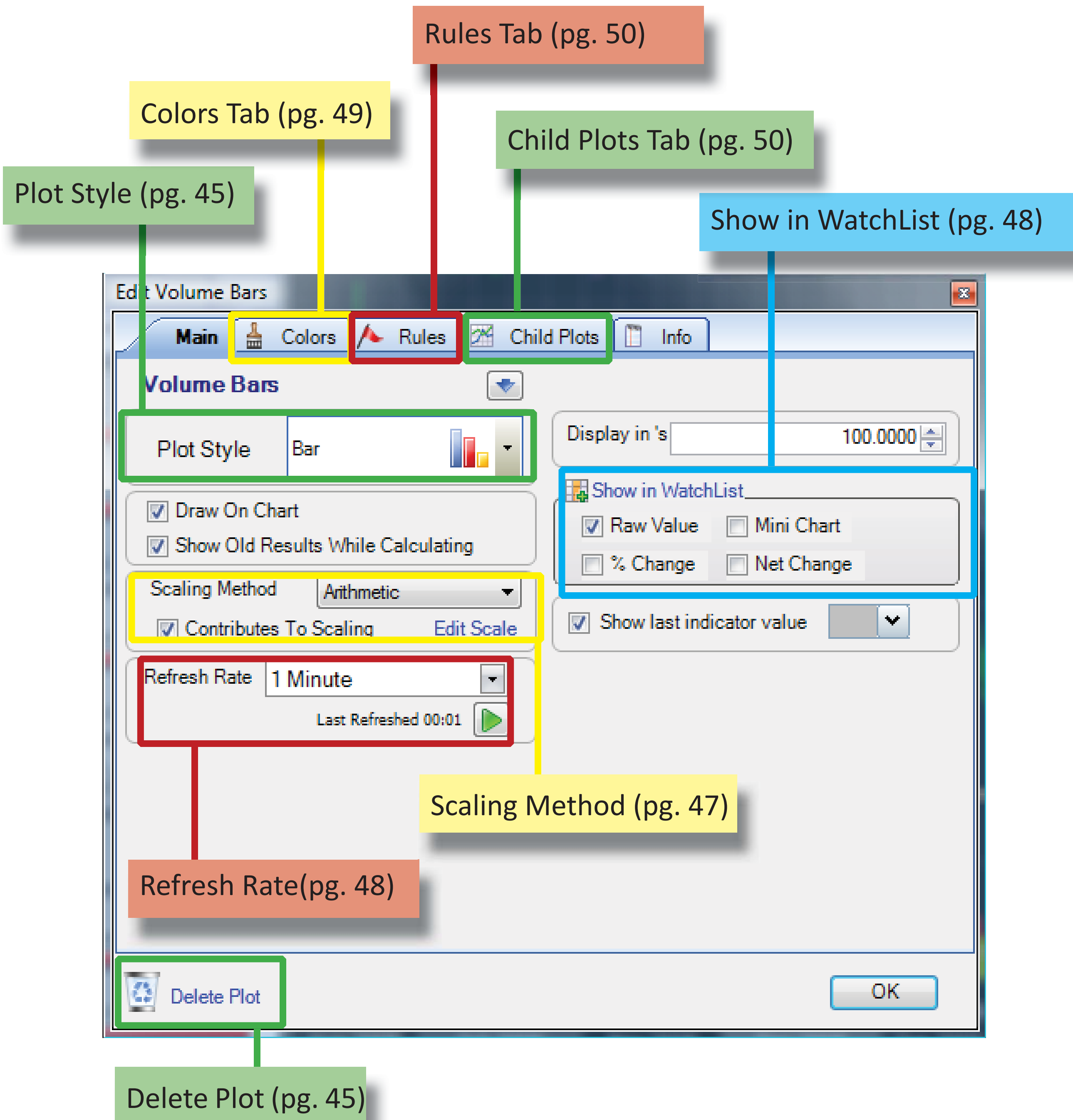

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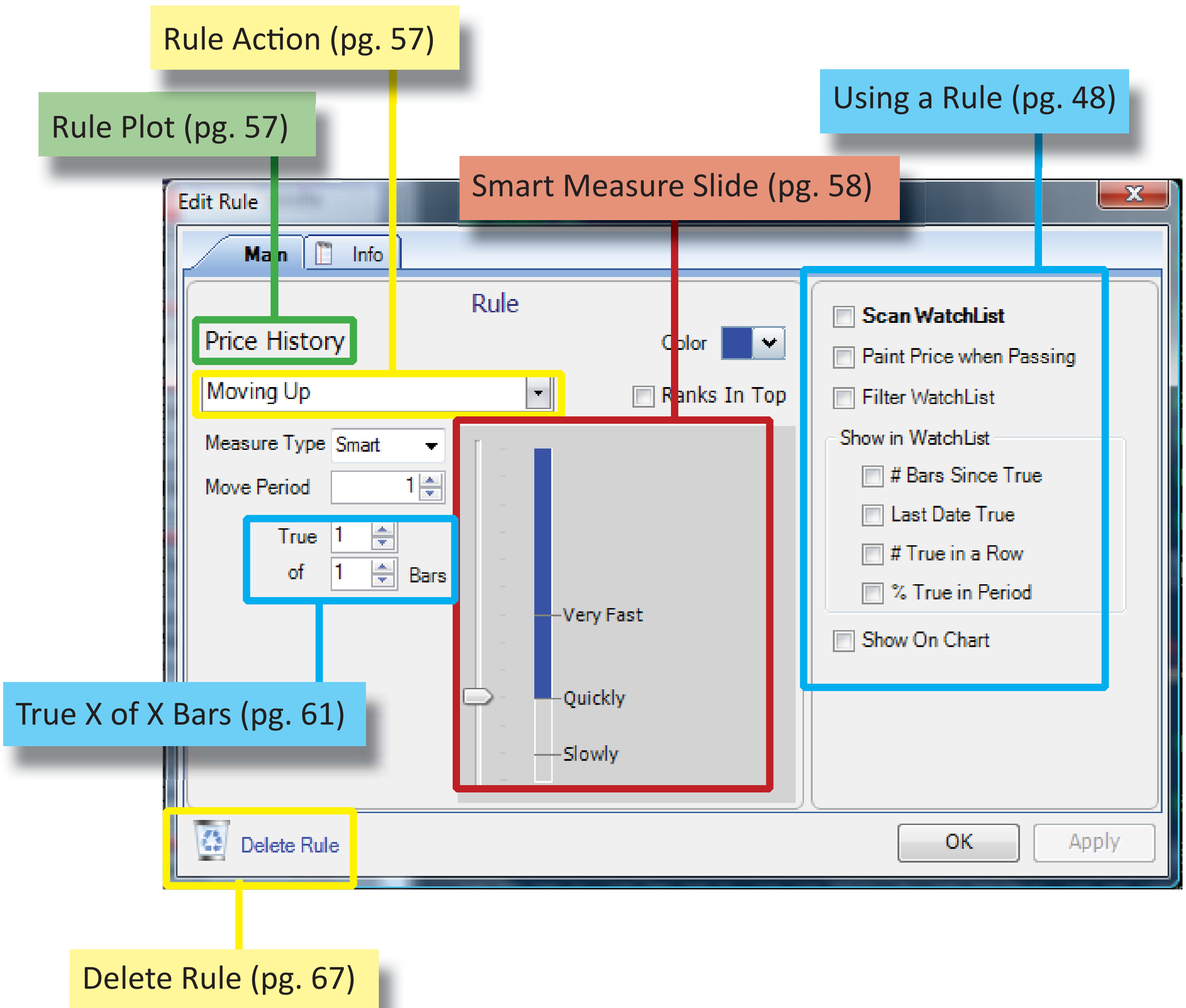

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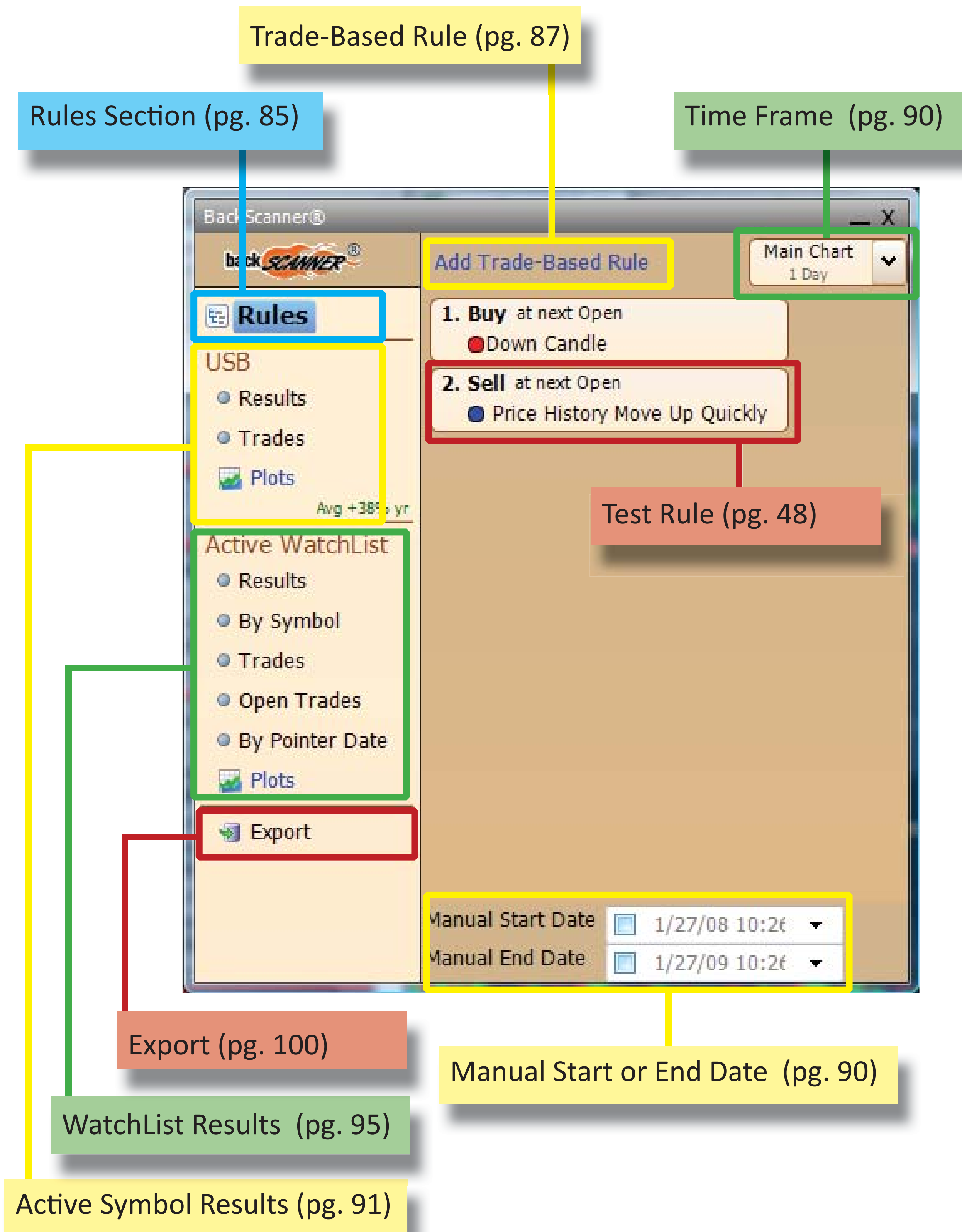


1 Welcome

StockFinder is for charting, sorting, scanning, backtesting, blogging and analyzing the stocks and indexes on the three major American exchanges and (with the proper services) mutual funds and stocks from the Toronto exchange.

StockFinder is the perfect meld of power and ease of use. Regardless of the analysis techniques used now (or in the future), the program is suited for any technique.

This manual explains all of the features and functions for StockFinder. It does not cover how to trade or analyze. Do not take any examples or illustrations presented as advice or suggestions for analyzing or implementing ideas in the program or for trading.

Send suggestions, questions or needed corrections for the manual via e-mail to support@worden.com. For technical support either call 919.408.0542 or email support@worden.com.

Getting Started

To install the program navigate a browser to the install the link on www.StockFinder.com. For more information on starting a StockFinder Gold, Platinum, Canadian or Mutual Fund account by calling (800) 776-4940.

System Requirements

To run StockFinder the following requirements must be met:

- Microsoft .Net framework 3.5 or higher
- Windows XP, Vista or Vista 64 bit
- At least 512 megabytes of RAM memory (one gigabyte or more is recommended)
- 16 megabytes of hard drive space for program installation
- 1ghz (or better) Intel or AMD CPU
- 200 Megabytes or more hard drive space for market data (depending on the services you subscribe to or install)
- Internet connection for updates to market data

Installation

Before starting the installation, disable all anti-virus and firewall software. They often interfere with program installation. Don't forget to turn these programs back on after the install finishes.

The install goes through several steps and may ask to install the *.Net Framework* from Microsoft (if it is not already on the machine). The wizard should start that install if necessary. It is also available for direct download from Microsoft (http://msdn.microsoft.com).

Important Terms

There are several terms used extensively in the manual.

Layout

A Layout is a collection of windows. The default Layout (when first opening the program or creating a new Layout) has three windows. On the left is the Main WatchList window. To the right is the Main Chart and Blocks.com Blog Reader windows (tabbed together). Saving a layout saves every window, everything in those windows and their location in the layout. Saving the Layout saves everything in the Layout.

Window

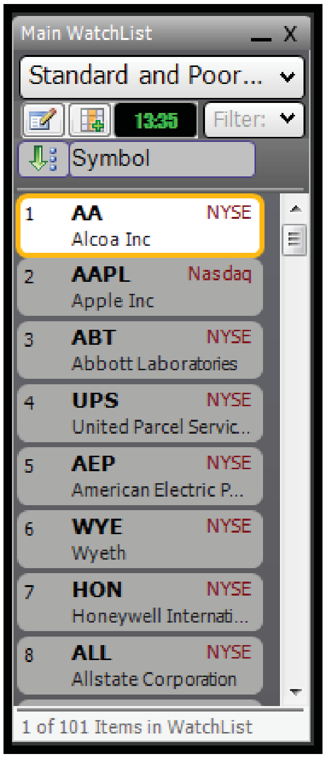
A window is one element of a Layout. A window can be a WatchList or a chart. Windows can be docked with each other within the Layout or floated within the Layout. Right-clicking the window's header gives the docking options.

Chart

A chart is a collection of one or more plots.

WatchList

A WatchList is a collection of symbols. There are several types of WatchLists. Some are system lists maintained by the program (like the Standard and Poors 500 or an industry list like Internet). Some are Personal WatchLists created and maintained by the user (like a portfolio or stocks to watch list).



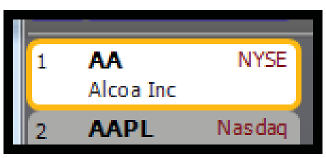
Rule

A Rule is a condition (or set of conditions) that symbols may pass (be TRUE for) or not pass (be FALSE for) on any particular bar.

A symbol passes a Rule if it meets the requirements set by the Rule. For example, if a stock closes lower on one bar than the previous bar it would pass (be "true" for) the *Down Close* Rule. Rules can be loaded from a library, created from a plot on a chart or from RealCode.

Active Symbol

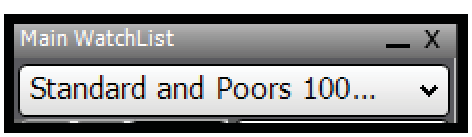
The Active Symbol is the symbol used by any window not locked to another specific symbol.



Typically the Active Symbol is the symbol jumped to or selected in a WatchList. All charts, browsers and other windows in a Layout (not locked to specific symbol) display information for the Active Symbol. Changing the Active Symbol (by jumping or selecting a symbol in a WatchList) changes any window using the Active Symbol.

Active WatchList

The Active WatchList is the list selected in the Main WatchList window.



Click

The term "click" in this manual means left-clicking the mouse button when the mouse cursor is over an item. For example, to select a stock in a WatchList, click it (put the mouse over the symbol and press the left mouse button).

Right-click

Right-click means clicking the right mouse button on an item versus using the left mouse button (which is called "clicking").

Float Mouse

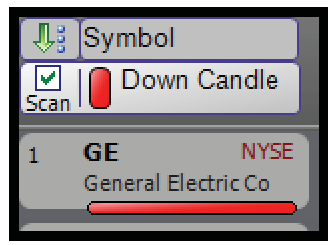
Floating the mouse means putting the mouse cursor over an item and leaving it there without moving the mouse. For example, floating the mouse over the disc icon at the top of the program causes a tool tip to appear saying "Save Layout".

Scanning

Scanning uses a Rule to create Scan Lights on a WatchList of stocks. Scanning a WatchList with a Rule causes every stock passing that Rule to show a Scan Light under it with the same color as the color assigned to that Rule.

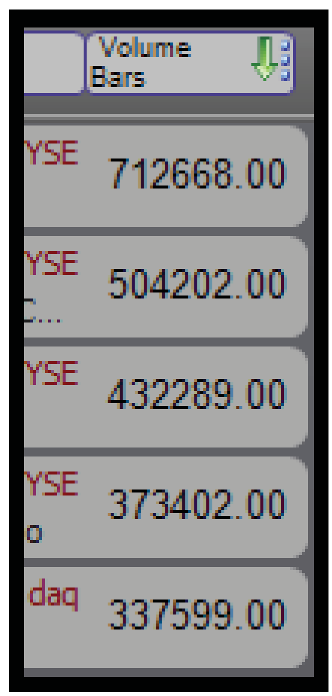
Scan Light

Scan Lights are colored bubbles under a stock if it passes a Rule. Scan Lights appear when a Rule is used to scan a WatchList and the symbol passes the Rule.



Sorting

Sorting a WatchList takes a column of values to arrange the list in a set order. Sorting a WatchList by the Symbol column arranges them in alphabetical order by ticker symbol. Sorting a WatchList by a Percent Change column arranges the symbols by their percent change values.



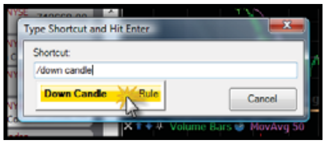
Filtering

Filtering a WatchList by a Rule limits the list to only the symbols passing the Rule on the most recent bar. Any symbols not passing the Rule are hidden from view.

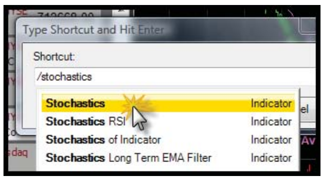
RealCode

RealCode is a code language available in the program. It is based on Microsoft Visual Basic with a few extra features. The best resource for learning RealCode is the RealCode Reference Manual (available on www.StockFinder.com) or any book or online reference for Microsoft Visual Basic.

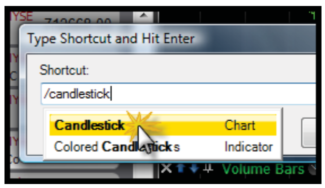
Quick Search Shortcut



The Quick Search Shortcut makes adding items to a Layout easy. When in a Layout (with no other windows open) type a forward slash (/) to initiate the Quick Search.



The Quick Search Shortcut gives access to all of the shortcuts, Layouts, charts, indicators and Rules available in the system.

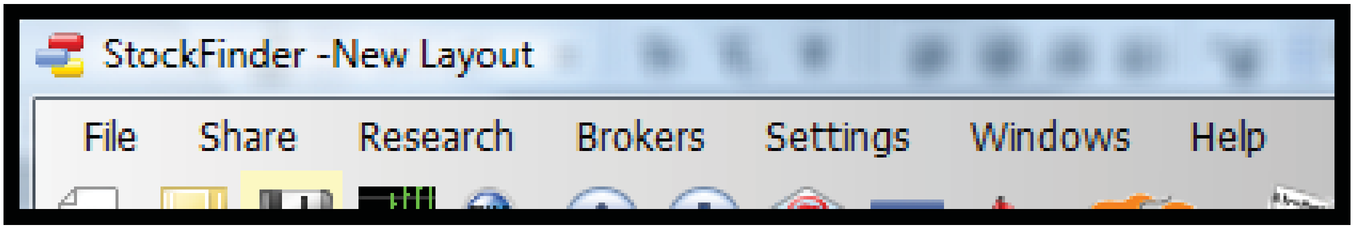


To add or open any of these items, start typing part of the name.

For example, the easiest way to add the *Down Candle* Rule is to type "/down candle" and choose it from the filtered list. The UP and DOWN arrows on the keyboard can move the selection highlight up or down.

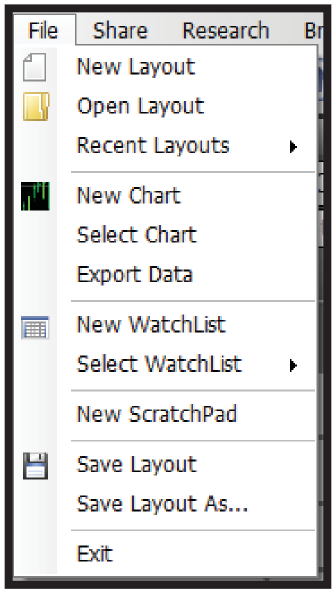
To add the indicator stochastics, type "/stochastics". To open a new candlestick chart, type "/candlestick" and pick the candlestick chart from the filtered menu.

2 Top Menu



File

The File menu includes functions relating to Layouts.

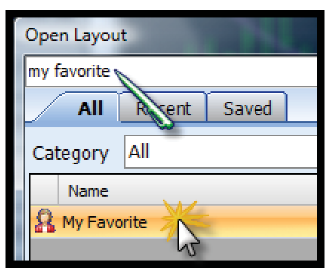


New Layout

Clicking *New Layout* closes the current Layout and opens a new default Layout.

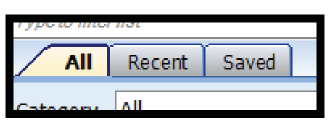
The program asks if the current Layout should be saved. Selecting *Save* saves the Layout before opening the new one. Selecting *Discard Changes* closes the current Layout without saving and opens a new Layout. Selecting *Cancel* stops the opening of the new Layout.

Open Layout



Clicking *Open Layout* opens the *Open Layout* window. It includes all of the saved Layouts as well as Layouts created by Worden.

Type in the *Type to filter list* box to filter the Layouts based on the characters typed. For example, typing “My Favorite” limits the library list to only the Layouts with “My Favorite” in their names. If no Layouts match the typed text, the library will appear empty.

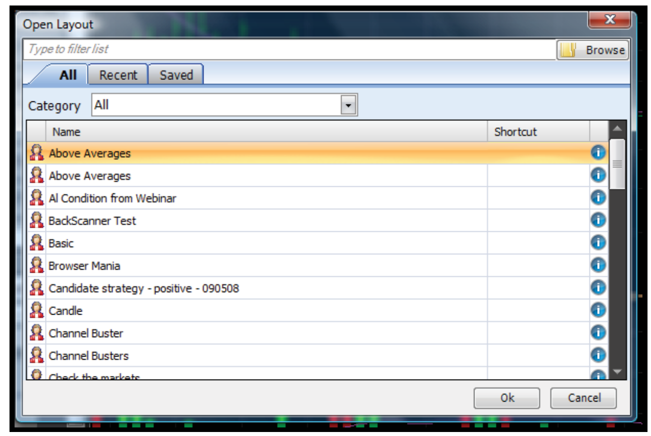


In the top right of the box is the *Browse* button. Clicking it brings up the folder browser for exploring folders outside the default *My Layouts* folder. Select a folder that contains Layout files to populate the *Open Layout* list.

There are three tabs below the *Type to filter list* box. Selecting *All* shows all Layouts. Selecting *Recent* shows recently opened Layouts. Selecting *Saved* shows all saved Layouts.

Choosing a category from the *Category* menu filters the list based on the category selected.

Clicking on the *Name* header or the *Shortcut* header toggles the sort direction for each column.

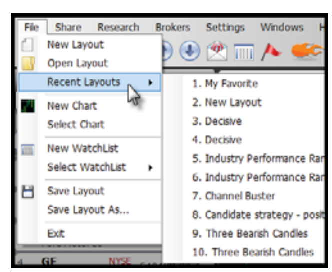


Float the mouse over the blue *Info* button on the far right of any Layout to view the Layout’s description. No text appears if the Layout has no saved description.

Click *OK* to open the selected Layout from the library. A prompt to save changes to the current Layout will appears. Click *Cancel* to abort the opening of the Layout.

Right-clicking any Layout on the list gives the option to delete the Layout.

Recent Layouts



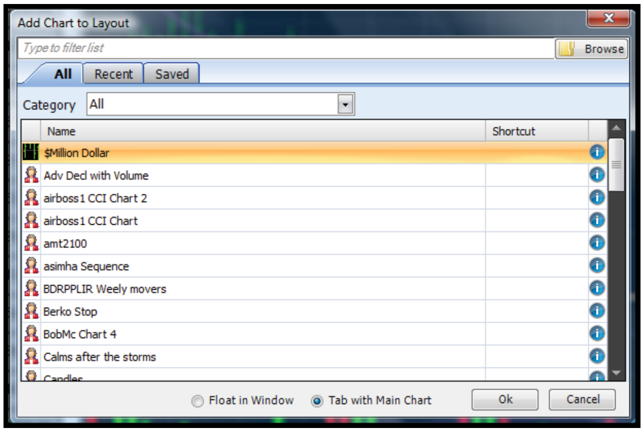
Moving the mouse to *Recent Layouts* displays the last ten Layouts opened. Selecting any Layout from the list opens the Layout. A prompt to save changes to the current Layout appears before the Layout is opened. Clicking *Cancel* aborts the opening of the Layout.

New Chart

Clicking *New Chart* opens a new chart tabbed with the Main Chart.

Select Chart

Clicking *Select Chart* opens the *Add Chart to Layout* box. It includes all saved charts and those loaded by Worden.



Typing in the *Type to filter list* box instantly filters the chart list. Typing the words "My Favorite" limits the library list to only the charts with "My Favorite" in their names. If no charts match the typed text, the library will appear empty.

In the top right of the box is the *Browse* button. Clicking it brings up a folder browser for looking in folders outside the default *My Charts* folder. Selecting a folder that contains chart files populates the *Add Chart to Layout* list.

There are three tabs below the *Type to filter list* box. Selecting *All* shows all charts. Selecting *Recent* shows recently opened charts. Selecting *Saved* shows all saved charts.

Choosing a category from the *Category* menu filters the list based on the category selected.

Clicking on the *Name* header or the *Shortcut* header toggles the sort direction for that column. The charts in the list sort when clicked based on the sort direction.

Float the mouse over the blue *Info* button on the far right of any Layout to view the Layout's description. No text appears if the Layout has no saved description.

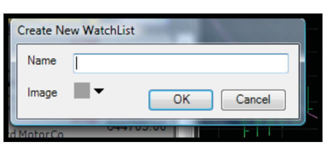
Clicking *OK* opens the selected chart from the library.

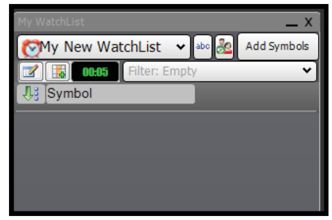
Export Data

Clicking Export Data opens the Export Chart Data window for exporting data to an outside file. For more information on exporting data from StockFinder charts to outside files refer to the "Export Data" section on page 125.

New WatchList

Clicking *New WatchList* opens a *Create New WatchList* window. Name the WatchList and (optionally) assign it an image. Click *OK* to open the new Personal WatchList.



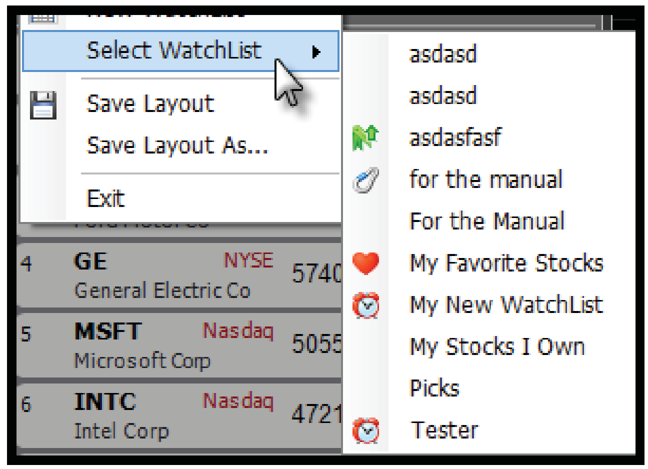


The new WatchList appears below the Main WatchList (tabbed with the Rules Palette if that is also open). Right-clicking on the My WatchList tab brings up the options to change the placement of the new WatchList in the Layout. Click and drag the title tab away from its current location to undock it.

For more information on WatchList functionality refer to the "Main WatchList" section on page 69.

Select WatchList

Floating the mouse over *Select WatchList* shows the Personal WatchLists in the My WatchLists folder. Select a WatchList from the list to add it to the current Layout.



The selected Personal WatchList appears below the Main WatchList (tabbed with the Rules Palette if that is also open). Right-clicking on the *My WatchList* tab brings up the options to float or dock the WatchList in the Layout. Click and drag the title tab away from its current location to undock it. For more information on using the My WatchList window refer to the "Opening a Personal WatchList" section on page 79.

New ScratchPad

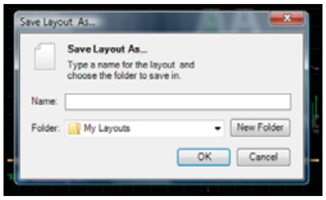
Clicking *New ScratchPad* opnes a new ScratchPad window. For more information on ScratchPad functionality refer to the "ScratchPad" section on page 129.

Save Layout

Clicking *Save Layout* saves the current Layout. If it is a new Layout, it will prompt to name and set the location of the new saved Layout. If it is a Layout already named (and saved previously), it saves over the previous Layout with the current Layout.

Save Layout As

Clicking *Save Layout As* prompts for a name and location to save the Layout. This is one way to save a Layout under a new name and/or location.



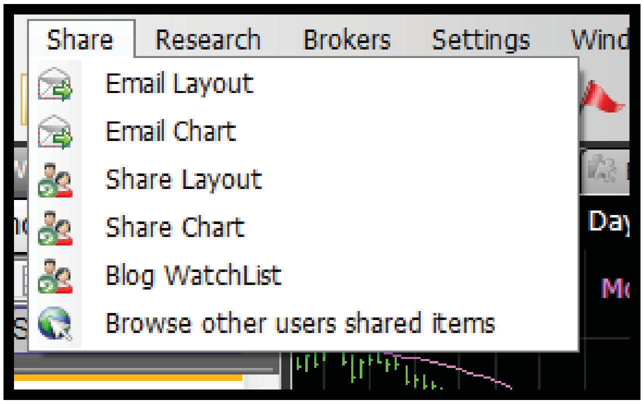
Exit

Clicking *Exit* closes StockFinder. It prompts to save the current Layout. Choosing *Save* brings up the *Save Layout As* box if the current Layout is an unnamed new Layout. Choosing *Save* saves the current Layout if the Layout was previously named and saved.

Choosing *Cancel* stops the exiting of the program.

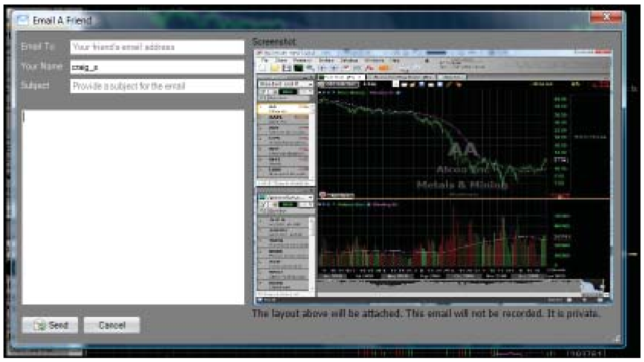
Share

The *Share* menu allows emailing, sharing and retrieval of shared charts and Layouts. All of the share functions require an active internet connection.



Email Layout

Clicking *Email Layout* opens the *Email a Friend* window. Enter the recipient's email address in the *Email To* field. The account user name appears in the *Your Name* field but can be changed. The email's subject can be entered in the *Subject* field.



The large text box below *Subject* is for entering a message for the body of the email.

Clicking *Send* sends an email to the recipient, including the subject, body text and a screenshot of the current Layout. The current Layout is attached (as a file) to the email. The recipient can save the attachment on their computer and open the Layout in their StockFinder. The recipient does NOT need StockFinder to view the screenshot of the Layout.

Email Chart

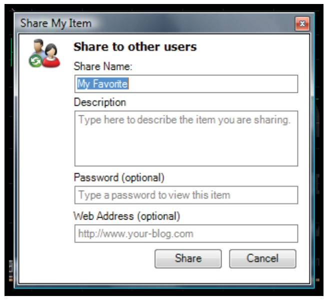
Clicking *Email Chart* opens the *Email a Friend* window. Enter the recipient's email address in the *Email To* field. The account user name appears in the *Your Name* field but can be changed. The email's subject can be entered in the *Subject* field.

The large text box below *Subject* is for entering a message for the body of the email.

Clicking *Send* sends the email to the recipient including the subject, body text, a screenshot of the current chart. The current chart is attached (as a file) to the email. The recipient can save the attachment on their computer and open the chart in their StockFinder. The recipient does NOT need StockFinder to view the screenshot of the chart.

Share Layout

Clicking *Share Layout* shares the current Layout to the StockFinder community. If it is an unnamed Layout, it will prompt to save and name the Layout.



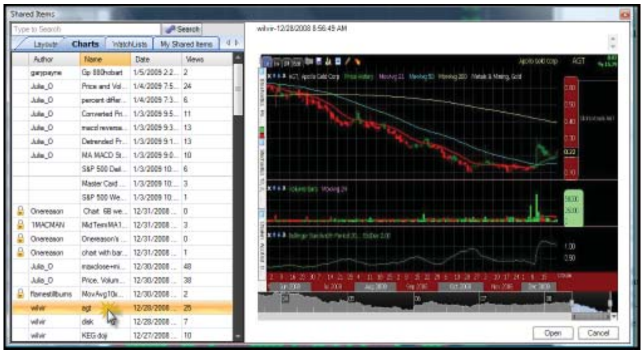
The *Share My Item* window opens. *Share Name* is the name that the Layout will be shared under. *Description* is the information text shown in the share library. Entering a password in the *Password* field requires the others to enter the password to open the shared Layout from the library. *Web Address* attaches a web link to the shared Layout.

Click *Share* to share the Layout to the share library. Click *Cancel* to stop the sharing and return to the Layout.

Share Chart

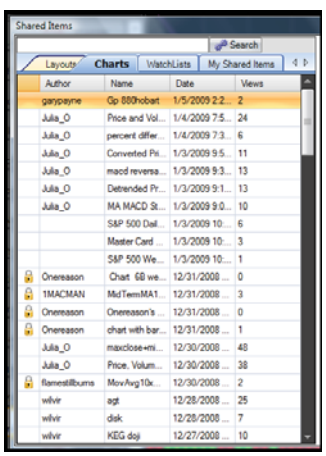
Clicking *Share Chart* shares the current chart to the StockFinder community.

The *Share My Item* window opens. *Share Name* is the name that the chart will be shared under. *Description* is the information text shown in the share library. Entering a password in the *Password* field requires the others to enter the password to open the shared Chart from the library. *Web Address* attaches a web link to the shared chart.



Click *Share* to share the chart to the share library. Click *Cancel* to stop the sharing and return to the Layout.

Browse other users' shared items



Clicking *Browse other users' shared items* opens the *Shared Items* window. At the top left is a *Type to Search* box. Type in key words to filter the lists of items. Any shared item with the typed words in their title or description will appear.

Below the *Type to Search* box are category tabs. The Charts tab is in the foreground when the library is opened. All shared charts are listed under the *Charts* tab. To see shared Layouts or WatchLists, choose their respective tabs. To review the items shared, click the *My Shared Items* tab.

Under each tab lists the most recently shared items for that tab. *Type to Search* searches all shared items, not just the most recent.

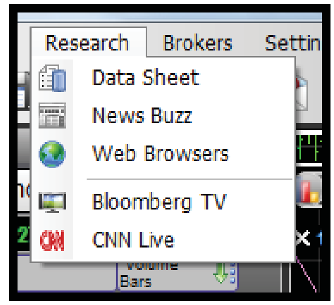
Click any of the column headers to sort the list. The *Author* column shows the name of who shared the item. The *Name* column shows the name of the item. *Date* is when the item was shared. *Views* shows how many times the item was opened.

Clicking once on any item will show the description text on the top right of the box. A picture preview also appears if available.

Double click any item or select an item then click the *Open* button (bottom right) to open a shared item.

Clicking the *Cancel* button closes the shared library without opening any items.

Research

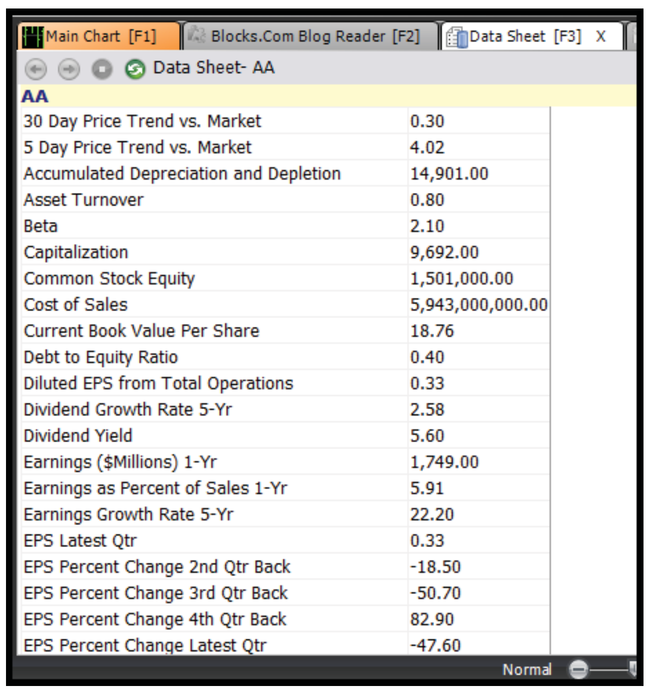


The *Research* menu offers different research tools.

Data Sheet

Selecting *Data Sheet* automatically tabs a Data Sheet with the Main Chart.

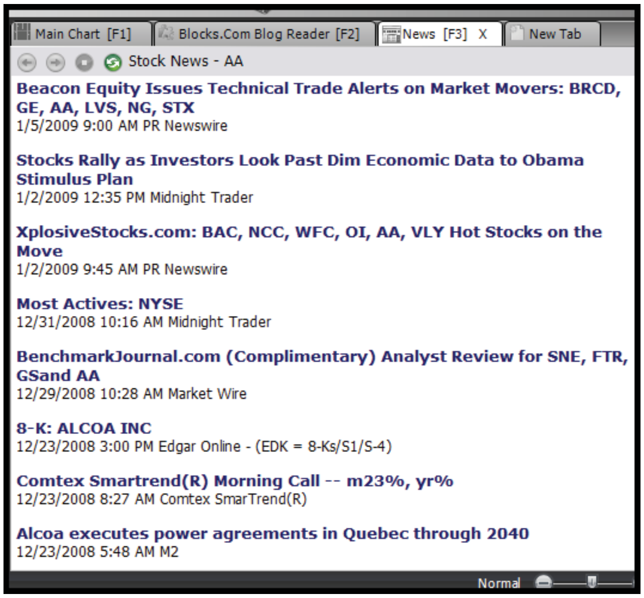
The Data Sheet displays all of the current values for the data provided by Morningstar for the active symbol. The left and right navigation buttons (arrows at the top left of the Data Sheet) browse to the next or previous sheet. Clicking the back button shows the information for the previous active symbol without changing the active symbol. Clicking the forward button navigates forward in the display history. The green *Refresh* button refreshes the Data Sheet.



Clicking the X on the right of the title tab closes the Data Sheet.

News Buzz

News Buzz is available at the Platinum service level. Clicking the *News Buzz* menu item tabs the current news stories for the active symbol with the Main Chart. Clicking any headline brings up the full news story.

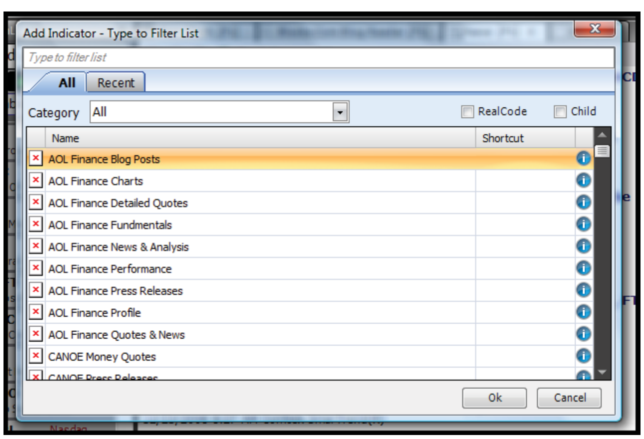


The left and right navigation buttons (arrows at the top left of the window) browse to the next or previous symbol headline viewing history.

Clicking the *back* button shows the news for the previous active symbol without changing the active symbol. Clicking the *forward* button navigates forward in the display history. The green *refresh* button refreshes the displayed news.

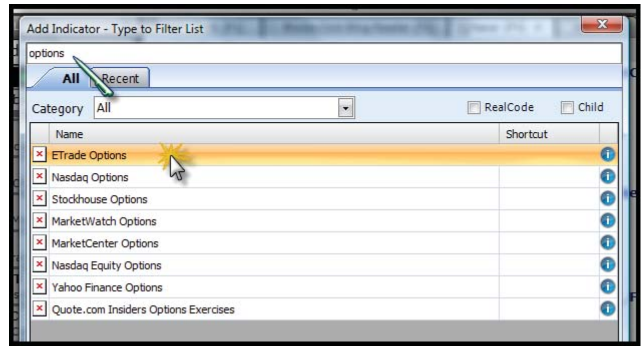
Web Browsers

Clicking *Web Browsers* brings up the *Add Browser* box. It includes all of the browsers available.



Type in the *Type to filter list* box to filter the browser list based on the characters typed. For example, typing the words "Options" limits the library list to only the browsers with "Options" in their names. If no browsers match the typed text, the library appears empty.

The *All* tab, when selected, shows all of the browsers available. Clicking the *Recent* tab brings up the recently selected browsers. The category pull down menu filters the list based on the selected category.



The *Name* and *Shortcut* column headers can be clicked to sort the library.

To open a browser, double click the item from the list or select the item and click the *Ok* button.

Clicking *Cancel* closes the box without adding a browser to the Layout.

Once a browser is selected, it is added to the Layout and stays synchronized with the active symbol. These browsers navigate to specific web pages using the page for the active symbol. The *back*, *forward* and *refresh* buttons on the top of the browser work like a standard web browser (allowing navigation through page history).

Click any links on the pages navigates like any browser. Clicking the small *Block Diagram* symbol at the top right of the window opens the browser's Block Diagram.

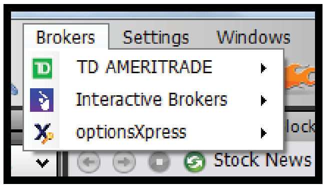
Bloomberg TV

Clicking *Bloomberg TV* opens the video web/audio stream from Bloomberg. The volume controls are at the bottom of the player.

CNN Live

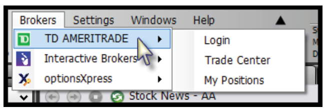
Clicking *CNN Live* opens the video web/audio stream from CNN Live. The volume controls are at the bottom of the player.

Brokers



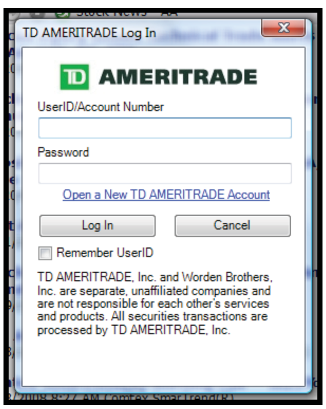
The *Brokers* menu lists optsion broker integration. For more information on Brokers and Trade Sliders go to that chapter of this manual.

TDAmeritrade



There are three options under the *TDAmeritrade* menu. To learn more about the TDAmertitrade interaction in StockFinder, refer to the "TDAmeritrade" section on page 107.

Login



Clicking *Login* brings up the login screen. Enter a TD User ID/Account number and password. Click *Log In* to log into the account via StockFinder.

Clicking *Cancel* closes the log in screen without logging in.

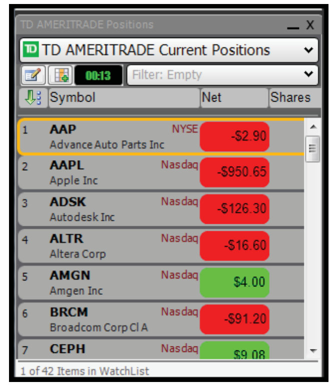
Checking the *Remember UserID* box will auto-fill the UserID in the future. A password will still be required.

Clicking the *Open a new TDAMERITRADE Account* option opens a browser pointed to an Online Account Application for TD AMERITRADE. Contact them for any questions on starting a new account.

After logging into an account with the correct UserID and password, the program opens the Trade Slider area on the chart. For more information on Trade Sliders refer to the "Trade Sliders" section on page 108.

A new WatchList also opens below the Main WatchList showing the current TDAMERITRADE holdings. This lists all the stocks currently in the account. Click on any item in the list to bring up the chart for that stock.

There are three columns in this WatchList (expand the WatchList to the right to see them).



The *Net* column offers the current net for the holding. The *Shares* column shows the number of shares held. The *Entry Price* column shows the price entered. Each column can be sorted by clicking on the header.

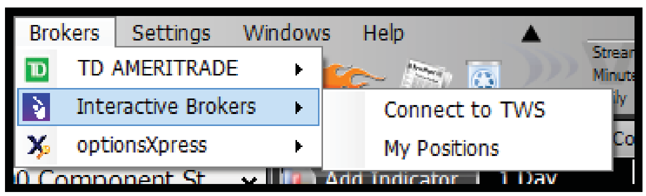
For more information on other WatchList functions refer to the "Main WatchList" section on page 69.

Trade Center

Clicking *Trade Center* opens the *TDAmeritrade Trade Center* window. For more information on the TD Trade Center refer to the "Trade Center" section on page 108.

Interactive Brokers

Floating the mouse over *Interactive Brokers* opens a submenu. To learn more about the Interactive Brokers interaction in StockFinder refer to the "Interactive Brokers" section on page 103.



Connect to TWS

Clicking *Connect to TWS* connects StockFinder to Trader Workstation (and the IB account). Trader Workstation must be open and logged into an account to connect.

A new window appears from Trader Workstation asking to accept the incoming connection. Click the *Yes* button to connect the programs.

Once connected, StockFinder opens a new WatchList window below the Main WatchList showing all of the current IB positions, the net, shares, and entry price on each position. Trade Sliders also open on the right of the chart. For more information on Trade Sliders refer to the "Trade Sliders" section on page 108.

My Positions

Clicking *My Positions* opens a *My Positions* WatchList set to the *Interactive Brokers Current Positions* WatchList.

optionsXpress

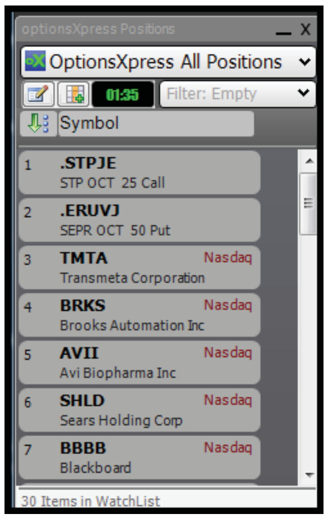
Floating the mouse over *optionsXpress* opens a submenu with three choices. To learn more about the optionsXpress interaction in StockFinder refer to the “optionsXpress” section on page 103.

Login

Clicking *Login* opens a login screen. Enter the username and password for an optionsXpress account.

Trade Center

If logged into an OX account and the Trade Center is not open, clicking *Trade Center* opens the Trade Center for optionsXpress. For more information on the optionsXpress Trade Center refer to the “Trade Center” section on page 104.

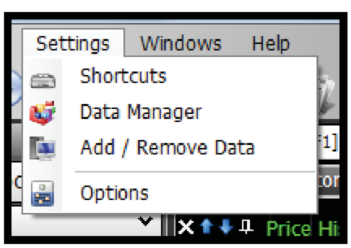


My Positions

If logged into an OX account but the My Positions WatchList is not open, this opens the My Positions WatchList. It contains all the positions from the OX account.

Settings

The *Settings* menu includes all of the setting options.

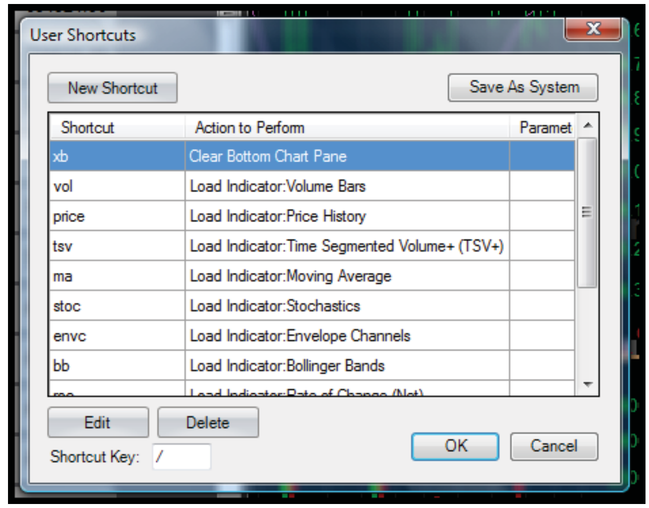


Shortcuts

Clicking *Shortcuts* opens the *User Shortcuts* window for managing, changing and creating shortcuts.

The current library of shortcuts is listed. There are two columns. The *Shortcut* column shows the shortcut. The *Action to Perform* column shows what happens if the shortcut is used.

Select any shortcut from the list and click the *Edit* button. This window is for changing the shortcut and/or action. Delete the selected shortcut by pressing the *Delete* button.

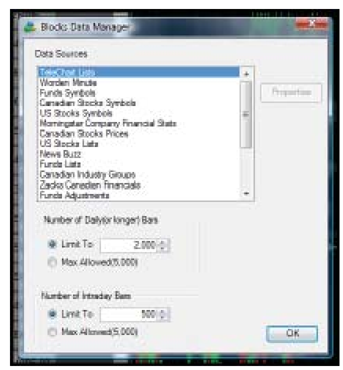


The *Save As System* button saves any changes made to the shortcut library.

At the very bottom is the *Shortcut Key*. By default it is set to the forward slash key (/).

Pressing this key invokes the shortcut box for entering and using a shortcut. For more information on using shortcuts refer to the “Shortcuts and Hot Keys” section on page 123.

Data Manager



Clicking *Data Manager* brings up the Data Manager window. This lists all of the different data sets installed.

Below the *Data Sources* list is the setting for the number of Daily Bars (or longer) available in the program. Limit the bars using the *Limit To* setting.

If set to 1,000 (for example) the program will only show (and use) 1,000 bars of data. In a daily time frame this will be 1,000 market days. In a weekly time frame, it will use 1,000 weeks of data. The maximum number of bars allowed is 5,000.

With a Platinum subscription, the *Number of Intraday Bars* option appears at the bottom. This option works the same way as the daily setting but applies to any time frame below daily (minute, hourly, etc).

Highlight any source and click *Properties* to bring up the properties of the selected source.

If the *Properties* button is grayed-out the selected source does not have viewable properties.

Source Properties

Worden Minute

Morningstar Company Financial Stats

News Buzz

Zacks Canadian Financials

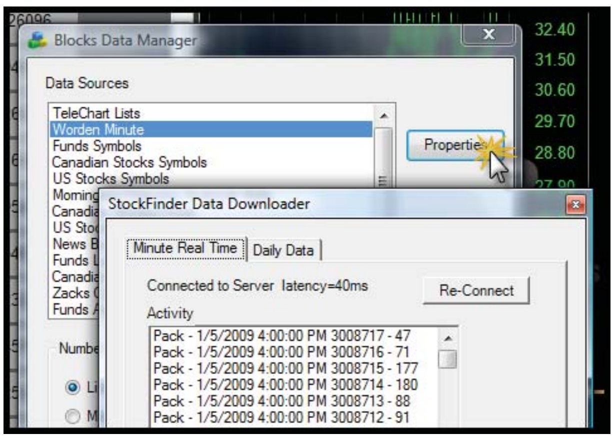
Fund Prices

Morningstar Canadian Financial Stats

Zacks US Financials

Selecting any of the above sources and clicking the properties button opens the *StockFinder Data Downloader*. This window is also available by double-clicking the *StockFinder Data Downloader* in the system tray to the left of the clock on the task bar.

There are two tabs in the downloader. *Under the Minute Real Time* tab is the activity screen showing packs that have been downloaded (or are downloading).



Under the *Activity* window are number of connections Under the connections is the indexing status. If the downloader is indexing downloaded packs, it will show here.

Any errors are listed in the error box at the bottom of the downloader. At the top right is a *Re-Connect* button. Clicking it will cause the downloader to attempt to connect to the Minute Source.

The *Daily Data* tab shows the update history for all non-minute feeds. Pressing the *Force Update* button will cause the downloader to check for any new available data. Normally this is done automatically.

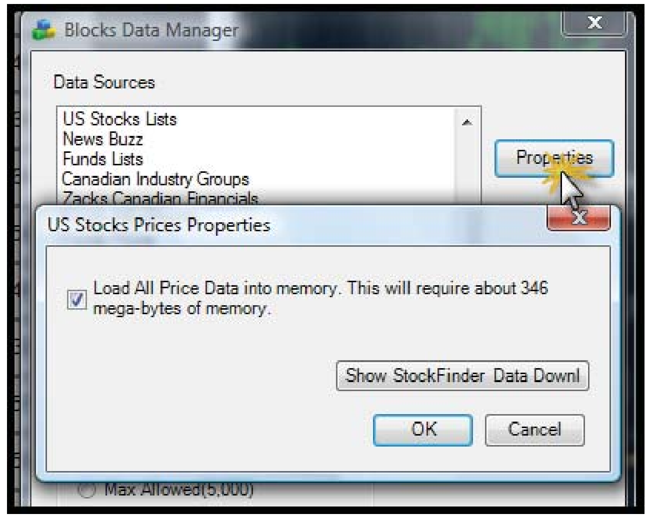
The X it in the top right of the window closes it.

Source Properties

Canadian Stocks Prices

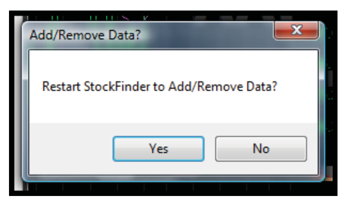
US Stocks Prices

Selecting and viewing the properties of any of the above sources gives the option to load all of the price data into memory for the source. If the machine has enough RAM, checking the *Load All Price Data into Memory* option speeds up the performance of many functions in the program including scanning on price and load times moving from chart to chart.



Clicking the *Show StockFinder Data Downloader* button opens the downloader. See the previous Source Properties section above to learn more about the data downloader.

Add/Remove Data

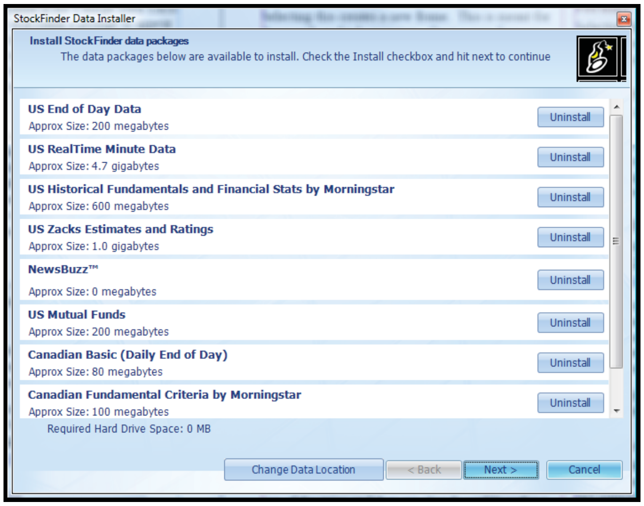


Clicking *Add/Remove Data* opens a *Add/Remove Data?* prompt. Adding or removing data requires a restart of StockFinder. Clicking *YES* restarts StockFinder and starts the add/remove procedure. Clicking *NO* closes the prompt.

StockFinder Data Installer

After clicking *YES* the program restarts and opens the *StockFinder Data Installer*. This lists all of the available data packages for the program with the option to install or uninstall each. All data packages require a particular service level. Go to www.StockFinder.com or call (800) 776-4940 for details on the different service levels.

At the bottom of the installer is the *Change Data Location* button. Clicking it will cause a prompt to appear asking to shut down the program. StockFinder must shutdown to change the data location. Clicking *YES* shuts down the program. Clicking *NO* reverts back to the installer.



Change Data Location

After clicking *YES*, the program shuts down and opens a *Browse for Folder* window. Either select or make a new folder to install StockFinder data to. Click *OK* after selecting the desired folder to move the data to the selected location. Click *CANCEL* will close the change procedure. Open StockFinder again from the shortcut.

Options

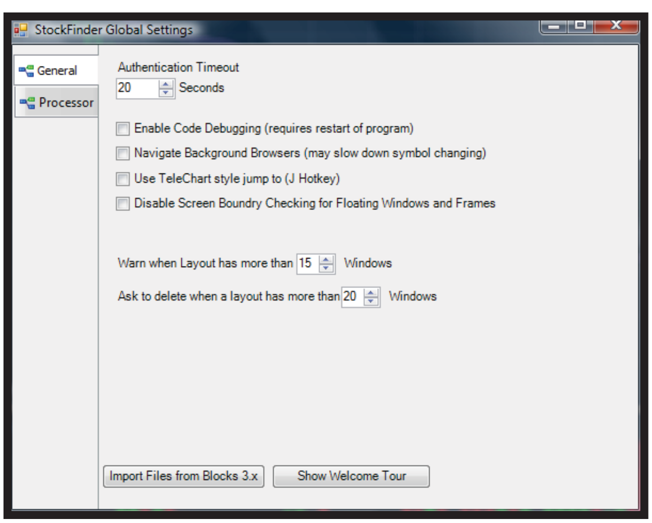
Selecting *Options* brings up the *StockFinder Global Settings* window. There are two tabs on the left.

General

The *Authentication Timeout* defaults to 20 seconds. For slower internet connections, increase the timeout value.

Checking the *Enable RealCode Debugging* allows code debugging within StockFinder. Check out the RealCode Programmer's Reference available on www.StockFinder.com for more information on RealCode.

Checking the *Navigate Background Browsers* option makes any tabbed browsers navigate automatically when the Active Symbol is changed. Otherwise, the browsers will only navigate from a symbol change when they are in the foreground. Leaving the option not checked makes changing symbols faster.



Checking the *Disable Screen Boundary Checking for Floating Windows and Frames* option stops the program from forcing floating windows and frames from appearing completely within the boundaries of the current display settings.

The *Warn when Layout has more than X Windows* setting determines how many windows must be open in a Layout before the program displays a message.

The *Ask to delete when a Layout has more than X Windows* setting determines how many windows must be open in a Layout before an Ask to Delete message appears.

Checking the *Use TeleChart style jump to (J Hotkey)* option changes the standard type in to jump to a symbol to requiring that the letter *J* is pressed to open the *Jump To* window.

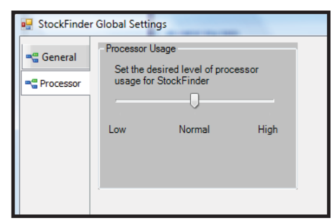
Import Files from Blocks 3.x

Clicking *Import Files from Blocks 3.x* button imports all saved charts, Layouts and WatchLists from Blocks to StockFinder. Clicking *YES* starts the process. Clicking *NO* returns to the settings box

Show Welcome Tour

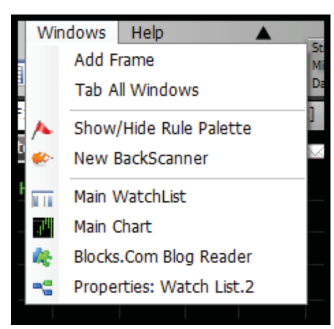
Clicking *Show Welcome Tour* starts the welcome tour. The tour runs through some of the basics of the program. At the end of the tour one can view or print the Quick Start Guide. This guide is also available via the *HELP* menu or by going to www.StockFinder.com.

Processor



Clicking the Processor tab opens the *Processor Usage* option to increase or decrease the level of processor usage available to StockFinder. Moving the slider to the right increases the processor power available to the program (also increasing the speed of the program's calculations). Moving the slider to the left decreases the processor power available to StockFinder.

For older (less powerful) computers, moving the slider to the left should decreases the preformance of StockFinder but increase the performance of other processor-intesive programs open while StockFinder is open.



Windows

The Windows menu has two actions and a list of all windows in the current Layout.

Add Frame

Clicking *Add Frame* creates a new frame. This is for use with multiple monitors. Once a new frame is created it can be moved to another monitor and used for docking other windows. For example, create a new frame, put it on a second monitor then create a new chart and dock it in the new frame.

Tab All Windows

Selecting *Tab All Windows* brings up a warning prompt. Clicking *NO* cancels the action and returns to the program. Clicking *YES* takes all the windows and tabs them together in the Layout frame.

Show/Hide Rule Palette

Clicking *Show/Hide Rule Palette* toggles the Rule Palette between visible to hidden. By default the Rule Palette appears docked under the Main WatchList. For more information on how to use the Rule Palette refer to the "Rule Palette" section on page 64.

New BackScanner

Clicking *New BackScanner* opens a new instance of BackScanner in the Layout. For more information on BackScanner refer to the "BackScanner" section on page 85.

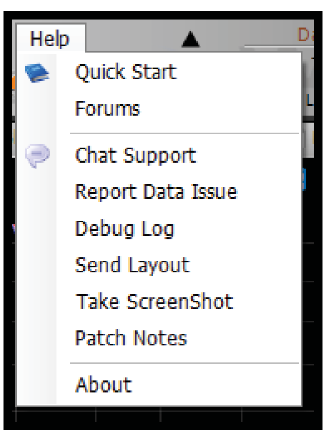
Current Layout Windows

Below the *New BackScanner* menu item is a list of each of the windows in the Layout.

Selecting a window on the list that has been minimized restores the window. Selecting a window that is tabbed behind another brings the selected window to the forefront.

Help

The *Help* menu gives access to items to assist using StockFinder.



Quick Start

Selecting *Quick Start* opens the Quick Start PDF in a browser. Each tip can be clicked on to play a short video of the tip.

Forums

Clicking *Forums* opens the StockFinder forums on the Worden web site in a browser. The forums are for reviewing posts and asking questions about StockFinder.

Chat Support

Clicking *Chat Support* opens a browser to the chat support section of the Worden site. Fill in a name and a question or comment and click Submit Question. During business hours the question enters the support queue. When an agent comes available a chat window opens.

Report Data Issues

Clicking *Report Data Issues* opens the *Email a Friend* window. The *Email To* is filled in with issues-data@worden.com.

Explain any data issues (bad ticks, pricing data, etc) in the body (under *Subject*). When selecting *Report Data Issues*, be sure the problem chart is open in the Layout. A screenshot of the current chart is sent with the email to the data support team.

Click *Send* to send the email. Click *Cancel* to close the window without sending an email.

Debug Log

Clicking *Debug Log* brings up the *Debug* tool. This is used to diagnose any issues with the program.

Send Layout

Clicking *Send Layout* opens the *Email a Friend* window. The *Email To* is defaults to support@worden.com. Clicking *Send* emails the Layout to the support team.

Explain any issues or questions about the Layout. The Layout is attached as a file to the email. A screenshot of the current Layout is also sent to the support team.

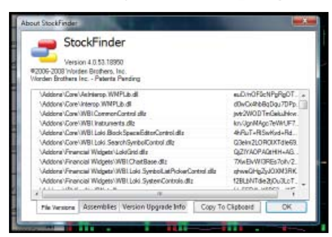
Click *Send* to send the email. Click *Cancel* to close the window without sending the email.

Take Screen Shot

Clicking *Take Screen Shot* copies an image file of the current Layout to the Windows clipboard. The image can be pasted into any other program using that program's paste feature (like a word processor or email).

About

Clicking *About* opens the *About StockFinder* window. This shows the build version, all the file versions, assemblies and upgrade information. Click the *Copy to Clipboard* option to copy all of the *About* information to the Windows clipboard. It can then be pasted into an email or any window program via that program's paste function.

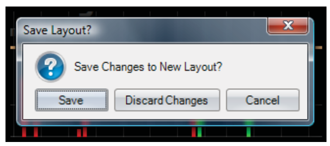


Click *OK* or *Close* to close this window.

3 Icon Toolbar

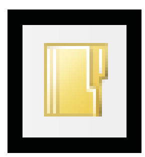
New Layout

Clicking the *New Layout* button closes the current Layout and opens a new default Layout containing a WatchList, Blog Reader and a Main Chart.



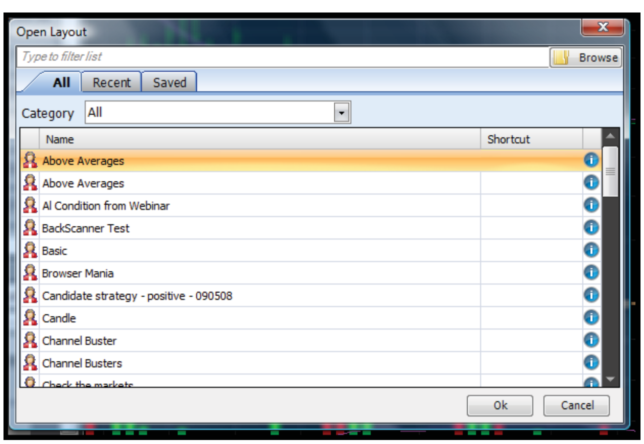
It will ask if the current Layout should be saved. Selecting *Save* saves the Layout before opening of the new one. Selecting *Discard Changes* closes the current Layout (without saving) and opens a new Layout. Selecting *Cancel* stops the opening of a new Layout.

Open Layout



Clicking the *Open Layout* button opens an *Open Layout* box. It includes all of the Layouts saved and loaded by Worden.

Type in the *Type to filter list* box to filter the Layout list based on the characters typed. For example, typing the words “My Favorite” limits the library list to only the Layouts with “My Favorite” in their names. If no Layouts match the typed text, the library will appear empty.



In the top right of the box is the *Browse* button. Clicking it brings up a folder browser to open folders outside the default *My Layouts* folder. Select a folder that contains Layout files to populate the Open Layout list.

There are three tabs below the *Type to filter list* box. Selecting *All* shows all Layouts. Selecting *Recent* shows recently opened Layouts. Selecting *Saved* shows all saved Layouts.

Choosing a category from the *Category* menu filters the list based on the selected category.

Clicking on the *Name* header or the *Shortcut* header toggles the sort direction for each column.

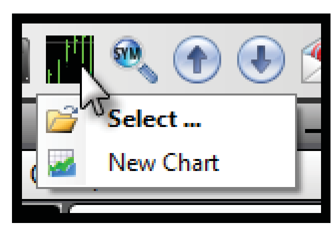
Float the mouse over the blue *Info* button on the right of any Layout to show the Layout’s description. No text appears if the Layout has no saved description.

Click *OK* to open the selected Layout from the library. A prompt to save changes to the current Layout will appear before the selected Layout is opened. Click Cancel to abort the opening of the Layout.

Save Layout

Clicking the *Save Layout* button saves the current Layout. If it is a new Layout, it prompts for a name and the location of the new saved Layout. If it is a named Layout (saved previously), it will save over the previous version with the current version.

Add or Create Chart



Clicking the *Add or Create Chart* button brings up a menu with two choices.

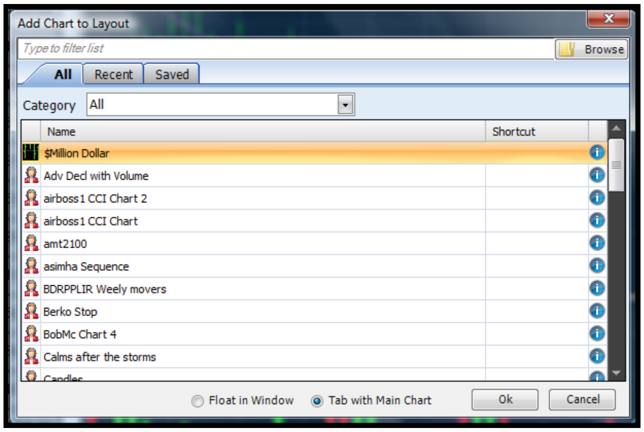
Select...

Clicking *Select* opens an *Add Chart to Layout* window. It includes all saved charts and those loaded by Worden.

Typing in the *Type to filter list* box filters the chart list. Typing “My Favorite” limits the library to only the charts with “My Favorite” in their names. If no charts match the typed text, the library will appear empty.

In the top right of the box is the *Browse* button. Clicking it brings up a folder browser to look in folders outside the default *My Charts* folder. Selecting a folder that contains chart files populates the *Add Chart to Layout* list.

There are three tabs below the *Type to filter list* box. Selecting *All* shows all charts. Selecting *Recent* shows recently opened charts. Selecting *Saved* shows all the saved charts.



The *Category* pull down filters the list based on the category selected.

Clicking on the *Name* header or the *Shortcut* header toggles the sort direction for that column. The charts in the list sort based on the sort direction.

Float the mouse over the blue *Info* button to the right of each chart to view the chart's description. No text appears if the chart has no saved description.

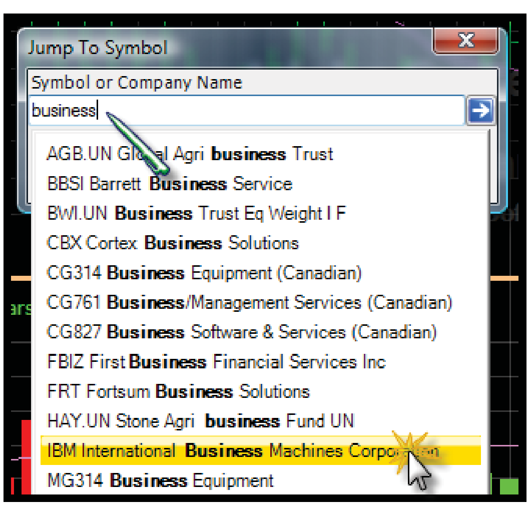
Clicking *OK* opens the selected chart from the library.

New Chart

Clicking *New Chart* opens a new chart tabbed with the Main Chart.

Change Symbol

Clicking the *Change Symbol* button opens a *Jump To Symbol* window. Type in a symbol or any part of a company name in the field.



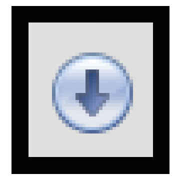
A filtered list appears based on what is typed. Press *ENTER* after typing the symbol or selecting an item to make it the active symbol.

The *Jump To* window also appears whenever a letter key is pressed on the keyboard. Typing a letter is the same as pressing the Change Symbol button.

Previous Symbol

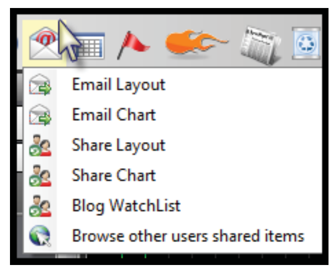
Clicking the *Previous Symbol* button changes to the previous symbol in the WatchList. Pressing *CTRL* and the *spacebar* key to does the same thing.

Next Symbol



Clicking the *Next Symbol* button changes to the next symbol in the WatchList. Pressing the *spacebar* key does the same thing.

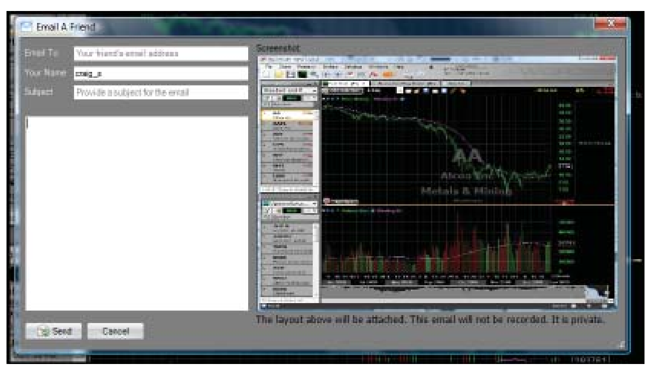
Shared Items



Clicking the *Shared Items* button brings up a menu of five options.

Email Layout

Clicking *Email Layout* opens the *Email a Friend* window. Enter the recipient's email address in the *Email To* field. The account name appears in the *Your Name* field and can be changed. The email's subject can be entered in the *Subject* field.



The large text box below *Subject* is for entering a message for the email.

Clicking *Send* sends an email to the recipient. The email includes the subject, body text and a screenshot of the current Layout. The current Layout is attached (as a file) to the email. The recipient can save the attachment on their computer and open the Layout in their StockFinder. The recipient does NOT need StockFinder to view the screenshot of the Layout.

Email Chart

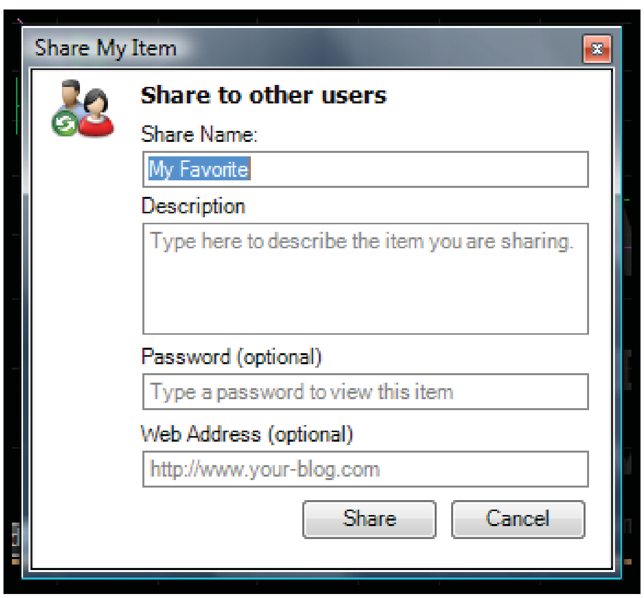
Clicking *Email Chart* opens the *Email a Friend* window. Enter the recipient's email address in the *Email To* field. The account name appears in the *Your Name* field and it can be changed. The email's subject comes from the *Subject* field.

The large text box below the Subject field is for entering a message the email.

Clicking *Send* sends the email to the recipient. The email includes the subject, body text, a screenshot of the current chart. The current chart is attached (as a file) to the email. The recipient can save the attachment on their computer and open the chart in their StockFinder. The recipient does NOT need StockFinder to view the screenshot of the chart.

Share Layout

Clicking *Share Layout* shares the current Layout to the StockFinder community. If it is an unnamed New Layout, it will promps to save and name the Layout. If it is already a saved Layout, the prompt will not appear.



The *Share My Item* screen appears. *Share Name* is the name that the Layout will be shared with. *Description* is the information text shown in the share library. Entering a password requires a password for others to open the shared Layout from the library. *Web Address* attaches a web link to the shared Layout.

Click *Share* to share the Layout to the share library. Click *Cancel* to stop the sharing and return to the Layout.

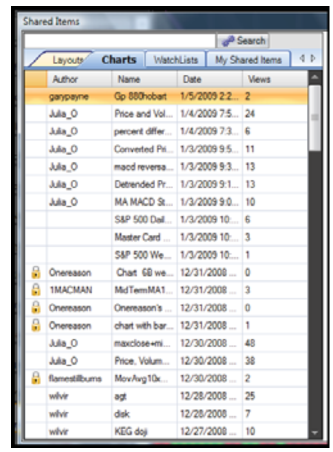
Share Chart

Clicking *Share Chart* shares the current chart to the StockFinder community.

The *Share My Item* screen appears. *Share Name* is the name that the chart will be shared under. *Description* is the information text shown in the share library. Entering a password requires a password for others to open the shared chart from the library. Web Address attaches a web link to the shared chart.

Click *Share* to share the chart to the share library. Click *Cancel* to stop the sharing and return to the Layout.

Browse other users' shared items

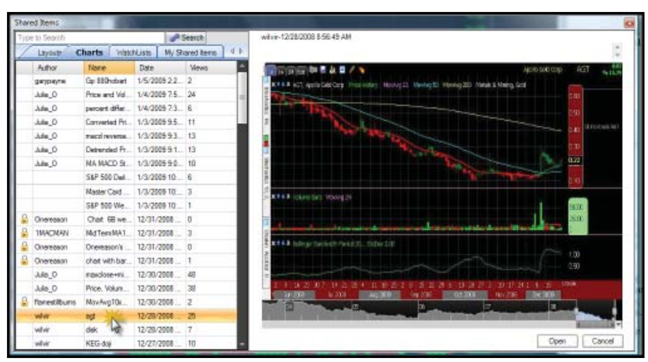


Clicking *Browse other users' shared items* opens the *Shared Items* window.

At the top left is a *Type to Search* box. Type in key words here to filter the list of items.

Below the *Type to Search* box are category tabs. The *Charts* tab is the selected tab on opening. All shared charts are listed under the *Charts* tab. To see shared Layouts or WatchLists, choose their respective tabs. To review the items shared, click the *My Shared Items* tab.

Under each tab lists the most recently shared items for each tab. Typing in the *Type to Search* field searches all shared items, not just the most recent.



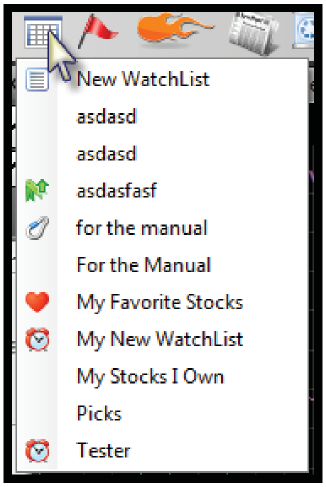
Click any of the column headers to sort the list by that header. The *Author* column shows who shared the item. The *Name* column shows the name of the item. *Date* is when the item was shared. *Views* shows how many times the item was opened.

Clicking once on any item shows the description text on the top right of the box. A picture preview also appears if available.

Double-click any item or select and item and click the *Open* button (bottom right) to open a shared item in StockFinder.

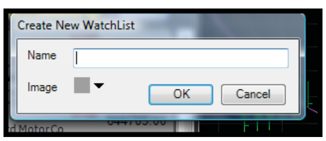
Clicking the *Cancel* button closes the shared library without opening any shared items.

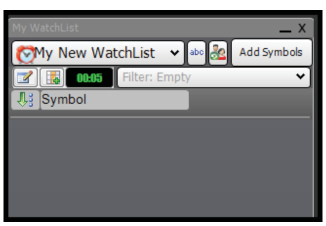
Open or Create WatchList



Clicking *Open or Create WatchList* brings up a menu. At the top of the menu is the option to create a New WatchList. Under that option is a list of all the Personal WatchLists. Clicking a WatchList opens the Personal WatchList.

The Personal WatchList appears below the Main WatchList (tabbed with the Rules Palette if that is also open). Right-clicking on the *My WatchList* tab brings up the options to change the placement of the new WatchList in the Layout. Click and drag the title tab away from its current location to undock it. For more information on using the *My WatchList* window refer to the "Personal WatchLists" section on page 78.

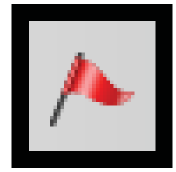




Choosing *New WatchList* opens the *Create New WatchList* Window. Name the WatchList and (optionally) assign it an image. Click *OK* to open the new empty Personal WatchList.

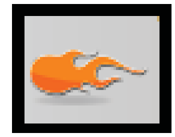
The new WatchList appears below the Main WatchList (tabbed with the Rules Palette if that is also open). Right-clicking on the *My WatchList* tab brings up the options to change the placement of the new WatchList in the Layout. Click and drag the title bar away from its current location to undock it. For more information on using the *My WatchList* window refer to the "Personal WatchLists" section on page 78.

Show/Hide Rule Palette



Clicking *Show/Hide Rule Palette* toggles the Rule Palette from show to hide. By default the Rule Palette appears docked under the Main WatchList. For more information on how to use the Rule Palette refer to the "Rule Palette" section on page 64.

Open New BackScan

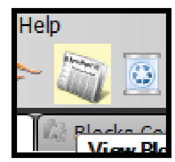


Selecting *Open New BackScan* opens a new instance of BackScanner in the Layout. For more information on BackScanner refer to the "BackScanner" section on page 85.

View Blog

Clicking the *View Blog* button brings up a submenu of three choices. For more details on these and all blog options refer to the "Blogs" section on page 111.

Blog Viewer



Clicking *Blog Viewer* either opens a new *Blog Reader* window or brings the Reader to foreground if it is already open in the Layout.

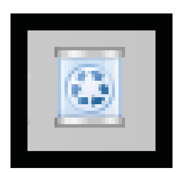
New Blog Entry

Clicking *New Blog Entry* opens the *NoteEditor* window. For more information on creating blog entries refer to the "Creating Blog Entries" section on page 116.

Publish WatchList

Clicking *Publish WatchList* opens the *Publish WatchList* window. To publish a WatchList to a blog choose whether the list should be private, public or limited to subscribers or certain channels then click the *OK* button.

Delete Item

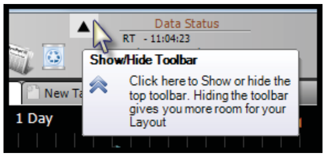


Clicking the *Delete Item* button does nothing. Drag and drop items from the Layout to this icon to delete them.

This includes symbols in a Personal WatchList, WatchList columns, WatchList Scan Lights, Rules on the chart, Indicators on the chart and Filter Rules.

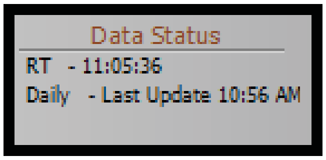
Symbols from a system-maintained WatchLists like *Standard and Poors 100* or *Banking* cannot be deleted. These are maintained by the program.

Show/Hide Toolbar



Clicking the *Show/Hide Toolbar* button toggles the Icon menu and Data Status from visible to hidden.

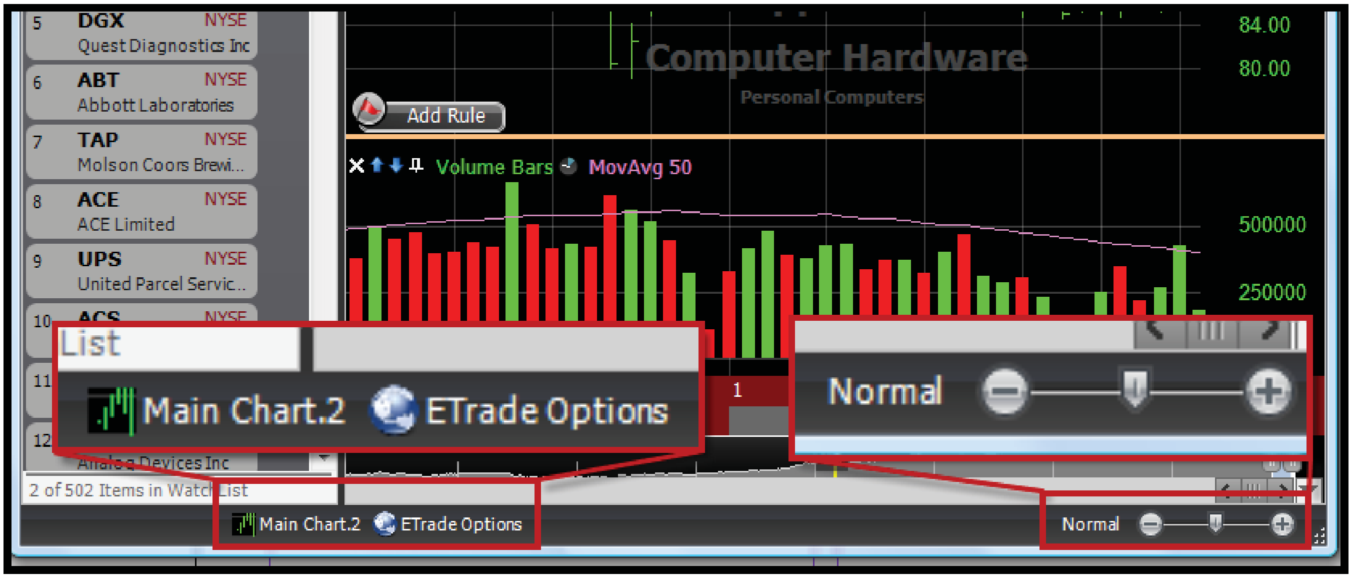
Data Status



The *Data Status* shows the date and/or time of the latest update. With Gold service it shows the date of the last update of the daily data.

With a Platinum service it shows the daily update and the last time the real-time data was updated.

4 Bottom Toolbar



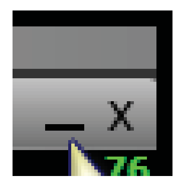
The Bottom Toolbar runs along the base of the program. It has two main areas; the *Font Size Control* and an area showing any minimized windows in the Layout.

Font Size Control

The *Font Size* control dictates the size of the fonts used in the program.

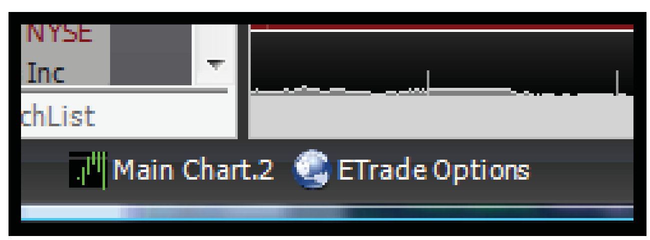
Moving the slider to the right (by dragging it or pressing the plus symbol on the tool) increases the font size of the symbol list, chart legends, date scale characters and vertical scale characters. Moving the slider to the left lowers the font sizes.

Minimize/Maximize Windows



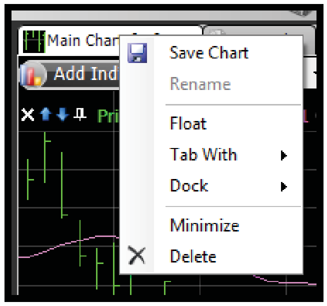
When a window is minimized (by pressing the flat line in the upper right corner of any window title bar) it shows its name at the bottom left of the program.

Click the name of the minimized window to restore the window where it was minimized from.



5 Charts

Title Bar



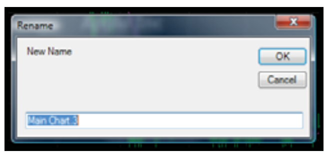
Right-clicking the title bar of any chart causes a menu to appear with the several options.

Save Chart

Selecting *Save Chart* on a new unsaved chart brings up the save chart dialogue.

Name the chart and save it to the default or any location. This chart will now be available via *Add Chart*.

Rename

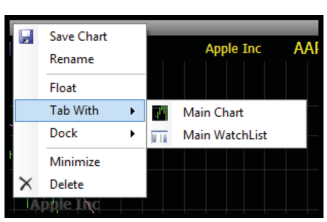


Clicking *Rename* allows the renaming of the chart. The Main Chart cannot be renamed.

Float

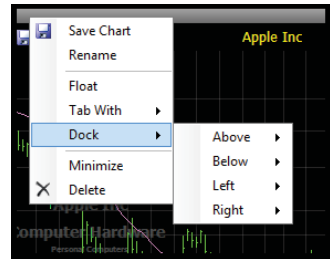
New charts are, by default, tabbed with the *Main Chart* when added. Clicking *Float* floats a docked or tabbed chart.

Tab With



Floating the mouse over *Tab With* shows a list of all the windows in the Layout. Choose the window to tab the chart behind.

Dock



Floating the mouse over *Dock* opens a menu of four locations (above, below, left, right). Move the mouse to the relative location desired.

To dock the chart to the right of another window in the Layout, choose *Right*. Once a location is chosen, a list of all available windows in the Layout appears. Choose the window to dock the chart relative to.

Minimize

Clicking *Minimize* minimizes the chart from the Layout (it will not be visible). The chart becomes listed on the bottom bar. Click the chart name on that bar to restore it to the location where it was minimized it from.

Delete

Selecting *Delete* gives the option of deleting the chart from the Layout. This does NOT delete the saved version of the chart from the drive, only from the active Layout.

Chart Header

There are several buttons, a menu, text information and icons along the top of every chart.

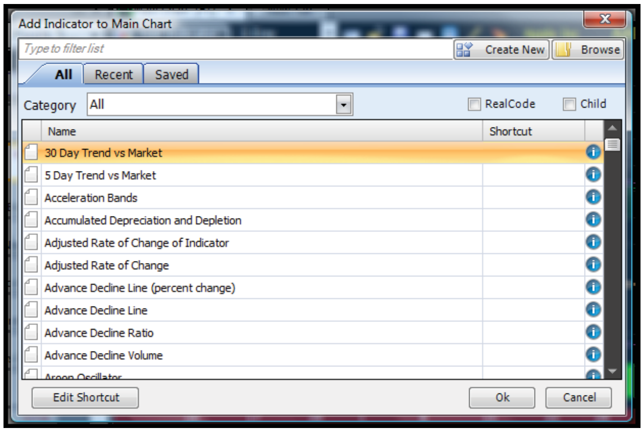
Add Indicator

Clicking the *Add Indicator* button brings up a menu.

Select (Add Indicator Window)

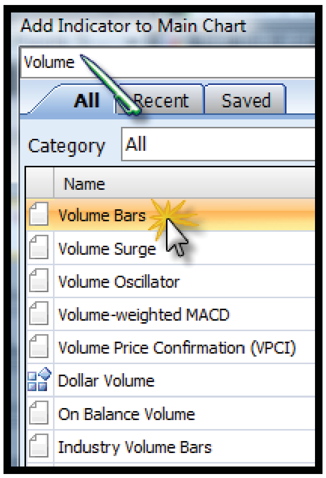
Clicking *Select* brings up the *Add Indicator to Main Chart* window. It has a library of every indicator provided by Worden and any indicators created and saved.

To add an indicator from the library double-click it from the list or select the indicator then click the OK button. Click *Cancel* to close the *Add Indicator* window without adding an indicator.



Type to Filter

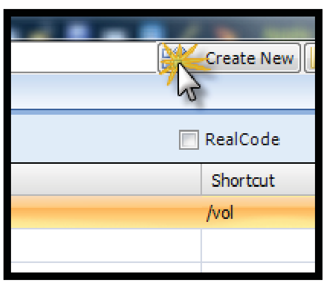
At the top left of the box is the *Type to filter list* field. Typing text into this box will filter the library of indicators based on what is typed. For example, typing "volume" will cause a filtered list of the indicators that have "volume" in their name.



Create New

To the right of the *Type to Filter* field is the *Create New* button.

Clicking *Create New* is the same as selecting *Create In RealCode* from the *Add Indicator* button. For more information refer to the "Create in RealCode (RealCode Editor)" section on page 24.



Browse

To the right of the *Create New* button is the *Browse* button. This brings opens a file browser to choose a different folder with saved indicators. Select a folder that has indicator files in it. Those indicators will appear in the library.

Tabs

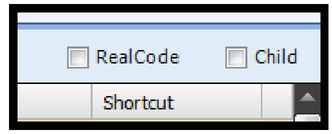
Selecting the *ALL* tab above the library populates the library with every indicator available in the folder. Selecting *Recent* shows just the most recent indicators added to a chart. The *Saved* tab shows only saved indicators.

Category

The *Category* menu filters the library based on the selected category. For example, choosing the *Momentum* category shows all the indicators categorized as momentum indicators.

RealCode

Checking the RealCode option filters the library to only indicators created by RealCode.



Child

Checking the *Child* option filters the library to only child indicators. Child indicators are indicators that are applied to other indicators (like price). Moving Average is a child indicator. A moving average is always applied to another indicator (moving average of price or moving average of volume).

Name

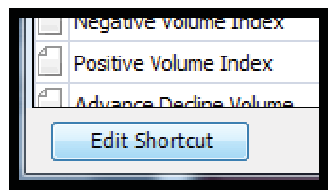
The *Name* column in the library shows the indicator name. It can be sorted by clicking the column header. Clicking the column header toggles between ascending, descending and unsorted sort orders.

Shortcut

The *Shortcut* column shows any shortcuts assigned to an indicator. It can be sorted by clicking the column header. Clicking toggles between ascending, descending and unsorted states. For more information on Shortcuts refer to the "Shortcuts and Hot Keys" section on page 123.

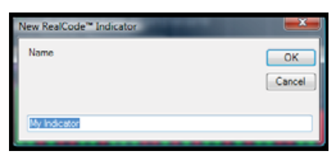
Edit Shortcut

After clicking and selecting an indicator in the library, click the *Edit Shortcut* button to add or change the shortcut for the indicator. For more information on Shortcuts, check out the Shortcuts and Hot Keys section of this manual.

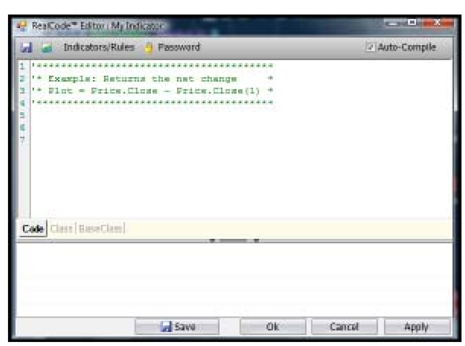


Create in RealCode (RealCode Editor)

Selecting *Create in RealCode* opens a *New RealCode Indicator* window. Name the new indicator then click *OK.*



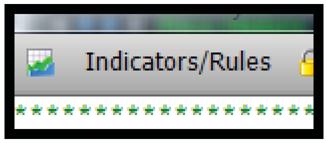
After naming the new RealCode indicator a *RealCode Editor* opens.



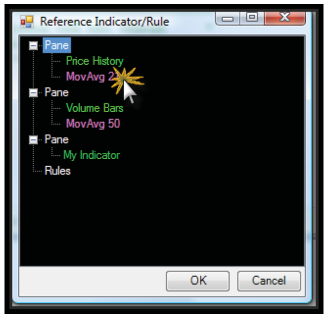
Save

Clicking the *Save* button (both in top left and bottom right of the editor) saves the indicator by the name given.

Reference an Indicator/Rule



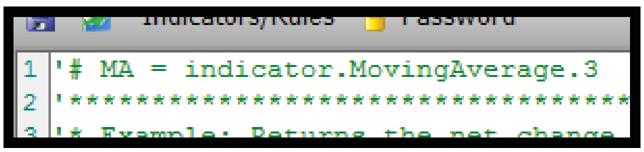
Clicking the *Indicators/ Rules* button brings up the *Reference Indicator/Rule* window.



Select the indicator or Rule to reference in the code and click *OK*.

A line will be added to the code that assigns a variable to the selected indicator or Rule.

The variable can be referred to in the code. For more information on RealCode, check the RealCode Programmer's Reference available on www.StockFinder.com.



Password

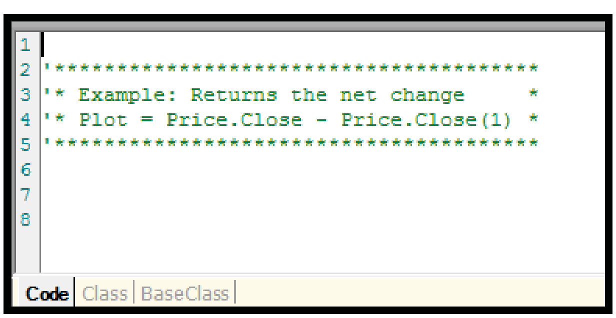
Click *Password* to assign and verify a password for the RealCode. If shared, the indicator or a chart with this indicator on it only those with the password can view the code.

Auto-compile

When this is checked, the code will automatically compile. This will not happen if unchecked.

Code Window

The *Code* window (with numbered lines) is where the code for the indicator goes. For more information on RealCode, download the RealCode Programmer's Reference available on www.StockFinder.com.



Code Tab

The *Code* tab displays the code window

Class Tab

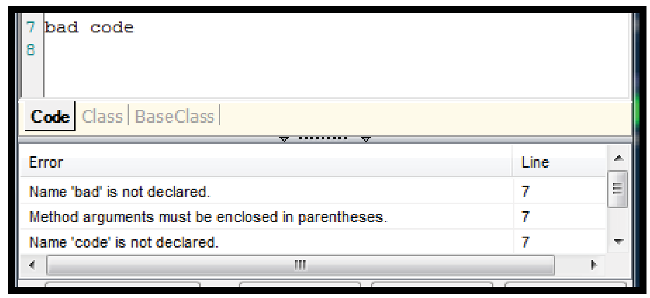
The *Class* tab displays the RealCode indicator class code that is auto-generated when a RealCode indicator is created.

BaseClass Tab

All of the base class code is located in the *BaseClass* tab. This information is auto-generated when the indicator is created.

Error report

At the bottom of the *Code* tab is the error report. As code is entered for the RealCode indicator any errors in the code will appear there with line references to help debug the code.

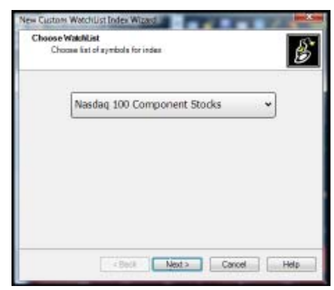


Create Custom Index

After clicking the *Add Indicator* button, clicking *Create Custom Index* starts the Custom WatchList Index Wizard.

For more detailed information on the Custom WatchList Index Wizard refer to the "Custom WatchList Indexes" section on page 81.

Custom WatchList Index Wizard



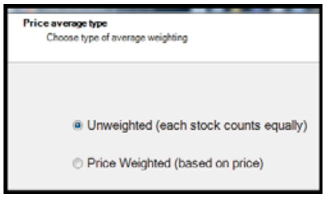
The first screen of the wizard asks for a WatchList to use for the index. Click the down arrow to choose any system or Personal WatchList to calculate the custom index. Once the WatchList is selected to calculate the index with, click the *Next* button.

The next step in the Wizard sets the type of index to create.

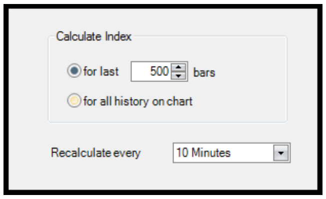
Price Average

Choosing *Price Average* makes the custom index an average of the prices of the stocks in the chosen WatchList. Click the *Next* button to go to the next step.

The next screen gives the option of an *Un-weighted price average* or a *Price Weighted* average. Choose one and click *Next*.



Next the wizard asks how many bars to calculate the index for. Choose *for last x* to limit the number of bars to use. Choose *for all history on chart* to calculate the index for every bar available on the active symbol.



The *Recalculate Every* setting sets how often the index will recalculate. This only matters with StockFinder Platinum where new data is always streaming in when the market is trading.

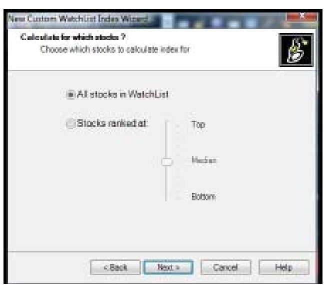
Click *Finish* to calculate and display the custom price average index.

Indicator Average

Select *Indicator Average* to create an average of a plotted indicator on the chart. The indicator must be on the chart when the custom index wizard starts.

The screen after choosing the WatchList asks which indicator on the charts to base the average on. Select the indicator then click *Next*.

The wizard then ask to calculate the average for all the stocks in the WatchList or only those stocks that rank a certain value in the list. Choosing *All stocks in WatchList* averages for every stock in the chosen WatchList.



Choosing the second option requires the rank to average for. Sliding the marker to *Top* means it will only average the stocks with the highest values for the indicator. Sliding to Median means it will average the stocks with indicator values that fall in the median values. Choosing *Bottom* averages the stocks with the lowest valued for the indicator in the list.

For example, choose *Volume Bars* for the indicator. Setting it to *Top* averages of all the highest volume stocks in the list. Set it to *Bottom*, will plot an average of all the lowest volume stocks in the chosen WatchList.

Once the stocks to calculate for is set, click “Next”.

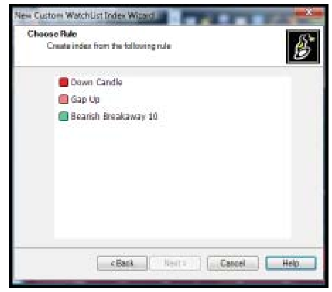
The next step in the wizard asks how many bars to calculate the index for. Choose *for last x* to limit the number of bars back to calculate or plot. Choose *for all history on chart* to calculate the index for every bar present on the active symbol for the chart.

The *Recalculate Every* setting sets how often the index will recalculate. This only matters with StockFinder Platinum where new data is always streaming in when the market is trading.

Once this choice is made click *Finish* and the indicator should plot.

Number of Stocks Passing a Rule

Number of Stocks Passing a Rule creates an indicator showing how many stocks in a list are passing a specific Rule. The Rule must already be on the chart. After choosing *Number of stocks passing a Rule*, click *Next*.



The wizard then asks for the Rule from the chart to use for the index. Select the Rule and click *Next*. Three options are available for how the index should calculate.

Count Passing

Count Passing counts the number of stocks in the list that pass the chosen Rule.

Percent Passing

Percent Passing gives the number of stocks in the list passing the Rule as a percentage of the total number of stocks in the list.

Average # bars since passed

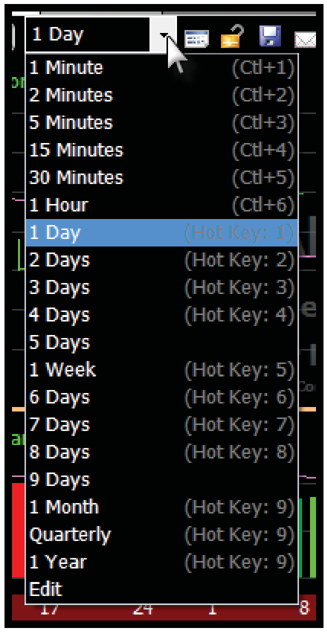
The *Average # bars since passed* option calculates the number of bars since the Rule was last true for each stock in the list. It then averages and plots the average of that number.

The next step in the wizard asks how many bars to calculate the index for. Choose *for last x* to limit the number of bars back to calculate or plot. Choose *for all history on chart* to calculate the index for every bar present on the active symbol for the chart.

The *Recalculate Every* setting sets how often the index will recalculate. This only matters with StockFinder Platinum where new data is always streaming in when the market is trading.

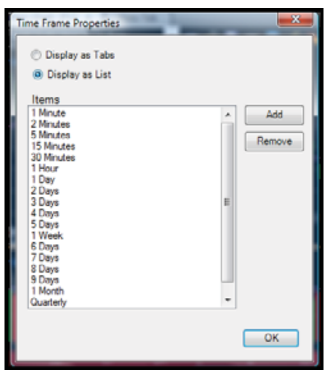
After this choice is made click “Finish” and the indicator should plot.

Time Frame Picker



The *Time Frame Picker* menu sets the amount of time associated with each bar. If set to *1 Day* the chart will plot a daily chart with one trading day assigned to each bar. All of the time frames in StockFinder are calendar based. As a result, a weekly chart assigns one trading week to each bar (some bars may not contain five days of trading if there was a market holiday).

To the right of every time frame on the list is the hot-key associated with that time frame. Pressing the hot-key on the keyboard changes the time frame of the chart. For example, press the 1 key on the keyboard to change to a daily chart. Press the 5 key to change to a weekly chart. Platinum users will notice intraday time frames in the picker. These have two-key combinations for their hot keys. Hold the *CTRL* key and press 1 to make a 1-minute chart.



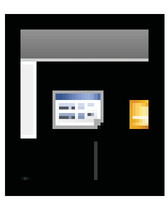
At the bottom of the picker is the *Edit* option. Clicking it brings up the *Time Frame Properties* window. At the top is the option of displaying time frames as either a pull-down list (the default) or as a series of tabs along the top of the chart.

Select any time frame on the list and click *Remove* to eliminate that time frame from the list.

Click *Add* to create a new time frame. Clicking *Add* brings up the *Add Time Frame* window. Choose the time denomination (day, week, month, etc) and the number (1,2, etc). For a 5-day chart set this to 5 and *Day*.

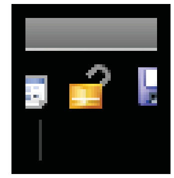
Platinum users have the option of making the time frame streaming or not. Click *OK* to add the new time frame to the list.

Show/Hide Watermark



The *Show/Hide Watermark* button toggles the symbol/company name watermark from the chart. Clicking once hides the watermark, clicking it again makes it visible.

Lock Symbol

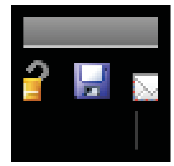


By default all charts are tied the active symbol for the Layout (the stock jumped to or selected in a WatchList). Clicking the Lock Symbol the chart locks the chart on the current symbol. The chart will change as the Active symbol changes.

With the *Lock Symbol* button a chart that is fixed on a certain symbol can be made.

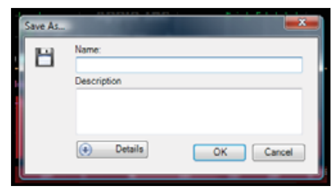
Change the active symbol to *SP-500* and click the Lock Symbol icon. The chart will always display the S&P as the Active Symbol changes.

Save Chart



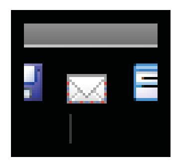
The *Save Chart* button saves the current chart to the *My Charts* library. If it is a new chart the *Save As…* screen appears. Here the name and a description of the chart can be entered.

Click the *Details* button and the expanded window appears. Here the path for the saved chart and a link to an outside URL can be set.



Clicking the *Save* button on a chart that was previously saved will bring up two options. Click *Save* to save the chart over the previous version. Click *Save As* to bring up the *Save As…* window.

Email or Share a Chart



Clicking the *Email or Share a Chart* button offers two options.

Email a Chart to a Friend

Clicking *Email a Chart to a Friend* opens the *Email a Friend* window. Enter the recipient's email address in the *Email To* field. The account login name appears by *Your Name* but it can be changed. The email's subject can be entered in the *Subject* field.

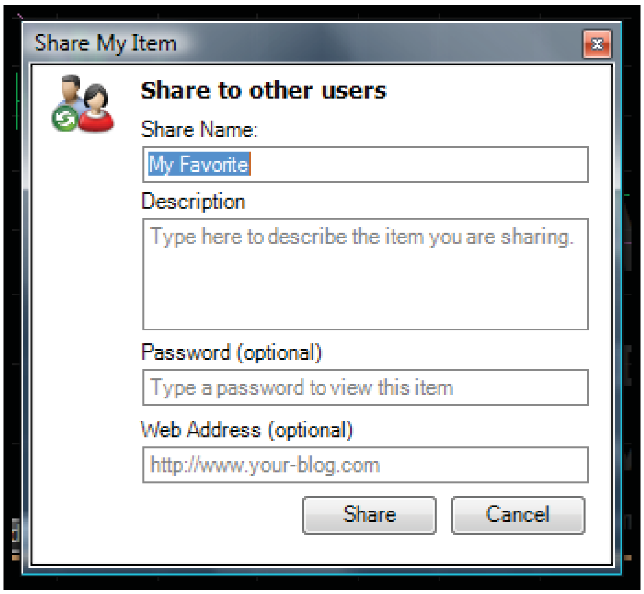
The large text box below *Subject* is for entering a message for the body of the email.

Clicking *Send* sends an email to the recipient including the subject, body text, a screenshot of the current chart. The current chart is attached (as a file) to the email. The recipient can save the attachment on their computer and open the chart in their StockFinder. The recipient does NOT need StockFinder to view the screenshot of the chart.

Share to all Users

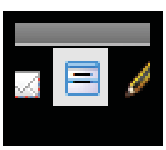
Clicking *Share to all Users* shares the current chart to the StockFinder community.

The *Share My Item* screen appears. *Share Name* is the name that the chart will be shared under. *Description* is the information text shown in the share library. Entering a password in the *Password* field requires a password for others to open the shared chart from the library. *Web Address* attaches a link to a site to the shared chart.



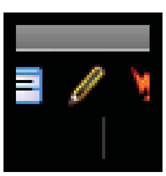
Click *Share* to share the chart to the share library. Click *Cancel* to stop the sharing and return to the Layout.

Equalize Pane Size



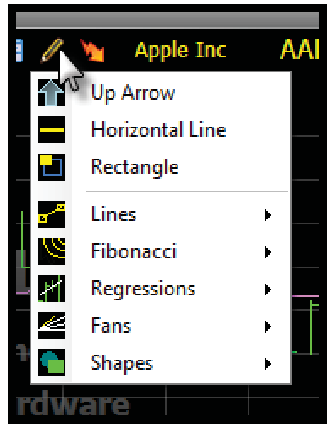
Clicking the *Equalize Pane Size* button automatically evenly resizes each pane on the chart.

Drawing Tools



Clicking the *Drawing Tools* button brings up the drawing tools menu. The first three items listed in the menu will be the last three drawing tools used. Below the last three tools used are the categories of drawing tools available.

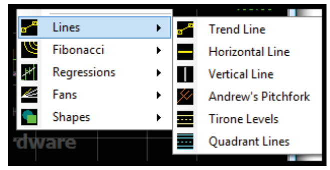
Lines



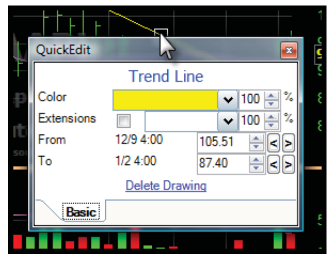
There are six types of lines to choose from.

Trend Line

After selecting *Tirone Line* click the location on the chart where the line should start, drag the mouse to an end point and release the mouse button.



Floating the mouse over the drawn line causes three boxes appear at the start, midpoint and end of the line. Click and grab either the start or end box to change the start or end point of the line. Grab the midpoint box to move the entire line.



Click any of the boxes to open the *QuickEdit* for the line. There the color of the line and its opacity (set to 100% by default) can be set. Checking the *Extensions* box extends the line in both directions. The extension color and opacity can be set in the *QuickEdit* as well.

The *From* and *To* fields manually set the start and end point based on a value and date. To change the value, use the spinner or manually edit the value. To change the date (bar) for the start or end, use the left and right arrows on the right of the *Value* box.

Click the *Delete Drawing* link to remove the line.

The hot-key for activating the Trend Line is *CTRL+D*.

Horizontal Line

After clicking the *Horizontal Line*, click the location on the chart where the line should fall. Hold the mouse button down and drag you can drag the line before it's drawn.

Floating the mouse over the drawn line causes a box to appears at the midpoint of the line. Grab and drag the midpoint box to move the entire line.

Click the box to open the *QuickEdit* for the line. There the color of the line and its opacity (set to 100% by default) can be set.

The value of the line can be set manually with the *Position* field. To change the value, use the spinner or manually edit the value.

Click the *Delete Drawing* link to remove the line.

Vertical Line

After clicking the *Vertical Line* from the menu, click the location on the chart where the line should fall. Floating the mouse over the line causes a box to appear at the midpoint of the line. Grab and drag the midpoint box to move the entire line.

Click the box to open the *QuickEdit*. Both the color of the line and its opacity (set to 100% by default) are set there.

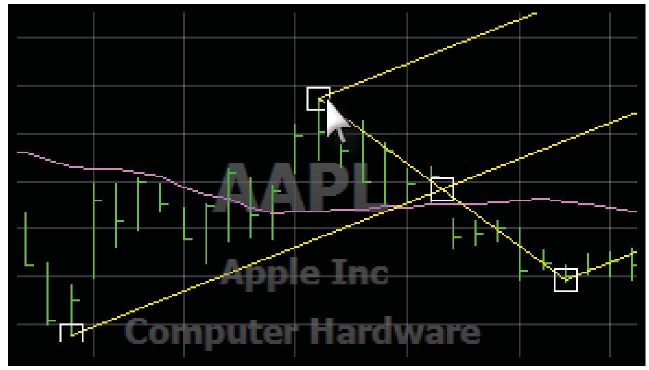
The date (bar) where the line is drawn is set manually with the *Position* field. To change the bar where the line is drawn use the spinner.

Click the *Delete Drawing* link to remove the line.

Andrew's Pitchfork

After selecting *Andrew's Pitchfork*, start drawing at the beginning of the desired trend, end the drawing by releasing the mouse. Floating the mouse over the pitchfork causes four boxes appear. One box falls at the base of the fork. The second box falls at the center of the fork. The last two fall at the outer tines of the fork. Grab and drag any of the boxes to change their location.

Clicking a box opens the *QuickEdit*. With the *QuickEdit* the color of the line and its opacity (set to 100% by default) may be set.

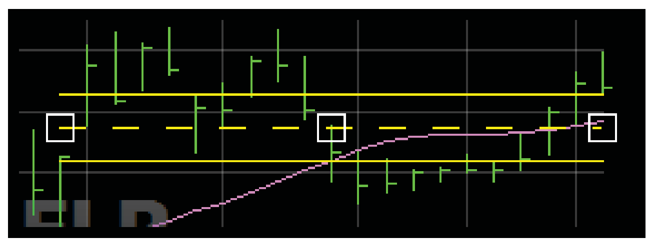


Three of the points' values and dates can be set manually with their *From* and *To* fields. To change the values, use the spinner or manually edit the values. To change the dates (bar) for the start or end, use the left and right arrows to the right of the value box.

Click the *Delete Drawing* link to remove the line.

Tirone Levels

After selecting *Tirone Levels*, click and drag on the chart to draw. Release the mouse where the levels should end. The levels are automatically calculated and drawn for the data between the start and end bars.



Float the mouse over the level causes boxes to appears. Click any box to open the *QuickEdit* for the line. Within the *QuickEdit* the color of the line and its opacity (set to 100% by default) can be set.

The *From* and *To* fields manually set the start and end points. To change the dates (bar) for the start or end, use the left and right arrows on the right of the unchangeable value boxes. The levels can be drawn on only the active symbol or on all the symbols in the system.

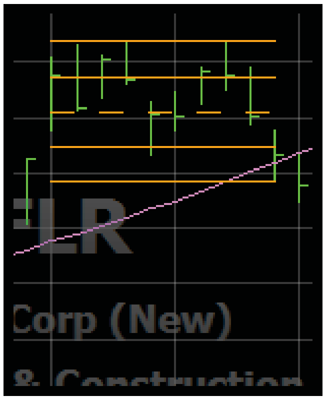
The *Attached To* menu sets which plot the drawing is locked to. Click the *Delete Drawing* link to remove the line.

Quadrant Lines

After clicking *Quadrant Lines*, click and drag on the chart to draw them. The lines are automatically calculated and drawn for the data between the start and end of the draw.

Float the mouse over the lines to bring up their edit boxes. Clicking any box opens the *QuickEdit* for the line. The color of the line and its opacity (set to 100% by default) can be adjusted in the *QuickEdit*.

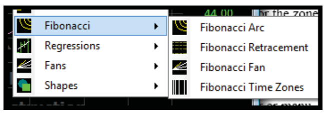
The start and end points can be manually set in the *From* and *To* fields. Use the left and right arrows on the right of the value boxes to change the dates (bar) for the start or end of the draw.



The lines can be drawn on the active symbol or on all the symbols in the system. The "Attached To" menu sets which plot the lines are attached to. Click the *Delete Drawing* link to remove the line.

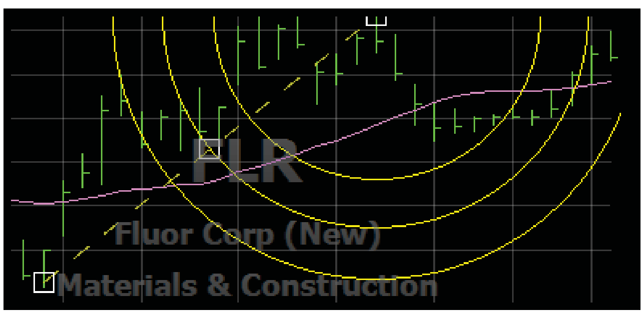
Fibonacci

There are four types of Fibonacci drawing tools available.



Fibonacci Arc

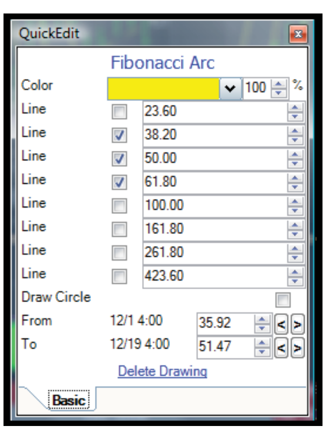
Click *Fibonacci Arc* from the menu. After selecting this, click at the start of the desired trend and drag to the end of that trend. The arc automatically draws and calculates for the drawn line.



Floating the mouse over the dashed drawn line causes three boxes appear at the start, midpoint and end of the line. Click and grab either the start or end box to change the start or end point of the line. Click and grab the midpoint box to move the entire line. The arc will recalculate if the line is changed.

Click any box to open the *QuickEdit* for the arc. There the color of the line and its opacity (set to 100% by default) is set.

Any fib level can be toggled on or off. The default levels can be changed as well. Checking the *Draw Circle* option makes the arc draw as complete circles.



The *From* and *To* fields manually set the start and end point based on the value and date for each. Change the values with the spinners. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box. Click the *Delete Drawing* link to remove the line.

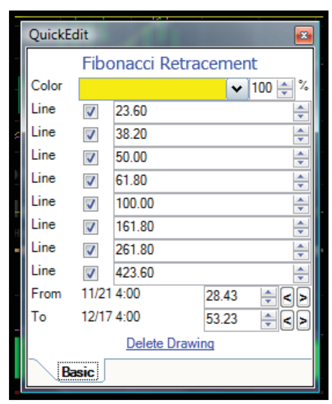
Fibonacci Retracement

Click *Fibonacci Retracement* from the menu. After selecting this, click at the start of the desired trend and drag to the end of that trend. The levels automatically draw and calculate for the drawn line.

Floating the mouse over the originally drawn line (the only non-horizontal line) causes three boxes to appear at the start, midpoint and end of the line. Click and grab either the start or end box to change the start or end point of the line. Grab the midpoint box to move the entire line. The levels will recalculate if the line is changed.

Click any box to open the *QuickEdit* for the retracement. There the color of the line and its opacity (set to 100% by default) are set.

Toggle any fib level on or off or change the default levels to any value. The *From* and *To* fields manually set the start and end point based on the value and date for each. To change the value, use the spinner or manually edit the value. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box. Click the *Delete Drawing* link to remove the line.



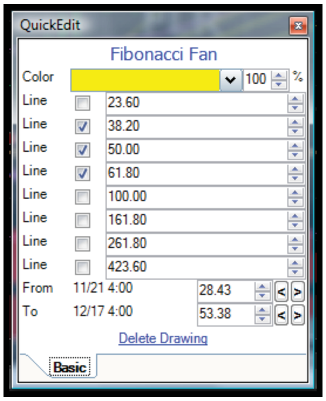
Fibonacci Fan

Click *Fibonacci Fan* from the menu. After selecting it, click at the start of the desired trend and drag to the end of that trend. The fan automatically draws and calculates for the drawn line.

Float the mouse over the originally drawn line (lowermost) to bring up three boxes at the start, midpoint and end of the line. Click and grab either the start or end box to change the start or end point of the line. Click and grab the midpoint box to move the entire line. The fan will recalculate if there is a change to the length of the drawn line.

Click any box to open the *QuickEdit* for the fan. There the color of the line and its opacity (set to 100% by default) are set.

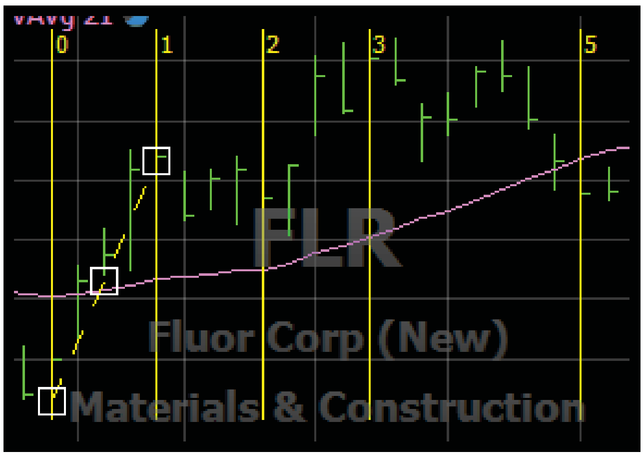
Any fib level can be toggled on or off. The default level values can be changed.



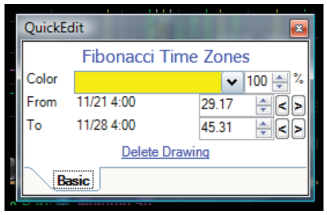
The *From* and *To* fields manually set the start and end point based on the value and date for each. The values are changed with the spinners or manually editing the values. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box. Click the *Delete Drawing* link to remove the line.

Fibonacci Time Zones

Click *Fibonacci Time Zones* from the menu. Once selected, click at the start of the desired trend and drag to the end of that trend. The zones automatically draw and calculate for the drawn line.



If the mouse is floated over the originally drawn line (non-vertical) three boxes appear at the start, midpoint and end of the line. Click and grab either the start or end box to change the start or end point of the line. Click and grab the mid-point box to move the entire line. The fan recalculates if the length of the drawn line is changed.

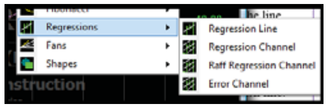


Click any box to open the *QuickEdit* for the zones. There the color of the lines and their opacity (set to 100% by default) can be set.

The *From* and *To* fields manually set the start and end point based on the value and date for each. To change the value, use the spinner or manually edit the value. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box. Click the *Delete Drawing* link to remove the line.

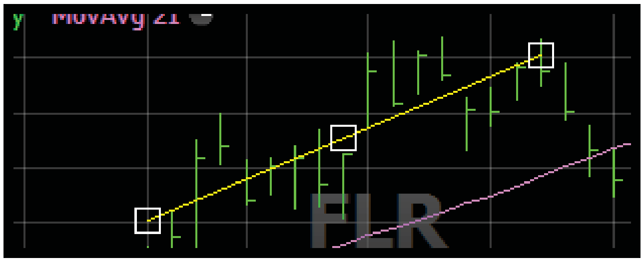
Regressions

There are four types of Regression drawing tools available.



Regression Line

After selecting *Regression Line*, click and drag the mouse between the two bars to measure. The slope of the line is automatically calculated based on the data covered by the line.



If the mouse is floated over the drawn line three boxes appear at the start, midpoint and end of the line. Click and grab either the start or end box to change the start or end point of the line. Grab the midpoint box to move the entire line. The regression will recalculate if the length of the drawn line is changed.

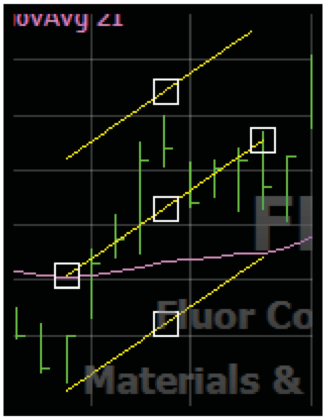
Click any box to open the *QuickEdit* for the line. There the color of the line and its opacity (set to 100% by default) can be set. Check the Extensions box to extend the line in both directions.

The *From* and *To* fields manually set the start and end point based on the date for each. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box.

The line can be drawn on only the active symbol or on every symbol in the system.

The *Attached To* menu sets the plot to attach the line to. This determines which plot the regression will be for Click the *Delete Drawing* link to remove the line.

Regression Channel

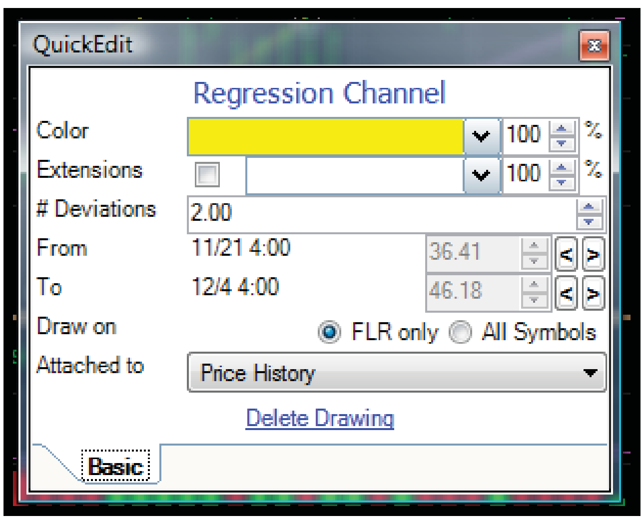


After selecting *Regression Channel*, click and drag the mouse between two parts of the chart. The slope of the line is automatically calculated based on the data covered by the line.

Float the mouse over the drawn line to make five boxes appear at the start, midpoint and end of the center line and at the midpoint of each of the channels. Click and grab either the start or end box to change the start or end point of the center line. Grab the midpoint box of the center line to move the entire line.

Grab either box on the top of bottom of the channel to manually change the width of the channel. The regression will recalculate if the length of the line is changed.

Click any box to open the *QuickEdit* for the channel. There the color of the line and its opacity (set to 100% by default) can be adjusted. Check the Extensions box to extended the line in both directions. The color and opacity of the extensions are changeable.

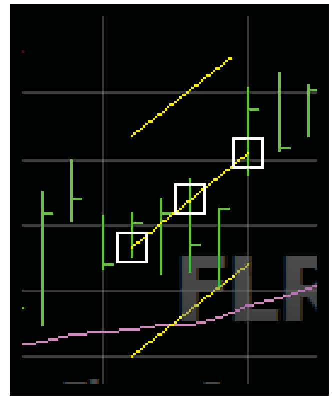


The number of deviations used by the channel can be manually set. The *From* and *To* fields manually set the start and end point based on the date for each. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box.

At the bottom there is a choice to have the line drawn on only the active symbol or to use the dates to draw the line on every symbol in the system.

The *Attached To* menu sets which plot the drawing is attached to. Click the *Delete Drawing* link to remove the line.

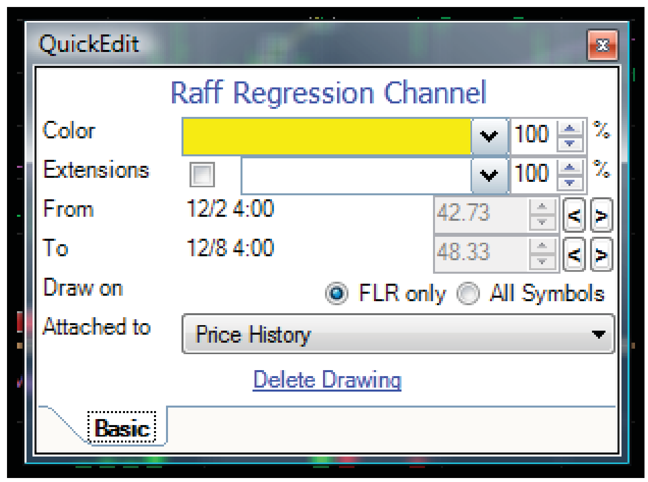
Raff Regression Channel



After selecting *Raff Regression Channel*, click and drag the mouse between the two bars for the regression channel to measure. The slope of the line is automatically calculated based on the data covered by the line.

If the mouse is floated over the drawn line, three boxes appear at the start, midpoint and end of the center line. Click and grab either the start or end box to change the start or end point of the center line. Grab the midpoint box for the center line to move the entire line. The regression will recalculate if there is a change to the length of the drawn line.

Click any box to open the *QuickEdit* for the channel. There the color and opacity of the line are set. If the Extensions box is checked the line is extended in both directions. The color and opacity of the extensions can be changed.



The *From* and *To* fields manually set the start and end point based on the date for each. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box.

At the bottom is the option to have the line drawn on only the active symbol or to use the dates to draw the line on every symbol in the system.

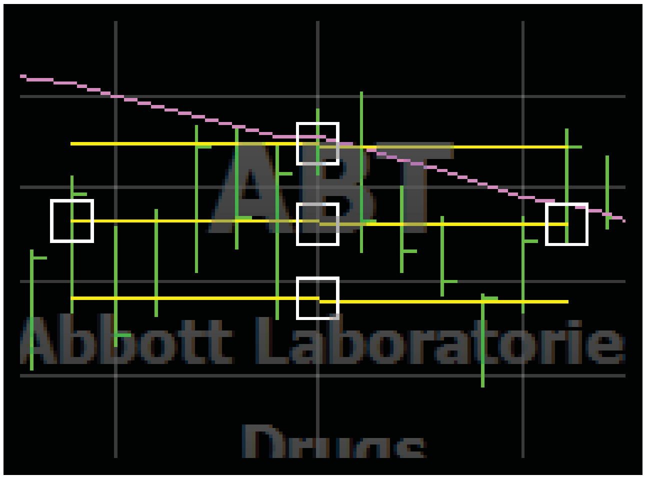
The *Attach To* pull down sets which plot to attach the line to. This determines which plot the regression will be for.

Click the *Delete Drawing* link to remove the line.

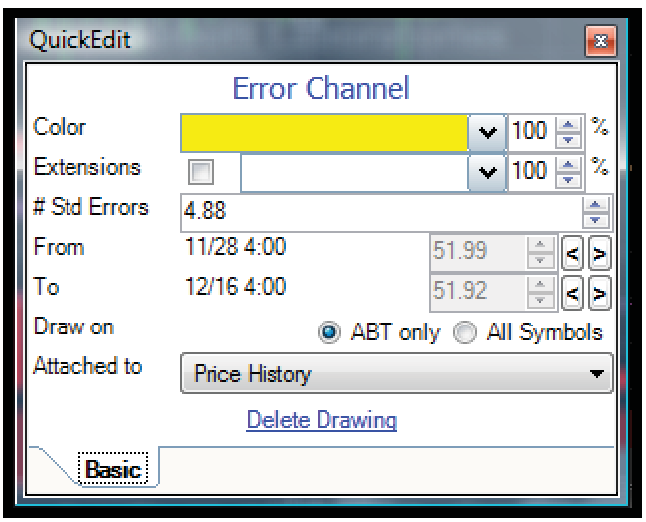
Error Channel

After selecting *Error Channel*, click and drag the mouse between the two bars on the chart to measure. The slope of the line is automatically calculated based on the data covered by the line.

Float the mouse over the drawn line makes five boxes appear at the start, midpoint and end of the center line and at the midpoint of each of the channels. Click and grab either the start or end box to change the start or end point of the center line. Grab the midpoint box for the center line to move the entire line. Grab either box on the top of bottom of the channel to manually grab and change the width of the channel. The channel will recalculate if there is a change to the length of the drawn line.



Click any box to open the *QuickEdit* for the channel. There the color of the line and its opacity (set to 100% by default) can be set. Checking the Extensions box extends the line in both directions. The number of deviation errors used by the channel can be manually set as well.



The *From* and *To* fields manually set the start and end point based on the date for each. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box.

At the bottom is the option to have the line drawn on only the active symbol or to use the dates to draw the line on every symbol in the system.

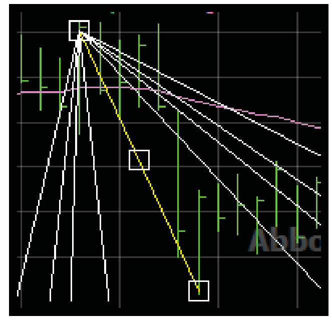
The *Attach To* menu decides what to attach the line to. This determines which plot the regression will be for. Click the *Delete Drawing* link to remove the line.

Fans

There are two types of Fan drawing tools available.

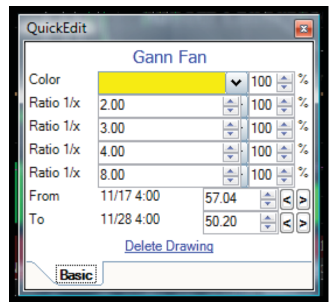
Gann Fans

After selecting *Gann Fan*, click and drag from a major top or bottom out 45 degrees. The yellow line should to be as close to 45 degrees out from the origin point.



Float the mouse over the drawn line to cause three boxes appear at the start, midpoint and end of the line. Click and grab either the start or end box to change the start or end point of the line. Grab the midpoint box to move the entire line. The fan automatically calculates based on this drawn line.

Click any box to open the *QuickEdit* for the fan. There the color of the line and its opacity (set to 100% by default) are set.



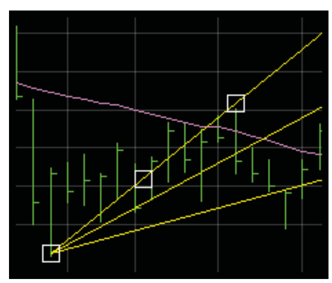
The ratios and opacity used for each fan can be manually set.

The *From* and *To* fields manually set the start and end point based on the value and date for each. To change the value, use the spinner or manually edit the value. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box.

Click the *Delete Drawing* link to remove the line.

Speed Lines

After selecting Speed Lines, click and drag from a major top to a bottom. The drawn line should be from the start of a down trend to the end of it.



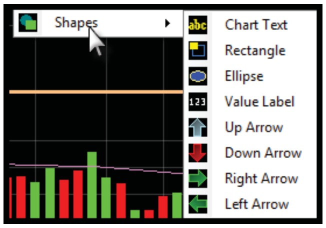
Float the mouse over the drawn line to cause three boxes appear at the start, midpoint and end of the line. Click and grab either the start or end box to change the start or end point of the line. Grab the midpoint box to move the entire line. The lines automatically calculate based on this drawn line.

Click any box to open the QuickEdit for the lines. There the color of the line and its opacity (set to 100% by default) can be set.

The *From* and *To* fields manually set the start and end point based on the value and date for each. To change the value, use the spinner or manually edit the value. To change the date (bar) for the start or end, use the left and right arrows on the right of the value box.

Click the *Delete Drawing* link to remove the lines.

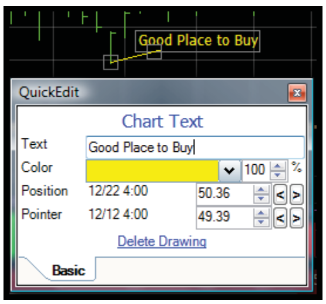
Shapes



There are eight shape tools available.

Chart Text

After selecting *Chart Text*, click where the text should be on the chart. The *QuickEdit* for the drawing appears after it is placed. Right-click the text at any time to edit it.

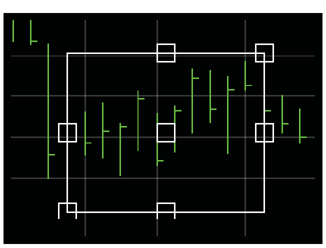


Click and drag the text to move it to a new location. Click and drag the arrow off the text and move it to any location. Float the mouse over text to make three boxes appear. Grab any box and drag it to any location.

In the *QuickEdit* type the text to appear on the chart. The color of the line and its opacity (set to 100% by default) can be changed.

The *From* and *To* fields manually set the position of the text and arrow based on the value and date for each. To change the value, use the spinner or manually edit the value. To change the date (bar), use the left and right arrows on the right of the value box.

Rectangle

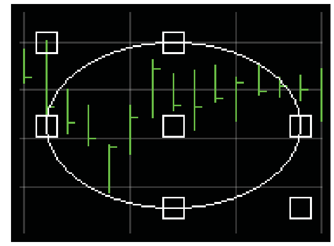


After selecting *Rectangle*, click and drag to draw the shape. Float the mouse over the rectangle to make seven boxes appear. Grab any box and drag it to change the shape or location of the rectangle. The center box, when moved, moves the entire rectangle without changing the shape.

Click any of the boxes to bring up the rectangle's *QuickEdit*. There the opacity and color for the rectangle edges and fill are set. The left and right edges of the rectangle can be manually set to specific bars.

Click the *Delete Drawing* link to remove the rectangle.

Ellipse



After selecting *Ellipse*, click and drag to draw the ellipse. Float the mouse over the ellipse to cause seven boxes to appear. Grab any box and drag it to change the shape or location of the ellipse. The center box, when moved, moves the entire ellipse without changing its shape.

Click any of the boxes to bring up the ellipse's *QuickEdit*. There the opacity and color for the ellipse edges and fill are set. The left and right edges of the ellipse can be manually moved to specific bars there as well.

Click the *Delete Drawing* link to remove the rectangle.

Value Label

After selecting *Value Label*, click and drag the label to the bar and location desired. It will always display the close (or only) value at that bar. Click and drag to change the location of the label at any time.

Right-click the label to bring up the label's *QuickEdit*. There the color and opacity of the label and what values should be shown in the label are set. The date and the value position of the label can be changed.

At the bottom set what the value label is attached to and if it should be drawn just on the active symbol or all the symbols in your system.

Click the *Delete Drawing* link to remove the label.

Up, Down, Left and Right Arrows

Once one of the four arrows are selected, click where to draw the arrow. The arrow can always be clicked and dragged to a new location. Click the arrow to bring up the arrow's *QuickEdit*.

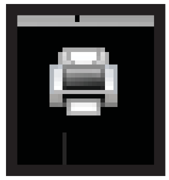
In the *QuickEdit* the arrow's color and opacity are set. Its value and date location can also be set manually.

Click the *Delete Drawing* link to remove the arrow.

Show/Hide Trade Sliders

Clicking the *Show/Hide Trade Sliders* button toggles the visibility of the Trade Sliders area to the right of the price scale. For more information on using Trade Sliders refer to the "Trade Sliders" section on page 108.

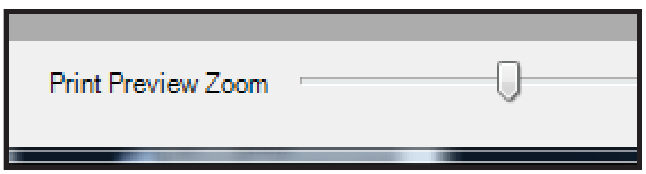
Print Chart



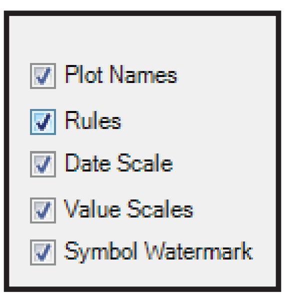
Clicking Print Chart opens the *Print Chart* Window. Clicking *OK* opens the print operation for the computer. Adjust the printer settings as needed then click *Print* to print the chart. Clicking the *Cancel* button cancels the chart printing.

Print Preview

On the left is a preview of the chart for printing. Below the *Print Preview* is the *Print Preview Zoom*. Moving the slider to the right or left on the *Print Preview Zoom* moves the preview in or out for more or less detail in the preview. The *Print Preview Zoom* does not affect the printed chart. To the right of the *Print Preview* is a list of options.



Plot Names



When *Plot Names* is checked, the names of the plots are visible in the pane legends. When not checked, the pane legends are not visible.

Rules

When *Rules* is checked, any Rules on the chart are visible. When not checked, any Rules on the chart are not visible.

Date Scale

When *Date Scale* is checked, the date scale along the bottom of the chart is visible. When not checked, the date scale along the bottom of the chart is not visible.

Value Scales

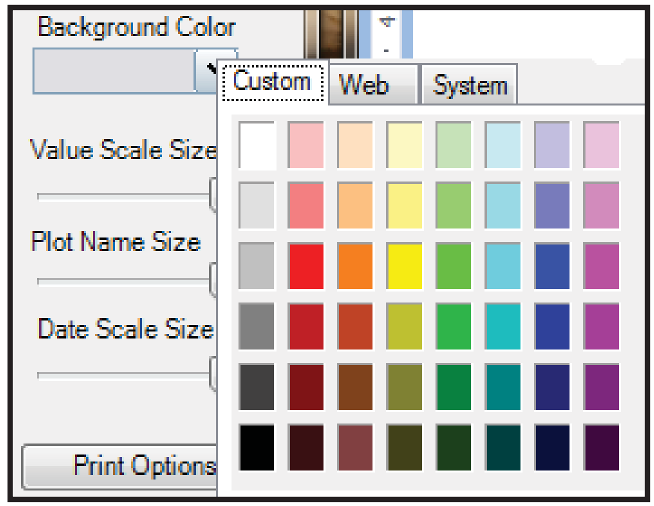
When *Value Scales* is checked, the value scales along the right of the chart are visible. When not checked, the value scales along the right of the chart are not visible.

Symbol Watermark

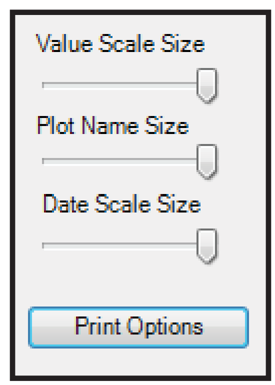
When *Symbol Watermark* is checked, the Symbol Watermark in the center of the chart is visible. When not checked, the Symbol Watermark in the center of the chart is not visible.

Background Color

Clicking the down arrow under *Background Color* opens a color picker. Clicking a color sets the printed chart's background color.



Value Scale Size



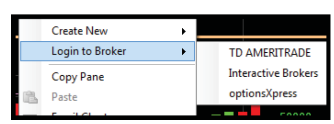
The *Value Scale Size* slider adjusts the size of the value scales on the right of the chart.

Plot Name Size

The *Plot Name Size* slider adjusts the size of the plot names in the pane legends.

Date Scale Size

The *Date Scale Size* slider adjusts the size of the date scale along the bottom of the chart.

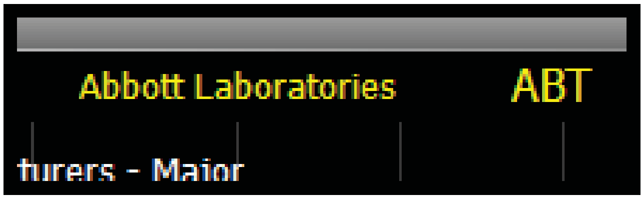


Print Options

Clicking *Print Options* opens a *Page Setup* window. This window allows the changing of paper size, source, orientation and margins.

Name

The *Name* display shows the name of the symbol (typically the company name) on the chart.



Ticker

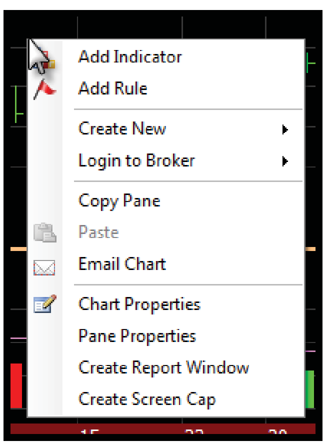
The Ticker display shows the ticker of the symbol on the chart.

Daily Change

The red *Daily Change* shows (regardless of the time frame of the chart) the daily net and percent change for the chart's symbol. The changes are updated in real-time with Platinum service.

Chart Right-Click Menu

Right-click the mouse in any empty space in a pane opens a menu of options.



Add Indicator

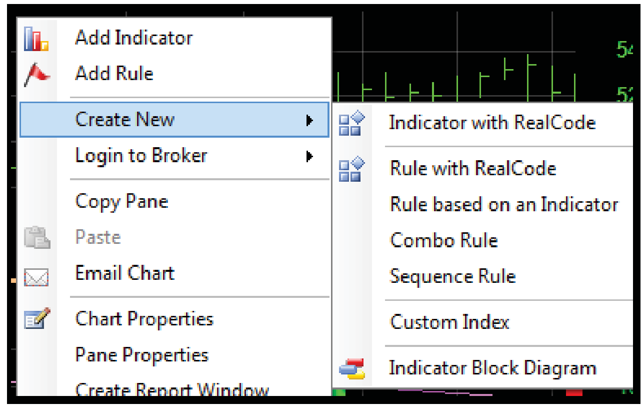
Clicking *Add Indicator* brings up the *Add Indicator* window. Select any indicator on the list to add it to the chart. For more information on the *Add Indicator* window refer to the "Add Indicator" section on page 23.

Add Rule

Clicking *Add Rule* brings up the *Add Rule* window. Select any Rule on the list to add it to the chart. For more information on the *Add Rule* window refer to the "Rules" section on page 57.

Create New

Clicking *Create New* opens a submenu of seven items



Indicator with RealCode

Clicking Indicator with RealCode starts the process of creating a new indicator based on RealCode. After naming the new plot a new code window opens. For information on RealCode download the RealCode Reference at www.StockFinder.com.

Rule with RealCode

Clicking *Rule with RealCode* creates a new Rule based on RealCode. After naming the new Rule a new code window opens. For information on RealCode download the RealCode Reference at www.StockFinder.com.

Rule based on an indicator

Clicking *Rule based on an indicator* opens the Add Rule window. This creates a new Rule based on any plot on the chart. For more information on the *Add Rule* window refer to the "Plot/Indicator-Based Rules" section on page 57.

Combo Rule

Clicking *Combo Rule* opens the *Edit Combination Rule* window. Add Rules to the combo to create a combination Rule. For more information on the *Edit Combination Rule* window refer to the "Combination Rule" section on page 64.

Sequence Rule

Clicking *Sequence Rule* opens the *Edit Sequence* window. For more information on the *Edit Sequence window* refer to the "Sequence Rule" section on page 65.

Custom Index

Clicking *Custom Index* opens the New Custom WatchList Wizard. For more information on the Custom WatchList Wizard refer to the "Custom WatchList Indexes" section on page 81.

Indicator Block Diagram

Clicking *Indicator Block Diagram* opens the *New Plot* window. Name the new indicator, choose the plot type and what to scale it with. After clicking *OK* a new *Properties* window opens with a Numeric Plot ready for a custom Block Diagram to feed it a series of dates and numbers.

Login to Broker

Floating the mouse over *Login to Broker* opens a submenu of all the brokers available for login via StockFinder. Click the desired broker to login to an account with that broker.

Copy Pane

Clicking *Copy Pane* copies the pane right-clicked in. The pane can later be pasted elsewhere with the paste command.

Paste

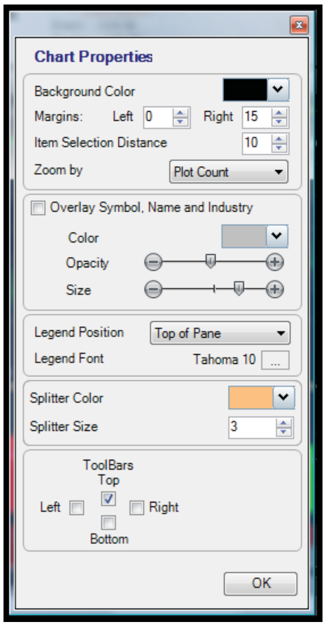
Clicking *Paste* pastes the last pane or indicator copied.

Email Chart

Clicking *Email a Chart* emails the current chart. For more information on emailing charts see the Email Chart section of this chapter.

Chart Properties

Clicking *Chart Properties* opens the *Chart Properties* window for the chart right-clicked in. Each of the options in the window can be changed.



Background Color

The *Background Color* picker changes the background color of the entire chart.

Margins

The *Margins* settings increase or decrease the left and right margins of the chart. The larger the numbers set here the more black unused space appears between the left or right of the plot chart and the chart edges.

Item Selection Distance

The *Item Selection Distance* determines how close the mouse needs to be to a plot before it becomes "selected" (it has the highlight boxes appear and is available for clicking). The larger the number the farther away from the plot the mouse pointer can be before it becomes highlighted by the boxes.

Zoom by

If *Zoom By* is set to the default *Plot Count*, as the time frame of the chart changes, the chart will always show the same number of bars. For example, if looking at a daily chart with 40 bars visible (40 days), change to a weekly chart still shows 40 bars (this time, 40 weeks).

If set to *Date Span*, as the time frame of the chart changes it always strive to show the same span in time. For example, if looking at a daily chart spanning from the beginning of November to the end of November (roughly 20 or so bars), changing to a weekly chart shows just the three to five weekly bars in November.

Overlay Symbol, Name and Industry

If the first option is checked the overlay on the chart of the symbol, company name and industry will be visible. If unchecked, it hides this overlay. Below that option the color, opacity and size of the overlay can be changed.

Legend Position

The *Legend Position* setting determines where the legend for each pane appears. By default all of the legends appear at the top of each pane. Legends appear on the chart (no space between the legend and the chart), to the right or left of the chart. If set to *None* there are no legends visible in any panes.

Legend Font

The *Legend Font* sets the font and size of the legends in all of the panes of the chart.

Splitter Color

The *Splitter Color* sets the color of the pane splitters for the chart. The pane splitters are the horizontal lines that separate the panes from each other.

Splitter Size

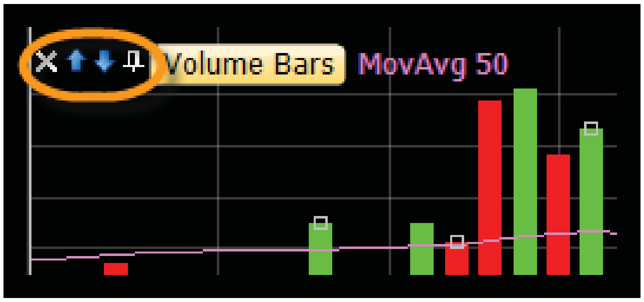
The *Splitter Size* sets the size (thickness) of the pane splitters for the chart. The pane splitters are the horizontal lines that separate the panes from each other.

Tool Bars

The four check boxes make the four Tool Bars visible or hidden. By default only the top bar is visible.

Pane Controls

There are four buttons in the top-left corner of every pane. These are the pane controls.



Close Pane

Clicking the close pane icon (an "X") brings up a confirmation to delete the pane. Once confirmed, the pane is removed from the chart. Any plots in the pane are lost with the deletion of the pane. Any Rules, columns or other plots that use a plot will be affected by this removal.

Hold the *SHIFT* key down when clicking the close pane icon to bypass the confirmation question.

Pane Up/Down Arrows

Clicking either arrow moves the pane up or down in the chart pane hierarchy.

Pin Pane

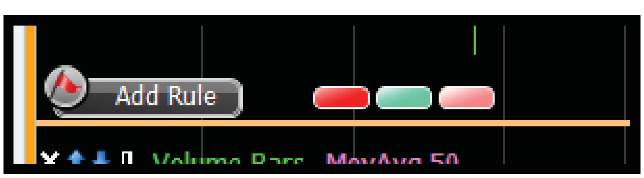
Clicking the pin hides the pane from the chart. On the left of the chart a tab appears showing the names of any plots in the hidden pane (as well as icons for any Rules in the pane). Click the tab to restore the pane on the chart.

Plot Names

Every plot in the pane will have its name listed to the right of the four pane control icons. Clicking the name of the plot is the same as clicking the plot itself on the chart. A single click brings up the plot's *Edit* screen. Right-clicking any plot brings up a menu of possible actions with that plot.

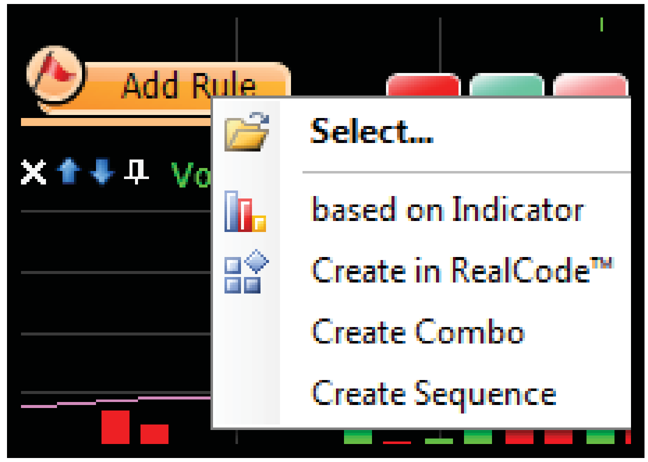
Rule Footer

Unless the price pane is pinned, the Rule Footer appears at the bottom of the pane containing the *Price History* plot. This area shows the *Add Rule* button, any Rules on the chart and any Rules marked to be shown on the chart.



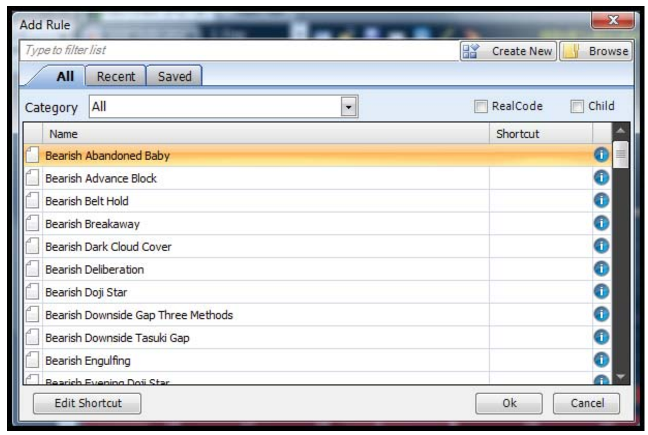
Add Rule

Clicking the Add Rule button opens a menu.



Select

Clicking *Select* opens the *Add Rule* window. Type in the *Type to filter list* box to filter the library of Rules available. The list filters down based on what was typed.



Clicking the *Create New* button is the selecting *Create in RealCode* from the previous menu.

Clicking the *Browse* button opens an *Open* window appears for navigating to another folder of Rules. If there is another folder on the machine that contains Rules, select that folder to populate the window.

There are three tabs above the list of Rules.

All

If the *All* tab is selected all the Rules available in the default folder are visible.

Recent

If the *Recent* tab is selected the list shows the most recently used Rules from the library.

Saved

If the *Saved* tab is selected only saved Rules are shown.

Below the tabs is the *Category* menu. If left at *All* it shows all of the Rules. If another category is selected, it only shows the Rules that meet that category.

Below the *Category* pull down is the library of Rules. The list can be sorted by either the name or the shortcut columns by clicking the column. To the right of some Rules is a blue information icon. Float the mouse over the icon and a text window may appear that gives more information about the Rule.

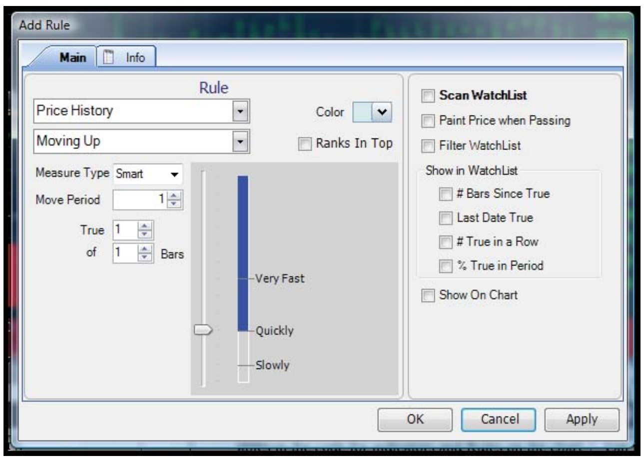
Double-click any Rule or select and click OK to add the Rule to the chart.

The *Edit Shortcut* button assigns or edits a shortcut assigned to at selected Rule. For more information on shortcuts refer to the "Shortcuts and Hot Keys" section on page 123.

Once a Rule is added to the chart the *Edit Rule* window appears. Here changes to the Rule are made. For more information on working with Rules refer to the "Rules" section on page 57.

Based on Indicator

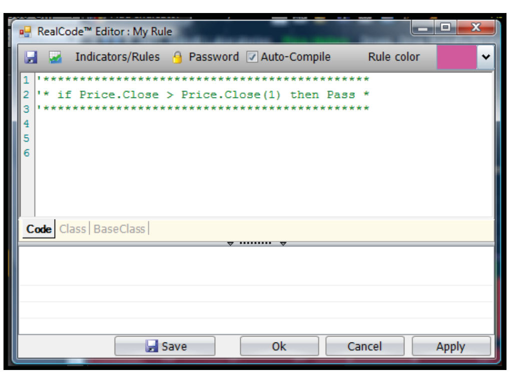
Clicking *Based on Indicator* brings up the *Add Rule* window. The first pull down in the upper left corner sets the indicator the Rule is based on. By default it shows *Price History* but the menu includes every plot on the chart as a choice.



For more information on creating Rules and the other options on this screen refer to the "Plot/Indicator-Based Rules" section on page 57.

Create in RealCode

Clicking *Create in RealCode* brings up the *New RealCode Rule* window asking for a name. Name the Rule and click *OK*. This opens the *RealCode Editor*. The *Save* button in the top left saves the Rule.



The *Indicators/Rules* button creates variables in the code for indicators and Rules on the chart. When clicked, a *Reference Indicator/Rule* screen appears with a tree for all Rules and plots on the chart. Select the plot or Rule to reference in the code and click *OK*.

At the top of the code window the reference is inserted. For more information on how to use the reference and writing RealCode, download the RealCode Reference manual on www.StockFinder.com.

The *Password* button password protects the code. Only those with the password have the ability to see protected code.

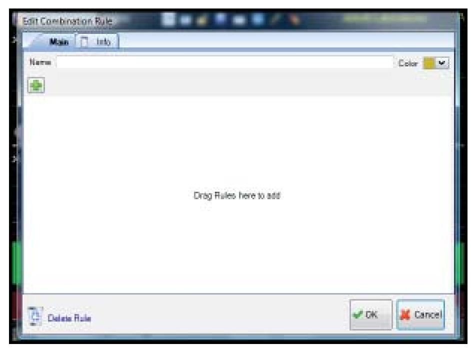
The Rule's color is set in upper right corner with the color pull down.

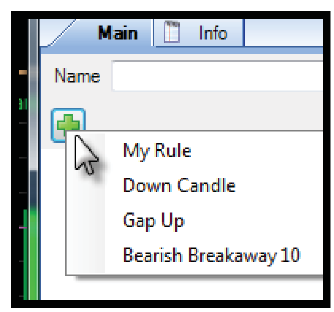
For more information on writing RealCode, download the RealCode Reference manual on www.StockFinder.com.

Once the code is written, click *OK* to close the window and the Rule will be on the chart.

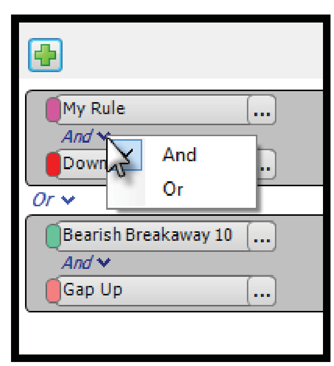
Create Combo

Clicking *Create Combo* opens the *Edit Combination Rule* window. At the top of the window is a field to name the *Combination Rule*. To the right of the Name field is the color picker for setting the Combination Rule's color.

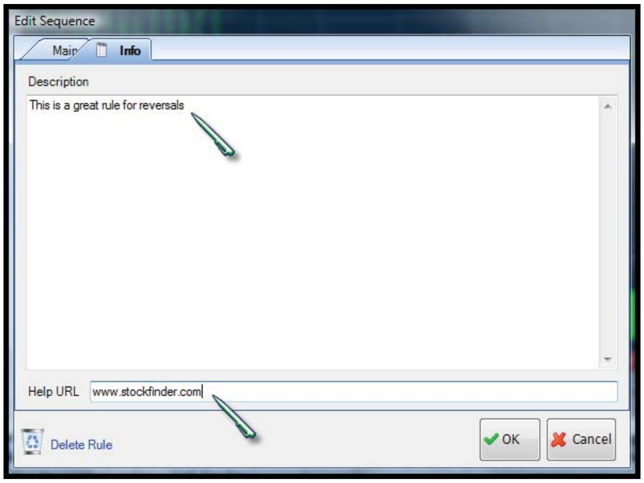




Click the *PLUS* button to add a Rule to the combination. It will bring up a list of all the Rules on the chart available to the combo. Rules can be click and dragged from the chart to the combo.



Once two or more Rules are added the can be grouped together in any combination of *AND* or *OR* sets. Use the pull downs between each Rule to set how they are connected. On the right are all of the options for using the the Rule (Scan WatchList, etc.) For more information on these options refer to the "Using a Rule" section on page 61.

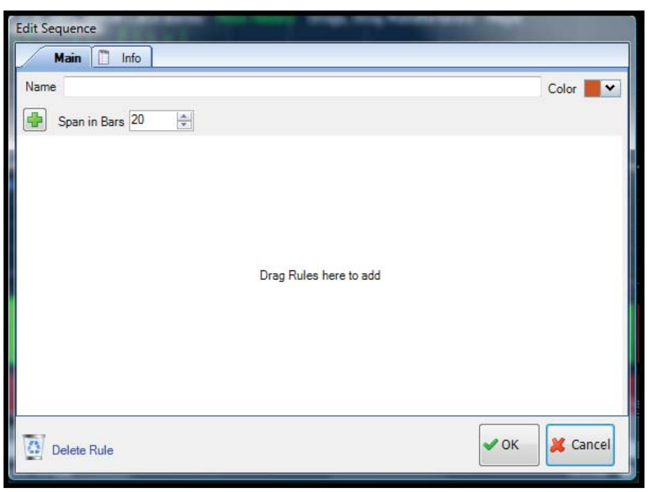


At the top of the window there are two tabs. The *Main* tab is where the Rule parameters are set, the *Info* tab has a description and/or a link for the Rule. This information is saved with the Rule.

Click *OK* to go back to the chart. The new Rule created appears to the right of the *Add Rule* button.

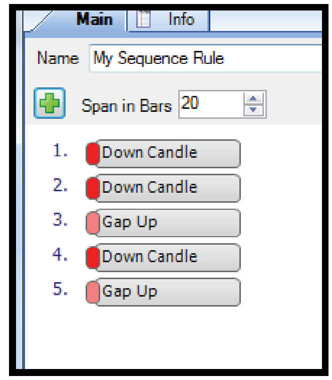
Create Sequence

Clicking *Create Sequence* opens the *Edit Sequence* window. Enter a name in the *Name* field. Set the color for the Sequence Rule with the color picker in the top-right corner. Click the *PLUS* button to add a Rule to the sequence. It will bring up a list of all the Rules on the chart available to the combo. Rules can be click and dragged from the chart to the sequence.



Once two or more Rules are added to the sequence the Rule order can be set and changed.

Treat each Rule in the sequence as an event. The order dictates the order of the events needed to fulfill the sequence. Above the Rule is the *Span in Bars* setting. This sets how many bars are allowed to pass between the first and last Rule in the sequence. In order for the Rule to pass (be true), the sequence of Rules must pass, in order and within the total *Span in Bars* setting.



If the sequence of Rules passes, in order, in fewer bars than set in *Span in Bars*, the sequence still passes. The *Span in Bars* setting is the maximum number of bars allowed for the sequence between the first and last Rule.

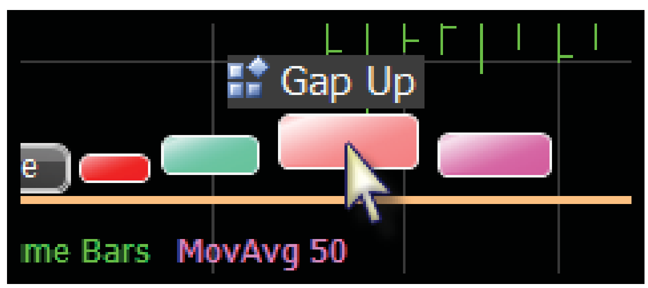
The same Rule can be repeated in the sequence. Multiple copies of the same Rule may appear in the sequence. Once one or more Rules are added, the options for using the sequence Rule will appear on the right. For more information on these options refer to the "Using a Rule" section on page 61.

At the top of the window there are two tabs. The *Main* tab is where the Rule is set, the Info tab is contains a description and/or a link for the Rule. This information is saved with the Rule.

Click OK to go back to the chart. The new Rule you created will appear to the right of the Add Rule button.

Rules for the Chart

Every Rule added or created on the chart appears as a bubble to the right of the *Add Rule* button. The color of the bubble matches the color for the Rule. To change the color of the bubble, click and edit the Rule's color.



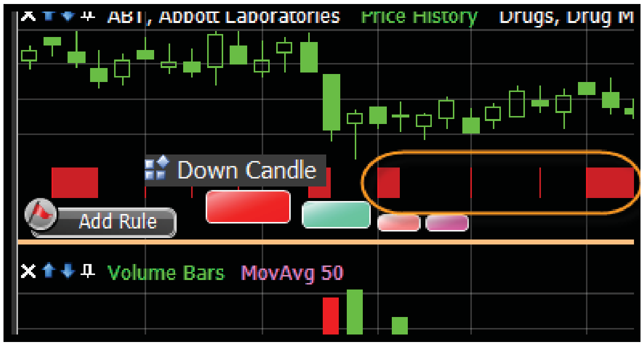
Floating the mouse over any Rule causes it to pop-up and show its name. Clicking on the Rule brings up the *Edit* Rule screen.

For more information on how to use Rules refer to the "Using a Rule" section on page 61.

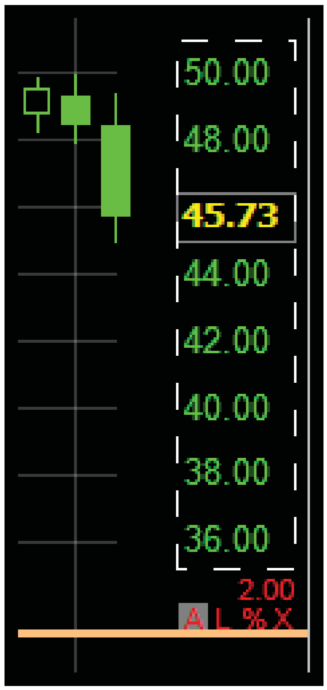
Rules Shown on Chart

Once the options for a Rule are closed is to show it on the chart. This creates a band for the Rule that runs above the *Add Rule* button. If a bar passes the Rule a vertical line of the same color as the Rule will appear along this band. If several bars in a row pass the Rule, the lines will run together and appear as blocks of the Rule color.

Clicking the band it brings up the *Edit Rule* window for the Rule. To remove the band, uncheck the *Show On Chart* option for the Rule.



Scale Displays



To the right of each pane is the scale display. The price scale has some unique options under its scale but all indicator scales share the same options when edited.

Price Scale Info/Options

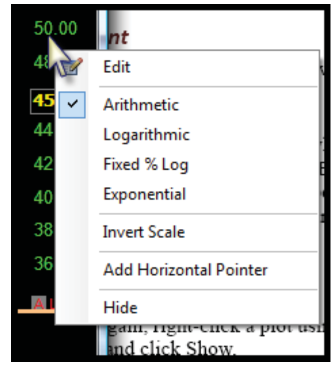
At the bottom right corner of the price scale are two sets of red characters. The top-most is the number of ticks between each grid line for the price scale. If it says "250" it means there are 250 ticks between each of the grid lines.

Below that are some quick scaling options. Click on one to change how price is scaled. Clicking *A* makes the chart an arithmetic scale (each grid line is the same visual distance). Clicking *L* makes the scale logarithmic. Each line is the same number of ticks but the grid lines will get visually closer to each other as the scale numbers increase. This scaling is based on percentage moves. In a log scale a jump from 10 to 20 (100% increase) has the same visual distance as a jump from 20 to 40 (also a 100% increase).

Clicking *%* changes the scale to fixed percent distance between the grid lines. The percent distance is shown in red above the *AL%X* line. The percentage can be adjusted manually when editing the price scale (opening the *Scale Editor*).

Clicking *X* sets the scale to an exponential scaling. Each grid line is the same value distance but the grid lines space visually based on exponential growth. This means a jump from 75 to 80 has a larger visual distance on the chart than a jump from 135 to 140 even though both are a 5 tick increase. It is very similar, visually, to a log scale but the visual distance is calculated exponentially instead of logarithmically.

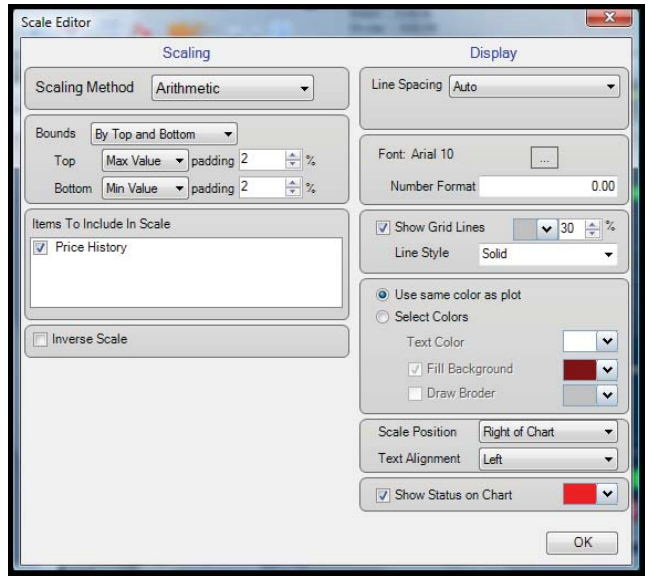
Plot Scale Options



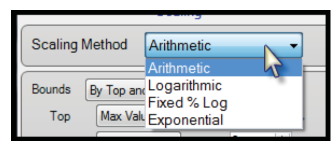
Click a scale display brings up a short menu with eight options.

Edit (Scale Editor)

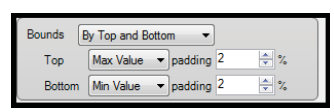
Clicking *Edit* opens the *Scale Editor*. On the left are the *Scaling* options, on the right are the *Display* options.



Scaling



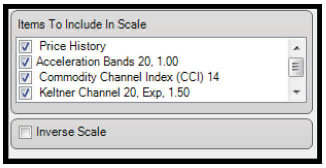
The first option under the *Scaling* column is the *Scaling Method*. Here you can choose either Arithmetic, Logarithmic, Fixed % Log or Exponential. Below the *Scaling Method* are the *Bounds* options. This controls how the plot is constrained in the pane.



Choosing by *Top and Bottom* stretches the plot to fit the entire pane based on the highest and lowest values present on the chart. The top and bottom values can be set based on these highest and lowest (Min and Max) values or manually. Padding can be set to create blank space above and/or below the minimum and maximum values of the plot.

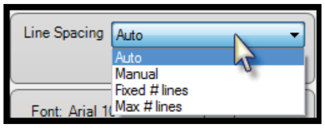
Choosing "Centered" will bind the plot by a center line. The Center option allows you to have the bound center be either the median value of the plot or a manual number (like zero). You can also configure the height automatically or manually.

The next window shows all of the plots in the same pane. Put a check mark next to any item to include in the scale. Below that is the option to invert the scale (lowest numbers on top and highest numbers on bottom).

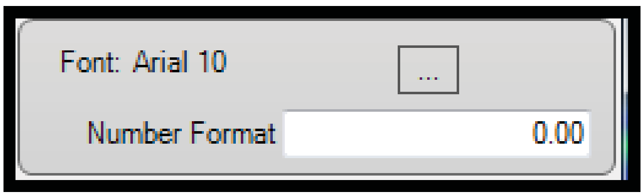


Display

The first option under the *Display* column is *Line Spacing*. The line increments can be set to *auto*, *manual*, a *fixed number of lines* or a *maximum number of lines*. Choosing *Manual* gives the option to set the percentage between each line. Choosing *Fixed # lines* gives the option of setting the number of lines. The other options are automatically set by the program.

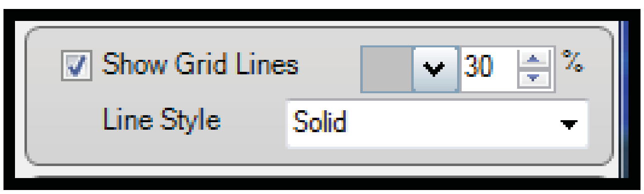


Under *Line Spacing* the font (type and size) and the number format are set to use in the scale. By default it is set to *0.00*.

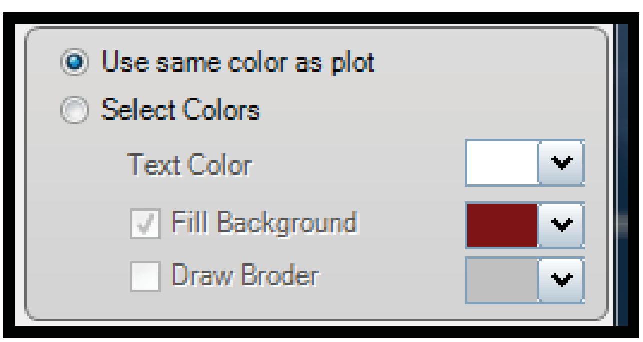


The number of decimal places shown in the scale can be increased or decreased by changing the number of zeroes to the right of the decimal.

Under *Font* check if the grid lines should be visible or not. The lines' color, opacity and the style are all changeable.



Under the *Grid Line* options set the color of the scale to be either the same as the plot or to specific colors.



Under the color options set where the scale is positioned and how the text is aligned. At the bottom of the *Display* column toggle the status and the status color. The scale status appears under the scale.

Arithmetic

When *Arithmetic* is checked the scale is arithmetic (each grid line is the same visual distance).

Logarithmic

When *Logarithmic* is checked the scale is logarithmic. Each line is the same number of ticks but the grid lines will get visually closer to each other as the scale numbers increase. This scaling is based on percentage moves. In a log scale a jump from 10 to 20 (100% increase) has the same visual distance as a jump from 20 to 40 (also a 100% increase).

Fixed % Log

When *Fixed* is checked the scale is logarithmic but the fixed percentage of the log can be set by editing the scale.

Exponential

When *Exponential* is checked the scale is exponential. Each grid line is the same value distance but the grid lines space visually based on exponential growth. This means a jump from 75 to 80 has a larger visual distance on the chart than a jump from 135 to 140 even though both are a 5 tick increase. It is very similar, visually, to a log scale but the visual distance is calculated exponentially instead of logarithmically.

Invert Scale

When *Invert Scale* is checked, the scale will be inverted. The larger numbers will be at the bottom of the scale, the smaller numbers will be at the top of the scale.

Add Horizontal Pointer

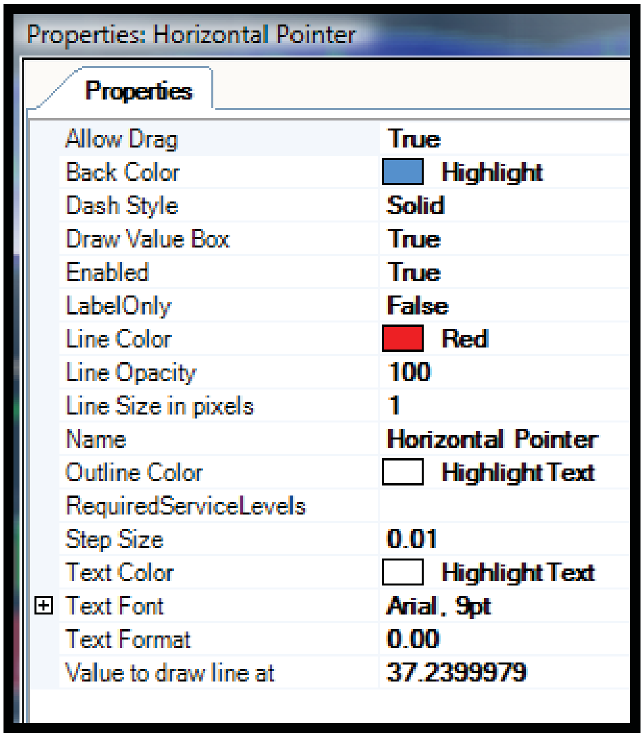
Selecting *Add Horizontal Pointer* adds a horizontal pointer to the scale. Grab and drag the line to any value on the scale. Right-clicking the pointer and choosing *Properties* opens the *Properties* window for the pointer. There are several options available in *Properties*.

Allow Drag

If *Allow Drag* is set to *TRUE* the line can be manually dragged on the chart. If this is set to *FALSE* the line cannot be manually dragged.

Back Color

Back Color determines the background color of the value label.



Dash Style

Dash Style sets the style of the horizontal line.

Draw Value Box

If *Draw Value Box* is set to *TRUE* there is a label for the value of the line. If this is set to *FALSE* the value label is not visible.

Label Only

If *Label Only* is set to *TRUE* the line is not visible but the value box is (assuming the *Draw Value Box* is also set to *TRUE*). If this is set to *FALSE* the line and the value box are visible (assuming the *Draw Value Box* is also set to *TRUE*)

Line Color

Line Color determines the color of the horizontal line.

Line Opacity

Line Opacity sets the opacity of the line.

Line size in pixels

Line size in pixels determines the size (or thickness) of the horizontal line.

Name

Name sets the name of the line. If connecting other objects to this line, naming it can be helpful. This name is the name that shows up in Block Diagrams.

Outline Color

Outline Color sets the color of the outline of the value label.

Step Size

Step Size sets the increment that the line moves up or down when dragged.

Text Color

Text Color sets the color of the text in the value label.

Text Font

Text Font sets the font and size for the value label.

Value to draw line at

The *Value to draw line at* setting allows you to manually set where the value line is drawn. If combined with a *FALSE* in the *Allow Draw* setting the line is set in a specific place without fear of mistakenly dragging it to another value.

Hide

If *Hide* is selected the scale is not visible. To make the scale visible again, right-click a plot using that scale, go to *Scaling* and click *Show*.

Tabs

Any windows can be tabbed with each other. The windows are layered on top of each other and tabs appear at the top of the layers. Clicking a tab flips between the layered windows.

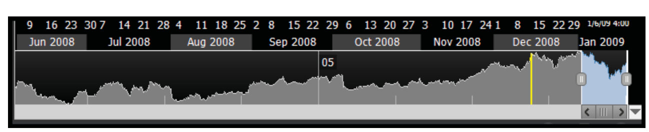
Clicking the *New Tab* allows adds a new item to the tabbed set.

Tabbing windows with the Main Chart assigns a function key (F1 through F12) to each tab. Press the assigned function key on the keyboard to quickly bring that tabbed window to the foreground.

Pan and Zoom Bar

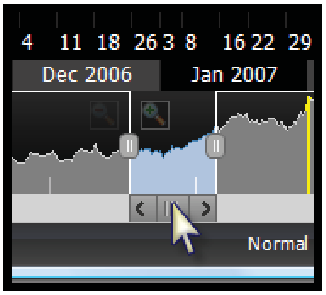
Along the bottom of a chart is the *Pan and Zoom Bar.* The bar controls what data is visible on the chart. It shows a white line (with a gray shading below it) representing the entire price history for the stock.

There are two white vertical lines (with gray handles) with a blue highlight section between them. This is the area visible on the chart. The part of the price preview highlighted in blue is the part of the chart that is shown above the bar.



Panning

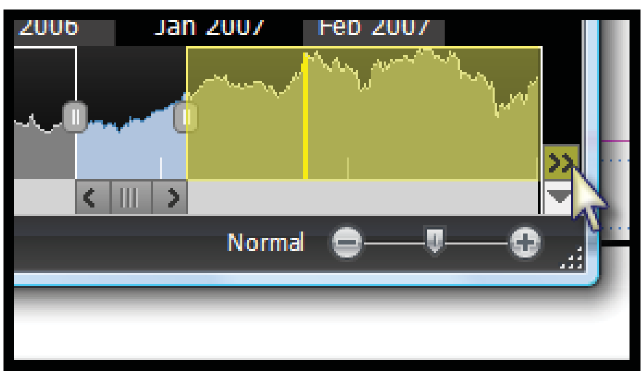
There are several ways to move the visible chart forward and backward in time. To pan the chart back or forward in time, grab and slide the center of the slide bar below the pan and zoom bar to any location to the left or right. Click and grab the highlighted (in blue) area of the pan and zoom bar and slide it left or right.



There are two hot keys to pan left and right in time. Pressing the *[* or *]* keys on the keyboard move the chart to the left or right one bar at a time.

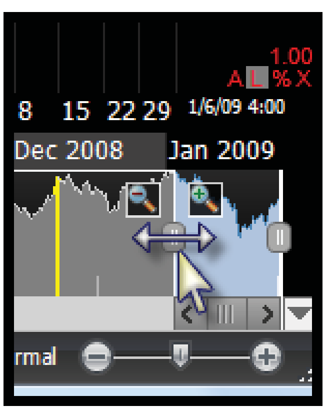
Holding down the *CTRL* key and spinning the mouse wheel up or down it pans the chart forward or backward in time by several bars. Holding the *SHIFT* and *CTRL* keys while spinning the mouse wheel pans as well but only one bar at a time.

When the chart is set back to past data (the right-most bar is not the most recent data) the current price of the stock will appear as a value box on the price scale in blue text. To bring the chart current, click the yellow double arrow that appears on the bottom right of the *Pan and Zoom* bar. This only appears if the chart is not showing the most current bars.



Zooming

There are several ways to increase or decrease the number of bars visible on the chart. Floating the mouse over any part of the chart and spinning the mouse wheel up or down zooms the chart.



Holding the *SHIFT* key while spinning the wheel also zooms but at smaller increments.

Grabbing either side of the blue-highlighted area of the *Pan and Zoom* bar and sliding the vertical bar to the left or right zooms the chart. The presence of the price preview makes it easy to zoom in or out to specific price events in the history of the symbol.

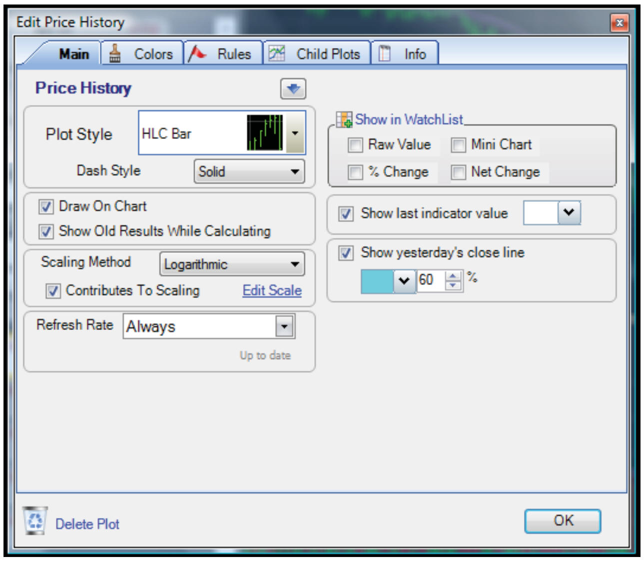
Floating the mouse over the left vertical handle of the highlighted area (in the pan and zoom bar) reveals a plus and minus magnifying glass. Clicking these icons zooms the chart in and out.

6 Indicator Plots

Any series of lines, bars or candles on the chart are referred as "plots". Plots can be moved, changed, colored and adjusted several ways.

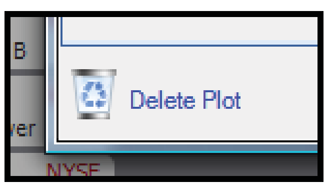
Editing Plots

Clicking on any plot brings up the *Edit* screen for the plot. There are several tabs in the *Edit* screen.



Delete Plot

At the bottom of every tab is the *Delete Plot* link (to the right of the trash can icon). Clicking this link deletes the plot from the chart.

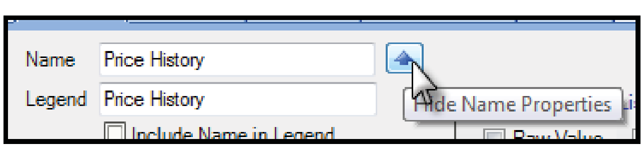


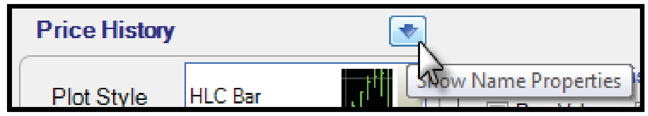
Main

Under the main tab are the primary options for the plot.

Name Properties

The name of the plot is in the top-left corner of the *Main* tab in a bold blue font. To the right of the name is a down arrow button. Clicking this button shows the *Name Properties* for the plot. Clicking it again hides these properties.





Name

The *Name* field shows the name the program uses to identify the plot.

Legend

The *Legend* is the name that appears in the pane legend for the plot. The name and the legend can be different. Abbreviating the name of the plot in the legend field can conserve space in the pane's legend.

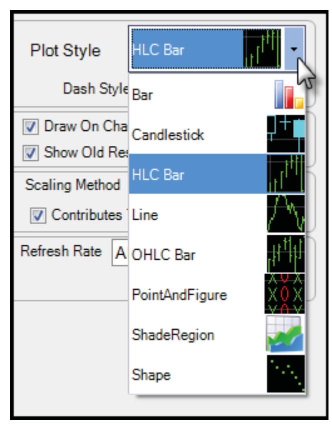
Include Name in Legend

Checking the *Include Name in Legend* option puts the name of the plot in the actual legend of the pane. In most cases, this option should remain unchecked unless there is important information in the name field that is not present in the legend field.

If the *Name* field is populated and the *Legend* field is empty, checking the *Include* option puts the name as the only text included in the pane legend.

If no text is in the *Legend* field and this option is not checked, there is no text for the plot present in the legend on the chart.

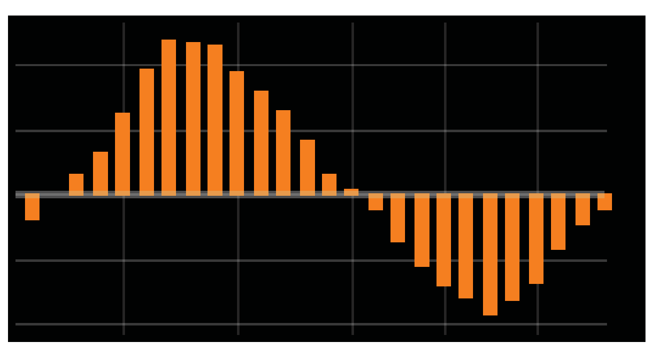
Plot Style



The *Plot Style* menu offers eight different styles for the plot. All of these descriptions assume the scale of the plot is not inverted.

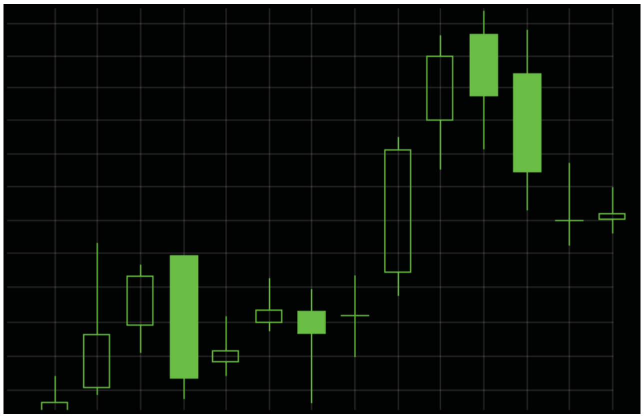
Bar

The *Bar* plot style sets a solid column from zero to the value of the plot. The most common indicators that use a bar plot style are Volume Bars and MACD Histogram.



Candlestick

If the plot has only one value per data point (date), this style is identical to a line plot style. If the plot has an open, high, low and close (last) for each data point; it plots as a candlestick. A candlestick has two main parts; the body and the wick.



The wick is a vertical line that runs from the highest to the lowest point of the candle. The top of the wick falls at the high. The bottom of the wick is at the low.

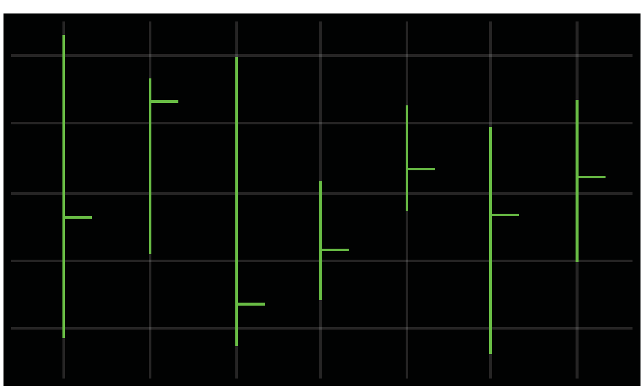
The body of a candle will be either solid (filled with the color of the plot) or hollow (outlined by the color of the plot but filled with the background color of the chart). If the body is hollow, the top of the body is the close and the bottom of the body is the open. If the body is solid, the top of the body is the open and the bottom of the body is the close.

Dash Style

The *Dash Style* determines the style of the candle's outline. If set to solid, the outline of the candles will be solid. The other settings break up the candle outlines into dashes, dots or some combination of the two.

HLC Bar

If the plot has only one value per data point (date), the *HLC Bar* style is identical to a line plot style. If the plot has a high, low and close (last) for each data point; it plots as a HLC Bar. There are two parts to the HLC Bar; the bar and the right hash.



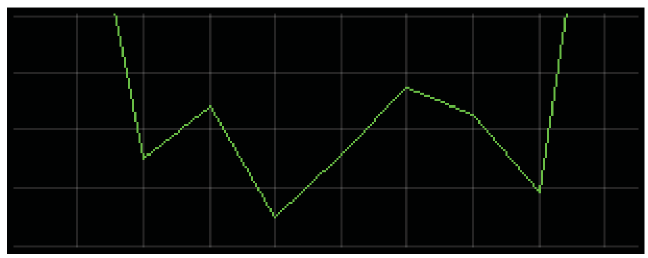
The bar is a vertical line. The top is the high and the bottom of the line is the low. The hash is a horizontal line that drawn to the right of the vertical line. The hash is the close. Even if the data point has an open value it is not shown in a HLC Bar.

Dash Style

The *Dash Style* sets the style of the bar's outline. If set to solid, the outline of the candles will be solid. The other settings break up the bar into dashes, dots or some combination of the two.

Line

A line plot takes the value for the data point and plots at that value. The value is connected, by a line, to the values at the previous and next (if available) data point. The line that connects the data point is the straightest direct line between data point values. The connecting line has no data behind it. The line is only a connector of values of the data points.



If the data point has more than one value (i.e. an open, high, low, close/last) the close or last value is used by the plot for the data point unless otherwise specified or changed.

Dash Style

The *Dash Style* determines the style of the line. If set to solid, the line will be solid. The other settings break up the line into dashes, dots or some combination of the two.

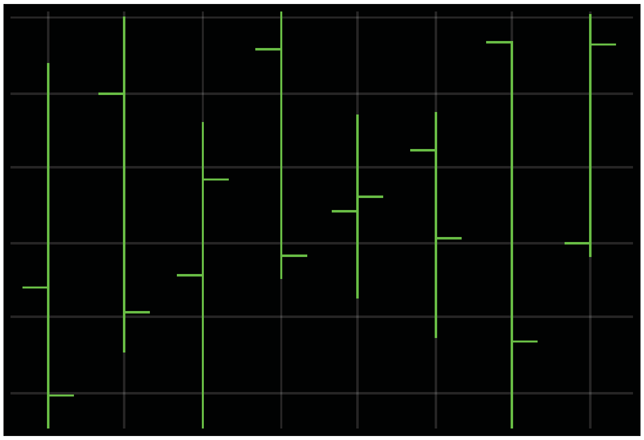
Line Thickness

The *Line Thickness* sets the size or thickness of the line chart. The larger the number the thicker the line will appear.

OHLC Bar

If the plot has only one value per data point (date), this style is identical to a line plot style. If the plot has an open, high, low and close (last) for each data point; it plots as an OHLC Bar. The OHLC Bar has three main components; the bar, the left hash and the right hash. The bar is a vertical line where the top is the high and the bottom of the line is the low.

The left hash is a horizontal line that drawn to the left of the vertical line. The left hash is the open. The right hash is a horizontal line that drawn to the right of the vertical line. The right hash is the close.



Dash Style

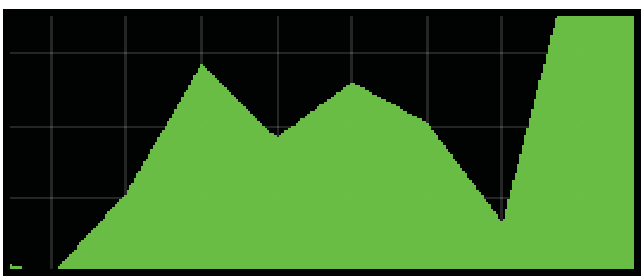
The *Dash Style* determines the style of the bar's outline. If set to solid, the bar will be solid. The other settings break up the bar into dashes, dots or some combination of the two.

Point and Figure

The *Point and Figure* plot style is currently in line for revision and should not be used until it is revised. When new versions are sent, check the Patch Notes for mention of a revised Point and Figure plot style.

Shade Region

The Shade Region plots like a Line style with more options.



Fill Method

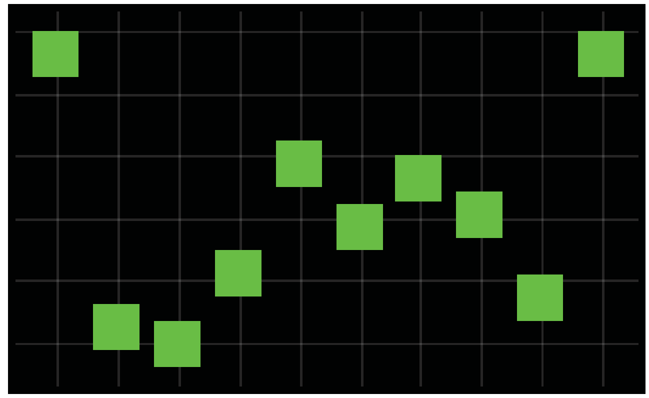
The *Fill Method* setting has two options; *Above Value* and *Below Value*. The shading happens between the close (last) of the plot and a value. Choosing *Above Value* shades from the close up to the chosen value. Choosing *Below Value* shades from the value down to the close of the plot.

Value

Value sets the value for the shading. Setting the *Fill Method* to *Above Value* and the *Value* to zero, the shading goes from the close to zero. This will be the most common settings for plots with values that don't fall below zero.

Shape

The *Shape* plot style uses shapes to mark the close (last) for the plot. It is similar to the *Line* style without a connection between each data point. There are two settings for this style.



Shape

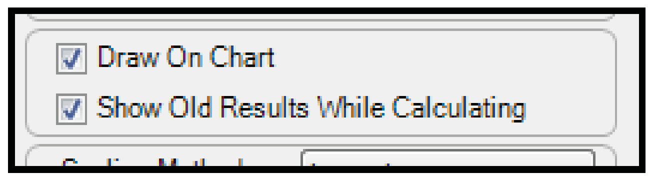
Shape determines the shape to mark the plot values.

Shape Size

Shape Size determines the size of the shape. The larger the number, the bigger the shape will be marking the plot value.

Draw on Chart

The *Draw on Chart* option, when checked, shows the plot on the chart. Uncheck the Draw on Chart option to make the indicator plot without being visible. This is useful if the plot is used by another indicator or Rule.

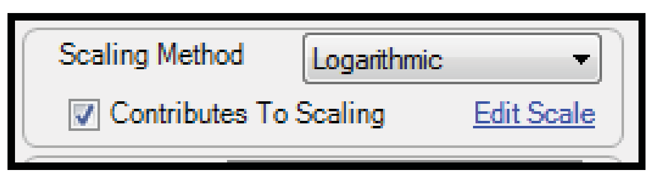


Show Old Results While Calculating

When checked, the plot will show the last calculated values as it calculates new values based on any new data available. When unchecked, the plot will not be visible as it recalculates. This setting is only important for those with Platinum service level where new data is constantly coming in during trading hours. The *Refresh Rate* setting determines how often the plot is calculated.

Scaling Method

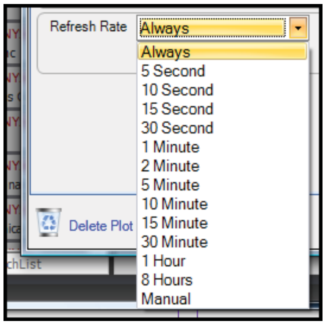
This is another way to adjust the scale used by the plot. For more information on scaling, refer to the Scale Displays section of this manual.



Contributes to Scaling

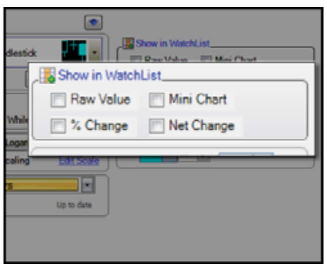
When *Contributes to Scaling* is checked, the plot impacts the highest and lowest values of the scale if the scale is using the plots to determine its range. If unchecked, the plot is still using the scale it is assigned but its values will not impact the maximum and minimum values of the scale.

Refresh Rate



The Refresh Rate sets how often the values for the plot are refreshed for the presence of new data. This is only important with Platinum service where new data is constantly streaming in during market hours.

Show in WatchList

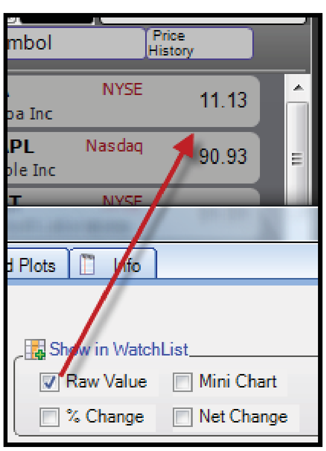


The *Show in WatchList* options create new columns in the Main WatchList based on the plot. Created columns can be sorted by clicking their headers. Repeated header clicks toggle between descending, ascending and unsorted orders. A down arrow in the header indicates the list is sorted by the column values in descending order. An up arrow indicates an ascending sort order for the column values.

If a created column is hidden, expand the width of the Main WatchList window by grabbing the window's right or left border and dragging the widow to make it wider. For more information on WatchList columns and sorting refer to the "Show in WatchList" section on page 63.

There are four *Show in WatchList* options.

Raw Value

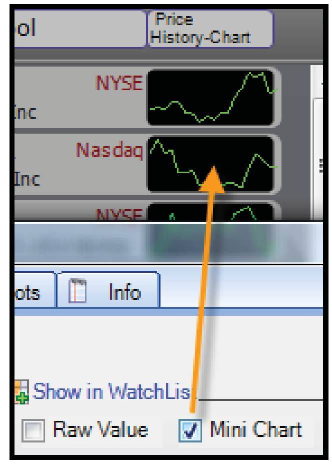


If *Raw Value* is checked, a new WatchList column is created showing the most recent value (close or last) for the plot.

To make the current price of the stock visible in the WatchList, check this on a *Price History* plot. To make the current volume of the stock visible in the WatchList, check this on a *Volume Bars* plot.

Mini Chart

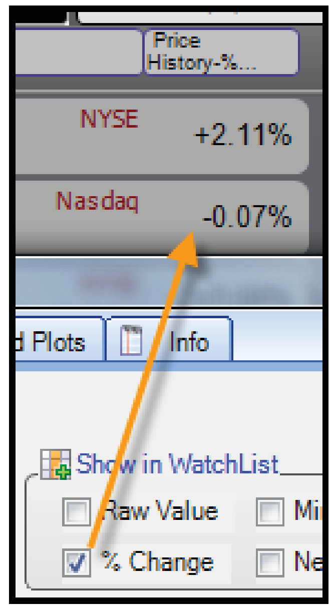
If *Mini Chart* is checked, a new WatchList column is created giving a small chart view for the plot.



The zoom and pan settings for the mini-chart mimic the pan and zoom setting from the chart where the plot is located.

If there are several charts in the Layout and each are in different time frames, it is interesting to create Mini Charts for each *Price History* in each time frame.

% Change

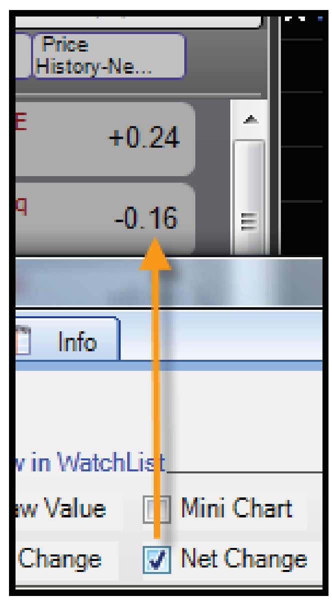


If *% Change* is checked, a new WatchList column is created giving the percent change of the plot from the previous bar to most recent bar.

The time frame of the chart determines the time frame of the change. The period of the change is defaulted to 1 when the column is created.

Edit the column to change the period. For more information on WatchList columns and sorting, refer to the WatchList chapter of this manual. Percent change values should not be used on plots that can register negative values.

Net Change



If *Net Change* is checked, a new WatchList column is created giving the net change of the plot from the previous bar to the most recent bar.

The time frame of the chart determines the time frame of the change.

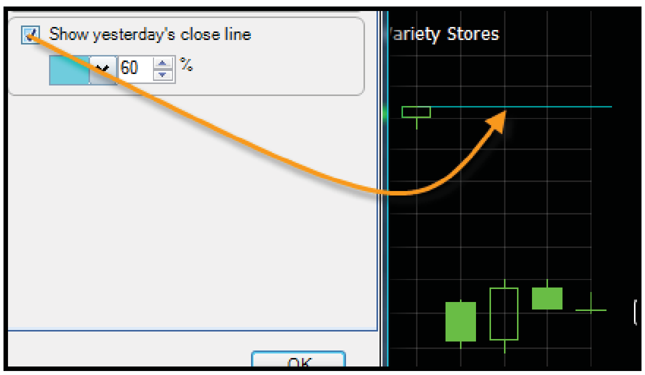
The period of the change is defaulted to 1 when the column is created. Edit the column to change the period. For more information on WatchList columns and sorting, refer to the "Sort Columns" section on page 74.

Show Last Indicator Value

If *Show Last Indicator Value* is checked, a value box appears in the scale for the plot showing the most recent value for the plot. The color of the box's text can be changed with the color picker to the right of the option.

Show Yesterday's Close Line

When editing a *Price History* plot, this option is available. When checked, if looking at a chart that has a time frame lower than daily (hourly, minute, etc.) There is a blue line on the chart that shows the value of the previous day's daily close (last).

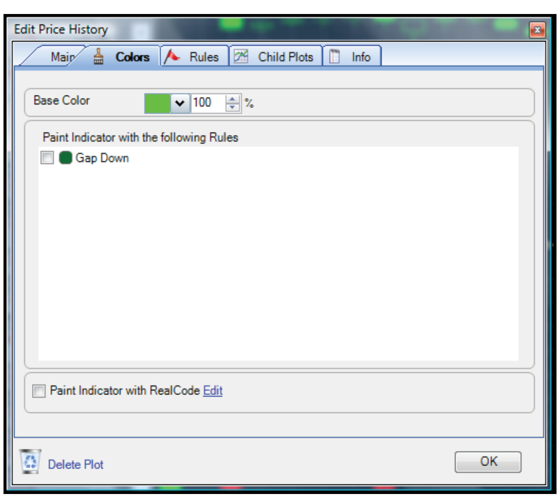


The blue bar draws at the value and extends from the previous day's last daily value to the current data point. The blue line shows both the previous day's value and what data has come in since that previous day's value.

All of the current day's values fall above or below the drawn blue line.

Colors

The *Colors* tab sets the colors used for the plot.

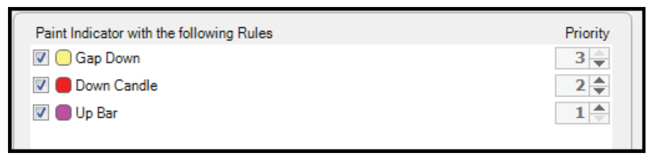


Base Color

The *Base Color* is the color of the plot if there are no Rules or RealCode used to color the plot OR if a bar is false for any Rule or RealCode color. To the right of the base color picker is the opacity setting for the plot. The lower the number percentage, the dimmer the plot will appear on the chart.

Paint Indicator with the following Rules

The *Paint Indicator with the following Rules* section shows all the Rules present on the chart. Check any Rule to use that Rule color to color the plot. The plot will use the Rule's color if that bar (data point) passes the Rule. If more than one Rule is used (checked) a Priority column appears.



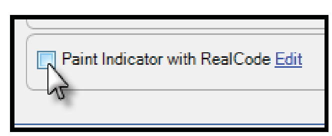
Priority

Priority settings show what priority the Rule has in the coloring. If two Rules are passing on the same bar, the color of the Rule with the lowest priority value (closer to 1) will be used. For example, if two Rules are used to color a plot, the Rule with a priority of "1" will trump the color of the Rule with a priority of "2".

To increase or decrease the priority value use the small arrows to the right of the priority value. Keep in mind the lower the priority number, the higher priority it has.

Paint Indicator with RealCode

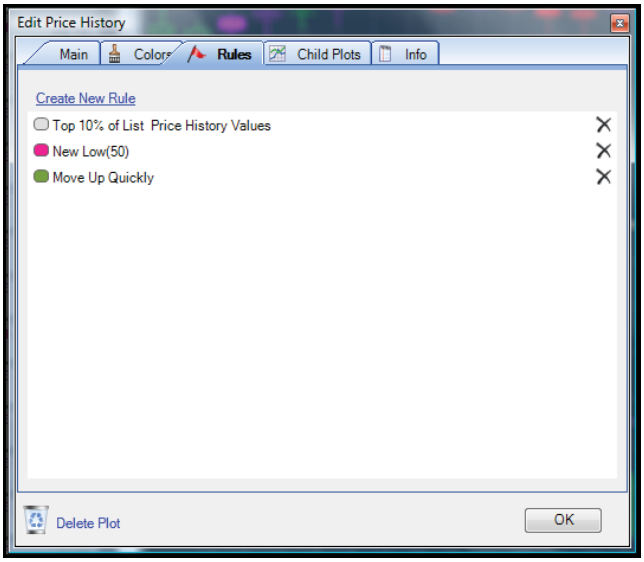
If checked, any RealCode paint brush replaces the base color setting.



Rules still have a higher priority than the RealCode paint brush. To edit or create the RealCode paint brush, click the *Edit* link to the right of the option. For more information on using RealCode, download the RealCode Reference manual on www.StockFinder.com.

Rules

The *Rules* tab is to review and create Rules based on the edited plot.



Create New Rule

Clicking the *Create New Rule* link opens the *Add Rule* window for creating a new Rule based on the plot.

For more information on creating Rules refer to the Rules chapter of this manual.

List of Rules based on Plot

If there are any Rules on the chart that are based on the plot they appear in the window below the Create New Rule link.

The list gives the color and name of the Rule.

Click the Rule's name to bring up the *Edit Rule* window for that Rule. Click the *X* icon to the right of the Rule to delete the Rule from the chart.

For more information on creating and editing Rules refer to the "Plot/Indicator-Based Rules" section on page 57.

Child Plots

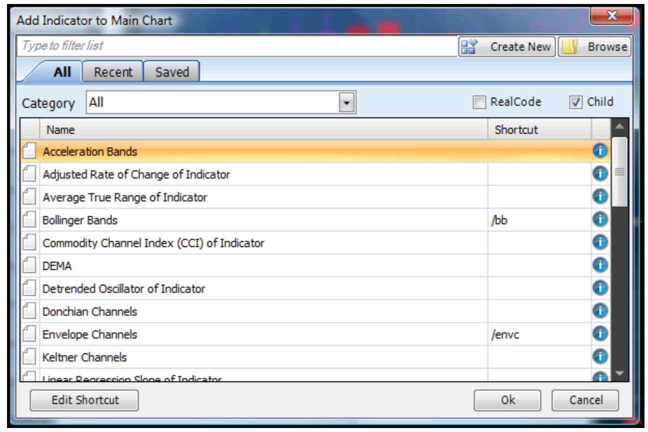
The *Child Plots* tab is for adding and reviewing child plots for a plot. A child plot is any indicator that is based on the plot and on the same scale as the plot. Common child plots are moving averages or Bollinger Bands.

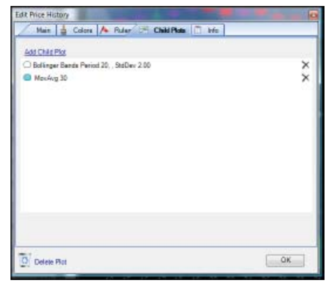
Add Child Plot

Clicking the *Add Child Plot* link brings up the *Add Indicator* window with the *Child* option checked. For more information on adding indicators and the *Add Indicator* window refer to the "Add Indicator" section on page 23.

List of Child Plots using Edited Plot

Below the *Add Child Plot* link is a list of any child plots present on the chart based on the edited plot. The list will give the color and name of the child plot.



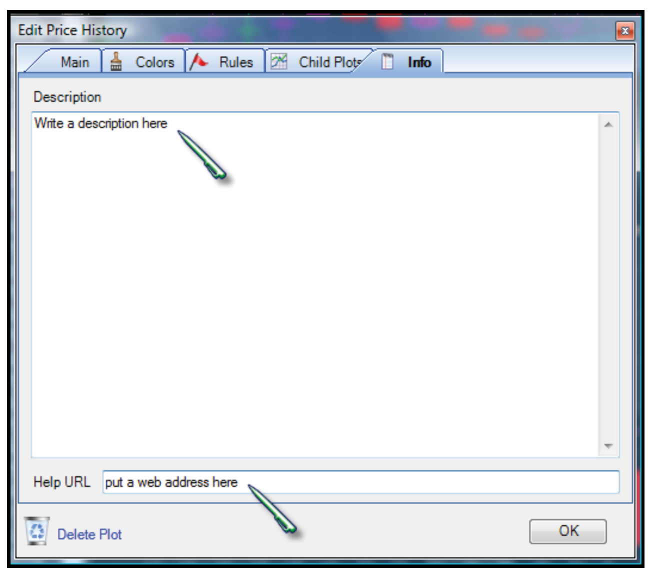


Clicking the name of the child plot opens the *Edit* screen for that plot. All of the options for editing a plot are there.

To the right of every child plot is an *X* icon. Clicking this deletes the child plot from the chart.

Info

The *Info* tab contains any additional information for the plot.



Description

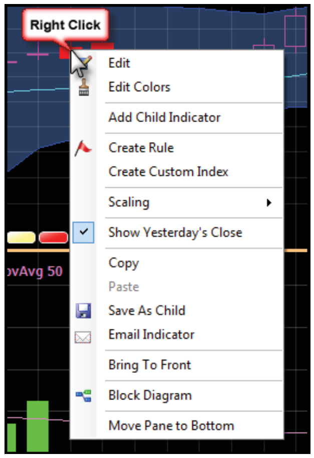
The *Description* area is to add a description or review an already entered description for the plot.

Help URL

The Help URL field offers a URL to an outside site. Clicking on the link opens a browser pointed to that URL. A URL can be edited or entered in this field.

Right-click Options

Right-clicking on any plot brings up a menu of options and actions for that plot.



Edit

Clicking *Edit* opens the *Edit* screen for the plot. For more information on the *Edit Indicator* window refer to the "Editing Plots" section on page 45.

Edit Colors

Clicking *Edit Colors* opens the edit screen for the plot set to the *Colors* tab. For more information on the *Colors* tab of the *Edit Indicator* window refer to the "Colors" section on page 49.

Add Child Indicator

Clicking *Add Child Indicator* opens the *Add Indicator* window with the *Child* option checked. Select the child indicator from the list. For more information on adding indicators and the *Add Indicator* window refer to the "Add Indicator" section on page 23.

Create Rule

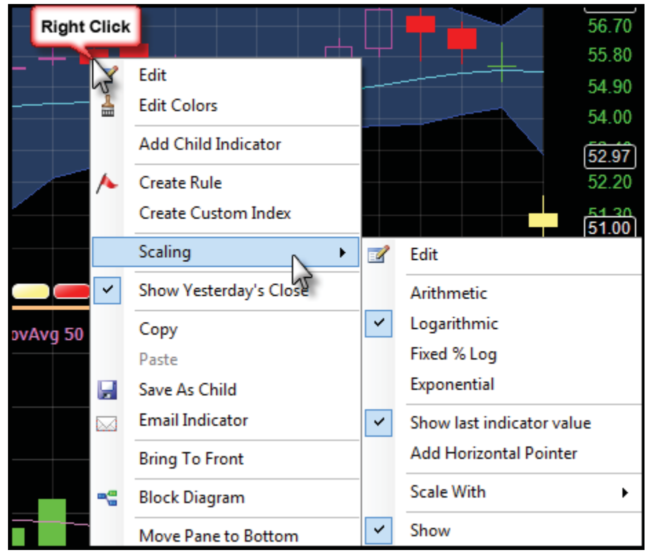
Clicking *Create Rule* opens the *Add Rule* window for adding a Rule based on the indicator. For more information on creating Rules refer to the "Plot/Indicator-Based Rules" section on page 57.

Create Custom Index

Clicking *Create Custom Index* option opens a *New Custom WatchList Index Wizard* window. For more information on the New Custom WatchList Index Wizard refer to the "Custom WatchList Indexes" section on page 81.

Scaling

Floating the mouse over *Scaling* brings up a submenu with nine choices.



Edit

Clicking *Edit* opens the *Scale Editor* for the scale used by the plot. For more information on the *Scale Editor* refer to the Edit (Scale Editor) section of Charts chapter of this manual.

Arithmetic

Clicking *Arithmetic* changes the scale used by the plot to Arithmetic. For more information on this scaling refer to the Edit (Scale Editor) section of Charts chapter of this manual.

Logarithmic

Clicking *Logarithmic* changes the scale used by the plot to Logarithmic. For more information on this scaling refer to the "Scale Displays" section on page 41.

Fixed % Log

Clicking *Fixed % Log* changes the scale used by the plot to a Fixed % Log. For more information on this scaling refer refer to the "Scale Displays" section on page 41.

Exponential

Clicking *Exponential* changes the scale used by the plot to Exponential. For more information on this scaling refer refer to the "Scale Displays" section on page 41.

Show Last Indicator Value

Clicking *Show Last Indicator Value* toggles the visibility of last value of the plot on the scale.

Add Horizontal Pointer

Clicking *Add Horizontal Pointer* adds a Horizontal Pointer to the chart scale used by this plot. For more information on horizontal pointers refer to the "Add Horizontal Pointer" section on page 42.

Scale With

Going to the *Scale With* item brings up a list of the different scale groupings in the pane. The grouping the plot is already a part off will be checked. Select another grouping to change the scale group the plot uses.

Show

Clicking *Show* toggles the display of the scale used by the plot on and off.

Show Yesterday's Close

If right-clicking *Price History* the *Show Yesterday's Close* option is available. Clicking it sets the visibility of the blue line for yesterday's close. For more information on the blue line for yesterday's close refer to the "Show Yesterday's Close Line" section on page 49.

Copy

Clicking *Copy* copies the indicator to the Window's clipboard. It can be pasted using the Paste command.

Paste

Clicking *Paste* pastes the last copied indicator or pane to the chart.

Email Indicator

Selecting *Email Indicator* opens the *Email a Friend* window. Enter an email address to send the indicator to with a subject and body for the email. On the right is a preview of the pane being sent. Clicking *Send* emails the pane (and indicator) to the *Email To* address. The recipient can then save the attached pane and open it in their StockFinder.

Bring to Front

Clicking *Bring to Front* puts the selected plot as the top-most plot. Any other plots in the same pane will draw below or behind the plot.

Block Diagram

Clicking *Block Diagram* opens the *Properties* window for the plot. This window shows the Block Diagram generating the plot. The diagram can be changed.

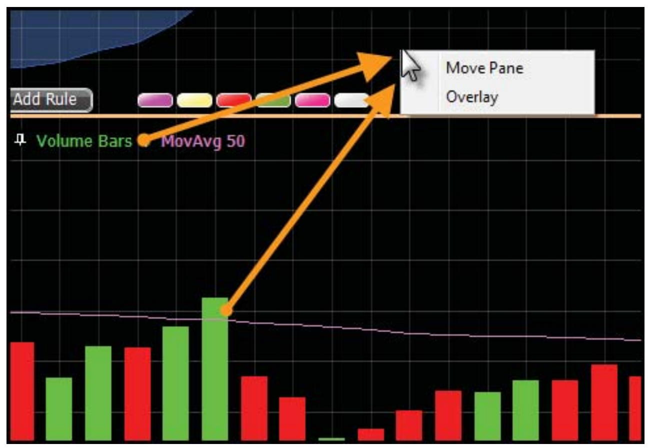
Move Pane to Top/Bottom

When *Move Pane to Top/Bottom* is selected, the pane containing the plot is moved up (or down) to the top (or bottom) of the chart.

Moving and Overlaying Plots

A plot can be grabbed by clicking and dragging the plot itself or by clicking and dragging its name in the legend.

Once grabbed, drag the plot from its current pane to the desired location. Release the mouse and it asks if to overlay or move the pane.



Move Pane

Selecting *Move Pane* moves the entire pane that contained the indicator dragged to the location.

Overlay

If *Overlay* is selected, the plot grabbed overlays in the pane. It brings its own scale with it and won't be scaled with the other items in its new pane. Right-click the placed plot to scale it with another group in the pane.

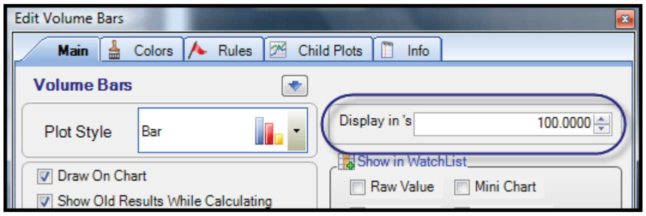
Settings for Popular Indicators

Many indicators (plots) have some unique settings in their *Edit* screens. There are no universally right, wrong, better or worse settings.

What follows are explanations of the settings for some of the common indicators available in StockFinder.

Volume Bars

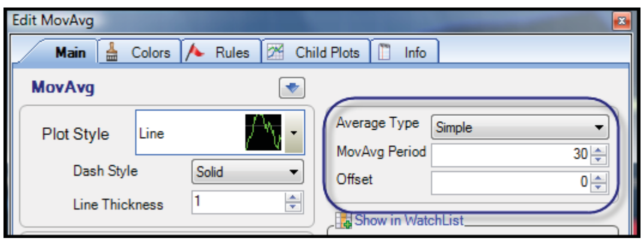
There is one unique setting for the Volume Bars plot. To change how volume is displayed use the *Display in 's* setting. By default it is set to 100.0000 as the raw volume is delivered in hundreds. This means a volume number displayed as 1000 is a volume of 1,000 hundreds or 100,000 shares. 100,000 is a hundred 1000.



To set the volume to display as actual volume, change the *Display in* setting from 100.0000 to 1.0000 (display in ones).

Moving Averages

A moving average plot has three unique settings.



Average Type

There are three types of averages available.

Simple

A simple moving average gives equal weight to each data point for the period. If the period is 3 and the last three data points are 3, 4 and 5 the most recent average value would be (3+4+5)/3=4 (divide by three because there are three data points).

Exponential

An exponential moving average gives more weight to the more recent data. If the data points are 3, 4 and 5 with 3 being the most recent and 5 being the oldest, the 3 has more of an influence on the value of the average than the 5. This causes the average to react more to the more recent data point.

Front Weighted

A front-weighted average, like an exponential average, allows the most recent data being averaged to impact the average value more than older data. It is calculated differently than exponential averages but it also gives recent data more weight.

MovAvg Period

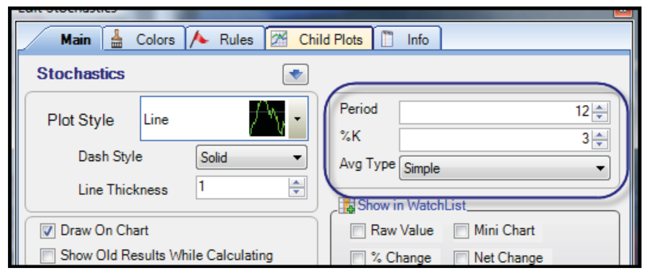
The *MovAvg Period* sets the period of the moving average. Popular settings include 200, 100, 50, 20, 10 and 5.

Offset

The *Offset* slides the moving average to the right or left on the chart. It does not change how it is calculated, only where on the Y (date) axis it appears. Negative values slide the average to the left and positive values slide it to the right.

Stochastics

Stochastics has two plots; the %K (white) and the %D (blue). Each have their own unique setting options.



Stochastics %K

Period

The *Period* is the period the stochastics looks at for its calculation. If set to 12 it will look at the last 12 bars for its values.

%K

% K is the average period used to smooth the raw stochastic values.

Average Type

Average Type is the type of average used by the *%K* to smooth the raw stochastic values.

Stochastics %D

The *Stochastics %D* line is a moving average of the *%K* values. There is no difference between a *%D* of stochastics and a moving average of stochastics.

%D

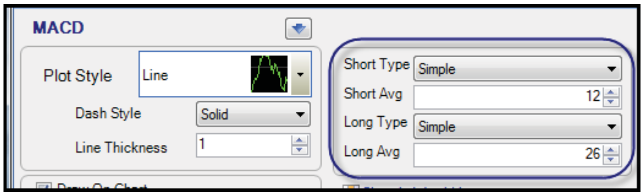
The *%D* is the period of the average of the *%K* line.

Avg Type

This is the type of average used to calculate the %D.

MACD

There are two common MACD plots; MACD and MACD Histogram. The MACD (not the histogram) comes with two plots. The second (turquoise) line is often called the Trigger and is an average of the yellow MACD line.



MACD

The MACD line is the difference of two moving averages of price (a short and a long average). The short is meant to be a smaller period moving average than the long.

Short Type

The *Short Type* sets the type of moving average used by the short average.

Short Avg

The *Short Avg* sets the period of the short moving average. It is meant to be a smaller period than the long.

Long Type

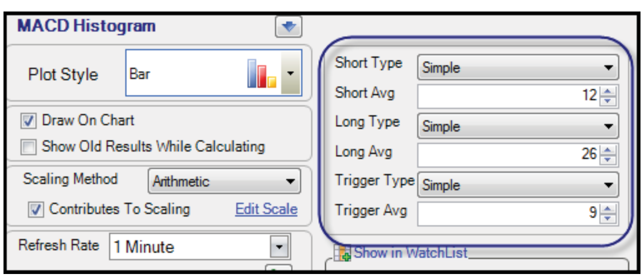
The *Long Type* sets the type of moving average used by the long average.

Long Avg

The *Long Avg* sets the period of the long moving average. It is meant to be a larger number than the short.

MACD Histogram

The MACD Histogram is the difference between a MACD line and its trigger.



Short Type

The *Short Type* sets the type of moving average used by the short average.

Short Avg

The *Short Avg* sets the period of the short moving average. It is meant to be a smaller period than the long.

Long Type

The *Long Type* sets the type of moving average used by the long average.

Long Avg

The *Long Avg* sets the period of the long moving average. It is meant to be a larger number than the short.

Trigger Type

The *Trigger Type* sets the type of moving average used by the trigger.

Trigger Avg

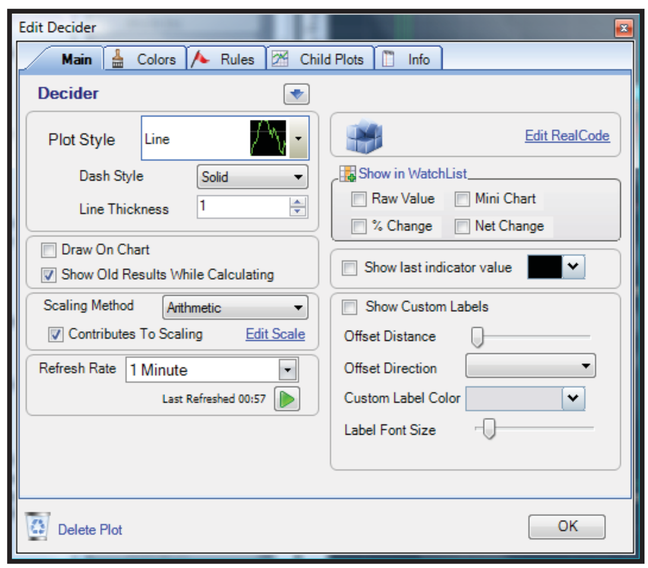
The *Trigger Avg* sets the period of the trigger average.

Other Indicators

There are dozens more indicators available in the program. In most cases the unique settings for these indicators are obvious and/or traditional. The help file is a good resource to learn more about any of the indicators/plots available in the program.

Editing RealCode Indicators

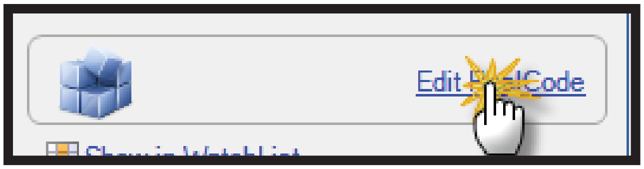
When an indicator created in RealCode is clicked on an *Edit* window opens with several options. Most of the options are identical to the options available when editing an indicator from the library. For more information on these options refer to the "Editing Plots" section on page 45.



There are a few options unique to RealCode indicators.

Edit RealCode

When the *Edit RealCode* link is clicked a *RealCode Editor* opens with the code behind the indicator. If the indicator is password protected, a prompt for the password appears.

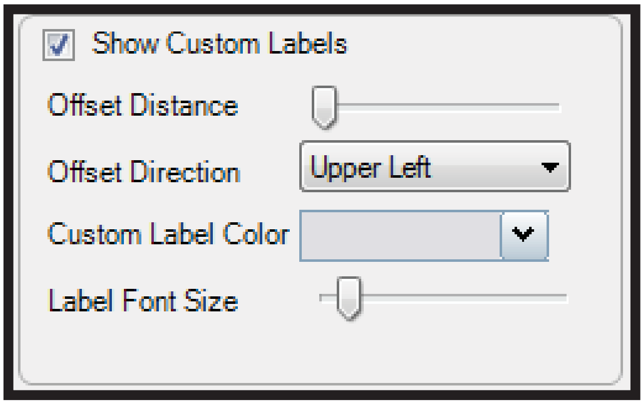


Custom Labels

Below the *Show last indicator value* option is the *Custom Labels* section with several options. For more information on RealCode and Custom Labels, download the RealCode Programmer's Reference available on www.StockFinder.com.

Show Custom Labels

If Show Custom Labels is checked and there is code for a Custom Label in the indicator's RealCode, the Custom Labels are drawn on the indicator. If not checked, then Custom Labels are not visible for that indicator.



Offset Distance

The *Offset Distance* slider sets how far the label is offset from the drawn indicator plot. Moving the slider to the right increases the distance. Moving the slider to the left decreases the offset distance.

Offset Direction

The *Offset Direction* setting determines where, relative to the plot, the label appears. This can be set to *Upper Left, Above, Upper Right, Right, Lower Right, Below, Lower Left* or *Left*.

Custom Label Color

The *Custom Label Color* sets the color of the Custom Label.

Label Font Size

The *Label Font Size* slider sets the size of the label's font on the chart. Moving the slider to the right increases the font size. Moving the slider to the left decreases the font size.

7 Rules

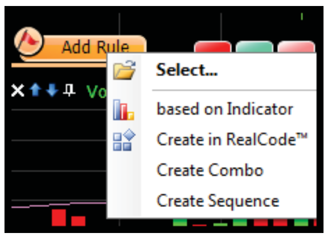
Rules are true or false conditions based on either a plot on the chart or RealCode. There are several ways to create or add a Rule to the chart.

Plot/Indicator-Based Rules

Rules can be created based on plots (indicators) on the chart. There are many ways to open the *Add Rule* window. The easiest way is to click the *Add Rule* button and click the *Based on Indicator* from the menu.

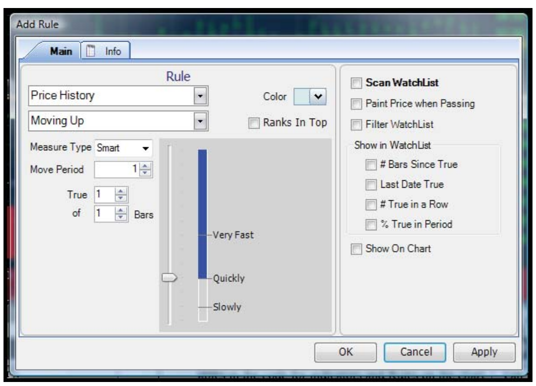
Creating a Plot-based Rule

The *Add Rule* window has two tabs. Below both tabs is a *Delete Rule* link that, when clicked, will delete the Rule from the chart.



Main

The *Main* tab is broken into two sections; the *Rule* section on the left and the list of ways to use the Rule on the right.



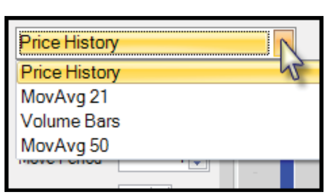
Rule Section

The left side of the *Add Rule* window is where the Rule is created, set and limited. In the top right of the Rule section sets the color for the Rule with the color picker.

The *Ranks in Top* option, when checked, automatically changes the Rule's *Action* to *Ranks in Top of WatchList*. For more information on *Ranks in Top of WatchList* refer to the "Ranks in Top of WatchList" section on page 60.

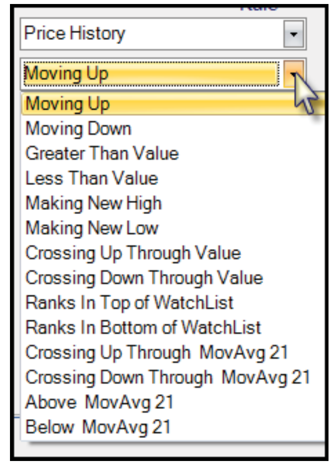
Rule Plot

The first menu at the top-left of the *Add Rule* window is a menu of all the plots on the chart. Select the plot from the list for the Rule to use (to be based on).



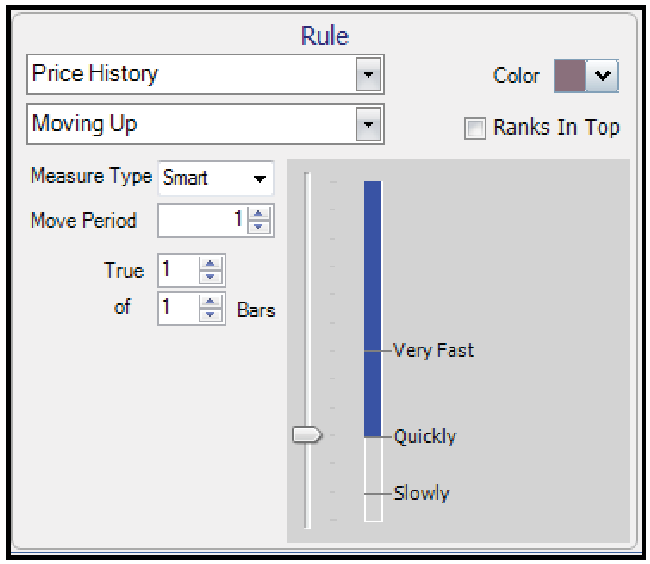
Rule Actions

There are several possible actions for the selected plot. Most of the *Rule Actions* have unique options (covered below) but most share the *True X of X Bars* option.



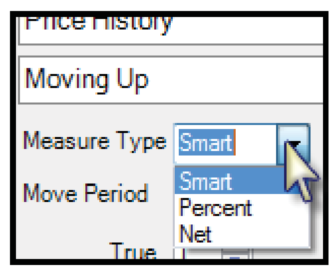
Moving Up

The *Moving Up* action looks for the plot to be moving up from a previous point. Choosing this action brings up several options.



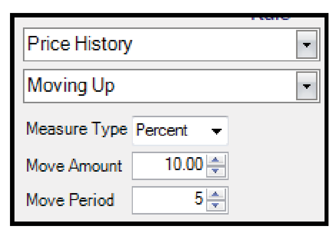
Measure Type

There are three types of Measure Types; *Smart*, *Percent* and *Net*.



If Percent is chosen, set the minimum percent move amount in the *Move Amount* field.

A value of 10 requires the stock move up at least 10 percent. The *Move Period* field sets, in bars, the period of the move.



For a move of at least a 10% over the last five bars, set the *Move Amount* to 10 and the *Move Period* to 5.

When *Net* is chosen there are the same options. For a move of least 10 values over the last two bars set the *Move Amount* to 10 and the *Move Period* to 2.

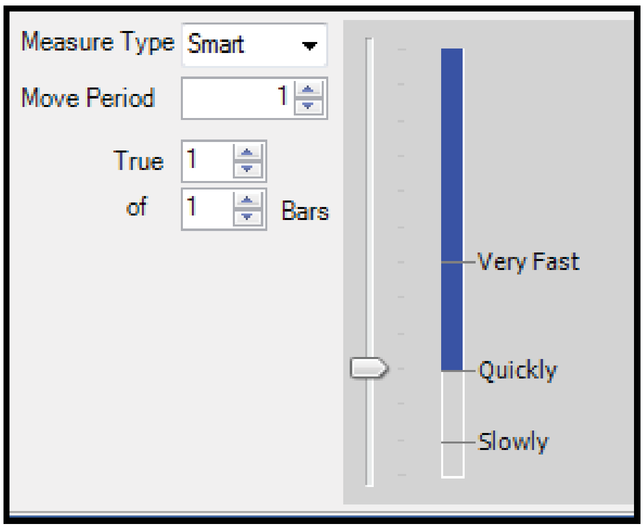
If *Smart* is chosen there are two options; the *Move Period* and where the Smart Measure Slide is set.

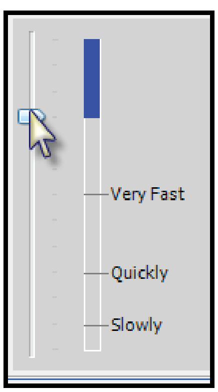
Move Period

Move Period sets the period of the move in bars. For example, to look for a certain move up for the last bar, set the *Move Period* to 1. To look for a move up over the last eight bars, set the *Move Period* to 8.

Smart Measure Slide

The slide qualifies the minimum allowed move to pass the Rule.

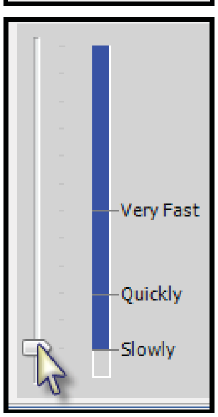




The handle on the left of the slide can be moved up or down to any level.

There are four major levels on the slide. If the slide is brought to the very bottom (the blue shading covers the entire slide) then any move up will qualify, regardless of how small the move up is.

If the slide is set to anything above the bottom there is a minimum required move to qualify that the Rule passes.



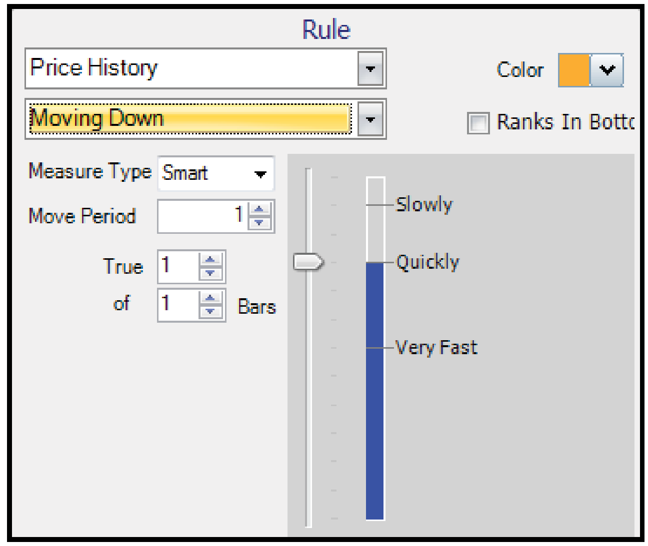
These minimums (*Slowly*, *Quickly*, *Very Fast*) are based on a proprietary function called Smart Measure.

Smart Measures look at how the plot normally moved in the past and then sets minimums to qualify as *Slowly*, *Quickly*, etc.

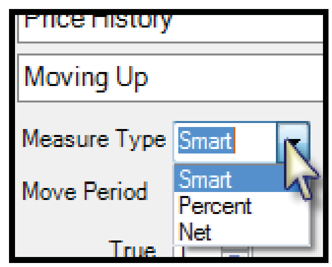
These Smart Measures are set by the program and match the visual move on the chart. The higher the slide is set, the greater the minimum move needs to be to allow the Rule to pass.

Moving Down

The *Moving Down* action looks for the plot to be moving down from a previous point. Choosing this action brings up several options.

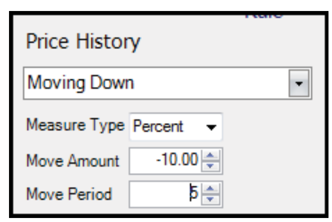


Measure Type



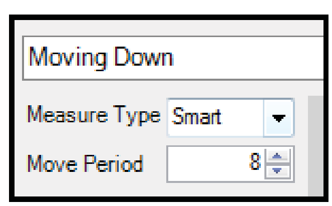
There are three types of Measure Types; *Smart*, *Percent* and *Net*.

If *Percent* is chosen, set the minimum percent move amount in the *Move Amount* field.



A value of -10 requires the stock move down at the most -10 percent or worse. The *Move Period* field sets, in bars, the period of the move. For at most a -10% move down over the last five bars, set the *Move Amount* to -10 and the *Move Period* to 5.

Net has the same options. For a move down of -3 values (or worse) over the last three bars set the *Move Amount* to -2 and the *Move Period* to 3.



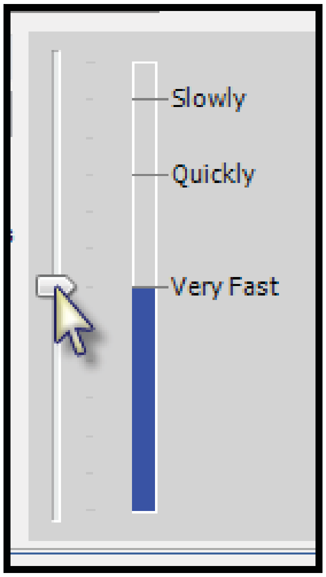
If *Smart* is chosen there are two options; the *Move Period* and where the Smart Measure Slide is set.

Move Period

This sets the period of the move in bars. For example, to look for a certain move down for the last bar, set the *Move Period* to 1. To look for a move up over the last eight bars, set the *Move Period* to 8.

Smart Measure Slide

This slide qualifies the minimum allowed move to pass the Rule. The handle on the left of the slide can be moved up or down to any level.



There are four major levels on the slide. If the slide is brought to the very top (the blue shading covers the entire slide) then any move down will qualify, regardless of how small the move is.

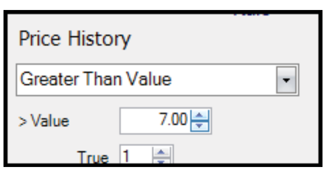
If the slide is set to anything below the top there will be a maximum required move to qualify that the Rule passes.

These minimums (*Slowly*, *Quickly*, *Very Fast*) are based on a proprietary function called Smart Measure.

Smart Measures look at how the plot normally moved in the past and then sets minimums to qualify as *Slowly*, *Quickly*, etc.

These Smart Measures are set by the program and match the visual move on the chart. The lower the slide is set, the worse the minimum move needs to be to allow the Rule to pass.

Greater Than Value

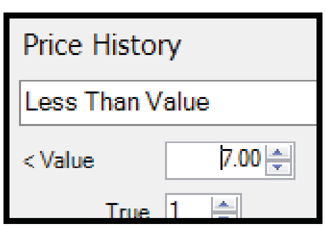


The *Greater Than Value* action looks for the value of the plot to greater than or equal to a certain value.

To set the minimum value allowed for the Rule to pass, enter it in the > *Value* field. If the plot chosen in the *Rule Plot* menu needs to be at least a value of seven or greater then set the > *Value* to 7.

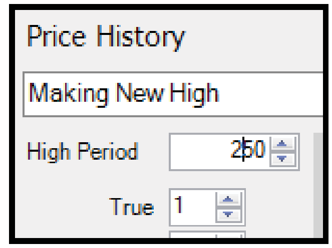
Less Than Value

The *Less Than Value* action looks for the value of the plot to be less than or equal to a certain value.



To set the maximum value allowed for the Rule to pass, enter it in the < *Value* field. If the plot chosen in the Rule Plot menu needs to be at most a value of seven or less then set the < *Value* to 7.

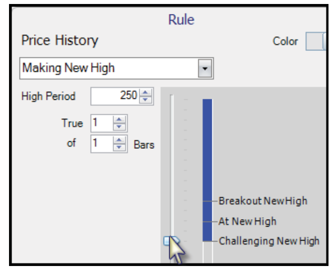
Making New High



This action looks for the plot versus its highest value for previous bars.

The *High Period* field sets how far back the program looks to determine the previous high to compare the current value to.

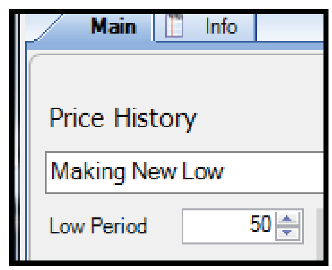
For a 250-bar high set the *High Period* to 250.



The slider sets if the current value should be challenging the new high (close to, at or above), at the new high (not a new high but matching a previous high) or a breakout new high (the current value is greater than any value in the previous period).

The slider is inclusive of everything above it. If the slider is set to *Challenging New High* it will include any stock that are also *At New High* or at a *Breakout New High*. It only excludes items below the slider. If set to *At New High* it will include those challenging new highs.

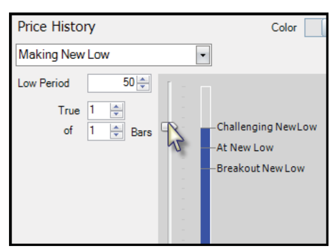
Making New Low



The *Making New Low* action looks for the plot to record a lower or lowest value for the previous X bars.

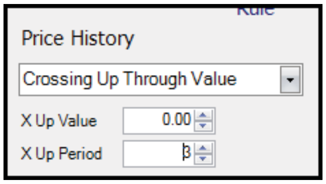
The *Low Period* sets how far back the program looks to determine the previous low to compare the current value to. If you want a 50-bar low set the *Low Period* to 50.

The slider sets if the current value can be challenging the new low (close to, at or below), at the new low (not a new low but matching a previous low) or a breakout new low (the current value is less than any value in the previous period).



The slider is inclusive of everything below it. If the slider is set to *Challenging New Low* it will include any stock that is also *At New Low* or *Breakout New Low*. It only excludes items above the slider. If set to *At New Low* it will not include those challenging new lows.

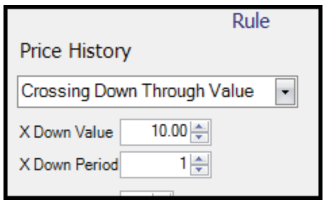
Crossing Up Through Value



The *Crossing Up Through Value* action looks for the plot to be above or at a certain value on the current bar but below or at it on a previous bar. The *X Up Value* field is where the value is set. The *X Up Period* is where the previous bar is set.

For the plot to cross zero in the last 3 bars (and it is still above zero) set the *X Up Value* to zero and the *X Up Period* to three.

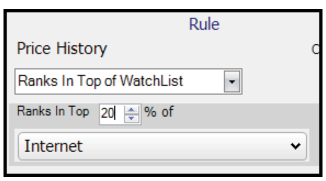
Crossing Down Through Value



The *Crossing Down Through Value* action looks for the plot to be below or at a certain value on the current bar but above or at it on a previous bar. The *X Down Value* field is where the value is set. The *X Down Period* is where the previous bar is set.

For the plot to cross ten on the most recent bar (it is below ten and just crossed down) set the *X Down Value* to ten and the *X Down Period* to one.

Ranks in Top of WatchList



The *Ranks in Top of WatchList* action looks for the value of the plot to be greater than or equal to a certain percentage of a particular WatchList. *The Ranks in Top* field is where the percentage of the list that the value of the plot falls at or above is set. The WatchList pull down menu sets the WatchList to use for the comparison.

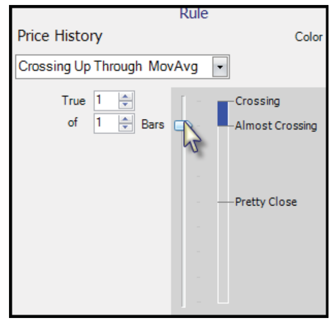
For the value of the plot to be in the top 20% of the *Internet* WatchList, set the *Ranks in Top* field to 20 and then select *Internet* from the WatchList menu. The only stocks that would pass are the ones with a value for the plot that is greater than or equal to 80% of the plot values for all the stocks in the *Internet* WatchList.

Ranks in Bottom of WatchList

The *Ranks in Bottom of WatchList* action looks for the value of the plot to be less than or equal to a certain percentage of a particular WatchList. The *Ranks in Bottom* field is where the percentage of the list that the value of the plot falls at or below is set. The WatchList pull down menu sets the WatchList to use for the comparison.

For the value of the plot to be in the bottom 10% of the *Standard and Poors 100 Component Stocks* WatchList, set the *Ranks in Bottom* field to 10 and then select *Standard and Poors 100 Component Stocks* from the WatchList menu. The only stocks that pass are the stocks with a value for the plot that is less than or equal to 90% of the plot values for all the stocks in the *Standard and Poors 100 Component Stocks* WatchList.

Crossing Up Through X



The *Crossing Up Through X* action looks for the plot to cross up through another plot on the same scale as the plot chosen in the Rule Plot menu above it.

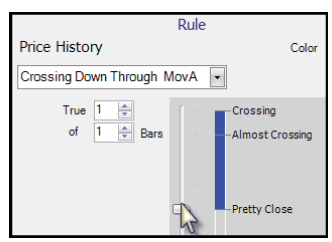
The Rule Plot's value on the current bar will be above the value of the other plot and the value of the Rule Plot in the previous bar will be below the value of the other plot.

The slider qualifies the crossing. For actual crosses, set the slider to the top (*Crossing*). For stocks approaching or threatening to cross, move the slider down to *Almost Crossing* or *Pretty Close* (or lower).

The slider is inclusive of everything above it so sliding down to *Almost Crossing* includes those that did cross.

For *Price History* to cross up through its moving average, set the *Rule Plot* to *Price History*, the *Action* to *Crossing Up Through MovAvg X* and the slider to *Crossing*.

Crossing Down Through X



The *Crossing Down Through X* action looks for the plot to cross down through another plot on the same scale as the plot chosen in the *Rule Plot* menu above it.

The *Rule Plot's* value on the current bar will be below the value of the other plot and the value of the *Rule Plot* in the previous bar will be above the value of the other plot.

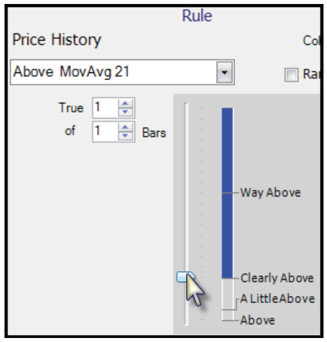
The slider qualifies the crossing. For actual crosses, set the slider to the top (*Crossing*). For stocks approaching or threatening to cross, move the slider down to *Almost Crossing* or *Pretty Close* (or lower).

The slider is inclusive of everything above it so sliding down to *Almost Crossing* includes those that did cross.

For *Price History* to cross down through its moving average, set the *Rule Plot* to *Price History*, the *Action* to *Crossing Down Through MovAvg X* and the slider to *Crossing*.

Above X

The *Above X* action requires that the *Rule Plot's* value on the current bar is a higher value than the X plot's value (X being another plot on the same scale as the *Rule Plot* on the chart).



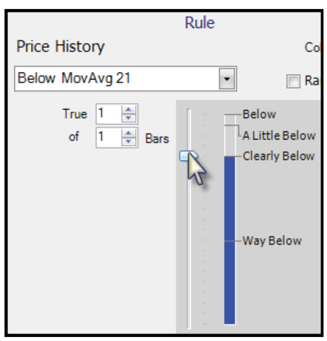
The slider qualifies how far above the *Rule Plot* is versus the other plot.

If set to *Above* (the slider is at the bottom) then all stocks with a *Rule Plot* value greater than the value of the other plot (however small the difference) pass the Rule. Moving the slider up qualifies how far above the Rule Plot's value need to be to pass the Rule.

The slider is inclusive of everything above it. Moving the slider to *Clearly Above* includes all that are *Way Above* while excluding those *A Little Above*.

Below X

The *Below X* action requires that the *Rule Plot's* value on the current bar is a lower value than the X plot's value (X being another plot on the same scale as the Rule Plot on the chart).



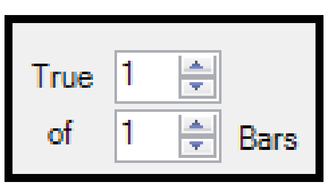
The slider qualifies how far below the *Rule Plot* is versus the other plot.

If set to *Below* (the slider is at the top) then all stocks with a *Rule Plot* value less than the value of the other plot (however small the difference) pass the Rule.

Moving the slider down qualifies how far below the Rule Plot's value needs to be to pass the Rule. The slider is inclusive of everything below it. Move the slider to *Clearly Below*, and all that are *Way Below* are included while those *A Little Below* are excluded.

True X of X Bars Option

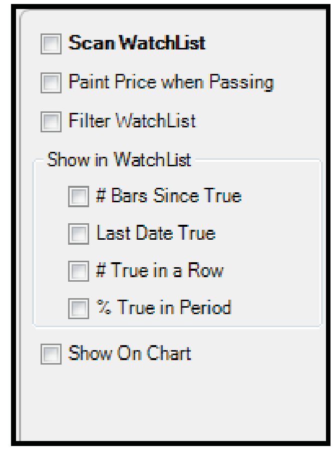
The *True of X of X Bars* option sets how often the Rule needs to pass over a certain number of bars to pass the overall Rule. By default this will always be True 1 of 1 Bars. This means the Rule will test one bar and if the Rule is true for that one bar, the Rule passes.



For the Rule to be true three of the last five bars, set this option to *True 3 of 5 bars*. It will look at the last five bars and if the Rule passes on 3 or more of these 5 bars, the overall Rule will pass (be TRUE).

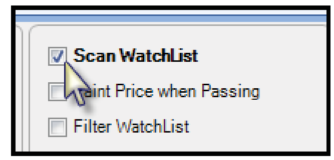
Using a Rule

There are several options for using the Rule created on the left of the *Add Rule* Window. One can check as many of these options as desired. A single Rule can be used different ways simultaneously.



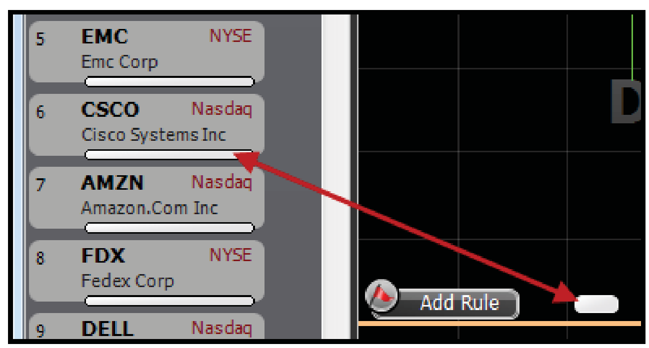
Scan WatchList

When this is checked the Rule is used to scan the active Main WatchList. When checked all tickers in the Main WatchList that pass the Rule receive a Scan Light and are grouped to the top of the WatchList

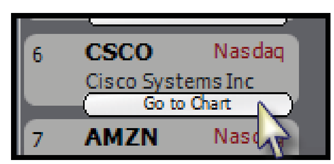


Scan Light

In the Main WatchList, all stocks the pass the Rule receive a scan light at the bottom of their cell. The scan light has the same color as the color assigned to the Rule. If a stock passes more than one Rule it will have a light for each of the Rules at the bottom of the cell.



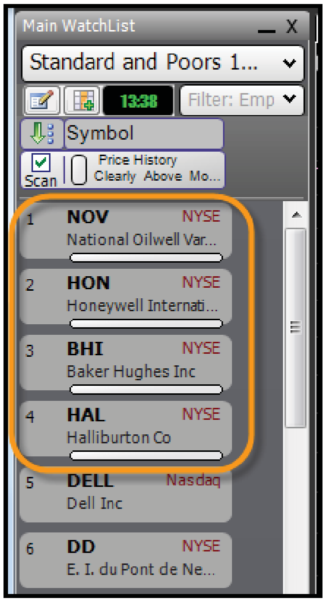
Clicking on the scan light under any cell causes the chart with that Rule to come to the foreground (if tabbed behind something else) and the Rule "jumps" on the chart to make it easy to find.



WatchList Grouping by Lights

If there is only one Rule scanning the WatchList, all of the stocks are in two potential groups. The first group is the stocks that pass the Rule (have the scan light). They are grouped to the top of the WatchList. There is no specific order if more than one stock passes the Rule. If no stocks pass the Rule, there is no first grouping. All stocks are part of the second grouping – stocks that do not pass the Rule.

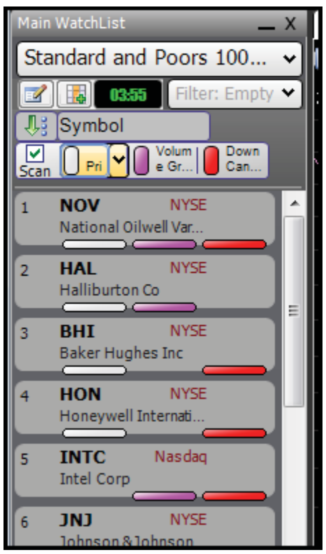
The second group (stocks that do not pass the Rule) are grouped together (in no particular order) under any stocks in the first group (stocks that do pass the Rule, if there are any).



If there are multiple Rules scanning the WatchList the order of the groupings work based on a priority system.

Scan Lights appear on stocks that pass their Rules. *Scan Light* column headers show in a row above the WatchList.

They are prioritized from left to right. A Rule that is left of any other Rules has priority. The Rule to the farthest left has the top priority in the scan.



The stocks are grouped in the scan based on which Rules they pass and the priority of those Rules. At the top of the scanned WatchList first will be all the stocks that pass the first-priority Rule. Within that group they will be ordered next by any that pass the first and second-priority Rule. Within the group that passes the first and second-priority Rules next will be those that pass the first, second and third-priority Rule and so on.

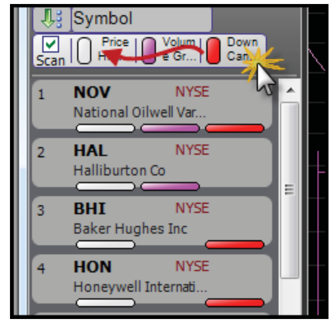
The next major grouping are the stocks that do not pass the first-priority Rule but do pass the second-priority Rule. This group orders based on the priority of the other Rules they pass.

This pattern of grouping continues with the last grouping being the stocks that only pass the lowest (right-most column) Rule and no other rules.

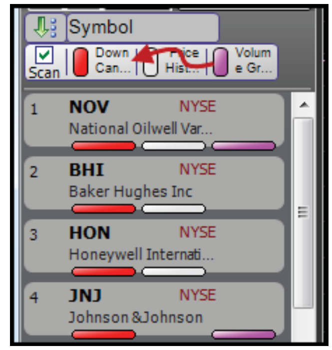
Stocks are grouped based on the priority of all the rules they pass. Stocks that pass the same exact Rules are grouped together. Stocks that pass the exact same rules are not in a particular order, they are only grouped together.

You can change from the default scan priority setting to grouping based solely the number of rules each symbol passes in the WatchList Properties window of the Main WatchList. For more information on the Prioritize Scan option in the WatchList Properties refer to the “WatchList Properties” section on page 69.

Changing Rule Priority



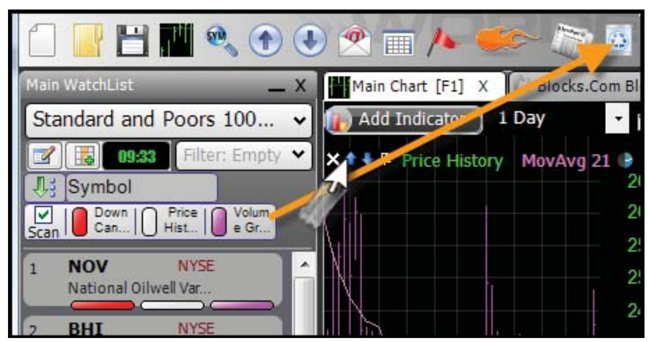
There are a few ways to change the priority of the Rules in the WatchList. By default, when a new Rule is clicked to Scan WatchList it is placed at the left-most column and given the first priority. As new Rules are scanned for the other Rules are shifted to the right and drop in priority.

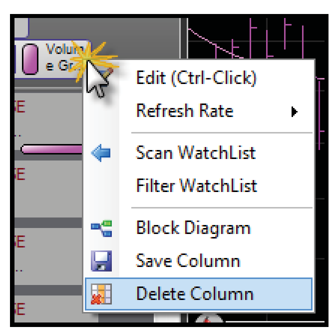


To immediately make any Rule the first priority, click the column header for that Rule. It will slide to the far left making it the first priority Rule. Click and drag any Rule column and move it to any location relative to the other Rule Columns to change its priority. Again, priority runs from left to right.

Removing a Rule from a Scan

There are several ways to remove a Rule from a WatchList scan. Removing the Rule column from the scan does not remove the Rule from its chart. Clicking and dragging the Rule column to the trash icon on the Icon Menu deletes the column.



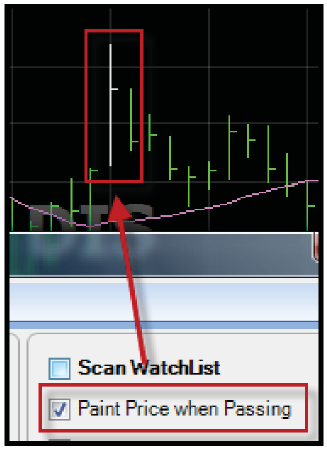


Floating the mouse over the Rule column and clicking the down arrow that appears on the right of the column header then clicking *Delete Column* removes it.

Clicking and editing the Rule on the chart and Unchecking the *Scan WatchList* option removes the Scan Light.

For more information on WatchList columns and Rule columns refer to the “Sort Columns” section on page 74.

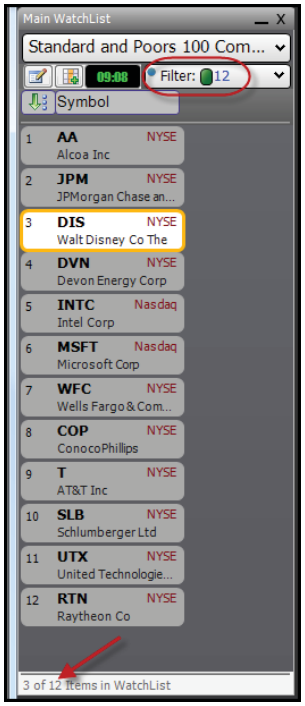
Paint Price when Passing



When *Paint Price when Passing* is checked, the *Price History* plot (on the same chart as the Rule) colors any bar passing the Rule the same color as the Rule.

Filter WatchList

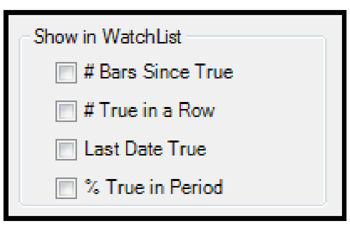
When *Filter WatchList* is checked the Rule is added to the filter for the Main WatchList.



The Main WatchList only shows stocks that pass any Rules in its filter. If a stock does not pass all of the *Filter* Rules, it is not shown in the WatchList. For more information on filtering the Main WatchList refer to the “Filter” section on page 73.

Show in WatchList

The *Show in WatchList* options create either numeric or date columns in the Main WatchList based on the Rule. For more information on WatchList columns refer to the “Sort Columns” section on page 74. There are four options for *Show in WatchList*.



Bars Since True

When *# Bars Since True* is checked a numeric column is added to the Main WatchList. For every stock in the WatchList a value will appear in the column. This value shows the number of bars since the last time the Rule passed (was true).

A value of zero means the rule is passing the current bar. A value of > *XX bars* means it has been more than *XX* bars since the Rule passed. The Rule has not passed for any of the last bars set to test by the column.

Float the mouse over the column header and click the down arrow that appears then click *Edit*. In the *Edit* window the *Max Bars To Test* value increases the number of bars the program should check for the rule passing.

To sort the WatchList by this column, click the column header. Repeated clicks of the header toggles between ascending, descending and no sort orders.

Last Date True

When *Last Date True* is checked a date column is added to the Main WatchList. For every stock in the WatchList a date appears. This value shows the date when the last time the Rule passed (was true).

A value of > *XX* means it has been more than *XX* bars since the Rule passed. The Rule has not passed for any of the last bars set to test by the column.

Float the mouse over the column header and click the down arrow that appears then click *Edit*. In the *Edit* window the *Max Bars To Test* value increases the number of bars the program should check for the rule passing.

To sort the WatchList by this column, click the column header. Repeated clicks of the header toggles between ascending, descending and no sort orders.

True in a Row

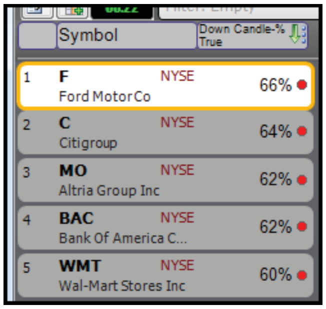
When *# True in a Row* is checked a numeric column is added to the Main WatchList.

For every stock in the WatchList a value appears in the column. This value shows the number of bars in a row that the Rule passed (was true). The highest possible value for this column is limited by the number of bars the column is testing.

Float the mouse over the column header and click the down arrow that appears then click *Edit*. In the *Edit* window the *Max Bars To Test* value increases the number of bars the program should check for the rule passing.

To sort the WatchList by this column, click the column header. Repeated clicks of the header toggles between ascending, descending and no sort orders.

% True in Period

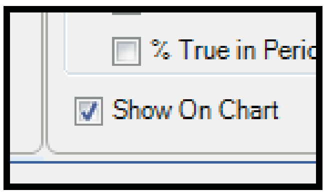


When *% True in Period* is checked a numeric column is added to the Main WatchList. For every stock in the WatchList a value appears in the column. This value shows the percent of bars tested that passed the Rule. A value of zero means the Rule never passed in the bars tested.

Float the mouse over the column header and click the down arrow that appears then click *Edit*. In the *Edit* window the *Max Bars To Test* value increases the number of bars the program should check for the rule passing.

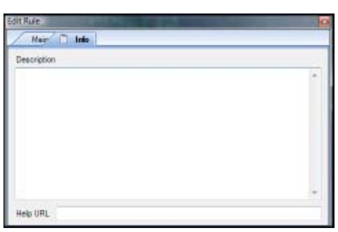
To sort the WatchList by this column, click the column header. Repeated clicks of the header toggles between ascending, descending and no sort orders.

Show on Chart



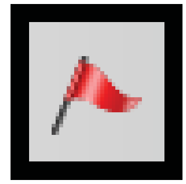
Checking the *Show on Chart* option opens a bar at the bottom of the *Price History* pane where a horizontal line will appear at any date or time when the Rule passed. The horizontal bar is the same color as the Rule. If a rule passes several bars in a row the horizontal bars will appear as blocks of color.

Info

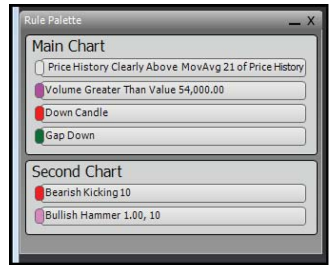


The *Info* tab is where one can read, write or edit a description of the Rule. Below the description is a field to click or edit a URL link.

Rule Palette



The *Rule Palette* can be opened with the flag icon along the top icon menu. By default the *Rule Palette* will open under the Main WatchList. The palette shows all of the Rules in the Layout grouped by the chart the Rule is on.

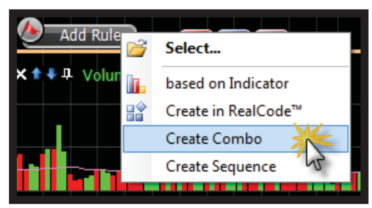


Clicking any rule in the palette opens the Edit window for the Rule. Clicking and dragging a Rule from the palette to any WatchList puts Rule in that WatchList.

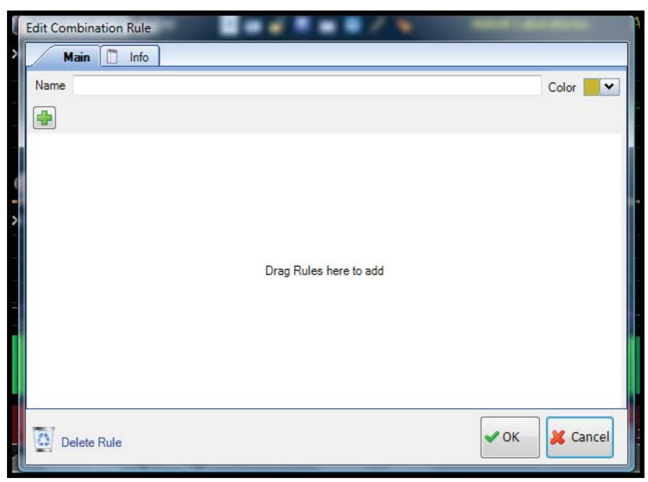
Dragging a Rule from the Palette to the BackScanner Rules makes it a trade rule for a BackScan. For more information on the ways to use a Rule in a WatchList refer to the “Scanning” section on page 77. For more information on using a Rule in a BackScan refer to the “BackScanner” section on page 85.

Right-click any Rule in the palette for a list of options available for that Rule.

Combination Rule

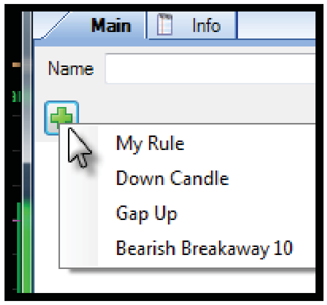


Rules can be combined together into one combination Rule. A Combinatino Rule works like all other Rules but it contains a set of Rules grouped together.



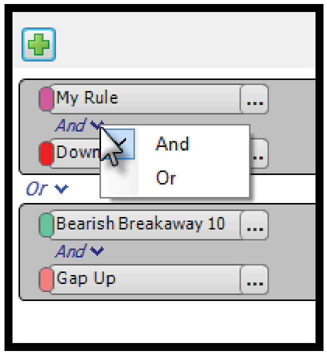
Clicking the *Add Rule* button then clicking *Create Combo* opens the *Edit Combination Rule* window. At the top of the window is a field to name the *Combination Rule*. To the right of the Name field is the color picker for setting the Combination Rule’s color.

Adding Rules



Click the *PLUS* button to add a Rule to the combination. It will bring up a list of all the Rules on the chart available to the combo. Rules can be click and dragged from the chart to the combo.

Rule Grouping

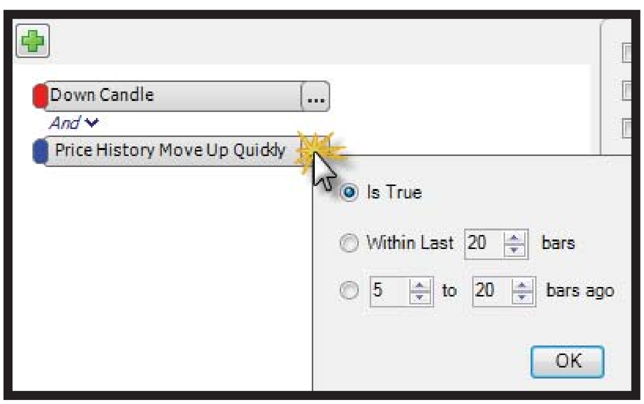


Once two or more Rules are added the can be grouped together in any combination of *AND* or *OR* sets. Use the pull downs between each Rule to set how they are connected.

On the right are all of the options for using the the Rule (Scan WatchList, etc.) For more information on these options refer to the “Using a Rule” section on page 61.

Rule When True

To the right of each Rule in the combo is the *Rule When True button (…)*. Clicking the button opens a menu with three options.



Is True

Is True is the default option when a Rule is added to a Combination Rule. When selected, the Rule must pass (be TRUE) to qualify within the Combination Rule.

Within Last X Bars

When *Within Last X Bars* is selected the Rule qualifies in the Combination Rule if the Rule passes (is TRUE) anytime in the range of bars set. For example, if set to 10 bars the Rule only needs to pass once in the last 10 bars to qualify within the Combination Rule.

X to X Bars Ago

When *X to X Bars Ago* is selected the Rule qualifies in the Combination Rule if the Rule passes (is TRUE) anytime between the range of bars set. For example, if set to 10 to 20 Bars Ago, the Rule needs to pass once within the range of 10 to 20 bars ago to qualify within the Combination Rule.

Tabs

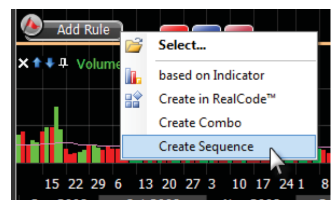
At the top of the window there are two tabs. The *Main* tab is where the Rule parameters are set, the *Info* tab has a description and/or a link for the Rule. This information is saved with the Rule.

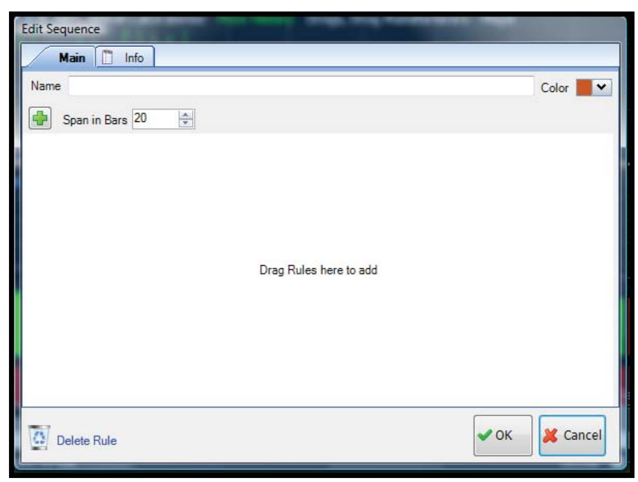
Click *OK* to go back to the chart. The new Rule created appears to the right of the *Add Rule* button.

Sequence Rule

Rules can be combined together into one Sequence Rule. A Sequence Rule works like all other Rules but it contains a series of Rules grouped together that must pass (in a specific order) to pass the overall Rule.

Clicking the *Add Rule* button then clicking *Create Sequence* opens the *Edit Sequence* window. Enter a name in the *Name* field. Set the color for the Sequence Rule with the color picker in the top-right corner.





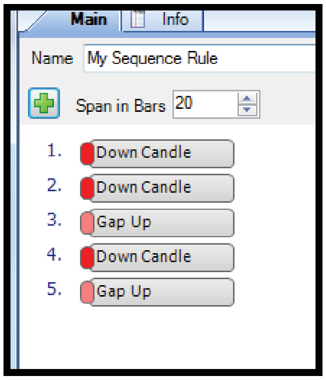
Adding Rules

Click the *PLUS* button to add a Rule to the sequence. It will bring up a list of all the Rules on the chart available to the combo. Rules can be click and dragged from the chart to the sequence.

Sequence Order

Once two or more Rules are added to the sequence the Rule order can be set and changed.

Treat each Rule in the sequence as an event. The order dictates the order of the events needed to fulfill the sequence. Above the Rule is the *Span in Bars* setting. This sets how many bars are allowed to pass between the first and last Rule in the sequence. In order for the Rule to pass (be true), the sequence of Rules must pass, in order and within the total *Span in Bars* setting.



If the sequence of Rules passes, in order, in fewer bars than set in *Span in Bars*, the sequence still passes. The *Span in Bars* setting is the maximum number of bars allowed for the sequence between the first and last Rule.

The same Rule can be repeated in the sequence. Multiple copies of the same Rule may appear in the sequence. Once one or more Rules are added, the options for the sequence Rule will appear on the right. For more information on these options refer to the "Using a Rule" section on page 61.

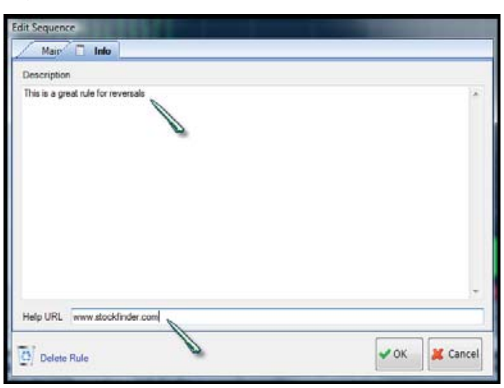
Tabs

At the top of the window there are two tabs. The *Main* tab is where the Rule is set, the Info tab is contains a description and/or a link for the Rule. This information is saved with the Rule.

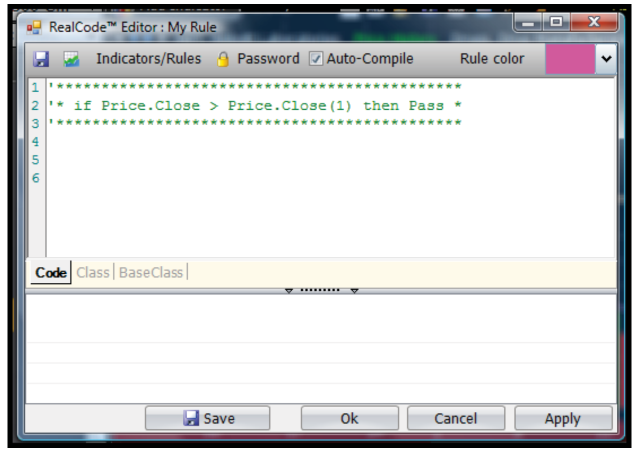
Click OK to go back to the chart. The new Rule created appears to the right of the Add Rule button.

RealCode Rule

Rules can be created based on RealCode. To create a RealCode Rule click the Add Rule button then click *Create in RealCode*. This brings up the *New RealCode Rule* window asking for a name. Name the Rule and click *OK*. This opens the *RealCode Editor*. The *Save* button in the top left saves the Rule.



The *Indicators/Rules* button creates variables in the code for indicators and Rules on the chart. When clicked, a *Reference Indicator/Rule* screen appears with a tree for all Rules and plots on the chart. Select the plot or Rule to reference in the code and click *OK*.



At the top of the code window the reference is inserted. For more information on how to use the reference and writing RealCode, download the RealCode Reference manual on www.StockFinder.com.

The *Password* button password protects the code. Only those with the password have the ability to see protected code.

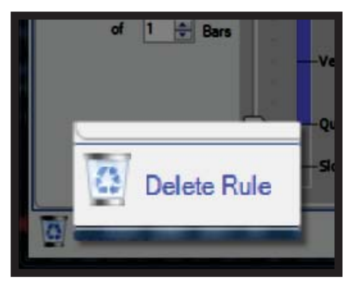
The Rule's color is set in upper right corner with the color pull down.

For more information on writing RealCode, download the RealCode Reference manual on www.StockFinder.com.

Once the code is written, click *OK* to close the window and the Rule will be on the chart.

Delete Rule

Clicking on a Rule opens the *Edit Rule* window. In the bottom-right corner of the window is the Delete Rule link. Clicking on the link removes the Rule from the current chart. Clicking Delete Rule does not remove a saved Rule from any library.



Other Rule Uses

Coloring Plots

Rules can be used to color any plot including *Price History*. Once a Rule has been added or created for a chart, click any plot (indicator) to bring up its *Edit* window. Click the *Colors* tab to see the color options.

Under the *Paint Indicator with the following Rules* header is a list of all the Rules on the chart. Check any Rule to paint the plot the Rule color if that bar passes the rule. If you check more than one Rule a *Priority* column appears on the right of the checked Rules.

The color Rule with the highest priority (the value closest to 1) will be used if another Rule passes on the same bar but has a lower priority.

To adjust the priority of any rule use the spinner arrows to the right of the priority number. The lower the number is the higher a priority it has. Rules with a higher priority supersede lower priority rules if they both pass on the same bar.

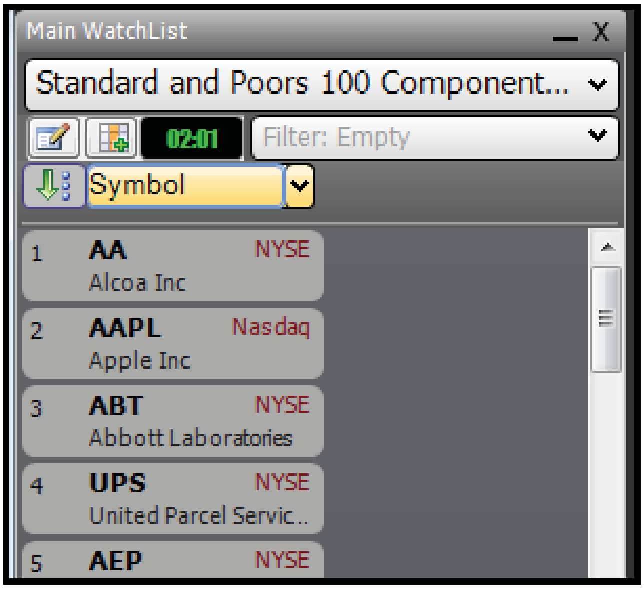
Creating Custom Indexes

Rules can be used to create Custom Index plots. Right click any Rule bubble on the chart and choose *Create Custom Index* from the menu. This opens the *Custom WatchList Index Wizard*. For more information on the Custom WatchList Index Wizard refer to the “Custom WatchList Indexes” section on page 81.

8 WatchLists

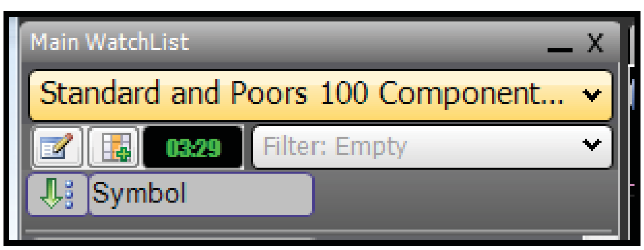
Main WatchList

On the left of new (and most other) Layouts is the Main WatchList window. It is the central location for listing stocks, reviewing system-maintained lists, sorting and scanning.



WatchList Picker

The *WatchList Picker* is at the top of the Main WatchList window. It displays the name of the Active WatchList for the tickers displayed below the picker. Changing the WatchList in the picker changes the list of stocks presented. Clicking on the pull down menu (or name of the Active WatchList) opens the picker.



Type to Search

Once the picker is open, type to filter the list of WatchLists available. While typing the list instantly filters based on the characters typed. If you want to see the WatchLists available based on the Standard and Poors, open the picker and start typing "Poors" (no quotes). This will limit the list to only the WatchLists that have the characters "Poors" together in their name. Click the WatchList from the list to change to that list.

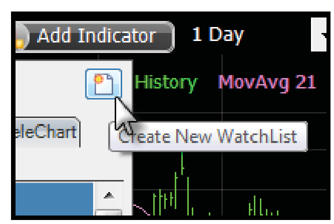
Category Tabs

Below the *Type to Search* red header is a series of category tabs for the WatchLists. Scrolling down the list of WatchLists while under the *Main* tab shows the category headers in the list (white lettering with blue backgrounds).

To filter the master list by one of the categories, click the appropriate category tab. This will hide all WatchLists but those in that category. Then click the desired WatchList name to change to that WatchList.

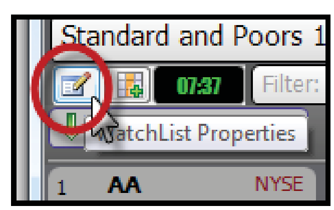
Create New WatchList

There is a New WatchList icon in the upper right corner of the opened WatchList Picker. Clicking this starts the process of creating a Personal WatchList. For more information on Personal WatchLists refer to the "Personal WatchLists" section on page 78.



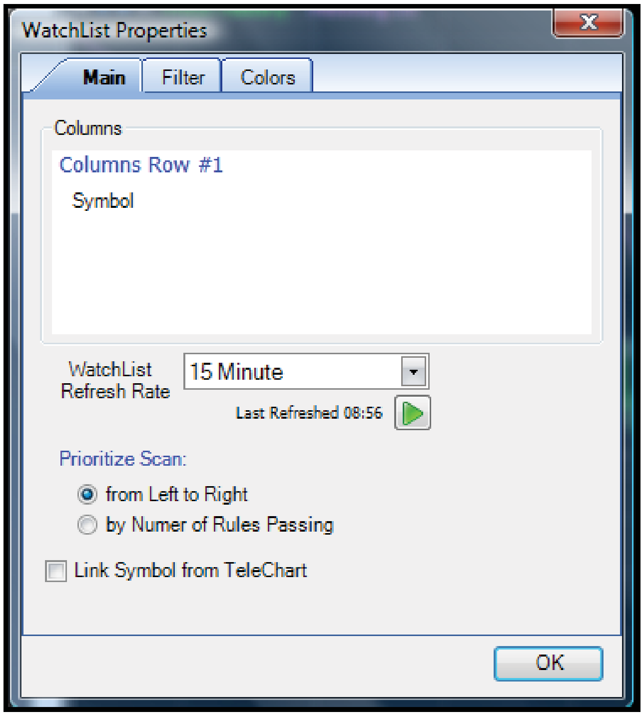
WatchList Properties

Just below the WatchList Picker on the left is the WatchList Properties button. Pressing this button opens the *WatchList Properties* window. It has three tabs.



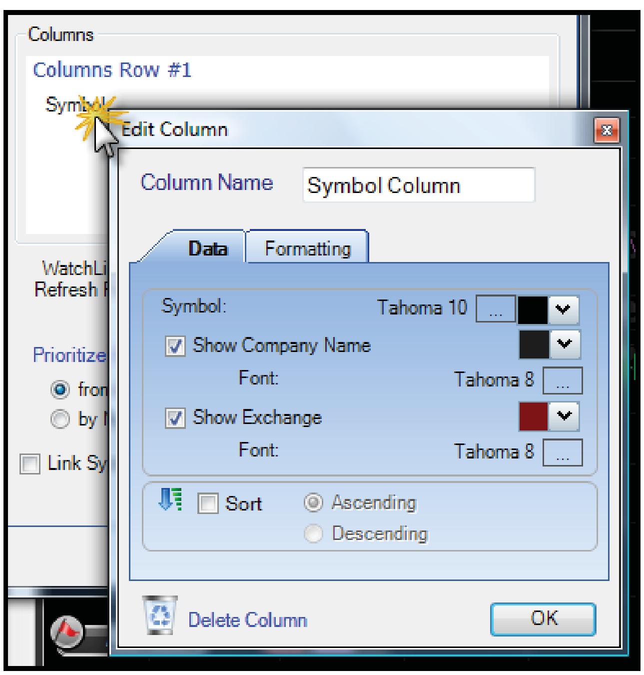
Main

Under the Main tab are four major items and options.



Columns

The Columns section shows all of the columns and WatchList (Scan) Lights currently in the Main WatchList. Click any of the columns or light names to bring up their *Edit* Column window.

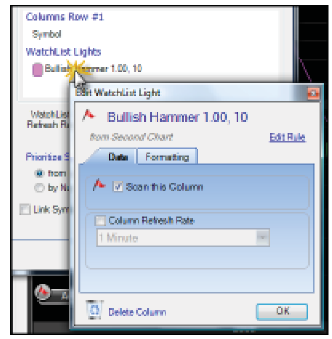


The *Edit Column* window allows the changing of the name, font, information, formatting and colors for that column. The option to sort by that column in either ascending or descending order is there. To make the column to highlight a certain color every time its values change, switch the *None* option next to *Highlight Changes* to one of the highlight options. To the right of that pull down menu is a color picker to set the color of the change.

To manually set the *Column Refresh* rate under the *Highlight Changes* check the *Column Refresh Rate* option. Below that set the refresh rate for that column. It will override the *WatchList Refresh Rate* setting.

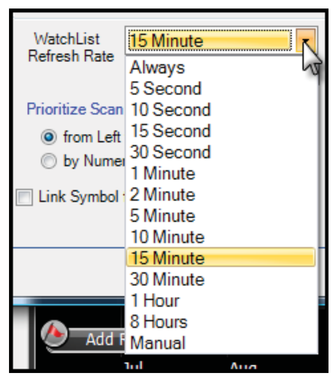
Click the *Delete Column* link at the bottom of the window to remove the column from the Main WatchList display.

Clicking the name of a WatchList light in the list opens the *Edit WatchList Light* window. At the top is a link to edit the rule.



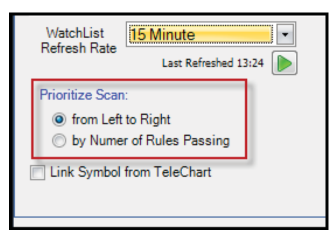
There are two tabs within the window for changing the formatting, toggling if the Rule is used in the current scan and setting the refresh rate. It has a *Delete Column* link at the bottom to remove the light from the *Main WatchList* window.

WatchList Refresh Rate



The WatchList Refresh Rate menu sets how much time will pass before the data in the WatchList (Scan Lights and columns) will refresh based on new data. This only matters at the Platinum service level where new data is streaming into the program when the market is open. Below the rate pull down menu is a running timer showing how much time as passed since the data was last refreshed. Clicking the green right arrow button to the right of the *Last Refreshed* will refresh the WatchList data and reset the timer.

Prioritize Scan



The *Prioritize Scan* options set how scans will be prioritized. To have them prioritize based on which Rules are passed choose *from Left to Right*.

The farther to the left the Rule is in the columns the higher its priority will be. The scan will group the results based on the left-to-right Rule priority. For more information on this (default) prioritization refer to the “Rule Grouping” section on page 65.

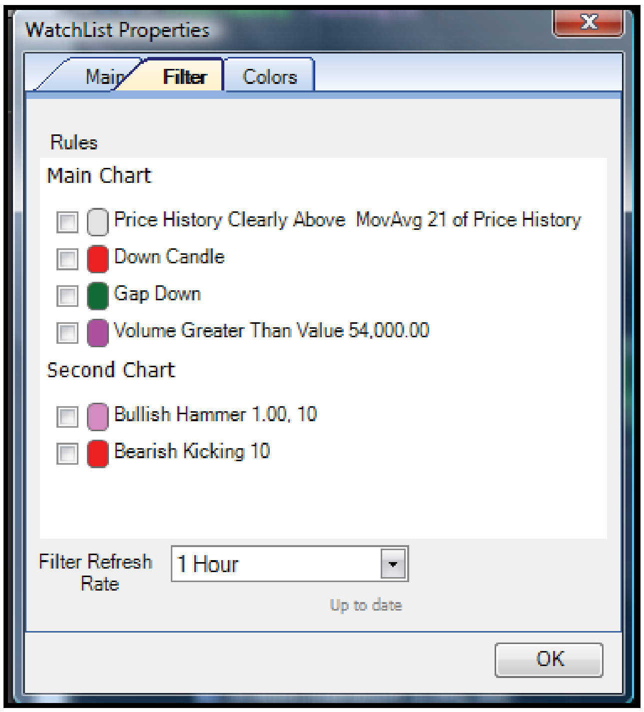
Changing to *by Number of Rules Passing* prioritizes strictly on the number of Rules passing (regardless of which Rules pass). The more Rules a symbol passes, the higher in the grouping it will appear if this option is selected.

Link Symbol from TeleChart

If checked and TeleChart is open on the same computer, any symbol made the Active Symbol in TeleChart will instantly become the Active Symbol in StockFinder.

Filter

The *Filter* tab has two sections.



Rules (to filter by)

The *Rules* section is a list of all the Rules available in the Layout. Click any Rule name to edit the Rule. Check the box to the left of the Rule color and that Rule becomes part of the WatchList filter.

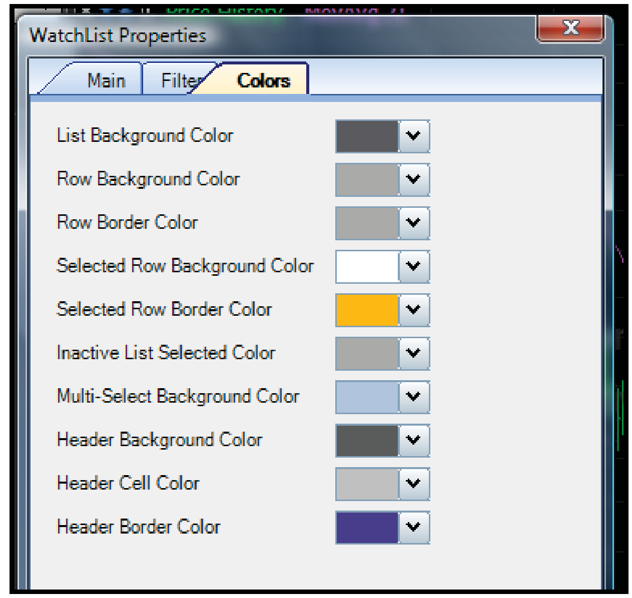
The WatchList filter is a set of one or more Rules that a symbol must pass to appear in the WatchList. For example, if the Active WatchList is the *Standard and Poors 100* and the filter uses two rules, only those *Standard and Poors 100* stocks that pass both filtering Rules show in the list. Any component of that WatchList that fails to pass both Rules is hidden from the list of symbols.

Filter Refresh Rate

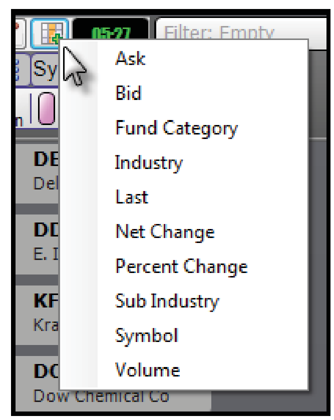
Below the list of Rules is the *Filter Refresh Rate* menu. This sets how often the filter is refreshed based on the most recently available data. This only matters at the Platinum service level where new data is streaming into the program when the market is open.

Colors

Colors is the third tab in the *WatchList Properties* window. It presents a list of color pickers tied to different WatchList elements. Here the colors for different backgrounds, borders, headers and cells are set.



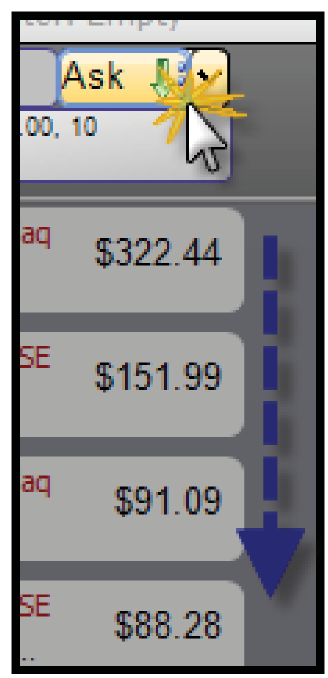
Add Column



To the right of the *WatchList Properties* button is the *Add Column* button. This is one way to add a column to the WatchList. When clicked a menu of available columns appear. Click any item in the menu to add it as a column.

To edit any column float the mouse over the column header and click the down arrow that appears on the right of the header then choose *Edit*. Each *Edit* screen offers options and formatting and a *Delete Column* link at the bottom.

To sort by any column, click the header to toggle from descending to ascending to no sorting.



Ask

Clicking *Ask* displays the current asking price for the symbol (if available). It requires a Platinum service level.

Bid

Clicking *Bid* displays the current bid price for the symbol (if available). It requires a Platinum service level.

Fund Category

Clicking *Fund Category* displays the Morningstar category for any mutual funds in the WatchList. This requires the Mutual Fund service.

Industry

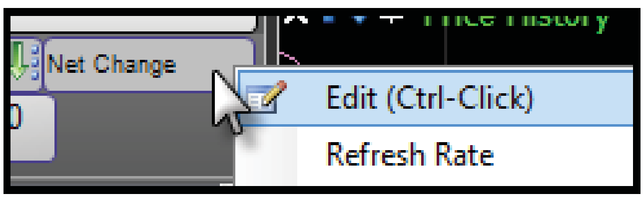
Clicking *Industry* displays the Morningstar industry classification for the stock (if available).

Last

Clicking *Last* displays the most recent price for the stock. If the market is closed, this will be the same as the close for the most recent bar. At the Platinum service level, this value is streaming when the market is open.

Net Change

Clicking *Net Change* displays the net change of the price for each symbol. Edit the column for more options.

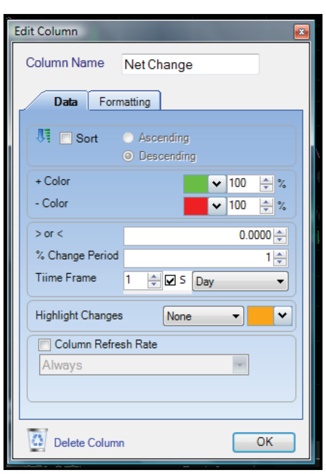


+ And – Colors

To can set the color and opacity of the cell if the number is greater than or equal to the > *or* < number by setting the + *Color*. The – *Color* sets the cell background for any values that are less than the value in the > *or* < field.

"> or <" Field

The > *or* < field is the value that determines if the cell uses the + *Color* or the – *Color* for its background. Any values greater than or equal to the > *or* < value use the + *Color* for their background. Any value less than that number use the – *Color.*



Net Change Period

The *Net Change Period* sets the period for the change. The default 1 means the net change is from the most recent time frame bar to the previous one. If changed to 10 it will present the 10-bar net change.

Time Frame

Time Frame sets the time frame of the change. The default *1 Day* sets the value of one period. If the *Net Change Period* is set to 1 and the *Time Frame* is set to *1 and Day* then the column will show the 1-day net change. If the *Net Change Period* is set to 4 and the *Time Frame* is set to *4 and Week* the column will show the four-week net change.

Highlight Changes

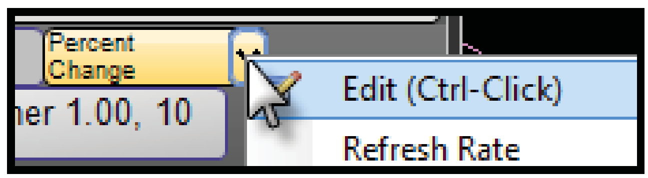
The *Highlight Changes* option sets a color notification of any changes in the column value. Use the pull down menu to determine the type of color notification and the picker to set the color of the notification. This only matters at the Platinum service level with its streaming data stream.

Column Refresh Rate

The *Column Refresh Rate* option sets the refresh rate for the column superseding the *WatchList Refresh Rate*.

Percent Change

Percent Change displays the percent change of the price for each symbol. Edit the column for more options.

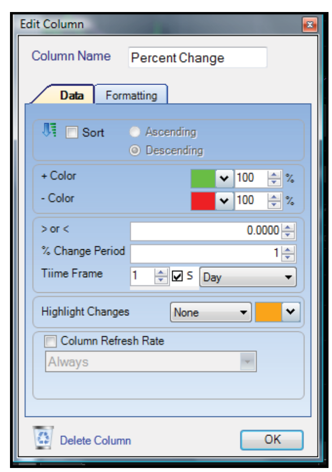


+ And – Colors

To set the color and opacity of the cell if the number is greater than or equal to the > *or* < number by setting the + *Color*. The – *Color* sets the cell background for any values that are less than the value in the > *or* < field.

"> or <" Field

The > *or* < is the value that determines if the cell uses the + *Color* or the – *Color* for its background. Any values greater than or equal to the > or < value use the + Color for their background. Any value less than that number use the – *Color.*



% Change Period

% Change Period sets the period for the change. The default 1 means the percent change is from the most recent time frame bar to the previous one. If changed to 10 it will present the 10-bar percent change.

Time Frame

Time Frame sets the time frame of the change. The default *1 Day* sets the value of one period. If the *% Change Period* is set to 1 and the *Time Frame* is set to *1 and Day* then the column shows the 1-day percent change. If the *% Change Period* is set to 4 and the *Time Frame* is set to *4 and Week* the column shows the four-week percent change.

Highlight Changes

Highlight Changes sets a color notification of any changes in the column value. Use the menu to determine the type of color notification and the picker to set the color of the notification. This only matters at the Platinum service level with its streaming data stream.

Column Refresh Rate

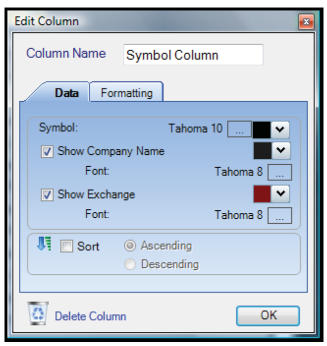
Column Refresh Rate option sets the refresh rate for the column superseding the *WatchList Refresh Rate*.

Sub Industry

Sub Industry displays the Morningstar sub-industry classification for the stock (if available).

Symbol

Symbol shows (by default) the ticker, exchange and company name. You can edit this column to adjust what is displayed and how the displays are formatted.



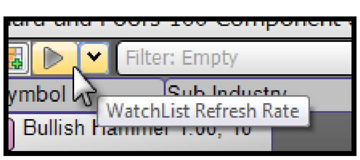
Volume

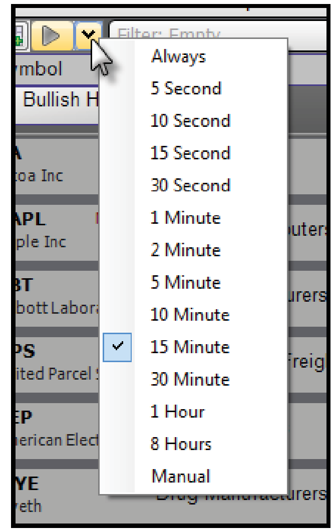
Volume shows the current daily volume in hundreds (100,000 shares is shown as 1000).

WatchList Refresh Rate

The timer between the *Add Column* button and the *Filter* menu shows how long it's been since the WatchList information was last refreshed. Unless an item in the WatchList was set to its own refresh rate, every column and scan light will refresh based on the *WatchList Refresh Rate*.

Floating the mouse over the timer shows both a green right arrow and the menu down arrow appear. Click the green arrow to immediately refresh all the WatchList items. Click the down arrow to set how often the WatchList refreshes. If set to *10 minute* the timer will run from 0:00 to 10:00 then refresh the WatchList and start at 0:00 again.





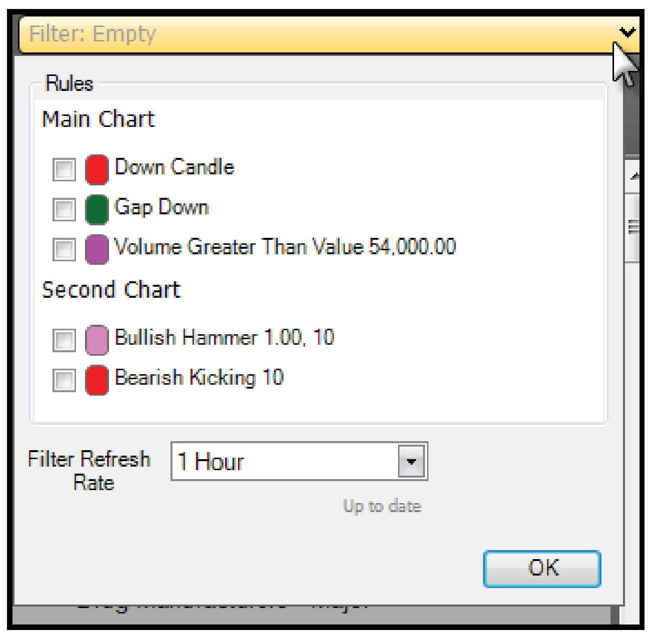
Filter

Any Rules set for filtering appear in the *Active Filter*. Click the *Active Filter* to open the filter options which are broken into two main sections.

Rules (to filter by)

The *Rules* section is a list of all the Rules available in the Layout. Click any Rule name to edit the Rule. Check the box to the left of the Rule color makes that Rule part of the WatchList filter.

The WatchList filter is a set of one or more Rules that a symbol must pass to appear in the WatchList. For example, if the Active WatchList is the *Standard and Poors 100* and you the filter it based on two Rules, only the *Standard and Poors 100* stocks that pass both filtering Rules show. Any component of that WatchList that fails to pass both Rules is hidden from the list of symbols.



Filter Refresh Rate

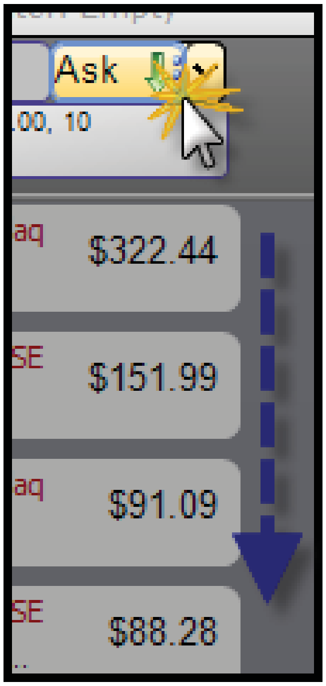
Below the list of Rules is the *Filter Refresh Rate* menu. This sets how often the filter is refreshed based on the most recently available data. This only matters at the Platinum service level where new data is streaming into the program when the market is open.

Sort Columns

Below the *WatchList Properties* button are the headers of all the WatchList columns.

Sorting by a WatchList Column

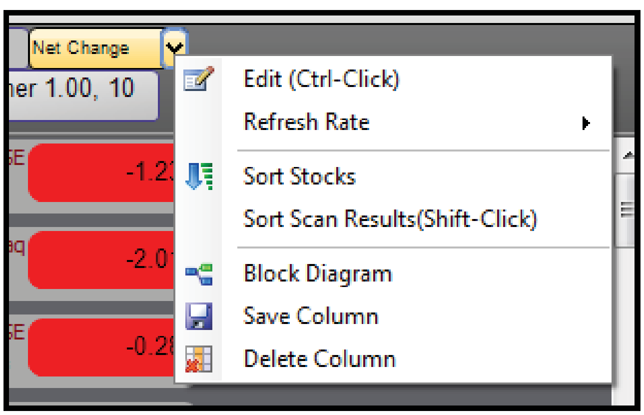
Sorting arranges every symbol in order by a certain column value. To sort by any WatchList click the column header. Repeated clicks toggle from descending (down arrow), ascending (up arrow) and no sorting. A list sorts by one column at a time. Click on an unsorted column header and it becomes the sort for the list superseding any other sorts or scans.



To sort while keeping any scan groupings use the Sort Scan Results option (see WatchList Column Options below for more on this).

WatchList Column Options

When floating the mouse over any WatchList column header a small down arrow button appears on the right side of the header. Click it for a menu of options.

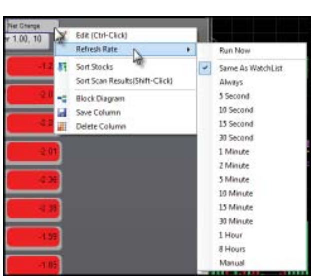


Edit

Edit opens the Edit Column window for that column.

Refresh Rate

Clicking *Refresh Rate* opens a submenu that includes the ability to refresh the column immediately or set it on a different refresh rate then the WatchList Refresh Rate.



Sort Stocks

Clicking Sort Stocks is the same as clicking the header and sorting by the values in the column. Each click toggles between descending, ascending and no sort order.

Sort Scan Results

If the WatchList has Scan Lights present, the *Sort Scan Results* option runs the scan (creating scan groupings) THEN sorts the scan results by the column. This option sorts the scan results. For more information on scanning refer to the “Scan WatchList” section on page 61.

Block Diagram

Clicking Block Diagram opens the *Properties* window for the column including the Block Diagram that feeds the column data.

Save Column

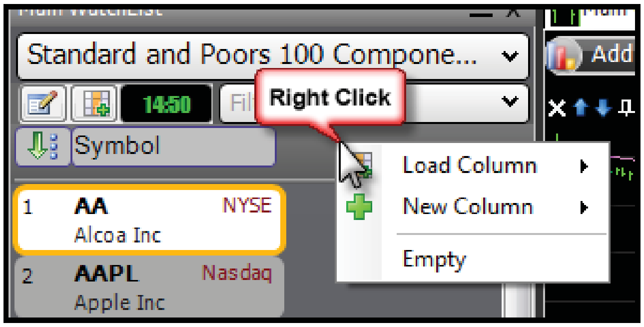
Clicking *Save Column* saves the column for use later or in another Layout.

Delete Column

Clicking Delete Column removes the column from the WatchList display.

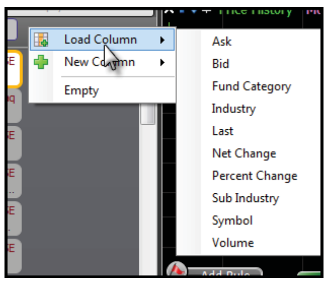
Column Options

Right-clicking in an empty area in the WatchList header area (where there is not a column header) opens a menu with three options.



Load Column

Floating the mouse over *Load Column* brings up a submenu of columns to add to a WatchList display.



Ask

Clicking *Ask* displays the current asking price for the symbol (if available). It requires a Platinum service level.

Bid

Clicking *Bid* displays the current bid price for the symbol (if available). It requires a Platinum service level.

Fund Category

Clicking *Fund Category* displays the Morningstar category for any mutual funds in the WatchList. This requires the Mutual Fund service.

Industry

Clicking *Industry* displays the Morningstar industry classification for the stock (if available).

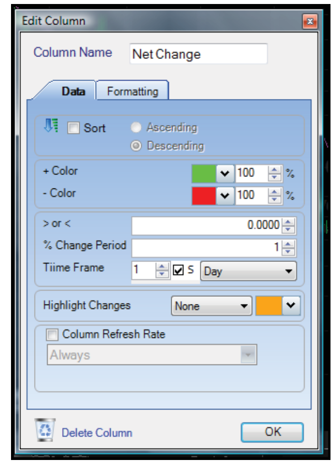
Last

Clicking *Last* displays the most recent price for the stock. If the market is closed, this will be the same as the close for the most recent bar. At the Platinum service level, this value is streaming when the market is open.

Net Change

Clicking *Net Change* displays the net change of the price for each symbol. Edit the column for more options.

+ And – Colors



To set the color and opacity of the cell if the number is greater than or equal to the > *or* < number by setting the + *Color*. The – *Color* sets the cell background for any values that are less than the value in the > *or* < field.

"> or <" Field

The > *or* < is the value that determines if the cell uses the + *Color* or the – *Color* for its background. Any values greater than or equal to the > *or* < value use the + *Color* for their background. Any value less than that number use the – *Color*.

Net Change Period

The *Net Change Period* sets the period for the change. The default 1 means the net change is from the most recent time frame bar to the previous one. If changed to 10 it will present the 10-bar net change.

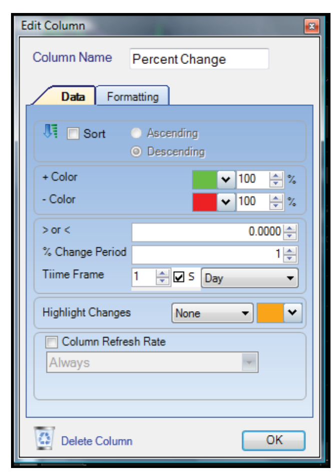
Time Frame

The *Time Frame* sets the time frame of the change. The default 1 Day sets the value of one period. If the Net Change Period is set to one and the Time Frame is set to 1 and Day then the column will show the 1-day net change. If the Net Change Period is set to four and the Time Frame is set to 4 and Week the column will show the four-week net change.

Highlight Changes

Highlight Changes sets a color notification of any changes in the column value. Use the pull down menu to determine the type of color notification and the picker to set the color of the notification. This only matters at the Platinum service level with its streaming data stream.

Column Refresh Rate



Column Refresh Rate sets the refresh rate for the column superseding the *WatchList Refresh* Rate.

Percent Change

Percent Change displays the percent change of the price for each symbol. Edit the column for more options.

+ And – Colors

To can set the color and opacity of the cell if the number is greater than or equal to the > *or* < number by setting the + *Color*. The – *Color* sets the cell background for any values that are less than the value in the > *or* < field.

"> or <" Field

The > *or* < is the value that determines if the cell uses the + *Color* or the – *Color* for its background. Any values greater than or equal to the > *or* < value use the + *Color* for their background. Any value less than that number use the – *Color*.

% Change Period

The *% Change Period* sets the period for the change. The default 1 means the percent change is from the most recent time frame bar to the previous one. If changed to 10 it will present the 10-bar percent change.

Time Frame

Time Frame sets the time frame of the change. The default 1 Day sets the value of one period.

If the *% Change Period* is set to one and the Time Frame is set to 1 and Day then the column will show the 1-day percent change. If the *% Change Period* is set to four and the Time Frame is set to 4 and Week the column will show the four-week percent change.

Highlight Changes

Highlight Changes sets a color notification of any changes in the column value. Use the pull down menu to determine the type of color notification and the picker to set the color of the notification. This only matters at the Platinum service level with its streaming data stream.

Column Refresh Rate

The *Column Refresh Rate* option sets the refresh rate for the column superseding the WatchList Refresh Rate.

Sub Industry

Sub Industry displays the Morningstar sub-industry classification for the stock (if available).

Symbol

Symbol shows (by default) the ticker, exchange and company name. You can edit this column to adjust what is displayed and how the displays are formatted.

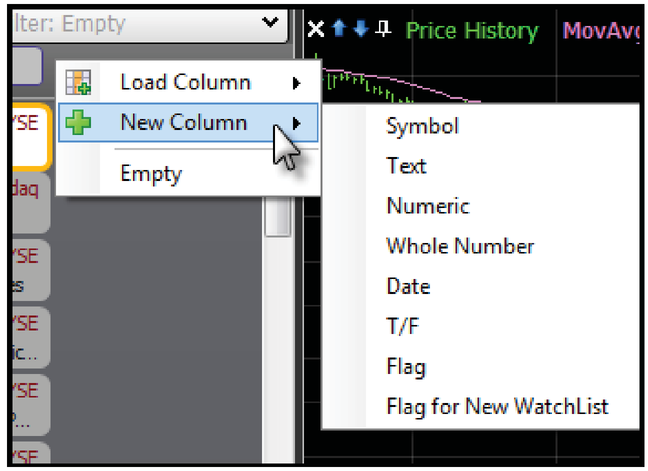
Volume

Volume shows the current daily volume in hundreds (100,000 shares is shown as 1000).

New Column

Floating the mouse over New Column brings up a submenu of scratch-built columns to add to the WatchList display.

Some require building a Block Diagram to feed the Column Data block for display in the column.



Symbol

Symbol shows (by default) the ticker, exchange and company name.

Text

Clicking *Text* opens the *Properties* window for a new text column. Once the desired block connections are made from Column Symbol (feeding the ticker for each symbol in the WatchList) to the Column Data Block (looking for a text input), the text data will be displayed in the new column.

Numeric

Clicking *Numeric* opens the properties window for a new numeric column. Once the desired block connections are made from Column Symbol (feeding the ticker for each symbol in the WatchList) to the Column Data Block (looking for a number input), the numeric data will be displayed in the new column.

Whole Number

Clicking *Whole Number* opens the properties window for a new whole number column. Once the desired block connections are made from Column Symbol (feeding the ticker for each symbol in the WatchList) to the Column Data Block (looking for a whole number input), the whole number data will be displayed in the new column.

Date

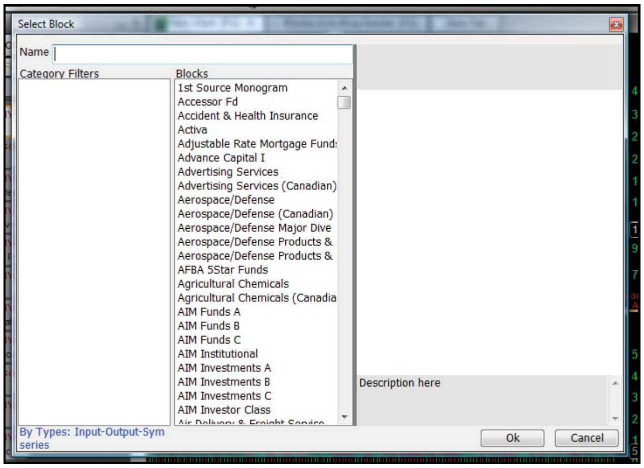
Clicking *Date* opens the properties window for a new date column. Once the desired block connections are made from Column Symbol (feeding the ticker for each symbol in the WatchList) to the Column Data Block (looking for a date input), the date data will be displayed in the new column.

T/F

Clicking *T/F* opens the properties window for a new T/F column. Once the desired block connections are made from Column Symbol (feeding the ticker for each symbol in the WatchList) to the Column Data Block (looking for a True False input), the T/F data will be displayed in the new column.

Flag

Clicking Flag opens the *Select Block* window. Type the desired WatchList to show a flag for in the column in the Name field (which filters the list).



Once the WatchList is found in the Blocks list, double-click it or click it then click the *OK* button. This creates a column that shows either a flag (picture icon) if the stock is in the chosen WatchList or an empty square if the stock is not in the selected WatchList.

Flag for New WatchList

Clicking *Flag for New WatchList* opens a *Create New WatchList* window. Name the new WatchList in the *Name* field then choose an image associated with the Personal WatchList. This image will be the flag shown in the column if the stock is a member of this WatchList. Click *OK* to continue.

A new column will appear full of empty flag boxes. Once stocks are added to the new Personal WatchList, these stocks will show flags in the column for their membership. For more information on Personal WatchLists (including adding and removing symbols to these WatchLists) refer to the "Personal WatchLists" section on page 78.

Empty

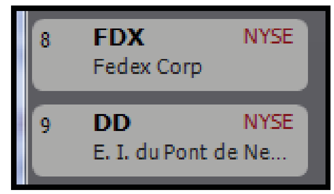
Clicking *Empty* creates an empty column that does (and cannot) display data. It is for a place holder or space in the column display.

Scanning

If any Rule is set to *Scan WatchList* a Scan row *Column Header* will be present under the WatchList Column header row. On the left is the option to scan. If checked, the WatchList will be grouped based on the Scan Lights (Rules) to the right of it.

If unchecked, the Scan Lights will still appear for symbols passing those Rules but the WatchList will not be grouped by the scan priorities. For more information on scanning refer to the "Scan WatchList" section on page 61.

Symbol Cells

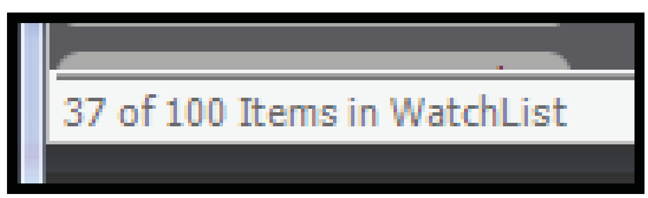


Below the headers is the main WatchList display. This shows all of the components of the Active WatchList (unless a filter is in place). Each cell is typically made up of the contents of the Symbol column, any Scan Lights that may be present (and on if the ticker passes the light's rule).

Clicking the cell makes that ticker the Active Symbol for the Layout.

WatchList Footer

At the bottom of the WatchList is a small footer that shows either the number of symbols in the Active WatchList or, if a stock is selected in the WatchList, both the number of total symbols in the list and where the Active Symbol falls on the list. For example if it says, "5 of 101 Items in WatchList" it means there are 101 stocks in the WatchList and the Active symbol is the fifth stock on the list (based on any sorts or scans that may be in place).



Selecting Symbols

When clicking on a symbol to make it the Active Symbol it is also considered "selected". Selected symbols can be copied or dragged to any open Personal WatchLists. To select more than one symbol hold down the *CTRL* key when clicking on each symbol. To select multiple symbols that are together in a list, click the first one and (while holding down the *SHIFT* key) click the last one.

All selected symbols have a light blue background to the symbol cell.

WatchList Quick Menu

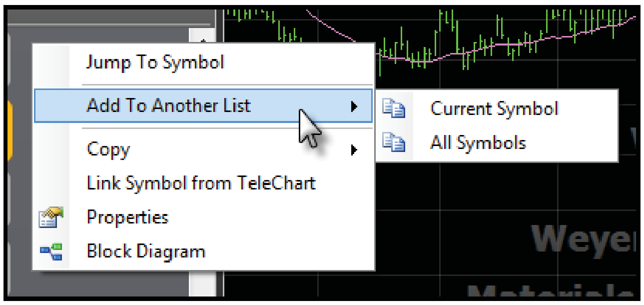
Right-clicking anywhere in the list of symbols opens a menu.

Jump to Symbol

Clicking Jump to Symbol opens a *Jump To* window. Type in a symbol or company name to make it the new Active Symbol.

Add to another List

Floating the mouse over *Add to another List* brings up a submenu with three choices.



Current Symbols

Current Symbols adds the Active Symbol (alone) to another WatchList.

Selected Symbols

Selected Symbols adds any selected symbols to another WatchList.

All Symbols

Clicking *All Symbols* adds all the symbols in the current WatchList to another WatchList.

Select List

After deciding on what symbols to add, the *Select List* window opens. This offers a list of all the Personal WatchLists available in the system.

Add the chosen symbol(s) to a new list by clicking (New List) at the top of this menu. This creates a new Personal WatchList for the symbols to populate.

Copy

Clicking *Copy* copies either the current or all the selected symbols to the Windows clipboard. To then paste these symbols into a Personal WatchList or any program that pastes text (like an email, word processor or spreadsheet).

Link Symbols from TeleChart

Clicking *Link Symbol from TeleChart* creates a link from TeleChart to StockFinder. If TeleChart is open, this will force the Active Symbol in StockFinder to be the same as the current Active Symbol in TeleChart.

Properties

Clicking *Properties* is the same as clicking the *WatchList Properties* button at the top of the WatchList Window (below the picker).

Block Diagram

This opens the Block Diagram for the WatchList window.

Personal WatchLists

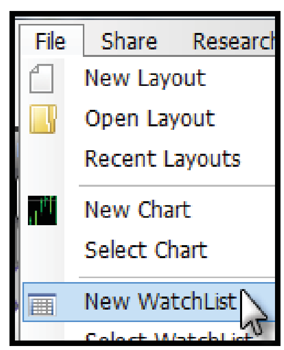
In many ways, *Personal WatchList* windows act like the *Main WatchList* window. Check the Main WatchList section (page 69) of this manual before learning about Personal WatchLists.

Personal WatchLists, unlike all the other WatchLists in the program, are populated and maintained by the user.

Personal WatchLists don't need to be "saved". Once created any changes made are immediate and permanent (even if the WatchList window showing the WatchList is closed).

Creating a Personal WatchList

There are several ways to create a new Personal WatchList

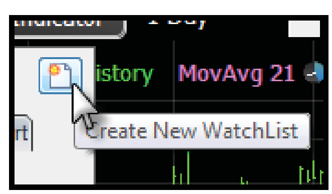


Via File Menu

Click *File* then choose *New WatchList* and the program creates a new Personal WatchList.

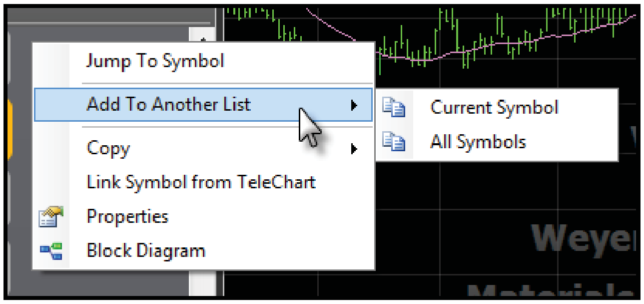
Via WatchList Picker

Click the *WatchList Picker*, in the upper-right corner of the WatchList selection screen is the *Create New WatchList* button. Clicking the button creates a new Personal WatchList.



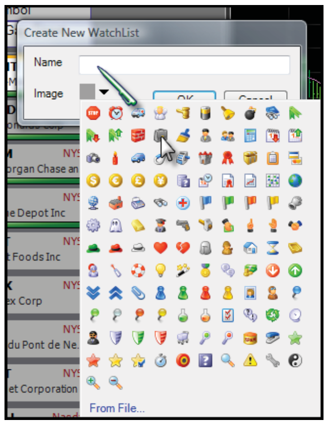
Via WatchList Quick Menu

Right-clicking in a WatchList of symbols then choosing one of the *Add to another List* options and choosing *New List* from the *Select List* window creates a new Personal WatchList.



New Personal WatchList

The first window that opens when creating a new Personal WatchList is the *Create New WatchList* window. In the *Name* field type the name for the new WatchList.



Below the *Name* field is the option to assign an image to the new list. This image will be used for any Flagging columns for the WatchList. It will also appear to the left of the WatchList name. Assigning an image is optional.

Once the list is named and, if desired, an image is selected, click the *OK* button. To load your own image to use click the *From File* link at the bottom of the image library.

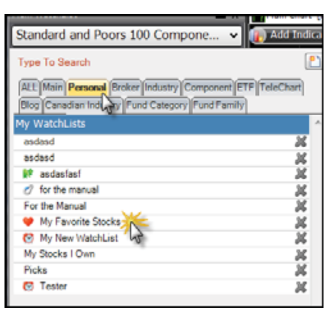
The Personal WatchList will appear in a new *My WatchList* window under the Main WatchList.

Opening a Personal WatchList

There are two ways to open an already created Personal WatchList.

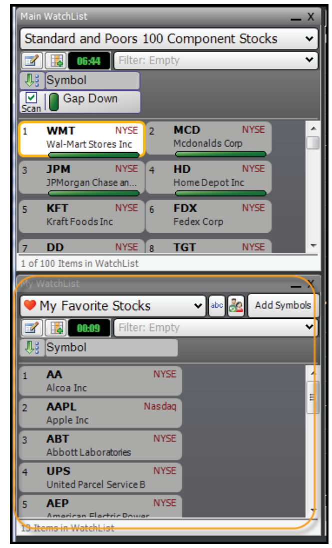
Inside Main WatchList

To display a Personal WatchList within the Main WatchList click the WatchList Picker and either type in the name of the list (filtering the library of WatchLists) or by click the *Personal Tab* at the top of the picker. Click the name of the Personal WatchList to open it inside the Main WatchList.



Inside My WatchList

My WatchList is a separate WatchList window from the *Main WatchList*. It allows one to look at a Personal WatchList while having another WatchList open in the Main WatchList.



To open a Personal WatchList in its own *My WatchList* window, click *File* then *Select WatchList*.

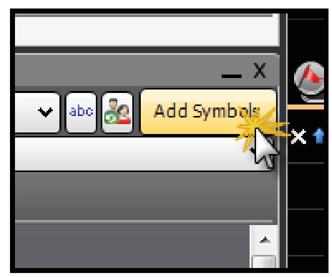
This opens a submenu of all the Personal WatchLists in the system. Click the name of the WatchList and it will open in its own *My WatchList* below the Main WatchList.

Adding and Removing Symbols

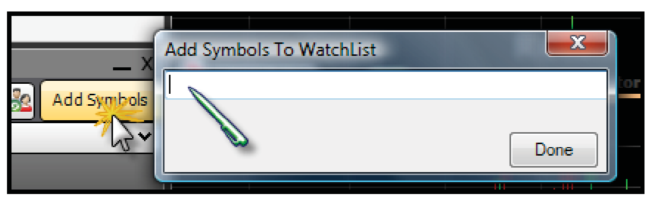
There are several ways to add and remove symbols to a Personal WatchList.

Add Symbols

When a Personal WatchList is open the *Add Symbols* button is available in the top-right corner of the WatchList window. Clicking it opens an *Add Symbols* to WatchList window. Type in any ticker or company name to search and add a symbol to the WatchList.



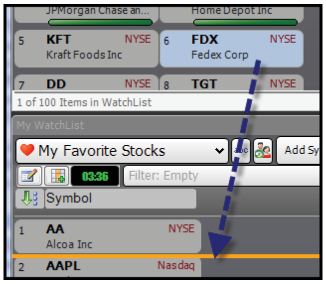
Typing in a valid ticker and hitting the *ENTER* key or clicking the *Done* button adds it to the WatchList.



Symbols cannot be added if they are not part of the available data feeds. For example, Mutual Funds cannot be added without the Mutual Fund service for StockFinder.

After adding the desired symbols, close the *Add Symbols* to WatchList window with the X in the top right corner of the window.

Dragging Symbols



With two WatchList windows open (the Main and one or more My WatchList windows) click and drag symbols from one WatchList to any Personal WatchList. For more information on selecting symbols refer to the Selecting Symbols section of this chapter.

Pasting Symbols

After selecting and copying any symbols either within StockFinder or any other text program, right-click in a Personal WatchList and choose Paste to paste the symbols in the Personal WatchList.

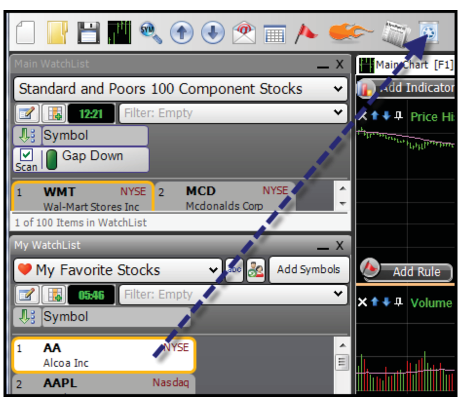
It will only add symbols that are available in StockFinder. Copied symbols that are not available in StockFinder will not paste.

Removing Symbols

There are a few ways to remove symbols from a Personal WatchList.

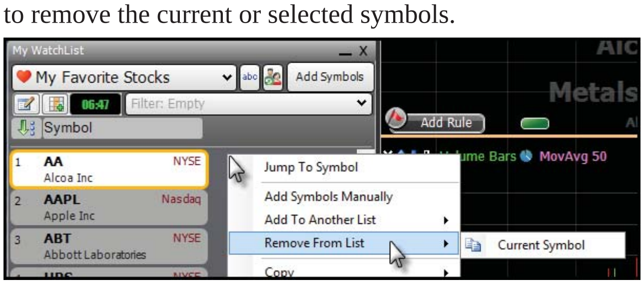
Trash Can

Within a Personal WatchList click and drag a symbol from the list to the Trash Can icon at the top of the program. This removes the symbol from the list. If multiple symbols are selected (using *SHIFT* or *CTRL*) they all can be dragged to the trash can.



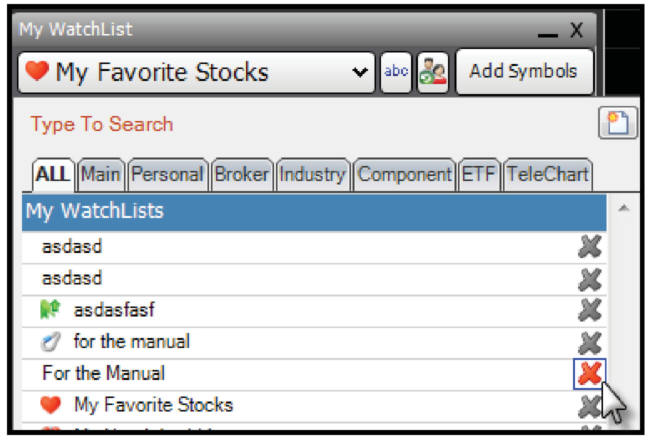
Quick Menu

Right-click in a Personal WatchList, go to Remove from List to remove the current or selected symbols.

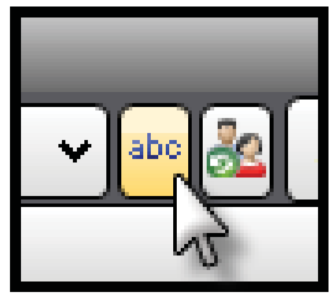


Deleting Personal WatchLists

When in the WatchList picker, all Personal WatchLists have an X icon to the right of their names. Clicking this icon deletes the list.



Renaming Personal WatchLists



To the right of the *WatchList picker*, when looking at a Personal WatchList, is the rename button.

Click it to change the name and/or the image associated with the list.

Sharing Personal WatchLists

When looking at a Personal WatchList, to the right of the *Rename* button is the *Share Personal WatchList* button.

When clicked the *Share My Item* window appears. Give the WatchList a name (the name of the WatchList is already filled in but can be changed). There is an area to offer a description, a password and a web address link. Only those users with the password can open a WatchList assigned a password. Leave the password field blank and any user can open the WatchList from the Share.

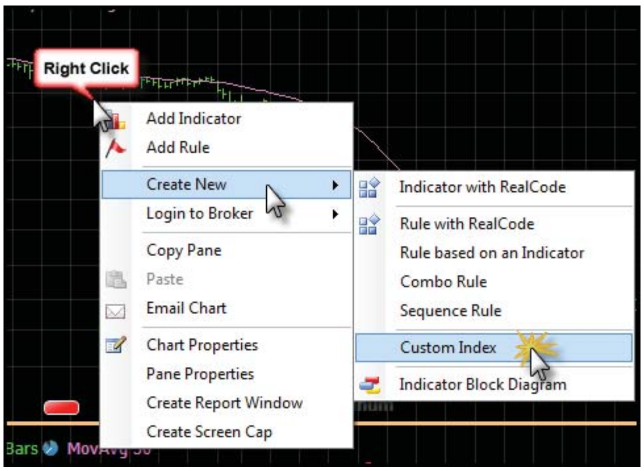
Click the *Share* button and the WatchList is uploaded to the community Share where other users can see and download the WatchList.

9 Custom WatchList Indexes

The *Custom WatchList Index Wizard* opens anytime a create a Custom Index is selected. There are several ways to create a Custom Index.

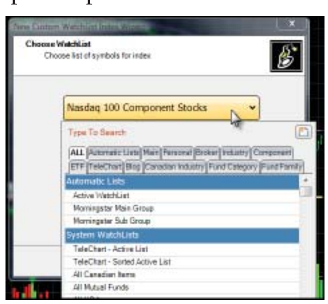
A Custom Index is a plot based on an entire WatchList of symbols. It can be anything from how many stocks are passing a Rule to the average price of all the stocks or indexes in the WatchList.

The easiest way to start the Wizard is to right-click the chart, go to *Create New* then choose *Custom Index*. This opens the *New Custom WatchList Index Wizard*.



Choose WatchList

The first screen asks which WatchList to use to calculate the Custom Index. Click the picker pull down and choose the list to use. Start typing to filter the WatchLists. For example, click the picker and type "standard" and it will filter down the library to only the Standard and Poors WatchLists. Click on any list to select it as the WatchList for the Custom Index then click the *Next* button.

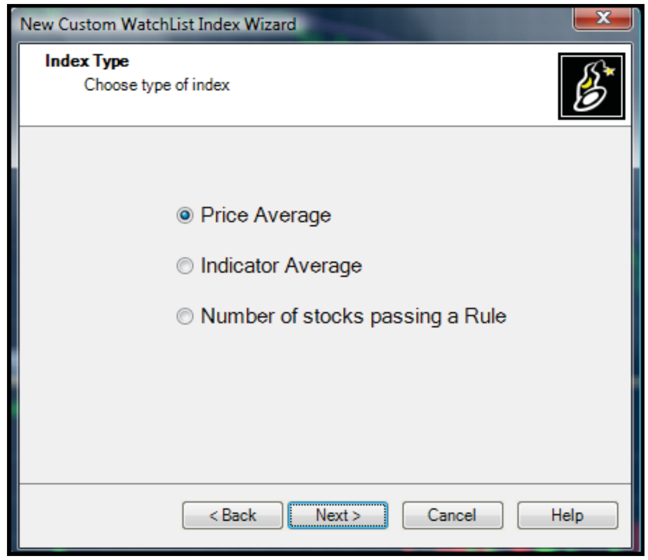


Index Type

The next screen asks for the type of index to create.

Price Average

Price Average creates an index based on the price values for the stocks in the WatchList. Once it is chosen click the *Next* button. The next screen gives two options; *Unweighted* and *Price Weighted*.



Unweighted

Unweighted gives each stock equal pull in the index. The values of the index created are meaningless but low priced and high priced stocks will have the same influence on the index. A $200 stock moving 10% will have the same influence as a $1 stock moving 10% because the index will be based on percentages, not the straight average of the price net moves.

Price Weighted

Price Weighted does a straight average of all the stocks in the list. Stocks with a higher price per share, as a result, will have more weight and influence in the movement of the index. A stock priced at $200 a share moving 10% ($20) has a larger impact than a $10 stock moving 10% (only $1 move).

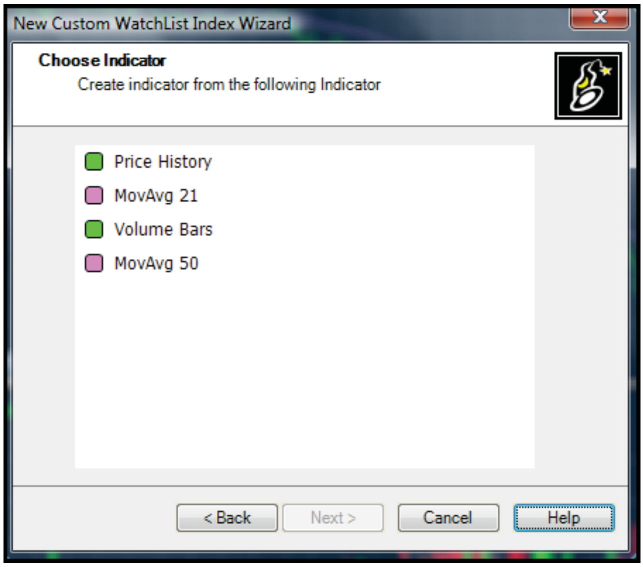
Indicator Average

Indicator Average creates an index that is the average a one plotted indicator on the chart.

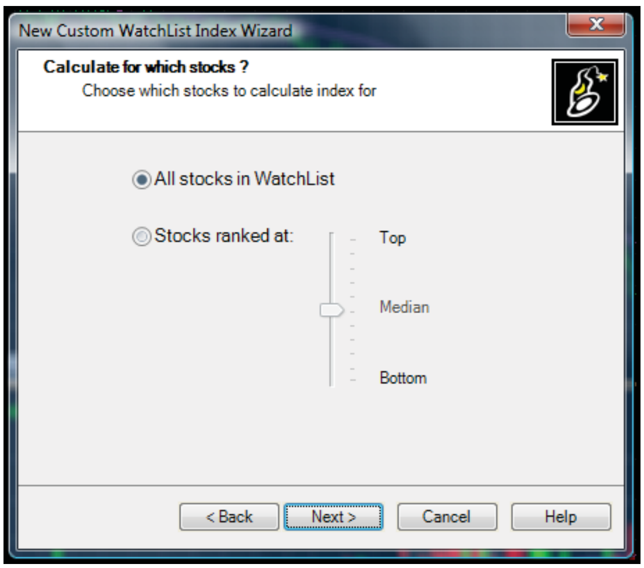
Once it is selected, click *Next* to bring up the *Choose Indicator* window. This shows a list of all the plotted indicators on the chart. Choose the indicator to average for the WatchList.

The next screen gives two choices. Selecting *All Stocks in WatchList* uses every stock in the WatchList to create the index. Selecting *Stocks Ranked At* uses a slider to limit which stocks will be used in the index calculation.

The rankings are based on the values of the indicator for each stock. Choosing *Top* on the slider takes only the stocks with the highest values for the indicator on each bar and av-



erages them to create the index. Choosing Median only uses the stocks with the median indicator values. *Bottom* means only those stocks with the lowest values for the indicator in the list will be used to calculate the average at each bar.



Several indexes can be created based on the same indicator and WatchList but based on stocks with different value ranks for the indicator at each bar.

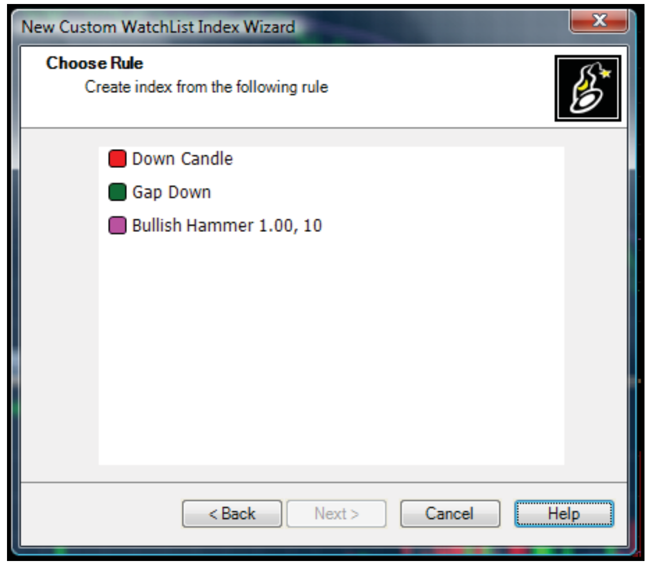
Number of Stocks Passing a Rule

The *Number of Stocks Passing a Rule* choice creates an index based on if the stocks in the WatchList pass a rule on from chart. Once it is selected, click the *Next* button to open the *Choose Rule* screen. This lists all of all the Rules on the chart. The Rule must already be on the chart before the wizard starts.

Select the Rule to use and click *Next* to bring up the next screen. This has three different methods for calculating the index.

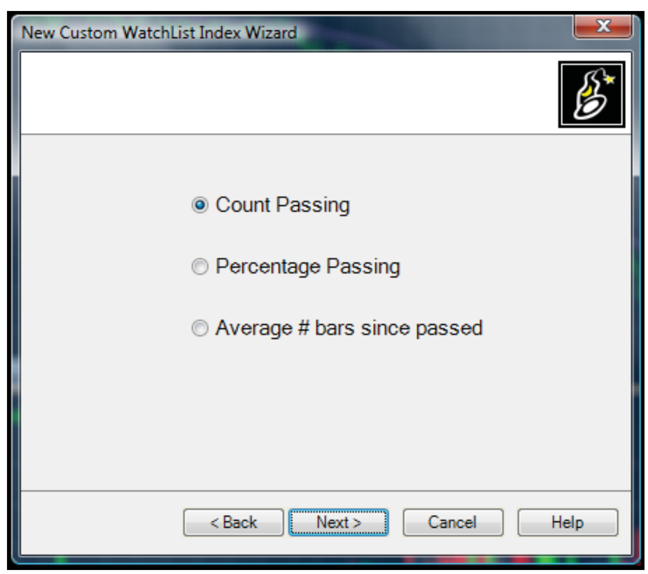
Count Passing

The *Count Passing* option means the index gives the count of the number of stocks in the WatchList that are passing the Rule for each bar. The larger the WatchList the greater the values for the index can be. If all the stocks pass the Rule on a particular bar then the value for the index on that bar will be the number of stocks in the WatchList.



Percentage Passing

This option means the index gives the percentage of stocks in the list that pass the Rule for each bar. The size of the WatchList has no impact on how large the values for the index can be. The largest value possible for the index will be 100 (if all the stocks pass the Rule on that bar) and the lowest possible value will be zero (if no stocks pass the Rule on that bar).

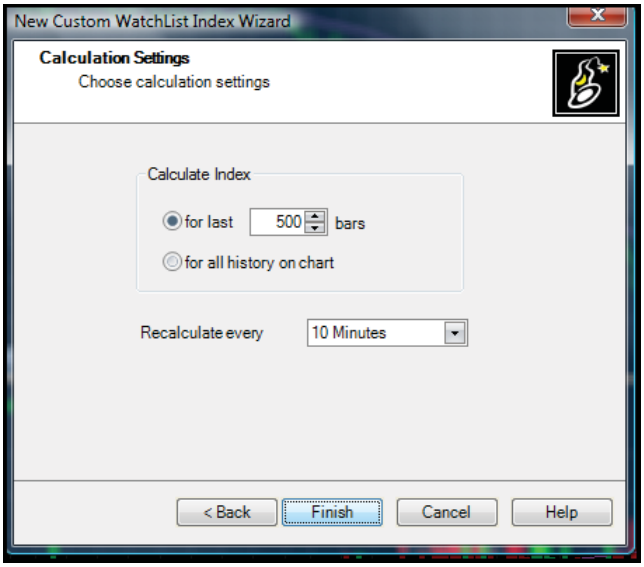


Average # Bars Since Passed

This option means the index averages the number of bars since the Rule last passed for each stock. A value of 10 for the index means that, on average, it was 10 bars since the Rule was last passed for each stock. If a stock passes the Rule on a particular bar, it will offer a value of zero for the average (it has been zero bars since the Rule last passed; it is passing on that bar).

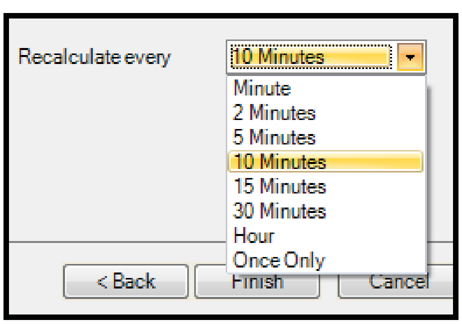
Calculation Settings

All Custom Indexes bring up a *Calculation Settings* screen during the Wizard. This sets how many bars the index uses to calculate and plot for.



The first option limits the bars to a certain number of bars. If selected and set it to 500 then the index plots 500 bars on the chart (if 500 bars are available). Choosing *for all history on chart* causes the the index to calculate as far back as the *Price History* has bars on the chart or as far back as the WatchList can calculate.

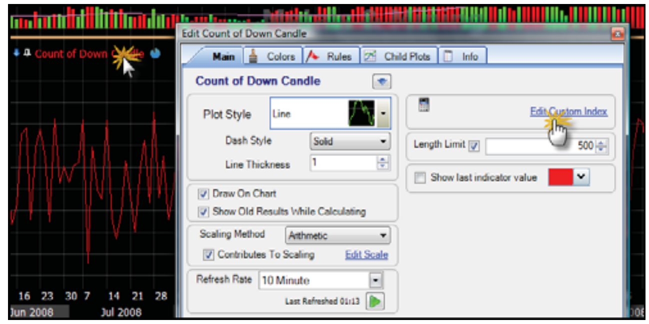
The screen also sets often the index should recalculate. This only matters at the Platinum service level where new data is constantly streaming into the program when the market is open.



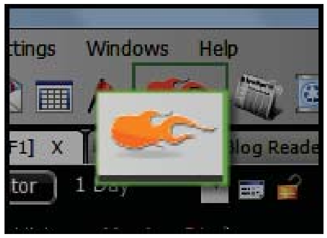
After making the calculation decisions, click *Finish* to plot the index on the chart.

Editing a Custom WatchList Index

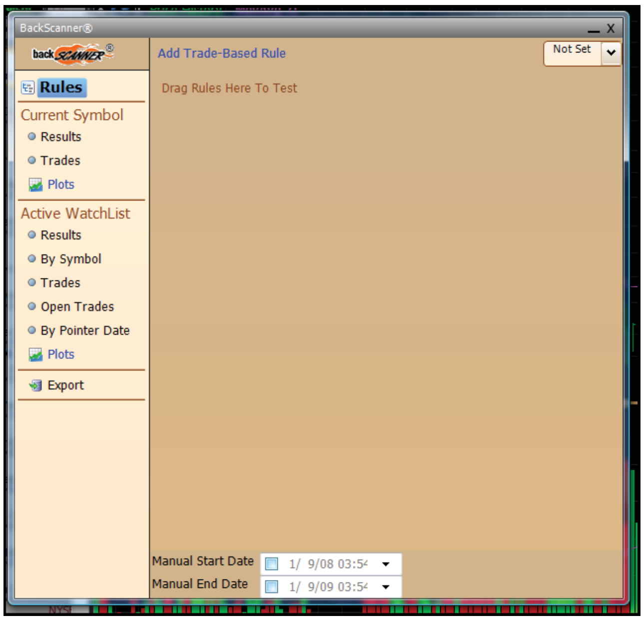
To return to the Wizard once the index is plotted, click on the index and choosing *Edit Custom Index* in the top right corner of the Edit screen that appears.



10 BackScanner



BackScanner allows one to create a set of trade and test rules then tests those rules on historical data to see how they performed. BackScans are created with any combination of chart Rules and Trade-Based Rules. One can get performance reports on individual symbols or entire WatchLists.



One can also plot the BackScan's results on the charts for visual analysis of the test.

To open a new BackScan click the *BackScanner* button on the Icon Toolbar. BackScans are saved with Layouts. To save a BackScan, save the Layout it's in. There can be as many instances of BackScanner open as desired within the same Layout.

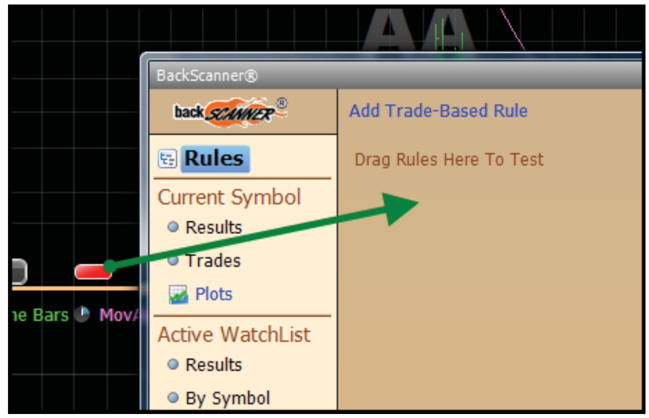
The BackScanner window is split into two sections. On the left is the *BackScanner Menu*. That menu is split into four sections (*Rules*, *Active Symbol Reports*, *WatchList Reports* and *Export*). Click an item with a icon to the left of it, the right side of the *BackScan* window shows that section's items.

Rules

There are two types of rules used in a BackScan. Rules from your charts and Trade Based Rules (based on how an open trade is progressing). A BackScan must use at least one Rule from a chart to open trades. Any other rules can come from charts or from created Trade-Based Rules.

Adding Test Rules

Test Rules are Rules transferred from a chart to the Rules section of BackScanner. For more information on Chart Rules refer to the "Rules" section on page 57. To add a Rule from the chart to the Rules section, click and drag the Rule from the chart into the Rules section of BackScanner.



Type of Test Rule

When dropping a Rule from the chart into the Rules section of BackScanner a menu appears where to choose what type of Test Rule to create.

Buy

Clicking *Buy* creates a Buy Test Rule. If a stock passes the Rule, BackScanner will open a historical long position based on *At Setting* and *Bars From Now* setting chosen.

Sell

Clicking *Sell* creates a Sell Test Rule. If a stock passes the Rule, BackScanner will close an opened historical long position based on *At Setting* and *Bars From Now* setting chosen.

Sell Short

Clicking *Sell Short* creates a Sell Short Test Rule. If a stock passes the Rule, BackScanner will open a historical short position based on *At Setting* and *Bars From Now* setting chosen.

Buy Cover

Clicking *Buy Cover* creates a Buy Cover Test Rule. If a stock passes the Rule, BackScanner will close an opened historical short position based on *At Setting* and *Bars From Now* setting chosen.

Exit All

Clicking *Exit All* creates an Exit Test Rule. If a stock passes the Rule, BackScanner will close any opened historical long or short position based on *At Setting* and *Bars From Now* setting chosen.

Remain Long

Clicking *Remain Long* creates a Stay in Trade Test Rule. If a stock passes the Rule, BackScanner will keep an historical long position open regardless of any exit or sell rules that have a lower priority.

Remain Short

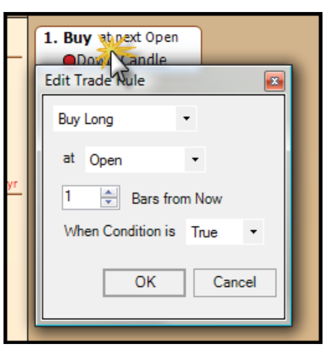
Clicking *Remain Short* creates a Stay in Trade Test Rule. If a stock passes the Rule, BackScanner will keep an historical short position open regardless of any exit or cover short rules that have a lower priority.

Remain in Trade

Clicking *Remain in Trade* creates a Stay in Trade Test Rule. If a stock passes the Rule, BackScanner will keep an historical long or short position open regardless of any exit, cover short or sell rules that have a lower priority.

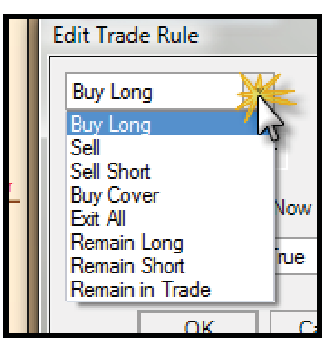
Edit Rule

Clicking a Test Rule opens the *Edit Rule* window where you can change the settings of the Test Rule.



Rule Type

Clicking the *Rule Type* opens a menu where you can set the type for the Test Rule.



Buy Long

Clicking *Buy Long* makes it a Buy Test Rule. If a stock passes the Rule, BackScanner will open a historical long position based on *At Setting* and *Bars From Now* setting chosen.

Sell

Clicking *Sell* makes it a Sell Test Rule. If a stock passes the Rule, BackScanner will close an opened historical long position based on *At Setting* and *Bars From Now* setting chosen.

Sell Short

Clicking *Sell Short* makes it a Sell Short Test Rule. If a stock passes the Rule, BackScanner will open a historical short position based on *At Setting* and *Bars From Now* setting chosen.

Buy Cover

Clicking *Buy Cover* creates a Buy Cover Test Rule. If a stock passes the Rule, BackScanner will close an opened historical short position based on *At Setting* and *Bars From Now* setting chosen.

Exit All

Clicking *Exit All* makes it an Exit Test Rule. If a stock passes the Rule, BackScanner will close any opened historical long or short position based on *At Setting* and *Bars From Now* setting chosen.

Remain Long

Clicking *Remain Long* makes it a Stay in Trade Test Rule. If a stock passes the Rule, BackScanner will keep an historical long position open regardless of any exit or sell rules that have a lower priority.

Remain Short

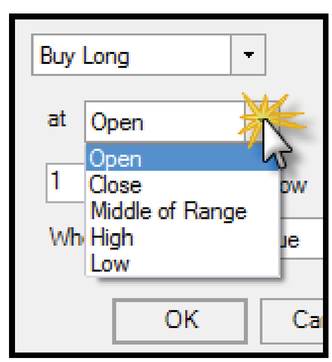
Clicking *Remain Short* makes it a Stay in Trade Test Rule. If a stock passes the Rule, BackScanner will keep an historical short position open regardless of any exit or cover short rules that have a lower priority.

Remain in Trade

Clicking *Remain in Trade* makes it a Stay in Trade Test Rule. If a stock passes the Rule, BackScanner will keep an historical long or short position open regardless of any exit, cover short or sell rules that have a lower priority.

At Setting

Clicking the *At Setting* opens a list of what price level to execute the Trade Rule.



Open

Selecting *Open* makes the Trade Rule execute at the open price point of the bar set in the *Bars From Now* setting.

Close

Selecting *Close* makes the Trade Rule execute at the close price point of the bar set in the *Bars From Now* setting.

Middle of Range

Selecting Middle of Range makes the Trade Rule execute at the middle of the range price point (halfway between the high and low) of the bar set in the *Bars From Now* setting.

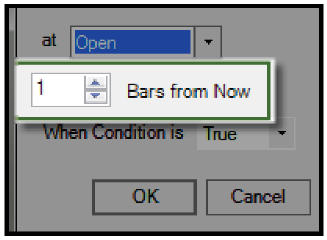
High

Selecting *High* makes the Trade Rule will execute at the high price point of the bar set in the *Bars From Now* setting.

Low

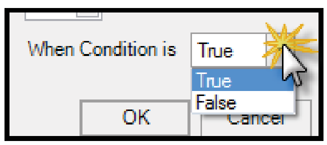
Selecting *Low* the Trade Rule will execute at the low price point of the bar set in the *Bars From Now* setting.

Bars from Now



The *Bars from Now* setting determines when the Trade Rule is executed relative to when the Rule was passed. If set to 0 (zero) the execution occurs on the same bar that the Rule was passed. If set to 1 then the trade is executed the bar after the Rule was passed. Think of "now" in *Bars from Now* as the bar that passed the Rule.

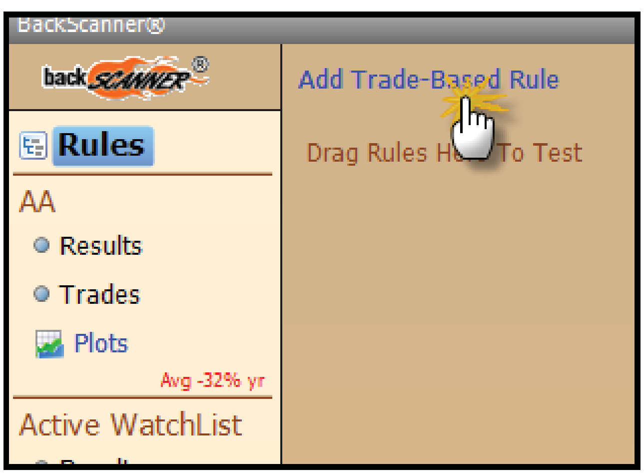
When Condition is



When Condition is can be set to *True* or *False*. If set to *True*, the Trade Rule is executes if the Rule passes (is True for the bar). If set to *False*, the Trade Rule executes if the Rule does not pass (is False for the bar).

Trade-Based Rules

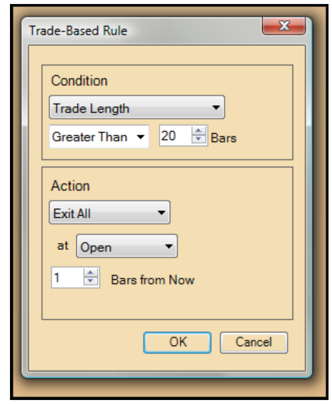
A Trade-Based Rule is a Trade Rule that depends on the status of an open trade. As a result, a Trade-Based Rule cannot open a trade. A Trade-Based Rule can only close or keep a trade open.



To add a Trade-Based Rule to the BackScan click the *Add Trade-Based Rule* link at the top of the *Rule* section of the BackScanner. After clicking the link the Trade-Based Rule is added and the edit window for the Trade-Based Rule is opened.

The Trade-Based Rule *Edit* window has two sections.

Condition

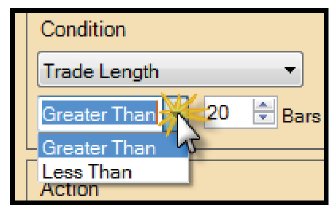


The *Condition* section is where the Trade-Based Rule's type is set. Clicking the menu under the *Condition* label brings up five choices.

Trade Length

Trade Length looks at the number of bars since the trade was open to execute the action. Trade lengths are compared two different ways.

Comparison



The *Comparison* menu has two choices.

Greater Than

Greater Than requires that the trade length is longer than the bars setting to execute the action.

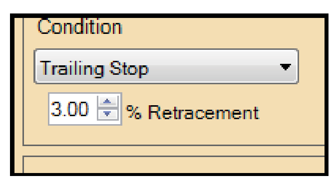
Less Than

Less Than requires that the trade length is shorter than the bars setting to execute the action.

Bars

Bars sets the number of bars for the comparison. If the comparison is set to Greater Than and the Bars is set to 10, the action will execute once the trade is eleven bars long.

Trailing Stop



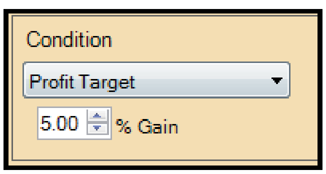
A *Trailing Stop* looks at where the price of the stock is now versus the highest high (for longs) or the lowest low (for shorts) of the trade. The stop moves higher as the stock trades higher (makes new trade highs) with long trades. The stop never gets lower in price value on long trades. The stop moves lower as the stock trades lower (makes new lows) with short trades. The stop never gets high in price value on short trades.

% Retracement

% Retracement sets the percent fall (on longs) from the highest high of the trade or the percent rise (on shorts) from the lowest low of the trade. If set to 5.00, the action will execute on a long trade if the stock ever falls 5% from the highest high of the trade. With a 5% setting, if the trade opens at $10 the action will execute if the stock falls $0.50 (5% of $10). If the trade opens at $10 then falls to $9.50, the action will execute. If the trade opens at $10 and rallies to $12 the stop value increases to $11.40 ($0.60 is 5% of $12 and $12 minus $0.60 is $11.40). On short trades it retraces from the lowest low of the trade and executes if the stock rises in price value from that trade lowest low.

Profit Target

Profit Target looks for the trade to reach a set percent increase (for longs) or decrease (for shorts) from the opening price of the trade. If the stock never reaches the set percent increase (for longs) or decrease (for shorts) the action will never execute.

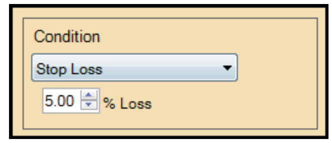


Gain

Gain sets the goal percent gain from the trade's opening price. If the gain is set to 5% and the long trade opening price is $10 the action will execute when the stock price reaches $10.50 ($0.50 is 5% of $10 and $10 plus $0.50 is $10.50).

Stop Loss

Stop Loss looks for the trade to fall (for longs) or rise (for shorts) a set percent from the opening price of the trade. The stop loss never changes; it is always a certain percent loss from the opening price value of the trade.

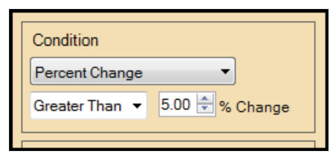


% Loss

This is the percentage loss that triggers the action. The percentage is measured from the trade's opening price.

Percent Change

Percent Change looks at the percent change from the open price of the trade to the price at the measured bar. Whether the open trade is a short or a long has no effect on how this type works.



Comparison

The *Comparison* menu has two choices for comparing the trade length.

Greater Than

Greater Than requires that the percent change from the open is higher than the *% Change* setting to execute the action.

Less Than

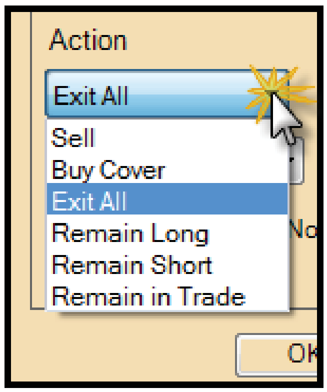
Less Than requires that the percent change from the open is lower than the *% Change* setting to execute the action.

% Change

% Change sets percentage amount to execute the action. If set to *Greater Than* and 10% the action will execute on either a long or short trade if the price increases 10% or more. If set to *Less Than* and -5% the action will execute on either a long or short trade if the price decreases 5% or more from the opening price.

Action

The *Action* is the what that will occur when the condition (set above it) is met.



Action Type

The *Action Type* menu has six choices for the action to execute.

Sell

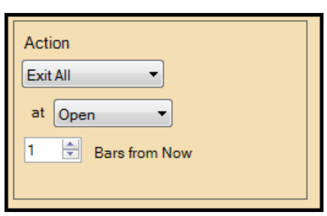
Selecting *Sell* makes it a Sell Trade-Based Rule. If a stock passes the Condition, BackScanner will close an opened historical long position based on *At Setting* and *Bars From Now* setting chosen.

Buy Cover

Selecting *Buy Cover* creates a Buy Cover Trade-Based Rule. If a stock passes the Condition, BackScanner will close an opened historical short position based on *At Setting* and *Bars From Now* setting chosen.

Exit All

Selecting *Exit All* makes it an Exit Trade-Based Rule. If a stock passes the Condition, BackScanner will close any opened historical long or short position based on *At Setting* and *Bars From Now* setting chosen.



Remain Long

Selecting *Remain Long* makes it a Stay in Trade Trade-Based Rule. If a stock passes the Condition, BackScanner will keep an historical long position open regardless of any exit or sell rules that have a lower priority.

Remain Short

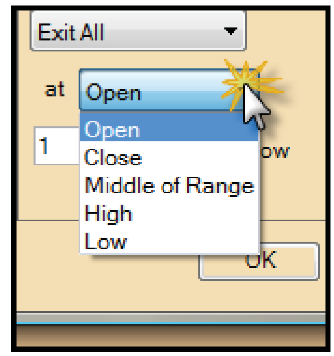
Selecting *Remain Short* makes it a Stay in Trade Trade-Based Rule. If a stock passes the Condition, BackScanner will keep an historical short position open regardless of any exit or cover short rules that have a lower priority.

Remain in Trade

Selecting *Remain in Trade* makes it a Stay in Trade Trade-Based Rule. If a stock passes the Condition, BackScanner will keep an historical long or short position open regardless of any exit, cover short or sell rules that have a lower priority.

At Setting

Clicking the *At Setting* opens a list of what price level to execute the Trade Rule.



Open

Selecting *Open* makes the Trade Rule execute at the open price point of the bar set in the *Bars From Now* setting.

Close

Selecting *Close* makes the Trade Rule execute at the close price point of the bar set in the *Bars From Now* setting.

Middle of Range

Selecting Middle of Range makes the Trade Rule execute at the middle of the range price point (halfway between the high and low) of the bar set in the *Bars From Now* setting.

High

Selecting *High* makes the Trade Rule will execute at the high price point of the bar set in the *Bars From Now* setting.

Low

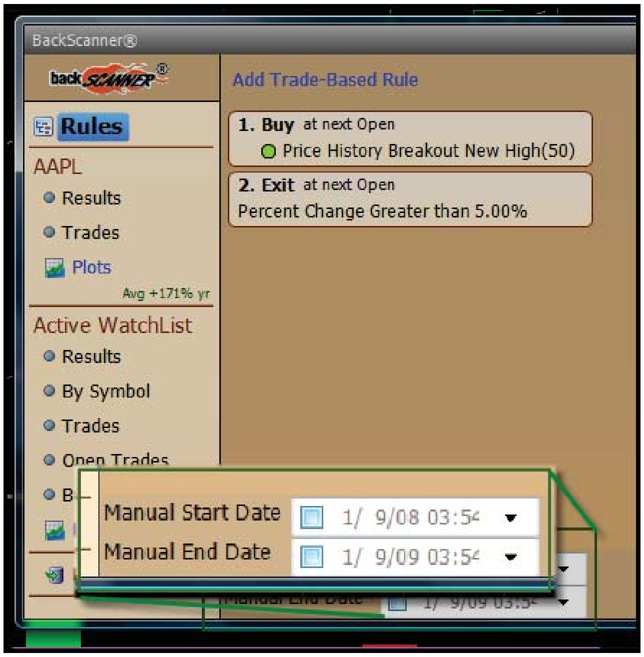
Selecting *Low* the Trade Rule will execute at the low price point of the bar set in the *Bars From Now* setting.

Bars from Now

The *Bars from Now* setting determines when the Trade Rule is executed relative to when the Rule was passed. If set to 0 (zero) the execution occurs on the same bar that the Rule was passed. If set to 1 then the trade is executed the bar after the Rule was passed. Think of "now" in *Bars from Now* as the bar that passed the Rule.

Manual Start or End Dates

At the bottom of the Rules section is the ability to set a manual start and/or end date for the BackScan. If left unchecked, the BackScan will run for 5,000 bars by default (unless the bar limit is changed in the Settings menu). One or both may be checked.



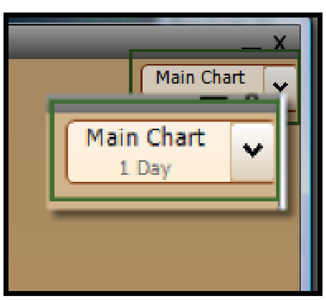
Manual Start Date

Checking the *Manual Start Date* sets a specific start date for the BackScan. Either type in a specific date and time for BackScanner to start the BackScan or click the down arrow and use the calendar control to set the start date.

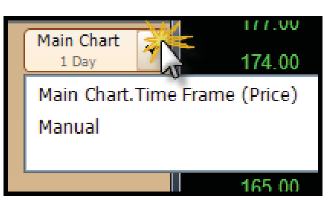
Manual End Date

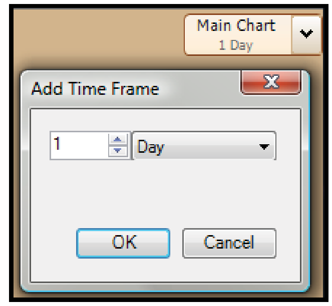
Checking the *Manual End Date* sets a specific end date for the BackScan. Either type in a specific date and time for BackScanner to end the BackScan or click the down arrow and use the calendar control to set the end date.

Time Frame



At the top right of the Rules section is the ability to set the time frame of the BackScan. BackScans are run and calculated based on bars. This setting determines how much time is encompassed in each bar. This works much like the time frame for charts (see the Charts chapter of this manual for more information on chart time frames).





Choose a chart (thus choosing its time frame) or manually set the time frame. If Manual, a small Time Frame window appears to select the manual Time Frame for the BackScan.

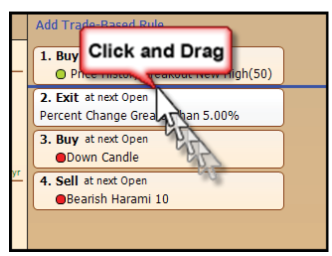
Any Rules from charts used in the BackScan will use their chart's time frame to determine if a stock passes the rule but all executions and results for the BackScan are based on this BackScan Time Frame setting.

Rule Priority

When a BackScan is run it always checks the Rules from top to bottom (1 then 2 then 3, etc.) The first rule to pass from top to bottom is executed. If a Rule falls lower in the priority than a Rule that passed it is ignored. The first Rule to pass on the tested bar is used and all others that fall below it are not tested or used.

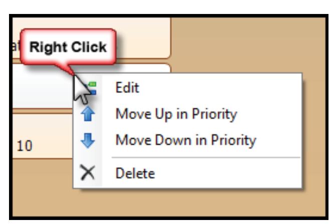
Set the Rule Priority based on each Rule's importance for the test. Should an exit Rule execute even if the Buy Rule is still true? If so, the exit Rule must have a higher priority than the Buy Rule.

To move a Rule up or down the priority list click and dragging it on the list or by right-clicking the Rule and choosing either Move Up in Priority or Move Down in Priority.



Rule Menu

Right-clicking on any Rule in the BackScan causes a menu with four items to appears.



Edit

Clicking *Edit* brings up the Edit window for the Rule.

Move Up in Priority

Clicking *Move Up in Priority* moves the Rule up one spot in the priority list.

Move Down in Priority

Clicking *Move Down in Priority* moves the Rule down one spot in the priority list.

Delete

Clicking *Delete* removes the Rule from the BackScan. Click and drag a Rule from the Rules section to the Trash Can delete icon on the Icon Toolbar also removes the Rule.

Active Symbol Results

Below the *Rules* in the BackScanner menu is the *Active Symbol Reports* section. At the top of the section is the current Active Symbol for the Layout. As the Active Symbol changes the ticker here changes.

The Results, Trades and Plots in this section are all based on the current Active Symbol.

Results

Clicking Results brings up a summary report for the BackScan run on the Active Symbol. There are nine rows of results and three category columns in the report.

	Winners	Losers	Total
# Trades	45	4	49
Return/Trade	+6.91%	-18.97%	+4.80%
Time/Trade	24.4 bars	207.3 bars	39.3 bars
Best Exit	+9.81%	+3.49%	+9.29%
Draw Down	-10.69%	-41.72%	-13.23%
Worst Exit	-7.05%	-39.48%	-9.70%
Winning %			92%
Gain/Loss Ratio			0.4
Ann Return/Trade			+113% yr

8,004 Conditions tested in 0.03 seconds
307,846 conditions/sec

Report Result Rows

There are nine different rows of results given for each of the three category columns.

Trades

The *# Trades* row shows the number of trades that were executed in the BackScan for each of the three categories. The number of trades for the *Winners* and *Losers* categories will add up to the number of trades in the Total category unless there were trades that broke even (neither a winner nor a loser).

Return/Trade

The *Return/Trade* row shows the average return per trade for each category. If there were two winning trades that returned +10% and +20% then it will show +15% under the *Winners* category (15 is the average of 10 and 20).

Time/Trade

The *Time/Trade* row shows the average length of the trades (in bars) for each of the trades. If there were two winning trades that were 20 and 30 bars long then it will show 25 under the Winners category (25 is the average of 20 and 30).

Best Exit

The *Best Exit* shows the average best exit for every trade in each category. The best exit is the percent change from the trade opening price to the highest high (for longs) or the lowest low (for shorts) in the trade. If a long trade opens at $10 and, at one point, trades up to $20 before closing at $15, the best exit will be 100% measured from $10 (open) to $20 (highest high). The only two points used to measure the best exit is the opening trade price and the trade's highest high (for longs) or the trade's lowest low (for shorts).

This number gives a sense of the upward volatility of the trades. It shows how much the trades go the right way at any point during the trades.

Draw Down

Draw Down shows the average draw down for every trade in each category. The draw down is the most given back during the trade. All of the retracements during each trade are evaluated then the program measures the draw down from the most extreme retracement during the trade.

This number gives you a sense of the volatility of the overall trades. Can you handle giving back this much during a trade? Think of Draw down as the "gut check" during a trade. If your risk tolerance cannot handle the draw down for the BackScan it may not be realistic for your trade style.

Worst Exit

Worst Exit shows the average worst exit for every trade in each category. The worst exit is measured from the open of the trade to the lowest low (for longs) or highest high (for shorts) of the trade.

This number gives you an idea of the downward volatility of the trade. Like Draw down, you have to evaluate whether the worst exit of the trade would be too much for you to endure. If it would be too much, you should adjust your BackScan.

Winning %

The winning percentage is the percentage of winning trades versus the total number of trades. Any winning percentage over 50 shows a BackScan with more winning trades than losing trades.

Gain/Loss Ratio

The *Gain/Loss Ratio* is derived by dividing the absolute percent change of the winning trades by the absolute percent change of the losing trades. If the BackScan had an average percent change of +10% on the winning trades and an average percent change of -2% on the losing trades the *Gain/Loss Ratio* would be 5 (10 divided by 2). A *Gain/Loss Ratio* of 5 essentially means you are gaining five times as much on your winning trades as you are losing on the losing trades. A *Gain/Loss Ratio* of 1 means there are as many winning trades as losing trades.

Ann Return/Trade

The *Ann Return/Trade* calculates the return expected for a selected symbol across a year, using the symbol's average percent change per trade and the average trade duration as inputs.

In order to calculate this figure, first the average percent change per trade is calculated by totalling the percent change figures for each of the symbol's trades and dividing by the number of total trades. Next, the average trade duration is calculated by totalling the trade durations for each of the symbol's trades and dividing by the total number of trades. The final Ann Return/Trade figure is calculated using the following formula:

(Avg Percent Change per Trade)*(365/Avg Trade Duration)

In intuitive terms, the Ann Return/Trade figure is calculated by multiplying the average amount returned per trade by the number of trades that would have been possible in a year, given the typical trade duration.

The Ann Return/Trade provides the ability to compare different strategies to each other, though they may result in trade durations that are very different from one another.

Don't confuse this with the actual annual return for the symbol, which would simply be the sum of all trade returns over a year.

Report Category Columns

There are three different categories of trades given for each of the nine result rows. Clicking on a trade (a row) highlights the trade in blue in the chart window.

Winners

Any trade that closed at a profit is categorized as a winner. All of the results for the winning trades are given in this column.

Losers

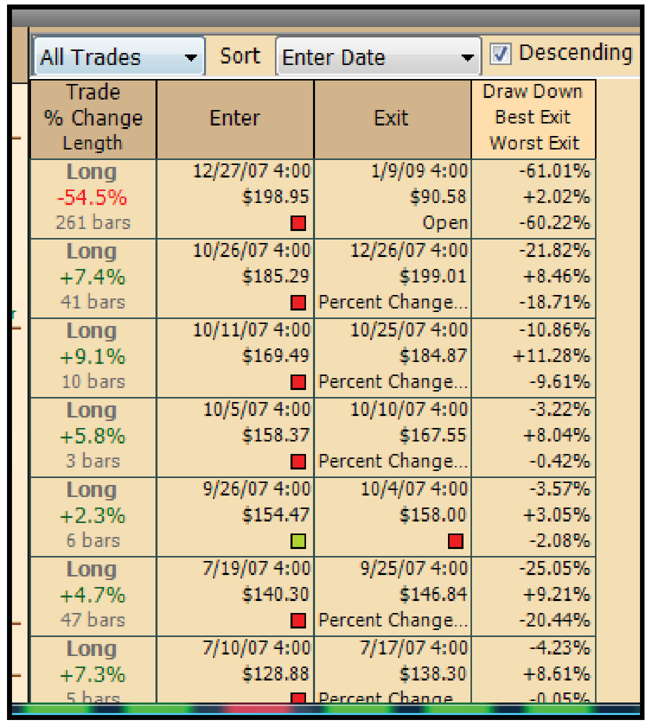
Any trade that closed at a loss is categorized as a loser. All of the results for the losing trades are given in this column.

Total

The *Total* column shows the results for all the winning, losing and break-even trades in the BackScan.

Trades

Trades brings up a table showing every trade in the BackScan broken into four columns.



All Trades | Sort | Enter Date | Descending

Trade % Change Length	Enter	Exit	Draw Down Best Exit Worst Exit
Long -54.5% 261 bars	12/27/07 4:00 $198.95	1/9/09 4:00 $90.58 Open	-61.01% +2.02% -60.22%
Long +7.4% 41 bars	10/26/07 4:00 $185.29	12/26/07 4:00 $199.01 Percent Change...	-21.82% +8.46% -18.71%
Long +9.1% 10 bars	10/11/07 4:00 $169.49	10/25/07 4:00 $184.87 Percent Change...	-10.86% +11.28% -9.61%
Long +5.8% 3 bars	10/5/07 4:00 $158.37	10/10/07 4:00 $167.55 Percent Change...	-3.22% +8.04% -0.42%
Long +2.3% 6 bars	9/26/07 4:00 $154.47	10/4/07 4:00 $158.00	-3.57% +3.05% -2.08%
Long +4.7% 47 bars	7/19/07 4:00 $140.30	9/25/07 4:00 $146.84 Percent Change...	-25.05% +9.21% -20.44%
Long +7.3% 5 bars	7/10/07 4:00 $128.88	7/17/07 4:00 $138.30 Percent Change	-4.23% +8.61% -0.05%

Trade Column

The first column shows three items for each trade

Trade

Trade shows if the trade was a long or a short trade.

% Change

% Change shows the percent change of the trade (from the trade open to the trade close).

Length

Length shows the length of the trade in bars.

Enter Column

The *Enter* column shows three items for each trade

Entry Date and Time

Entry Data and Time shows the date and time for the trade's open.

Entry Price

Entry Price shows trade's opening price.

Entry Rule

Entry Rule shows the color of the Rule used to execute the trade's entry.

Exit Column

The *Exit* column shows three things for each trade

Exit Date and Time

Exit Date and Time shows the date and time for the trade's close.

Exit Price

Exit Price shows trade's closing price.

Exit Rule

Exit Rule shows either the color of the Rule or the name of the Trade-Based Rule used to execute the trade's exit.

Volatility Column

The *Volatility* column shows three items for each trade.

Draw Down

Draw Down shows the greatest draw down that occurred in the trade. The draw down is the most given back during the trade. All of the retracements during the trade are evaluated and the program measures the draw down from the most extreme retracement during the trade.

Best Exit

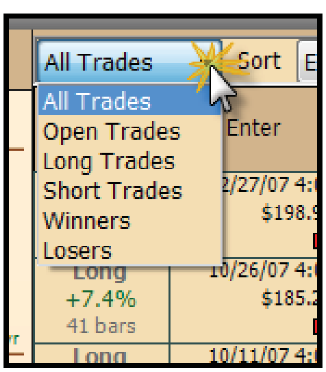
Best Exit shows the best exit for the trade. The best exit is the percent change from the trade opening price to the highest high (for longs) or the lowest low (for shorts) in the trade.

Worst Exit

Worst Exit shows the worst exit for the trade. The worst exit is measured from the open of the trade to the lowest low (for longs) or highest high (for shorts) of the trade.

Trades to Show Menu

At the top left above the table is the *Trades to Show* menu. It determines what trades are shown in the table. There are six options in the menu.



All Trades

If *All Trades* is selected the table will show every trade executed in the BackScan.

Open Trades

If *Open Trades is* selected the table will show the trades that did not fire an exit rule before the either the current bar or the Manual End Date (if set) for the BackScan.

Long Trades

If *Long Trades* selected the table will show only the long trades executed in the BackScan.

Short Trades

If *Short Trades* is selected the table will show only the short trades executed in the BackScan.

Winners

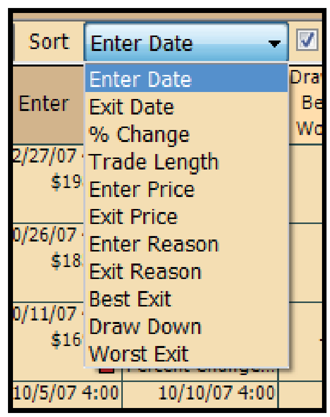
If *Winners* selected the table will show only the winning trades (trades that closed with a profit) executed in the BackScan.

Losers

If *Losers* selected the table will show only the losing trades (trades that closed with a loss) executed in the BackScan.

Sort Menu

To the right of the *Trades to Show* menu is the *Sort* menu. This determines the order that the trades are shown in the table. If the *Descending* option is checked, the sort order is in descending order. If unchecked the order is ascending. There are eleven choices available in the menu.



Enter Date

If *Enter Date* is selected the table is sorted on each trade's entry date and time.

Exit Date

If *Exit Date* selected the table is sorted on each trade's exit date and time.

% Change

If *% Change* is selected the table is sorted on each trade's percent change.

Trade Length

If *Trade Length* is selected the table is sorted on each trade's trade length in bars.

Enter Price

If *Enter Price* is selected the table is sorted on each trade's price at entry.

Enter Reason

If *Enter Reason* selected the table is sorted on which rule was used to enter the trade.

Exit Reason

If *Exit Reason* is selected the table is sorted on which rule was used to exit the trade.

Best Exit

If *Best Exit* is selected the table is sorted on each trade's best exit value.

Draw Down

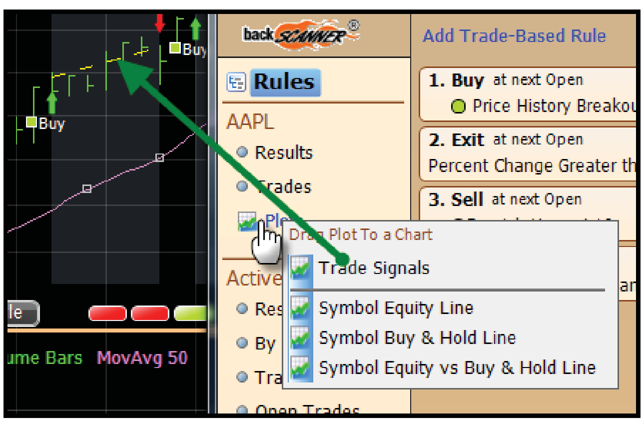
If *Draw Down* is selected the table is sorted on each trade's draw down value.

Worst Exit

If *Worst Exit* is selected the table is sorted on each trade's worst exit value.

Plots

Several bits of data from your BackScans can be plotted on any chart. Click the Plots link (under Trades but above Active WatchList) to get a list of all the plots available that pertain to the single stock BackScan. Click and drag any of the plots from the list to the chart to plot them.



Trade Signals

The *Trade Signals* plot is automatically added to the chart when a BackScan is created with at least one trade-opening Rule.

Trade Signals show the trades visually on the chart. They can be dragged to any plot on the chart. By default they appear on the Price History plot.

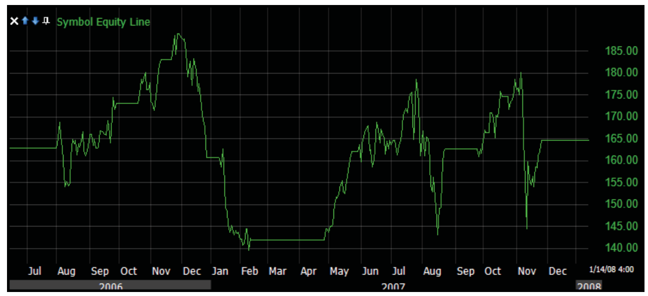
Symbol Equity Line

The *Symbol Equity Line* plot shows how a symbol's equity changes over time given the specified strategy. The beginning equity plot value for a test period is 100.

Each subsequent plot value is calculated according to the following formula:

prior equity plot value*(current price/previous price)

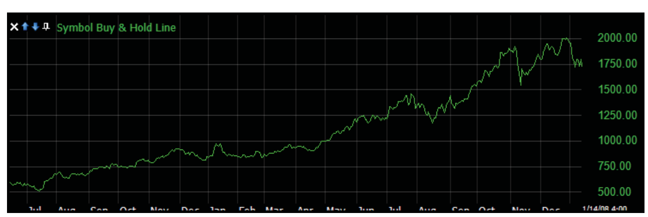
Note that in order for the Symbol Equity Plot value to change, the symbol must be involved in an open trade.



Equity Line is not a portfolio simulation. It does not take into account number of shares bought/sold, scaling in or out of trades or commissions. It is strictly a way to see how the equity changes at different points in the trade test period for that symbol in that BackScan.

Symbol Buy & Hold Line

The *Buy and Hold Line* represents an "always in" strategy for the stock. It mimics the percent changes of the price of the stock for the period tested. It assumes you put 100% of your equity in the stock at the start of the test period and held it until the end of the test period.



This can be used as a benchmark to measure the *Strategy Equity* line against. Some may only consider their strategy of value if it exceeds the return of just buying and holding the stock.

Symbol Equity vs. Buy & Hold Line

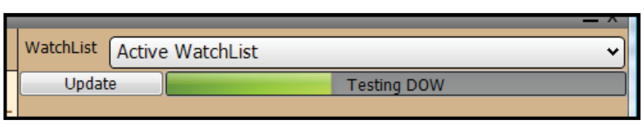
As mentioned above, some may feel a strategy is only worth-

while if it can beat a Buy and Hold benchmark. The *Symbol Equity vs. Buy & Hold* plot is the relative strength of the Symbol Equity plot and the Buy & Hold plot. If the line is rising it means the strategy is performing better than the Buy and Hold benchmark. If the line is falling, it is performing worse than the Buy and Hold benchmark.

If it ends at a value higher than when it started, overall the strategy performed better than the Buy and Hold strategy. If it ends lower then it did not perform better.

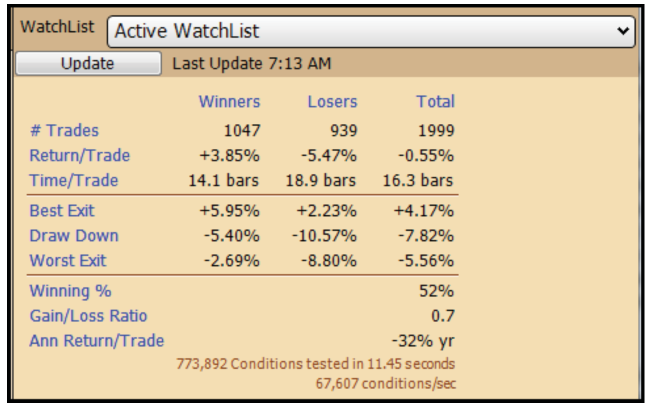
WatchList Results

Below the *Active Symbol* section of the BackScanner menu is the *WatchList Results* section. The items in this section of the menu are based on a WatchList. The WatchList being used is shown at the top of this section of the menu.



Results

When *Results* is first clicked the BackScan is run on every stock in a selected WatchList. Above the results report the WatchList being used may be changed. If set to the Active WatchList (the default) the BackScan is run on the Layout's Active WatchList.



WatchList: Active WatchList
Update — Last Update 7:13 AM

	Winners	Losers	Total
# Trades	1047	939	1999
Return/Trade	+3.85%	-5.47%	-0.55%
Time/Trade	14.1 bars	18.9 bars	16.3 bars
Best Exit	+5.95%	+2.23%	+4.17%
Draw Down	-5.40%	-10.57%	-7.82%
Worst Exit	-2.69%	-8.80%	-5.56%
Winning %			52%
Gain/Loss Ratio			0.7
Ann Return/Trade			-32% yr

773,892 Conditions tested in 11.45 seconds
67,607 conditions/sec

If anything changes in the BackScan (the WatchList or anything in the Rules section) the *Update* button must be pressed to run the BackScan again with the new settings. To the right of the *Update* button it shows the time of the last update.

Below the *Update* button is a summary report for the BackScan run on the WatchList. This report shows the results of the BackScan for every stock in the selected WatchList. There are nine rows of results and three category columns in the report.

Report Result Rows

There are nine different rows of results given for each of the three category columns.

Trades

The *# Trades* row shows the number of trades that were executed in the BackScan for each of the three categories. The number of trades for the *Winners* and *Losers* categories will add up to the number of trades in the *Total* category unless there were trades that broke even (neither a winner nor a loser).

Return/Trade

The *Return/Trade* row shows the average return per trade for each category. If there were two winning trades that returned +10% and +20% then it will show +15% under the Winners category (15 is the average of 10 and 20).

Time/Trade

The *Time/Trade* row shows the average length of the trades (in bars) for each of the trades. If there were two winning trades that were 20 and 30 bars long then it will show 25 under the Winners category (25 is the average of 20 and 30).

Best Exit

The *Best Exit* shows the average best exit for every trade in each category. The best exit is the percent change from the trade opening price to the highest high (for longs) or the lowest low (for shorts) in the trade. If a long trade opens at $10 and, at one point, trades up to $20 before closing at $15, the best exit will be 100% measured from $10 (open) to $20 (highest high). The only two points used to measure the best exit is the opening trade price and the trade's highest high (for longs) or the trade's lowest low (for shorts).

This number gives a sense of the upward volatility of the trades. It shows how much the trades when your way, at any point during the trades.

Draw Down

Draw Down shows the average draw down for every trade in each category. The draw down is the most given back during the trade. All of the retracements during each trade are evaluated then the program measures the draw down from the most extreme retracement during the trade.

This number gives a sense of the volatility of the overall trades. Can you handle giving back this much during a trade? Think of Draw down as the “gut check” during a trade. If your risk tolerance cannot handle the draw down for the BackScan it may not be realistic for your trade style.

Worst Exit

Worst Exit shows the average worst exit for every trade in each category. The worst exit is measured from the open of the trade to the lowest low (for longs) or highest high (for shorts) of the trade.

This number gives an idea of the downward volatility of the trade. Like Draw down, one must evaluate whether the worst exit of the trade would be too much for to endure. If it would be too much adjust the BackScan.

Winning %

The winning percentage is the percentage of winning trades versus the total number of trades. Any winning percentage over 50 shows a BackScan with more winning trades than losing trades.

Gain/Loss Ratio

The *Gain/Loss Ratio* is derived by dividing the absolute percent change of the winning trades by the absolute percent change of the losing trades. If the BackScan had an average percent change of +10% on the winning trades and an average percent change of -2% on the losing trades the *Gain/Loss Ratio* would be 5 (10 divided by 2). A *Gain/Loss Ratio* of 5 means the BackScan is gaining five times as much on the winning trades as is lost on the losing trades. A *Gain/Loss Ratio* of 1 means there are as many winning trades as losing trades.

Ann Return/Trade

The *Ann Return/Trade* calculates the return expected for a selected WatchList of symbols across a year, using the average percent change per trade and the average trade duration as inputs.

In order to calculate this figure, first the average percent change per trade is calculated by totalling the percent change figures for each of the symbol’s trades and dividing by the number of total trades. Next, the average trade duration is calculated by totalling the trade durations for each of the symbol’s trades and dividing by the total number of trades. The final Ann Return/Trade figure is calculated using the following formula:

(Avg Percent Change per Trade)*(365/Avg Trade Duration)

In intuitive terms, the Ann Return/Trade figure is calculated by multiplying the average amount returned per trade by the number of trades that would have been possible in a year, given the typical trade duration.

The Ann Return/Trade provides the ability to compare different strategies to each other, though they may result in trade durations that are very different from one another.

Don’t confuse this with the annual return for the BackScan. The annual return for the BackScan would be the return for the BackScan over a year’s period. The annualized return per trade is a projection figure calcualted using average trade data.

Report Category Columns

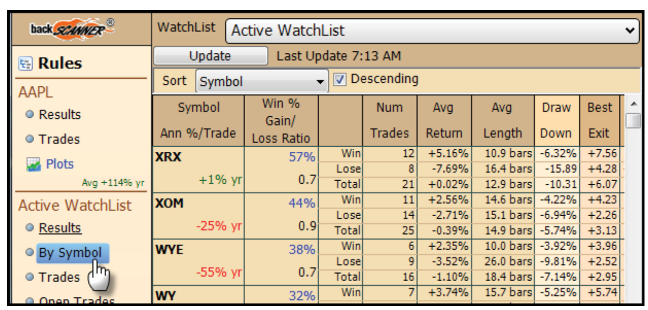
There are three different categories of trades given for each of the nine result rows. Click on a trade (a row) and that trade will be highlighted in blue in the chart window.

Winners

Any trade that closed at a profit is categorized as a winner. All of the results for the winning trades are given in this column.

Losers

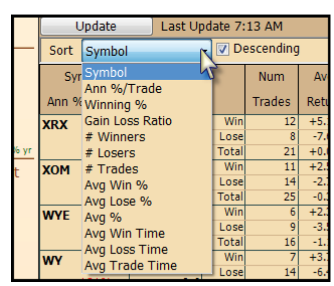
Any trade that closed at a loss is categorized as a loser. All



of the results for the losing trades are given in this column.

Total

The *Total* column shows the results for all the winning, losing and break-even trades in the BackScan.



By Symbol

Clicking *By Symbol* brings up a table that summarizes all the trades for each of the symbols in the WatchList.

Sort Menu

The table can be sorted by thirteen different fields from the *Sort* menu. If the *Descending Order* option is checked, the table will sort in descending order, otherwise it is sorted in ascending order by the item selected in the *Sort* menu.

Symbol

If *Symbol* is selected the table is sorted in alphabetical order by the ticker symbol.

Ann %/Trade

If *Ann %/Trade* is selected the table is sorted by the average annualized return per trade for each symbol.

Winning %

If *Winning %* is selected the table is sorted by the winning percentage for each symbol.

Gain Loss Ratio

If *Gain Loss Ratio* is selected the table is sorted by the gain to loss ratio for each symbol.

Winners

If *# Winners* is selected the table is sorted by the number of winning trades for each symbol.

Losers

If *# Losers* is selected the table is sorted by the number of losing trades for each symbol.

Trades

If *# Trades* is selected the table is sorted by the total number trades for each symbol.

Avg. Win %

If *Avg Win %* is selected the table is sorted by the average return on the winning trades for each symbol.

Avg. Lose %

If *Avg Lose %* is selected the table is sorted by the average return on the losing trades for each symbol.

Avg. %

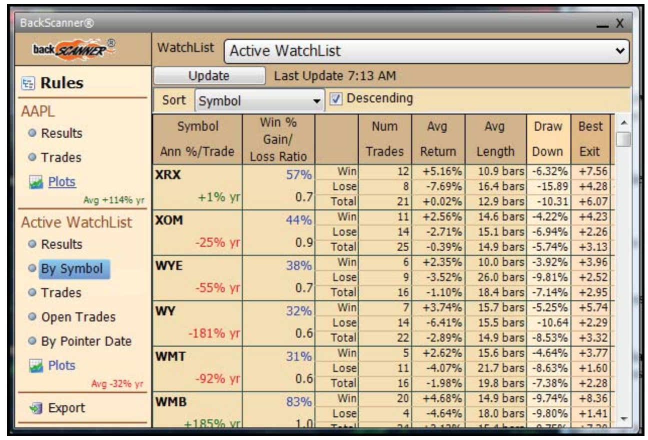
If *Avg %* is selected the table is sorted by the average return on the winning trades for each symbol.

Avg. Win Time

If *Avg Win Time* is selected the table is sorted by the average trade length on the winning trades for each symbol.

Avg. Loss Time

If *Avg Loss Time* selected the table is sorted by the average trade length on the losing trades for each symbol.



Avg. Trade Time

If *Avg Trade Time* is selected the table is sorted by the average trade length on all trades for each symbol.

By Symbol Results Table

Each row in the table shows the results for the symbols in the WatchList. The results are broken down into eight columns. The last six columns have three mini-rows for each symbol showing the breakdowns of the last six columns by winning, losing and all trades for the symbol.

Result Columns

Symbol and Annualized Return

The *Symbol and Annualized Return* column shows the ticker and the average annualized return per trade for the symbol.

Win % and Gain to Loss Ratio

The *Win % and Gain to Loss Ratio* column shows the winning percentage (in blue) and the gain to loss ratio (in black) for the symbol.

Number of Trades

The *Number of Trades* column shows the number of trades for the winners, losers and all the trades for the symbol.

Average Return

The *Average Return* column shows the average percentage return on the trades for the winners, losers and all the trades for the symbol.

Average Length

The *Average Length* column shows the average length of the trades for the winners, losers and all the trades for the symbol.

Draw Down

The *Draw Down* column shows the average drawn down of the trades for the winners, losers and all the trades for the symbol. The draw down is the most given back during the trade. All of the retracements during each trade are evaluated then the program measures the draw down from the most extreme retracement during the trade.

Best Exit

The *Best Exit* column shows the average best exit of the trades for the winners, losers and all the trades for the symbol. The best exit is the percent change from the trade opening price to the highest high (for longs) or the lowest low (for shorts) in the trade.

Worst Exit

The *Worst Exit* column shows the average worst exit of the trades for the winners, losers and all the trades for the symbol. The worst exit is measured from the open of the trade

to the lowest low (for longs) or highest high (for shorts) of the trade.

Trades

Clicking *Trades* brings up a table showing every trade in the BackScan broken into five columns.

Symbol Column

The *Symbol* column shows the ticker for the symbol.

Trade Column

The *Trade* column shows three items for each trade

Trade

Trade shows if the trade was a long or a short trade.

% Change

% Change shows the percent change of the trade (from the trade open to the trade close).

Length

Length shows the length of the trade in bars.

Enter Column

The *Enter* column shows three items for each trade

Entry Date and Time

Entry Date and Time shows the date and time for the trade's open.

Entry Price

Entry Price shows trade's opening price.

Entry Rule

Entry Rule shows the color of the Rule used to execute the trade's entry.

Exit Column

The *Exit* column shows three things for each trade

Exit Date and Time

Exit *Date and Time* shows the date and time for the trade's close.

Exit Price

Exit Price shows trade's closing price.

Exit Rule

Exit Rule shows either the color of the Rule or the name of the Trade-Based Rule used to execute the trade's exit.

Volatility Column

The *Volatility* column shows three items for each trade.

Draw Down

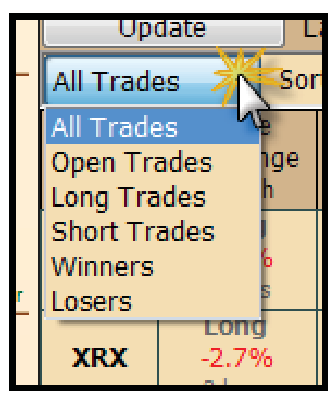
Draw Down shows the greatest draw down that occurred in the trade. The draw down is the most given back during the trade. All of the retracements during the trade are evaluated and the program measures the draw down from the most extreme retracement during the trade.

Best Exit

Best Exit shows the best exit for the trade. The best exit is the percent change from the trade opening price to the highest high (for longs) or the lowest low (for shorts) in the trade.

Worst Exit

Worst Exit shows the worst exit for the trade. The worst exit is measured from the open of the trade to the lowest low (for longs) or highest high (for shorts) of the trade.



Trades to Show Menu

At the top left above the table is the *Trades to Show* menu. It determines what trades are shown in the table. There are six options in the menu.

All Trades

If *All Trades* is selected the table will show every trade executed in the BackScan.

Open Trades

If *Open Trades* is selected the table will show the trades that did not fire an exit rule before the either the current bar or the Manual End Date (if set) for the BackScan.

Long Trades

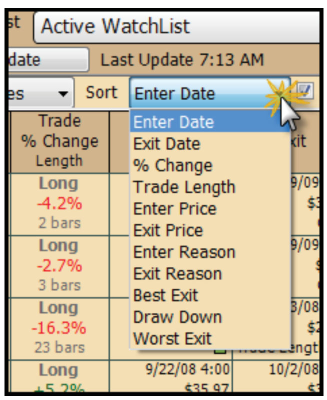
If *Long Trades* is selected the table will show only the long trades executed in the BackScan.

Short Trades

If *Short Trades* is selected the table will show only the short trades executed in the BackScan.

Winners

If *Winners* is selected the table will show only the winning trades (trades that closed with a profit) executed in the BackScan.



Losers

If *Losers* is selected the table will show only the losing trades (trades that closed with a loss) executed in the BackScan.

Sort Menu

To the right of the *Trades to Show* menu is the *Sort* menu. This determines the order that the trades are shown in the table. If the *Descending* option is checked, the sort order is in descending order. If unchecked the order is ascending. There are eleven choices available in the menu.

Enter Date

If *Enter Date* is selected the table is sorted on each trade's entry date and time.

Exit Date

If *Exit Date* is selected the table is sorted on each trade's exit date and time.

% Change

If *% Change* is selected the table is sorted on each trade's percent change.

Trade Length

If *Trade Length* is selected the table is sorted on each trade's trade length in bars.

Enter Price

If *Enter Price* is selected the table is sorted on each trade's price at entry.

Enter Reason

If *Enter Reason* is selected the table is sorted on which rule was used to enter the trade.

Exit Reason

If *Exit Reason* is selected the table is sorted on which rule was used to exit the trade.

Best Exit

If *Best Exit* is selected the table is sorted on each trade's best exit value.

Draw Down

If *Draw Down* is selected the table is sorted on each trade's draw down value.

Worst Exit

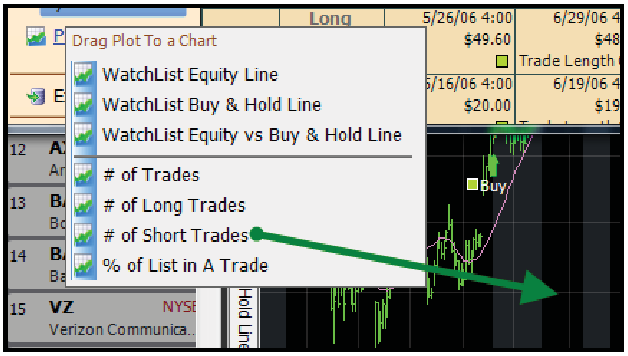
If *Worst Exit* is selected the table is sorted on each trade's worst exit value.

Open Trades

The *Open Trades* table is identical to the *Trades* table but only shows open trades. Open trades are trades with an entry Rule met but, by the last bar of the BackScan, an exit was not met. For details on the information in this table refer to the "Trades" section on page 98.

By Pointer Date

By Pointer Date generates a table showing all open trades at the date set by the pointer. To activate the pointer either press the period key on the keyboard (as a toggle) or by click any blank area on the chart. Move the pointer with the mouse to adjust the date used by the table. The table



information is identical to the *Trades* table. For details on the information in this table refer to the "Trades" section on page 98.

Plots

Like the plots for a single symbol, drag any plot from this list to the chart. It includes the *Equity and Buy and Hold* plots for the entire list. They work the same way as the plots for a single symbol. There are several unique plots available in the *Active WatchList Plots*.

Number of Trades

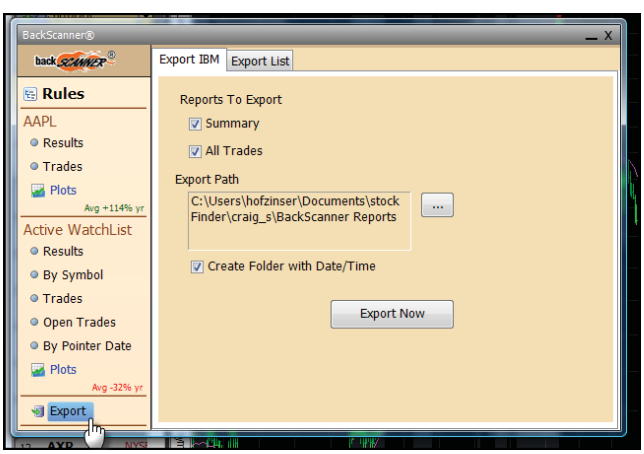
Dragging *Number of Trades* to the chart displays the number of open trades at any given time when the strategy was tested. This gives a sense of how active the strategy was at different points in time.

Number of Long Trades

The *Number of Long Trades* plot is like the *Number of Trades* plot but it only shows the number of long trades for the strategy.

Number of Short Trades

The Number of Short Trades plot is like the *Number of Trades* plot but it only shows the number of short trades for the strategy.



% of List in Trade

The only difference between the *% of List in Trade* plot and the *Number of Trades* plot is this is presented as a percentage vs. the total number of stocks in the Active WatchList.

Export

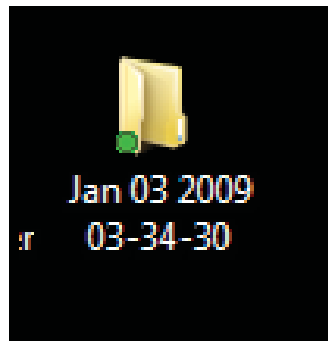
This is where the results of a BackScan can be exported to a file. There are two tabs in the Export screen.

Export Active Symbol

Export Active Symbol exports the BackScan information for the active symbol. This tab has four options. Once the options are set, export the information using the *Export Now* button. The file(s) created are Microsoft Office Excel Comma Separated Values file(s). You can open each file in most spreadsheet programs.

Summary

If the *Summary* option is checked a summary of the BackScan for the symbol is exported as its own file.



All Trades

If the *All Trades* option is checked a file showing all the trades for the symbol is exported as its own file.

Export Path

The *Export* path is shown in the large box. To the right is the button to change the path to export the file(s) to.

Create Folder with Date/Time

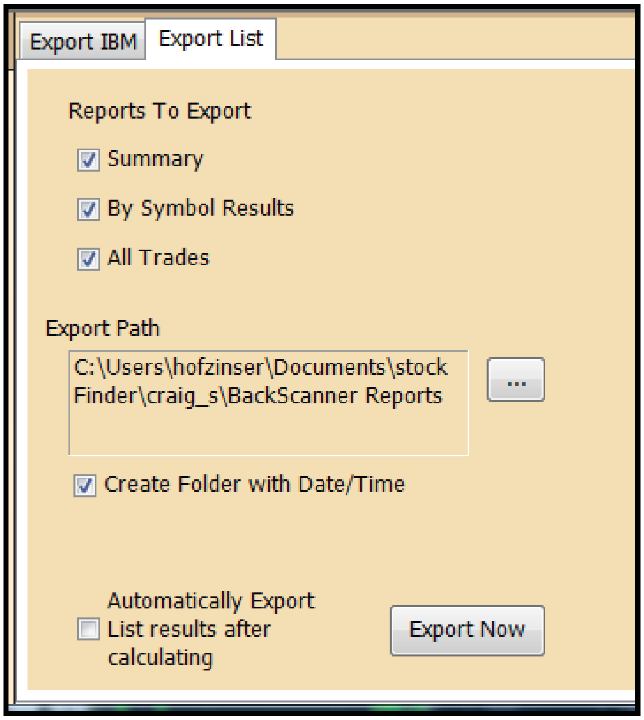
If *Create Folder with Date/Time* is checked the files are put in a created file that has the date and time of the export. The time is given as Hour-Minutes-Seconds in the folder name.

Export List

Export List exports the BackScan information for the WatchList. This tab has six options. Once the options are set, export the information using the *Export Now* button. The file(s) created are Microsoft Office Excel Comma Separated Values file(s). You can open each file in most spreadsheet programs available.

Summary

If the *Summary* option is checked a summary of the BackScan for the WatchList is exported as its own file.



By Symbol Results

If the *By Symbol Results* option is checked a summary broken down by symbol for the BackScan is exported as its own file.

All Trades

If the *All Trades* option is checked a file showing all the trades for the WatchList is exported as its own file.

Export Path

The *Export* path is shown in the large box. To the right is the button to change the path to export the file(s) to.

Create Folder with Date/Time

If the *Create Folder with Date/Time* is checked the files are put in a created file that has the date and time of the export. The time is given in the following format in the folder name: Hour-Minutes-Seconds.

Auto Export

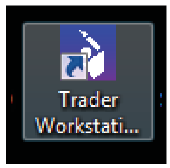
If *Auto Export* is checked an export is made (like clicking *Export Now*) every time the *Update* button is clicked under the *Results* section for the *WatchList Results*.

11 Brokers and Trade Sliders

StockFinder allows integration with three different brokerage firms; Interactive Brokers, optionsXpress and TDAmeritrade. With one of the above broker accounts, Stockfinder can be used to review the status of any of trades, make trades on the chart (with Trade Sliders) and/or utilize Trade Centers within a Layout.

Once connected, StockFinder opens a new WatchList window below the Main WatchList showing all of IB positions, the net, shares, and entry price on each position. It also opens the Trade Sliders on the right of the chart. For more information on Trade Sliders refer to the "Trade Sliders" section on page 108.

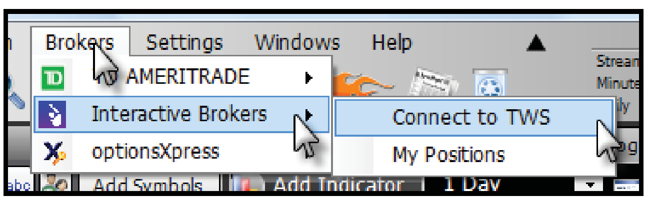
Interactive Brokers



In order to connect with an Interactive Broker account, IB's Trader Workstation program must be open on the same computer with StockFinder.

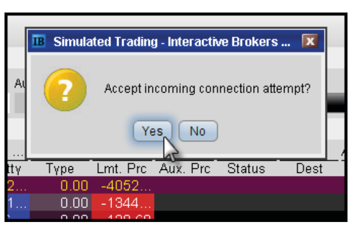
Connecting with Trader Workstation

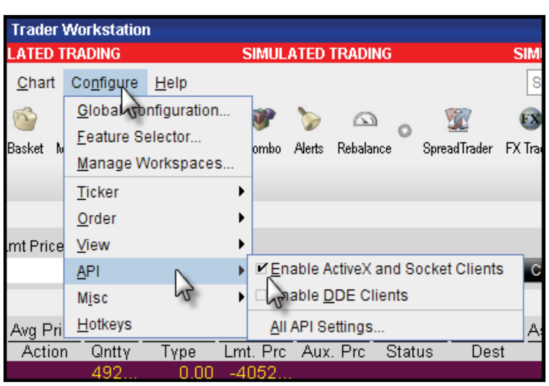
Once Trader Workstation is open (and logged into an account) connect StockFinder to Trader Workstation. On the top menu in StockFinder, click the Brokers menu, go to *Interactive Brokers* and click *Connect to TWS*.



If it does not connect, in Trader Workstation, in TWS click *Configure* go to *API* and check *Enable Active X and Socket Clients* then try and connect again through StockFinder.

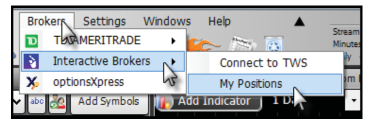
Connecting with Trader Workstation connects StockFinder to Trader Workstation (and the IB account). A new window appears from Trader Workstation asking if to accept the incoming connection. Click the *Yes* button to connect the programs.

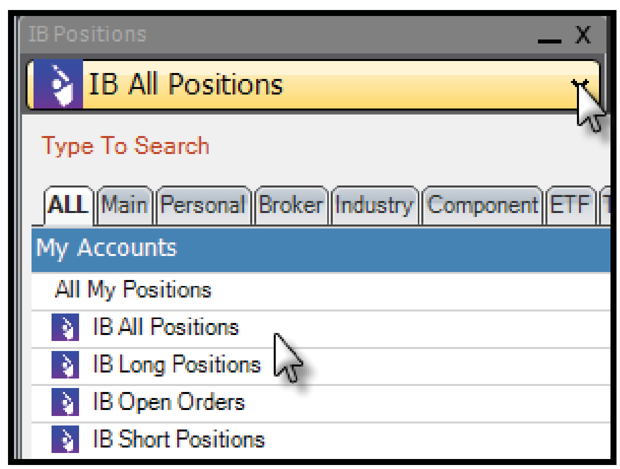




IB WatchLists

To open WatchLists based on the connected IB account click the *Brokers* menu, go to *Interactive Brokers* then click *My Positions*. This opens a new window set to the *IB All Positions WatchList*. This can be changed via the picker to show just open positions, long or short positions. Click the picker and change the WatchList as desired.





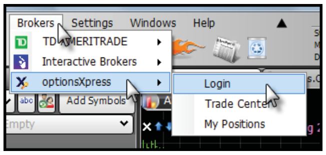
optionsXpress

When StockFinder is logged into an optionsXpress account it has access to WatchLists (based on the activity in the account), Trade Sliders and a Trade Center.

Account Login

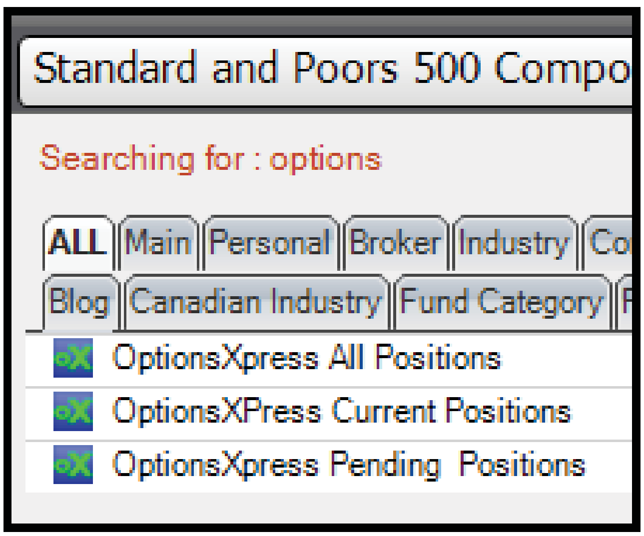
To login to an OX account, on the top menu click the *Brokers* menu, go to *optionsXpress* then click *Login*.

The *optionsXpress Login* window opens asking for a User name and Password. Checking the *Remember User Name* option at the bottom of the window uses the last user name entered. The user name will be remembered the next time a login is attempted. The *Open An Account* link navigates a browser to optionsXpress' web site for opening an account. Once the user name and password are entered, click the *OK* button to login.



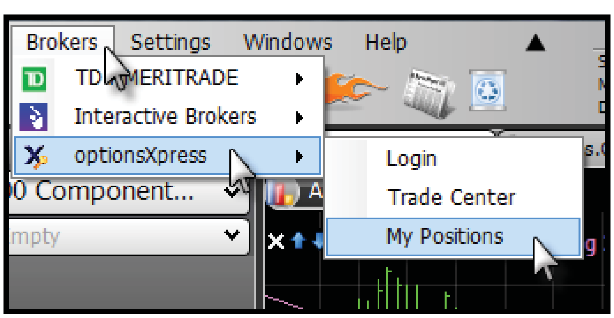
OX WatchLists

When logged into the OX account, there are three OX WatchLists available in the Main WatchList picker. These can be opened in their own WatchList window by going to the *Brokers* menu on the top menu, going to *optionsXpress* then clicking *My Positions*.



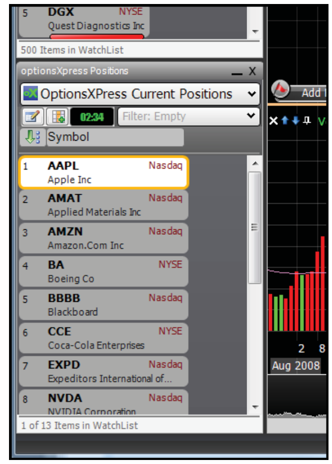
OptionsXpress All Positions

This WatchList contains every ticker that is or was a position in the account. It includes all open and closed positions. Making one of the symbols the Active Symbol will bring up the chart if the symbol is available in one of the StockFinder data sources. For more information on WatchLists refer to the "WatchLists" section on page 69.



OptionsXpress Current Positions

The *Current Positions* WatchList contains every current open position in the account. Making one of the symbols the Active Symbol will bring up the chart if the symbol is available in one of the StockFinder data sources. For more information on WatchLists refer to the "WatchLists" section on page 69.

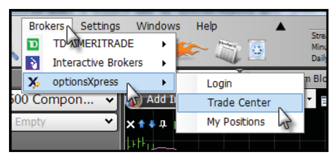


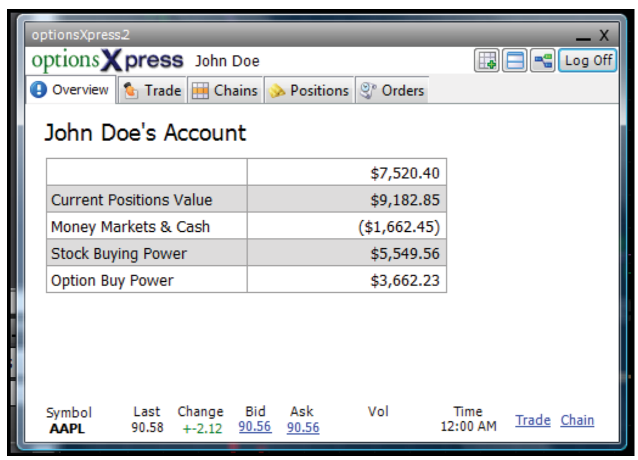
OptionsXpress Pending Positions

The *Pending Positions* WatchList contains every closed position in the account. Making one of the symbols the Active Symbol brings up the chart if the symbol is available in one of the StockFinder data sources. For more information on WatchLists refer to the "WatchLists" section on page 69.

Trade Center

To open the *OX Trade Center* click the *Brokers* menu on the top menu, go to *optionsXpress* then click *Trade Center*. This opens a new *Trade Center* window. At the top of the window is the OX logo and the name on the OX account.



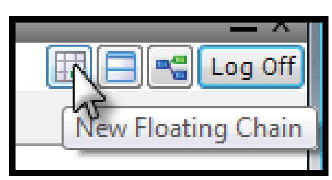


Trade Center Buttons

In the top-right corner of the Trade Center are four buttons.

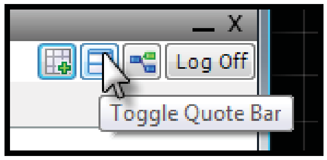
New Floating Chain

Clicking the *New Floating Chain* button opens a new window (which can be docked like the *Trade Center*).



This new window is the same as the *Chains* tab. Refer to the *Chains Tab* below for more information on what appears in this new window. There is no limit to the number of *OX Chains* windows that can be opened in a Layout.

Toggle Quote Bar



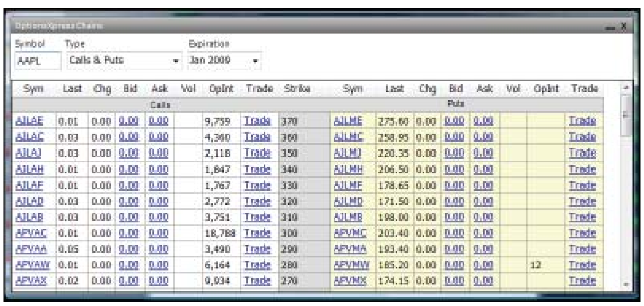
Clicking the *Toggle Quote Bar* button hides or reveals the quote bar at the bottom of the window. The bar shows the Active Symbol, its last price, the change for the most recent trading day, the most recent Bid and Ask, volume, time and two links.

Trade

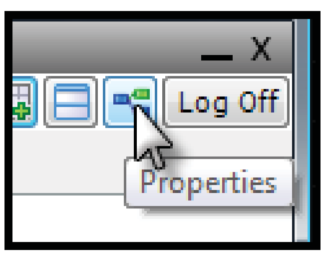
The *Trade* link opens a trade ticket. For more information on trade tickets in the Trade Center refer to the Trade Tab section of this manual below.

Chain

The *Chains* link opens the Chains tab. Refer to the Chains Tab section below for more information what is presented there.

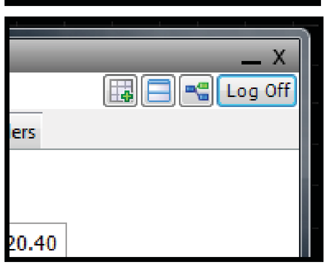


Properties



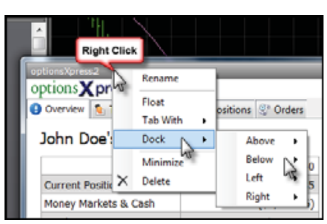
This opens a *Properties* and Block Diagram window for the Trade Center.

Log Off



Clicking the *Log Off button* logs StockFinder out of the OX account.

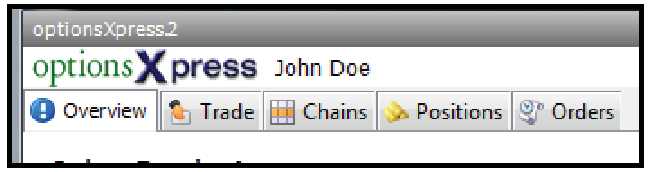
Docking the Trade Center



Right-clicking the title bar of the *Trade Center* window brings up a menu. Go to the *Dock* submenu to dock the *Trade Center* above, below, to the left, to the right or tabbed with another window in the Layout.

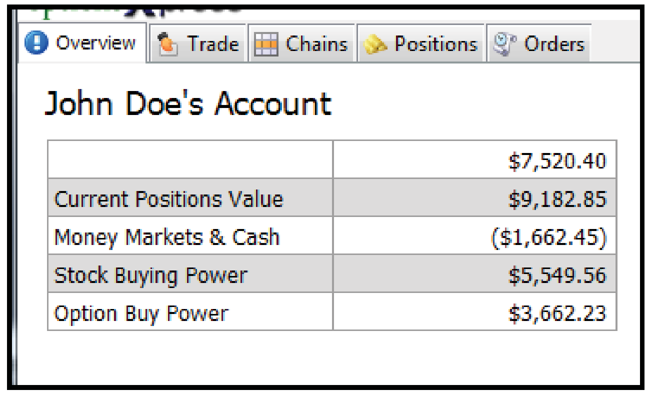
Tabs

The *Trade Center* is made up five tabs.

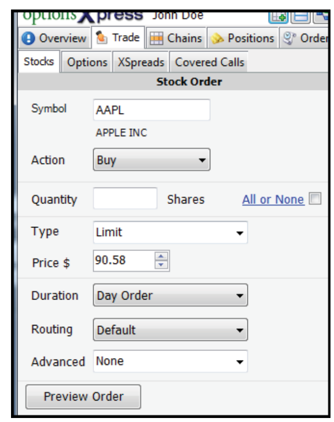


Overview Tab

The *Overview* tab shows the account name, account value, current positions value, money markets and cash value, stock buying power and options buying power.



Trade Tab



The *Trade* tab opens a trade ticket. The four tabs allow tickets for stocks, options, XSpreads and Covered Calls.

Stocks

Clicking *Stocks* opens a trade ticket for placing a stock order in the OX account. There are several fields and buttons in this ticket.

Symbol

Symbol is for ticker to place the trade for. This field is automatically populated with the Active Symbol's ticker but it can be manually changed.

Action

Action is the type of order to place; buy, sell, sell short or buy to cover.

Quantity

Quantity is the number of shares to trade.

All or None

If *All or None* is checked, the order becomes an *OX All or None* order.

Type

Type sets the type of order to place; limit, market, stop, stop limit or market on close.

Price

Price sets the price for the order. It defaults to the current price of the stock but can be manually changed.

Duration

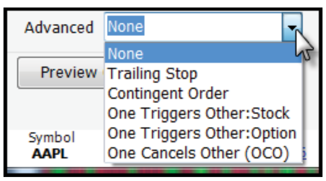
Duration sets the duration of the order to either day order or good until cancelled.

Routing

Routing sets the routing to either default or ARCA.

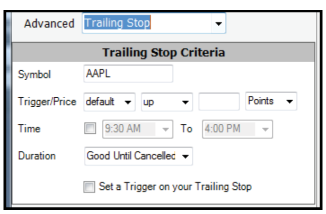
Advanced

This allows any of the available advanced order types. For more information on these advanced order consult the account advanced order information available though optionsXpress.



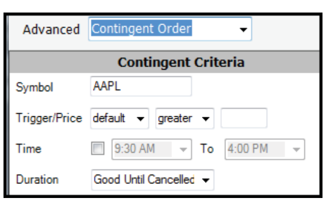
Trailing Stop

If *Trailing Stop* is chosen a mini ticket opens with the symbol, trigger price choices, time options, duration options and the set a trigger option.



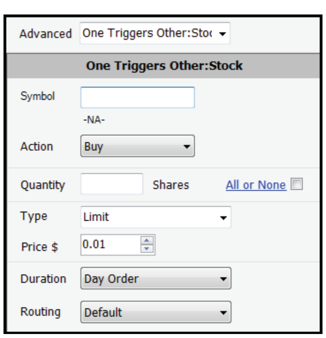
Contingent Order

Clicking *Contingent Order* opens a mini ticket with the symbol, trigger price choices, time options and duration options.



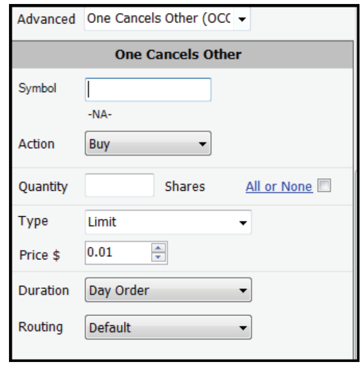
One Triggers Other: Stock

Clicking *One Triggers Other: Stock* opens a mini ticket with the symbol, action choices, quantity choice, All or None option, type choice, duration choice and routing choice.



One Triggers Other: Option

One Triggers Other: Option is the same as the *OTO: Stock* above but for options.

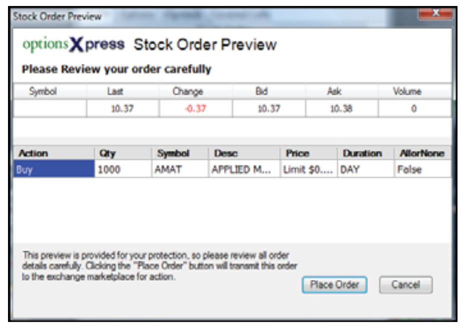


One Cancels Other

One Cancels Other is the same as the OTO: Stock but places a OCO order.

Preview Order

When *Preview Order* is clicked a *Stock Order Preview* window appears. All of the order information chosen in the ticket appears for review. Clicking the *Place Order* button transmits the order to the exchange marketplace for action via the OX account. Clicking the *Cancel* button cancels the order.



Options

Options presents the same choices as the Stocks tab above but is for placing an options order.

XSpreads

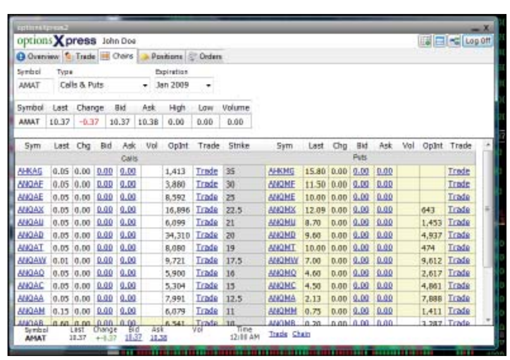
XSpreads presents the choices and settings for placing an XSpreads order.

Covered Calls

Covered Calls presents the choices and settings for placing a Covered Call order.

Chains Tab

The *Chains* tab opens any chains available for the Active Symbol. The symbol can be manually entered a symbol in that field but it defaults to the active symbol.



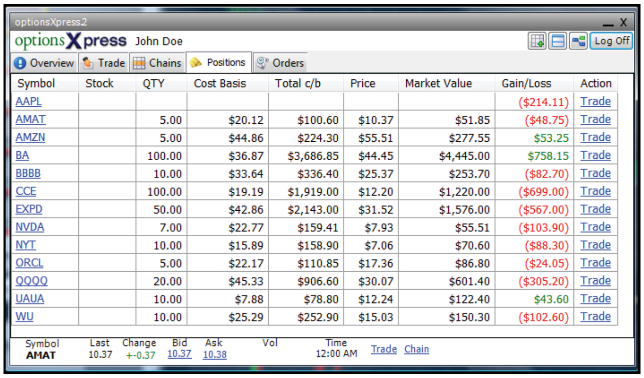
To change the type of chain shown use the *Type* menu. You can adjust the options expiration with that menu.

Below those choices is a snapshot of the current stock status.

Below that is a table showing the selected chain for display. Clicking any of the *Trade* links in the table opens a trade ticket filled in for that option order.

Positions Tab

Clicking the *Positions Tab* opens a table showing all the open positions in the account. Clicking any of the ticker symbols makes that symbol the Layout's Active Symbol. Clicking any of the *Trade* links opens a trade ticket for that symbol.



Symbol	Stock	QTY	Cost Basis	Total c/b	Price	Market Value	Gain/Loss	Action
AAPL							($214.11)	Trade
AMAT		5.00	$20.12	$100.60	$10.37	$51.85	($48.75)	Trade
AMZN		5.00	$44.86	$224.30	$55.51	$277.55	$53.25	Trade
BA		100.00	$36.87	$3,686.85	$44.45	$4,445.00	$758.15	Trade
BBBB		10.00	$33.64	$336.40	$25.37	$253.70	($82.70)	Trade
CCE		100.00	$19.19	$1,919.00	$12.20	$1,220.00	($699.00)	Trade
EXPD		50.00	$42.86	$2,143.00	$31.52	$1,576.00	($567.00)	Trade
NVDA		7.00	$22.77	$159.41	$7.93	$55.51	($103.90)	Trade
NYT		10.00	$15.89	$158.90	$7.06	$70.60	($88.30)	Trade
ORCL		5.00	$22.17	$110.85	$17.36	$86.80	($24.05)	Trade
QQQQ		20.00	$45.33	$906.60	$30.07	$601.40	($305.20)	Trade
UAUA		10.00	$7.88	$78.80	$12.24	$122.40	$43.60	Trade
WU		10.00	$25.29	$252.90	$15.03	$150.30	($102.60)	Trade

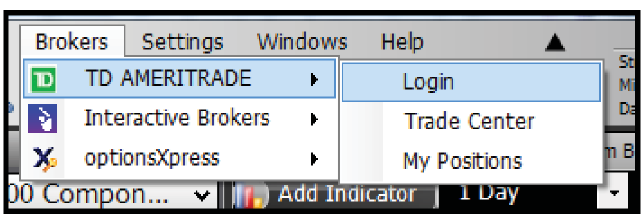
Symbol	Last	Change	Bid	Ask	Vol	Time		
AMAT	10.37	+-0.37	10.37	10.38		12:00 AM	Trade	Chain

Orders Tab

Clicking the *Orders* tab displays all the pending orders in the account based on the period selected.

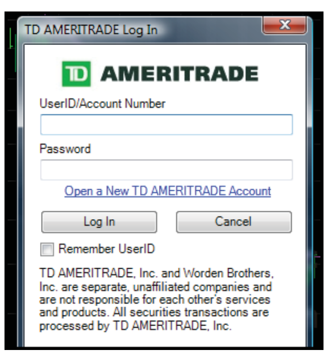
TDAmeritrade

When StockFinder is logged into a TDAmeritrade account it has access to WatchLists (based on the activity in the account), Trade Sliders and a Trade Center.



Login

To log into a TDAmeritrade account go to the *Brokers* menu on the top menu, go to *TDAmeritrade* then click *Login*. This brings up the login screen. Enter a TD User ID/Account number and the password. Click *Log In* to log into the account via StockFinder.



Clicking *Cancel* closes the log in screen without logging in. Checking the *Remember UserID box* auto-fills the User ID for future logins.

Clicking the *Open a new TDAmeritrade Account* option opens a browser to an Online Account Application for TDAmeritrade. Contact TDAmeritrade directly with questions on starting a new account.

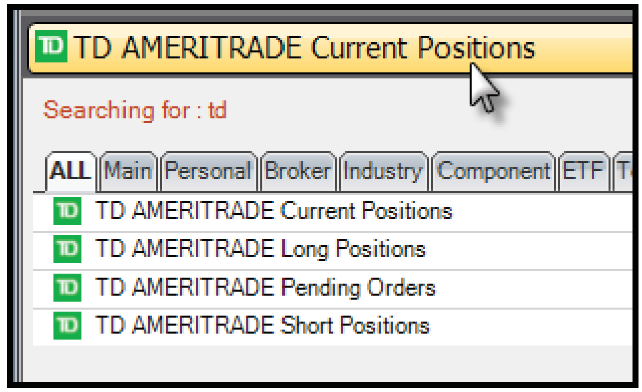
After login the program opens the Trade Slider on the chart. For more information on Trade Sliders go to that section of this chapter. A new WatchList with the current TDAmeritrade holdings opens below the Main WatchList.

TD WatchLists

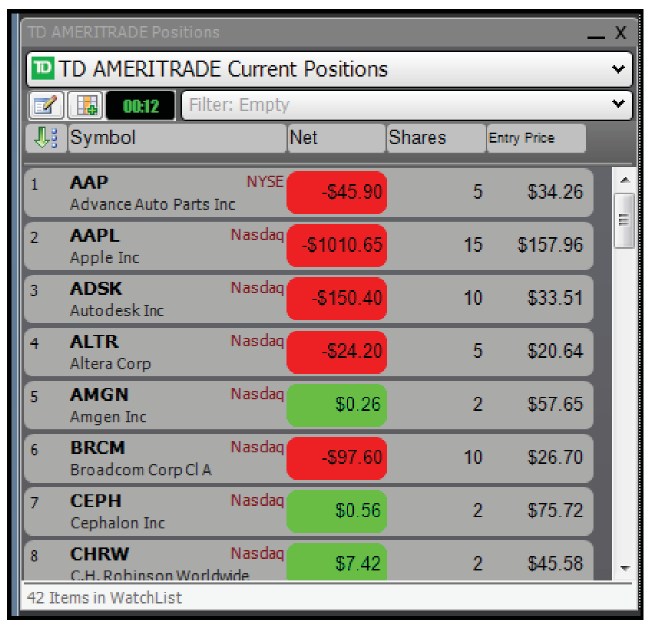
This new WatchList window can be changed to any of the four TDAmeritrade-specific WatchLists.

TDAmeritrade Current Positions

Current Positions lists all the stocks currently in the account. Click on any item in the list to make it the Active Symbol.



There are three columns in this and the other three WatchLists (expand the WatchList to the right to see them).



The *Net* column offers the current net standing for the holding. The *Shares* column shows the number of shares held. The *Entry Price* column shows the price entered. Each column can be sorted by clicking on the header.

For more information on other WatchList functions refer to the "Main WatchList" section on page 69.

TDAmeritrade Long Positions

Long Positions list the same information as the *Current Positions* WatchList but for only the long positions in the account.

TDAmeritrade Pending Positions

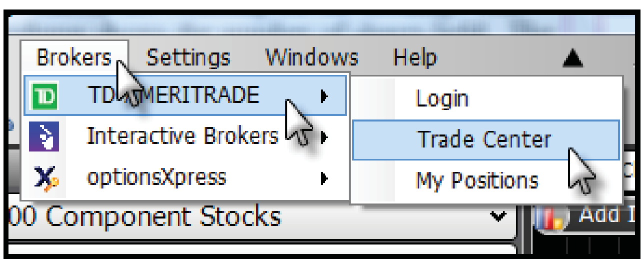
Pending Positions lists the same information as the *Current Positions* WatchList but for only the pending orders in the account.

TDAmeritrade Short Positions

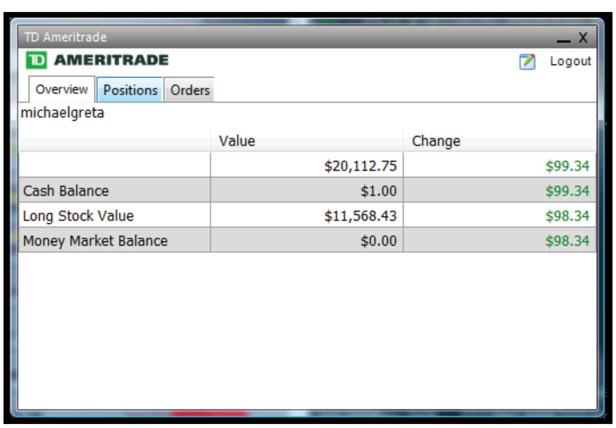
Short Positions lists the same information as the *Current Positions* WatchList but for only the short positions in the account.

Trade Center

Clicking the *Trade Center* under the *Broker*, *TDAmeritrade* menu opens the *TDAmeritrade Trade Center* window. Right-clicking on the title bar opens the docking options.



The *Overview* tab shows the Cash Balance, Long Stock Value and Money Market information for the account.

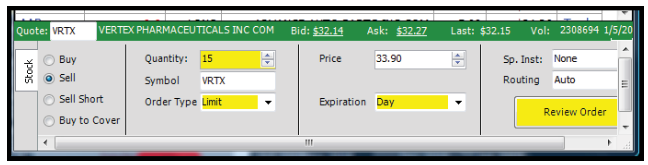


The *Value* column gives the values for each row including the account value at the top.

The *Change* column shows how each row has changed.

The *Positions* tab shows all of the open positions in the account. This includes the symbol, Gain/Loss, type of position, company name, quantity of shares, entry price and an action column.

Clicking the *trade* link under action for a symbol brings up a SnapTicket allowing order placement.



Clicking the *float* icon on the top right of the *SnapTicket* floats the ticket. Right-click the window's title bar to dock it. Choosing *Minimize* from this menu minimizes the ticket to the bottom of the program. Click it there to restore it.

Clicking any symbol on the list in the *Trade Center* window changes the Active Symbol.

Clicking *Logout* at the top right of the window logs the program out of the TD account.

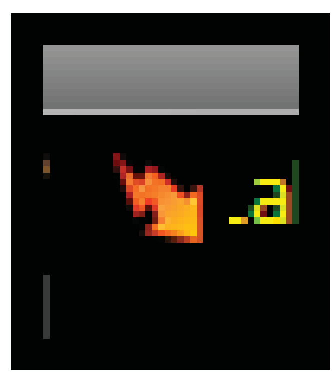
The *Orders* tab brings up any pending orders in the account.

Clicking a symbol in the *Orders* tab changes the active symbol. Clicking *Cancel* will cancel the order. All orders ask to confirm the order.

Trade Sliders

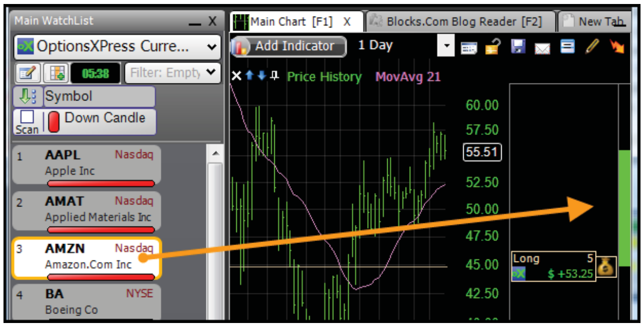
With Trade Sliders once can visually review open trades and visually execute trades on the chart in any of the brokers compatible with StockFinder.

To open the *Trade Slider* bar, click the *Show/Hide Trade Sliders* button at the top of the chart. A vertical space opens to the right of the price scale. This is where one can see and create Trade Sliders. StockFinder must be connected to one of the brokers to see Trade Sliders.



Reviewing Trades

When the symbol on the chart is a stock with an open position, a Trade Slider appears at the average cost level of the position. To the right of the Slider is a green or red bar that runs from the Slider to the current price of the stock. This bar represents the profit or loss of the current position.



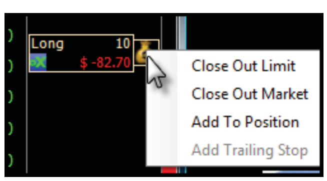
Within the slider one can see the type of position, the number of shares in the position and the net profit or loss of the position. In the bottom left corner of the Slider is an icon for the broker that the position is held with. It is possible to have more than on slider on a stock if two brokers are connected to StockFinder and the stock is a position in both or more of the brokers.

Making Trades

The Trade Sliders are used to make trades directly on the chart. Sliders can open a new position trade, close a trade, add to a position or place a stop.

Closing an Open Trade

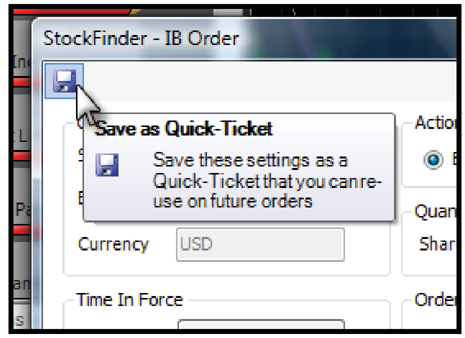
If the symbol on the chart is an open position, click the *money bag* icon to the right of the Slider for the *Slider Action* menu.



Close Out Limit

If *Close Out Limit* is selected a new orange Trade Slider appears at the current close of the stock. Click the slider and drag it to the price level desired for the close out limit order. As it is slid, the net profit or loss at the level will appear in green in the upper right corner of the slider. Click the *broker* icon in the slider to change the broker to use for the order.

Once the slider is positioned at (or near) the desired price level, click the *lightning bolt* icon on the right of the slider to open an *Order Ticket* window. The *Order Ticket* is split into five sections. Clicking the *save* button (top left corner) saves the order for future use in another trade. Click the *Place Order* button to execute the trade once the settings are correct,.



Contract Desc

The *Contract Desc* area shows the symbol, exchange and currency for the order.

Time in Force

The *Time in Force* area is for setting the time in force and expiration date for the order.

Action

The *Action* area sets the action for the order.

Quantity

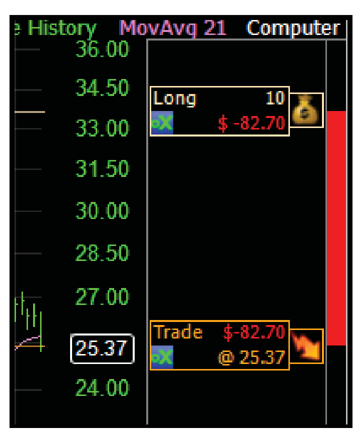
The *Quantity* area sets the number of shares for the order.

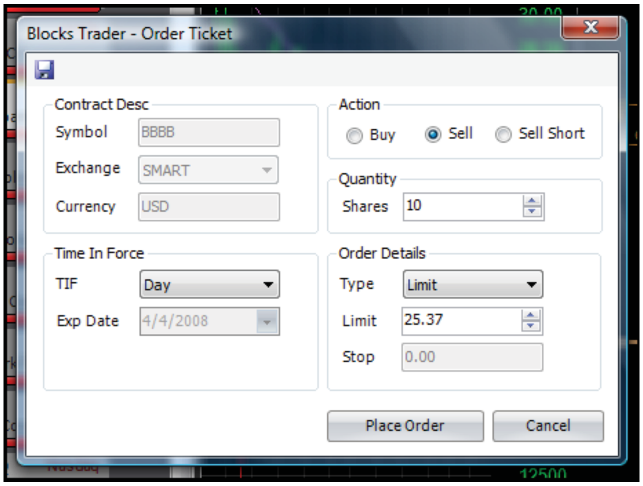
Order Details

The *Order Details* area sets the type, limit level and stop for the order.

Close Out Market

If *Close Out Market* is selected a new orange Trade Slider appears at the current close of the stock. Click the *lightning bolt* icon on the right of the slider to open an *Order Ticket* window. The *Order Ticket* is split into five sections. Clicking the *save* button (top left corner) to save the order for future use in another trade. Click the *Place Order* button to execute the trade once the settings are correct.





Contract Desc

The *Contract Desc* area shows the symbol, exchange and currency for the order.

Time in Force

The *Time in Force* area is for setting the time in force and expiration date for the order.

Action

The *Action* area sets the action for the order.

Quantity

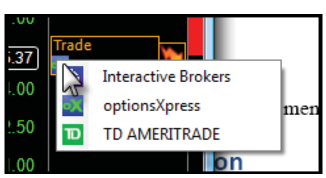
The *Quantity* area sets the number of shares for the order.

Order Details

The *Order Details* area sets the type, limit level and stop for the order.

Add to Position

If *Add to Position* is selected a new orange Trade Slider appears at the current close of the stock. Click the slider and drag it to the price level desired for the order. As it is slid, the price at the level will appear in green in the upper right corner of the slider. Click the *broker* icon in the slider to change the broker to use for the order.



Once the slider is positioned at (or near) the desired price level, click the *lightning bolt* icon on the right of the slider and click *Show Trade Ticket* to open the *Order Ticket* window. The *Order Ticket* is split into five sections. Clicking the *save* button (top left corner) to save the order for future use in another trade. Click the *Place Order* button to execute the trade once the settings are correct,.

Contract Desc

The *Contract Desc* area shows the symbol, exchange and currency for the order.

Time in Force

The *Time in Force* area is for setting the time in force and expiration date for the order.

Action

The *Action* area sets the action for the order.

Quantity

The *Quantity* area sets the number of shares for the order.

Order Details

The *Order Details* area sets the type, limit level and stop for the order.

Add Trailing Stop

Add Trailing Stop is currently not available via the menu.

Opening a New Position

At any time a new trade can be started by clicking anywhere in the *Trade Slider* area. Immediately an orange Trade Slider appears. Drag the Trade Slider to the desired price point and click the *lightning bolt* icon then *Show Trade Ticket* to open the *Order Ticket* window. The broker can be changed by clicking the broker icon in the Trade Slider. Click the *Place Order* button to preview then place the order. Click the *Save* button in the top right of the *Order Ticket* to save the order settings for later use. The *Order Ticket* is broken into five areas.

Contract Desc

The *Contract Desc* area shows the symbol, exchange and currency for the order.

Time in Force

The *Time in Force* area is for setting the time in force and expiration date for the order.

Action

The *Action* area sets the action for the order.

Quantity

The *Quantity* area sets the number of shares for the order.

Order Details

The *Order Details* area sets the type, limit level and stop for the order.

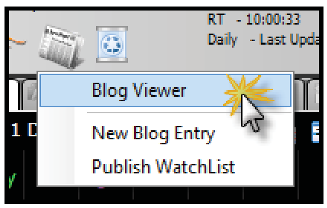
12 Blogs

StockFinder uses www.Blocks.com to integrate trade journals (notes) and blogging. With the integration, StockFinder offers the ability to create a personal record of thoughts on individual symbols and easy public blogging of ideas.

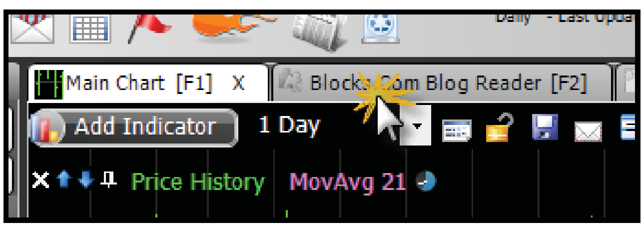
Creating a Blog

The first step is to create and configure a personal Blog. Entries to the blog can be private (entries are not publically visible) or public.

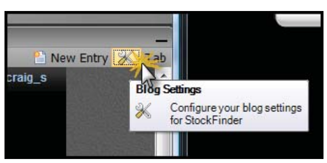
Opening Blog Reader



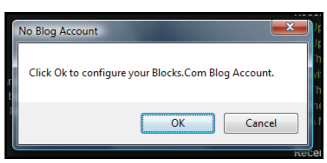
New layouts already have *Blog Reader* open and tabbed behind the Main Chart. If the reader is not already in the Layout, click the *View Blog* button then *View Blog*. This brings the *Blog Reader* to the foreground (usually tabbed with the Main Chart).



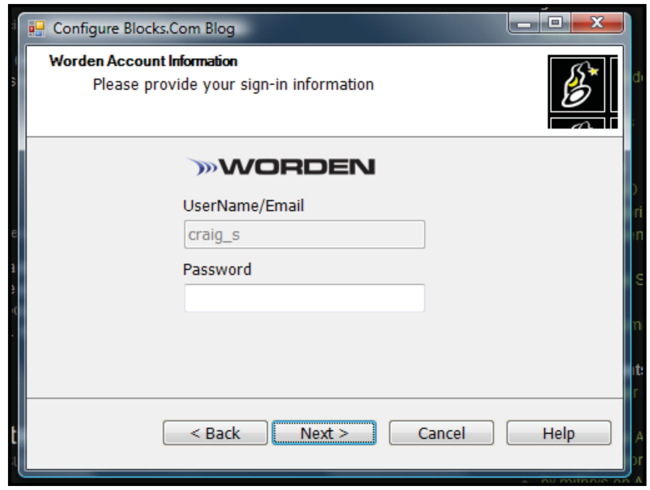
Configuring My Blog

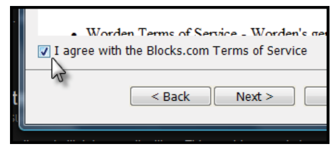


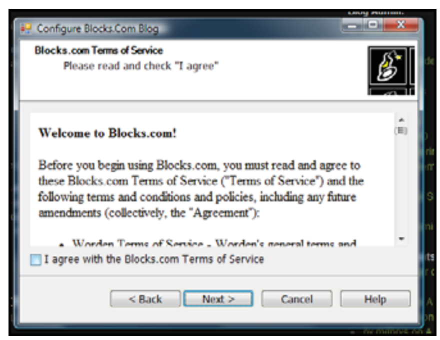
Click the *Blog Settings* button in the top right of the Blog Reader. When clicked, the program asks to configure a Blocks.com account. Click the *OK* button when the question appears. The *Configure Blocks.com Blog* window opens with two choices. Click the *Create a new Blocks.com Blog* option and click *Next*.



The next screen asks for the User Name (or email) and password for an active Worden account. By default it uses the same User Name used in StockFinder. Enter the Password and click *Next*. The *Terms of Service* screen opens. Read the terms of service, check the *I agree with the Blocks.com Terms of Service* check box then click *Next*.

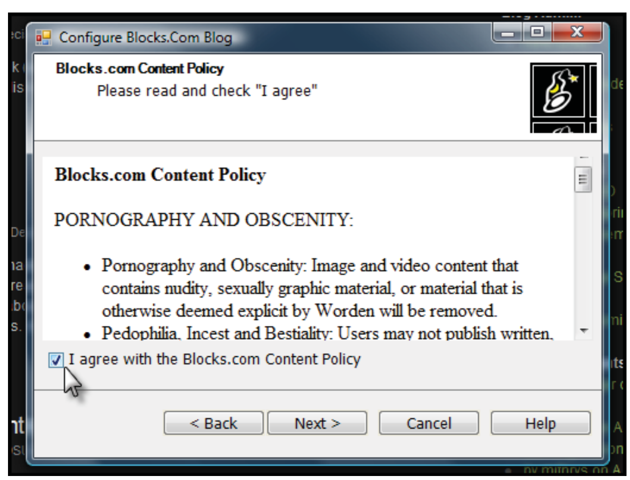


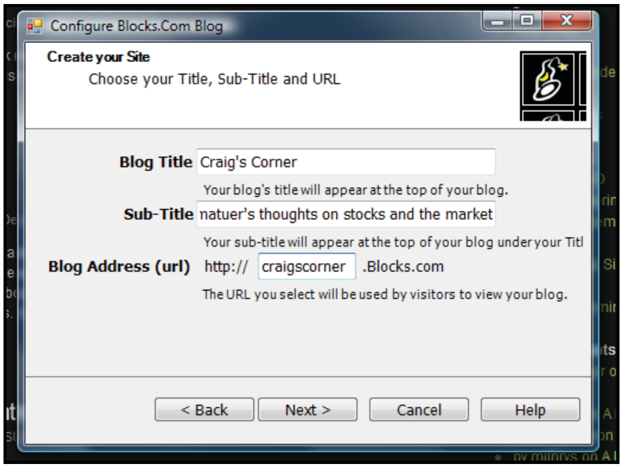




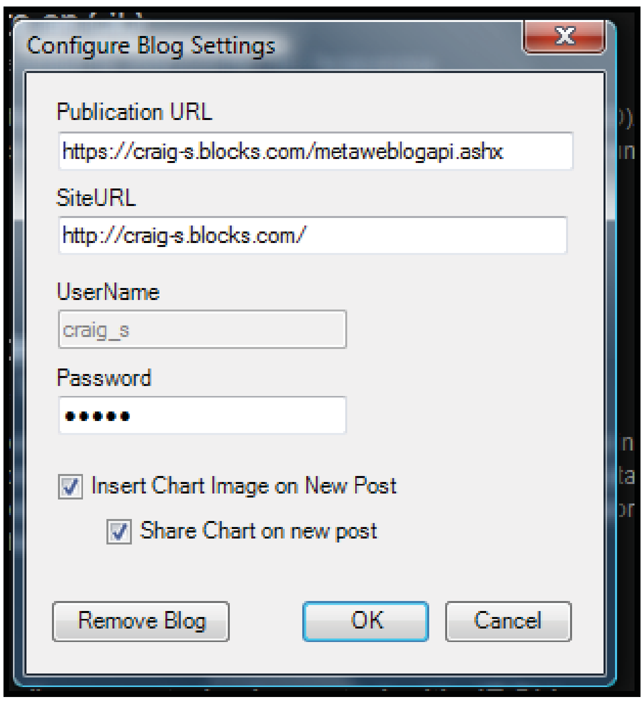
The next screen gives the Content Policy for Blocks.com. Read it, click the *I agree* check box at the bottom then click *Next*.

The *Create your Site* screen opens. Fill in a Blog Title, Sub-Title and the prefix for the site's URL (web address) then click *Next*.





The personal blog is created. The next screen gives the option to either create a new entry or to navigate to the created blog. Click the *Go to my Blog* button then click *Finish*. This opens the *Configure Blog Settings* window for making any changes. This window is always available via the *Blog Settings* button.

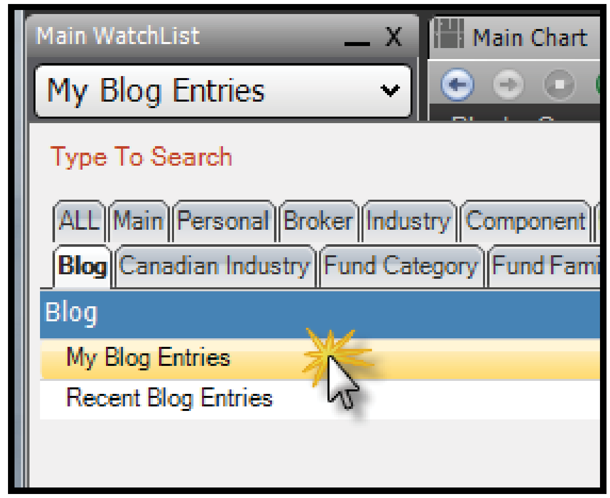


Reviewing Blogs

The Blog Reader shows Blogs and entries from Blocks.com. Both private entries from *My Blog* and other user public entries are available. Peter Worden's blog and public entries are available for review.

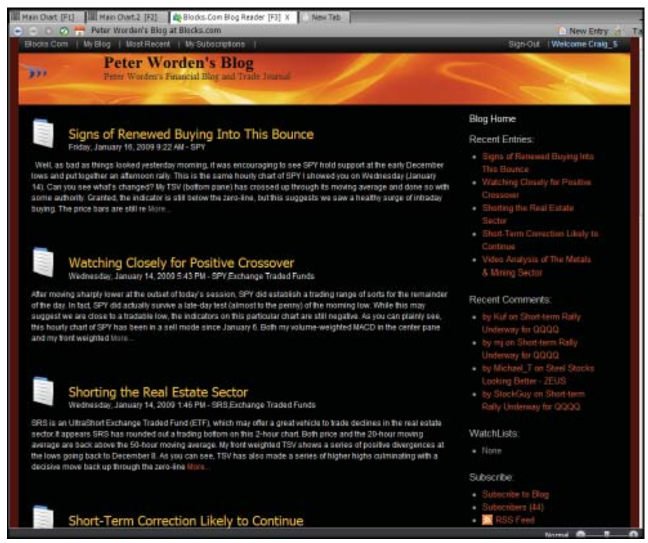
Personal Blog

To review a personal Blog ("My Blog"), open the Blog Reader and change the Active WatchList to the *My Blog Entries* WatchList. This WatchList shows all of the private and public Blog Entries for the account. Clicking a ticker in the list brings up the entry within the Blog Reader.



Peter Worden's Blog

To review the latest entries on Peter Worden's Blog click on *My Subscriptions* on the Blocks.com toolbar then click Peter Worden's Blog. Peter Worden's Blog then opens in the Blog Reader.



On the left are the most recent entries by Mr. Worden. Click the title of the entry to open the entry.

Many entries include a chart. Click the chart to open the chart from StockFinder.

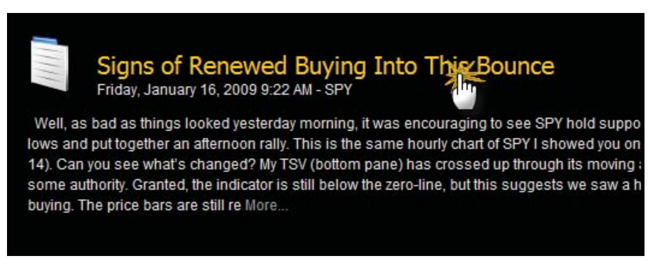


Chart from StockFinder

From the enlarged chart there are two links.

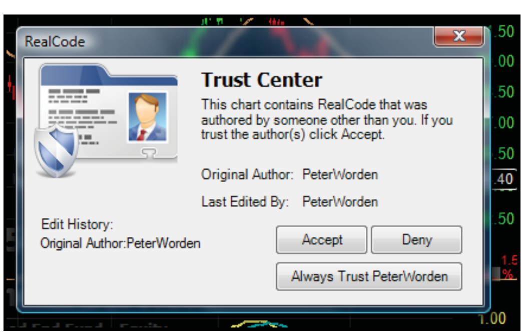
View in StockFinder

This opens the exact chart Mr. Worden used in the entry. If the chart contains any RealCode elements the Trust Center will appear first. Click *Accept* to accept the code, *Deny* to open the chart without the code element or *Always Trust Peter Worden* to bypass this window in the future when opening RealCode items from Peter Worden.

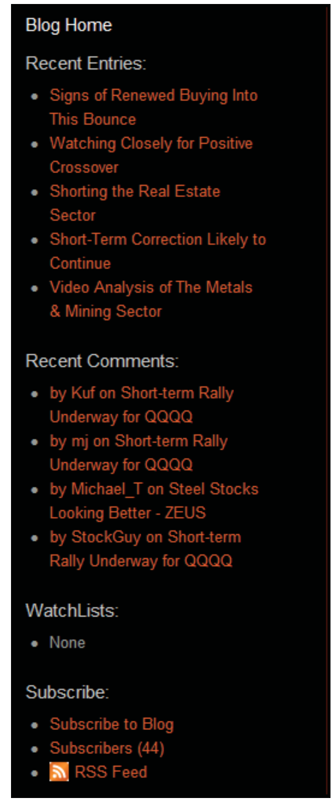
A new chart opens tabbed with the Main Chart. The chart can be saved or changed like any chart in StockFinder. For more information on charts refer to the "Charts" section on page 23.

Download File

Clicking *Download File* downloads the chart file to a desired location.



Right Toolbar



There are several links available on the right side of Peter Worden's Blog.

Blog Home

The *Blog Home* link navigates to the blog configured in the *Blog Settings*.

Recent Entries

The links under *Recent Entries* list the last five entries made to the blog. Clicking the headline on the list navigates to the entry.

Recent Comments

Under *Recent Comments* are links to the most recent comments left on entries. Clicking any of these links navigate to the comment on the entry.

WatchLists

If any WatchLists are posted on the blog they are listed under the WatchLists header. Clicking on the *WatchList* name link opens the list in the Reader. When the list is open in the Blog Reader, click on any symbol to make that the Active Symbol in StockFinder.

Subscribe

There are three links under the Subscribe heading.

Subscribe to Blog

Clicking the *Subscribe to Blog* link adds the blog to the *My Subscriptions list*. When a new entry is made on the blog an email notfication is sent to all subscribers.

Subscribers

Clicking the *Subscribers* links brings up a list of subscribers to the blog including a link to their blog, if available.

RSS Feed

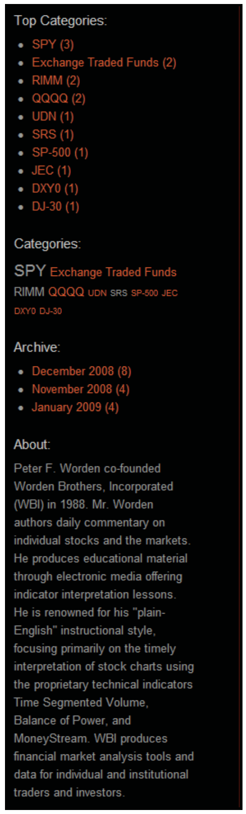
Clicking the *RSS Feed* opens the RSS Feed code needed for other RSS Feed readers.

Top Categories

Blog entries can be assigned categories. This lists ranks the categories used on the blog by frequency. Clicking a category on the list opens all the entries assigned that category.

Categories

Categories lists all the categories used in entries with the font size indicating how often the category is used. Click any category to bring up the entries assigned that category.



Archive

All entries from previous months are archived and available via these links. Click a month to open a list of all the entries from that month.

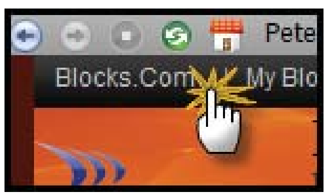
About

About displays the information entered by the blog Author. Usually it includes some history, background and the blog's purpose.

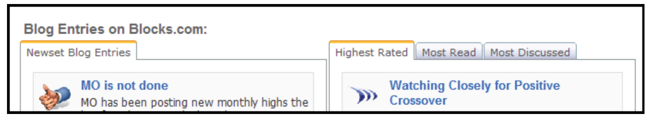
Reviewing Entries

Recent entries published to My Blog, Peter Worden's Blog or other public blogs are available for review a few ways.

Blocks.com



The first item on the Blocks.com toolbar is the Blocks.com link. Clicking it brings up the main page for Blocks.com. Below the header are four tabs under the *Recent Entries* subject.



Newest

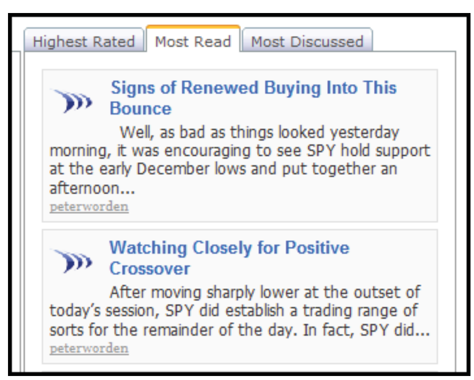
The *Newest* tab lists the most recently posted entries on Blocks.com. Click the title of any entry to navigate to the entry.

Highest Rated

The *Highest Rated* tab lists the highest rated entries made on Blocks.com. Click the title of any entry to navigate to the entry. Entries increase their rating when someone clicks the *Recommend this!* link at the bottom of any entry.

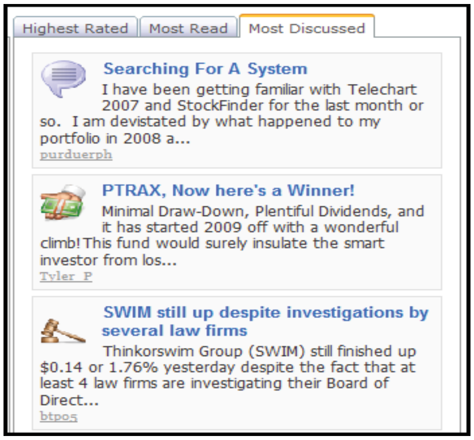
Most Read

The *Most Read* tab lists the entries with the most page views on Blocks.com.



Most Discussed

The *Most Discussed* tab lists the entries with the most comments posted to them. Comments can be made at the bottom of any entry.

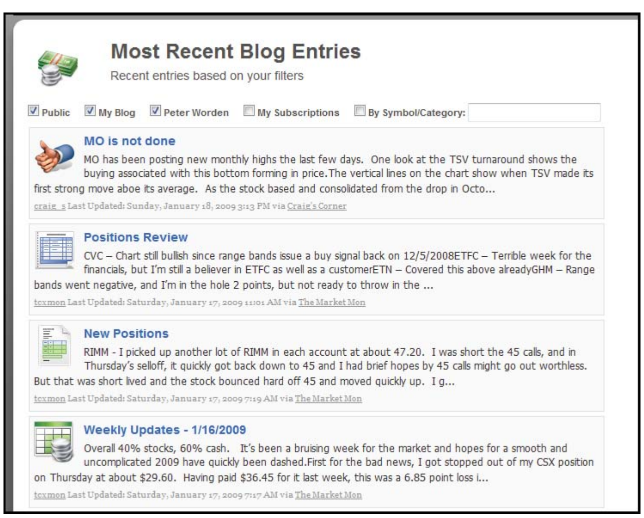


My Blog

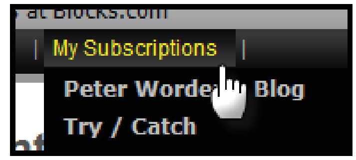
The second item on the Blocks.com toolbar is the *My Blog* link. Clicking it brings up the blog associated with the account. This lists all of the entries with the more recent entries first. On the right sidebar is the archive for accessing entries from past months.

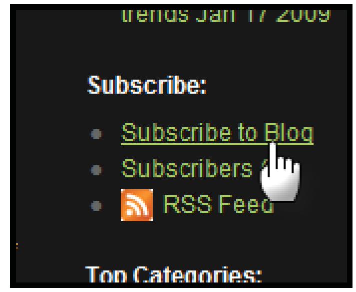
Most Recent

The third item on the Blocks.com toolbar is the *Most Recent* link. Clicking it brings up the most recent blog entries. The list can be filtered using the filter options under header. The resulting list shows the most recent entries based on the filters checked.



My Subscriptions





The fourth link on the Blocks.com toolbar is the *My Subscriptions* link. This opens a submenu of all the blogs subscribed to. Any blog can be added to the subscription list by clicking the *Subscribe to Blog* link on the right sidebar of the particular blog.

Clicking one of the blogs in the subscription list navigates the Reader to that blog. This lists all of the entries on the blog with the more recent entries first. On the right sidebar is the archive for accessing entries from past months.

Attachments to Entries

Items such as charts, Layouts or hyperlinks may be instered in blog entries. The inserted item can be opened by clicking on it.

Charts

If a chart is inserted into an entry it can be clicked on. Clicking the chart navigates to a *Chart from StockFinder* page with a larger view of the inserted chart. Clicking on the *View in StockFinder* link opens the exact chart from the blogger inside of StockFinder. The chart can then be saved like any charts. For more information on charts refer to the "Charts" section on page 23. The chart's StockFinder file is downloadable by clicking the *Download File* link.

Layout

If a Layout is inserted into an entry it can be clicked on. Clicking the Layout navigates to a *Layout from StockFinder* page showing the Layout. Clicking on the *View in StockFinder* link opens the exact layout from the blogger inside of StockFinder. The Layout can then be saved like any Layout. The Layout's StockFinder file is downloadable by clicking the *Download File* link.

Hyperlink

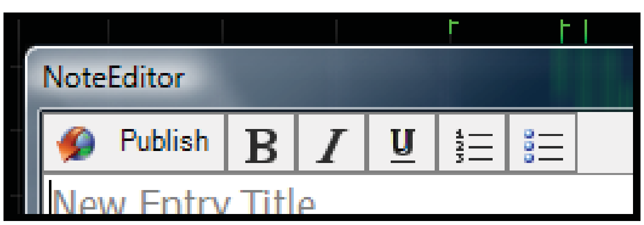
Clicking an inserted hyperlink in an entry will navigate to the page linked.

Creating Blog Entries

Entries can be made to the blog associated with the account within the Blog Reader. To create a new entry, go to the Blog Reader and click the *New Entry* button on the reader's toolbar. This opens the *NoteEditor* window.

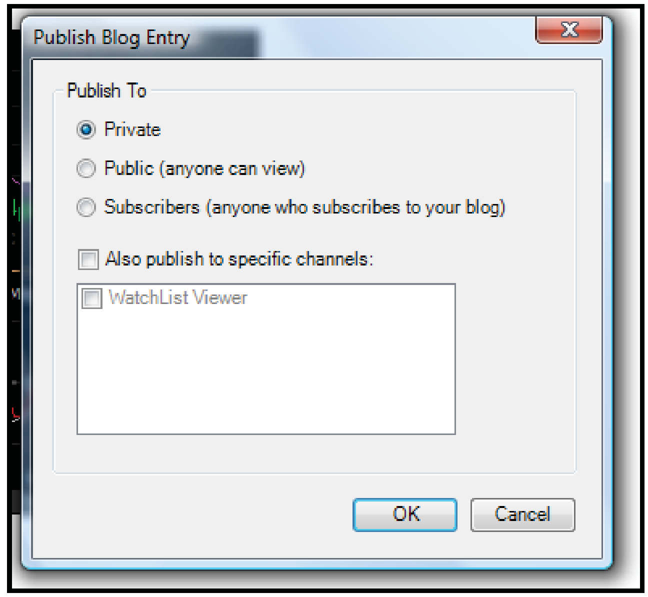
Publishing and Formatting

There are series of buttons in the top left corner of the *NoteEditor*.



Publish

Clicking the *Publish* button opens the *Publish Blog Entry* window. There are four options available in this window.



Private

If the *Private* option is selected, clicking the *OK* button will publish the entry and the entry will not be visible by the public. This is for any entries that are for private use only. All entries to a blog can be made privately making the blog a private stock journal.

Public

If the *Public (anyone can view)* option is selected, clicking the *OK* button will publish the entry. The entry will be visible by anyone in their Blog Reader or in a browser navigated to the blog.

Subscribers

If the *Subscribers (anyone who subscribes to your blog)* option is selected, clicking the *OK* button will publish the entry. The entry will be visible by anyone with a subscription to the blog. It is not visible to those that go to the blog but have not subscribed.

Specific Channels

If the *Also publish to specific channels* option is selected, clicking the *OK* button will publish the entry. The entry will be visible to anyone on the selected channels.

Bold

The *Bold* button toggles text from normal to bold. If text is selected when this button is pressed it toggles the selected text from normal to bold.

Italic

The *Italic* button toggles text from normal to italicize. If text is selected when this button is pressed it toggles the selected text from normal to italicize.

Underline

The *Underline* button toggles text from normal to underline. If text is selected when this button is pressed it toggles the selected text from normal to underline.

Number List

The *Number List* button toggles text from normal to a list format. If text is selected when this button is pressed it toggles the selected text from normal to a list format.

Bullet List

The *Bullet List* button toggles text from normal to a list format. If text is selected when this button is pressed it toggles the selected text from normal to a list format.

Entry Title

Text entered in the *New Entry Title* will be the title for the entry. The title serves as the link on the blog to the full entry.

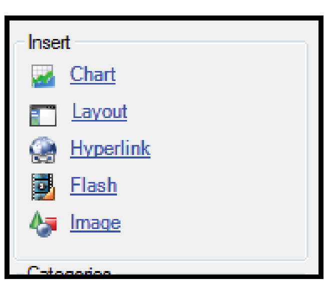
Entry Body

The entry body area is the main body of the entry. Text entered here will show in the body entry.

The first several lines will be visible on the blog main page. All of the text will be visible when anyone opens the full entry.

By default, the chart from the Main Chart is inserted in the body of the entry. More items can be inserted in the entry via the insert menu on the right. Anything inserted can be removed from the entry by clicking on it then pressing the *Delete* key on the keyboard.

Insert



This menu offers a list of items that can be inserted into the entry.

Chart

Clicking the *Chart* link opens a *Chart Image* window. This shows the chart last selected in the Layout. To insert a different chart in the entry, click that chart's title bar in the Layout before clicking the *Chart* link under *Insert*.

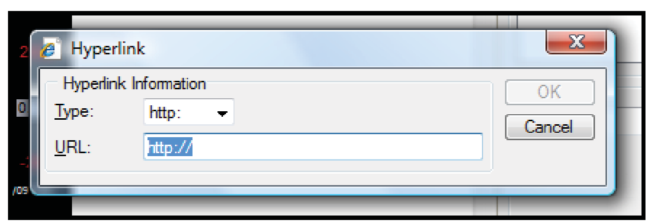
The size of the chart can be adjusted by the menu on the right. By checking the *Also share Chart File* option, the chart file will also insert (for download) in the entry.

Layout

Clicking the *Layout* link inserts the current Layout in the entry.

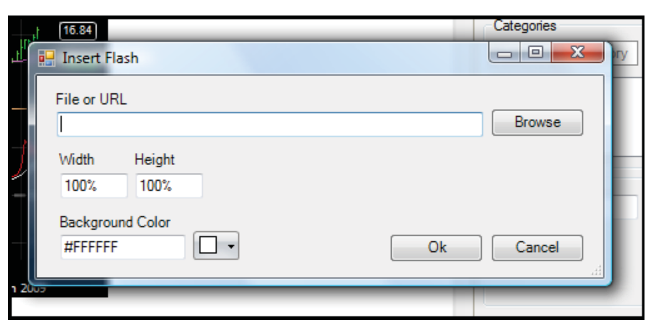
Hyperlink

Clicking the *Hyperlink* link opens the *Hyperlink* window. Once the type and URL are chosen and entered the link is inserted in the entry.

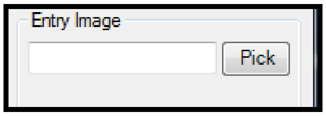


Flash

Clicking the *Flash* link opens the *Insert Flash* window. Flash files from the computer or from the web can be inserted.

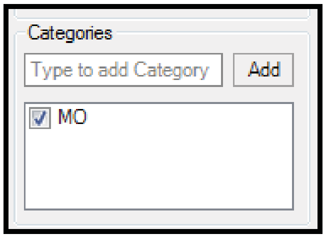


Image



Clicking the *Image* link opens the *Open* window. Browse to the image file on the computer to upload and display it in the entry.

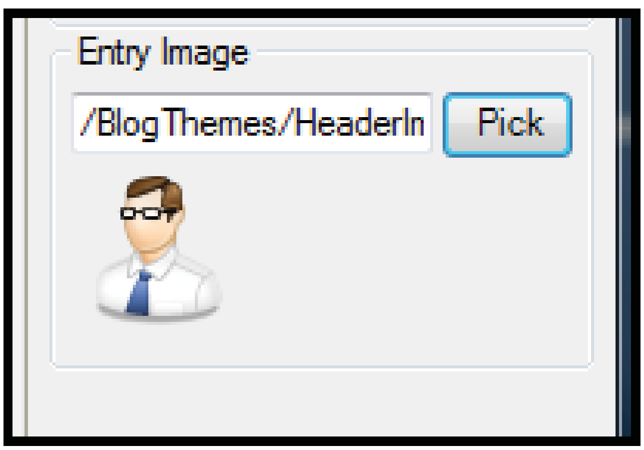
Categories



Entries can have one or more categories. By default the active symbol is already entered as a category. Other categories can be added by typing the category in and clicking the *Add* button.

Entry Image

A library of images is available to pick an image to appear to the left of an entry. Click the *Pick* button to browse the image library. Once an image is selected it appears below the image name and *Pick* button.

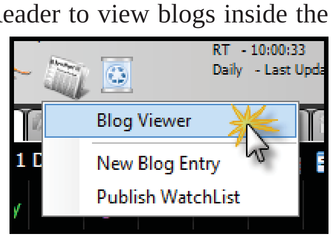


Source (HTML View)

Clicking the *Source* tab changes the body view to HTML code. Code can be enter directly in this tab.

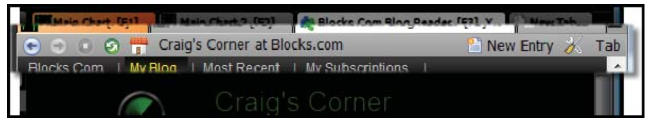
Blog Reader

StockFinder uses the Blog Reader to view blogs inside the program. If the Reader is not already open in the Layout (usually tabbed behind the Main WatchList), click the *View Blog* button on the Icon Toolbar then click *Blog Reader*.



Reader Toolbar

At the top of the Reader window is the Reader Toolbar with several buttons. Some work like a typical browser but others are unique to the Reader.



Back/Forward

The *Back* and *Forward* buttons work like any browser. To navigate to the last page viewed click the *Back* button. If at a previously navigated page click *Forward* to move ahead in the navigation history.

Stop

The *Stop* button stops any current navigation attempts by the Reader.

Refresh

The *Refresh* button refreshes the current page. It navigates again to the current page.

Home

The *Home* button navigates to the page assigned to My Blog.

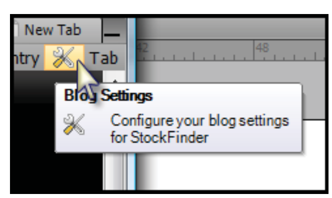
Page Name

To the right of the Home button is the current page's name.

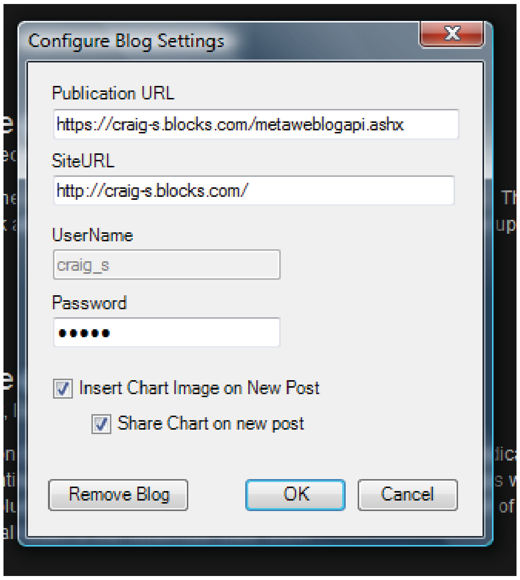
New Entry

The *New Entry* button, when clicked, brings up the *NoteEditor* window. For more information on creating new entries refer to the "Creating Blog Entries" section on page 116.

Blog Settings



Clicking the *Blog Settings* button opens the *Configure Blog Settings* window. This shows (and allows changes to) the publication URL, Site URL, account user name and password for the blog. At the bottom are two options.

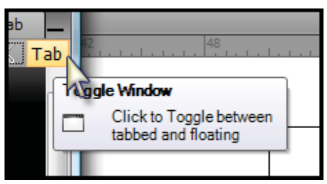


Clicking the *Insert Chart Image on New Post* option will automatically insert a chart into a new entry when the *New Entry* button is pressed. The *Share Chart on new post* option, when checked, automatically shares a chart on any new entries.

Clicking the *Remove Blog* button removes the blog associated with the account. A new blog can be created and configured after this is pressed.

Tab

Clicking the *Tab* button toggles the Blog Reader window from floating in the Layout to being tabbed with the Main Chart of the Layout.



Blocks.com Toolbar

Along the top of any blog or the main Blocks.com page is a black toolbar with five links.

Blocks.com

The first item on the Blocks.com toolbar is the *Blocks.com* link. Clicking it brings up the main page for Blocks.com. Below the header are four tabs under the *Recent Entries* subject.

Highest Rated

The *Highest Rated* tab lists the highest rated entries made on Blocks.com. Click the title of any entry to navigate to the entry. Entries increase their rating when someone clicks the *Recommend this!* link at the bottom of any entry.

Newest

The *Newest* tab lists the most recently posted entries on Blocks.com. Click the title of any entry to navigate to the entry.

Most Read

The *Most Read* tab lists the entries with the most page views on Blocks.com.

Most Discussed

The *Most Discussed* tab lists the entries with the most comments posted to them. Comments can be made at the bottom of any entry.

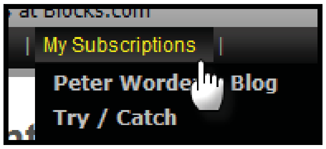
My Blog

The second item on the Blocks.com toolbar is the *My Blog* link. Clicking it brings up the blog associated with the account. This lists all of the entries with the more recent entries first. On the right sidebar is the archive for accessing entries from past months.

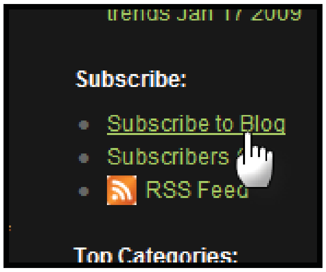
Most Recent

The third item on the Blocks.com toolbar is the *Most Recent* link. Clicking it brings up the most recent blog entries. The list can be filtered using the filter options under header. The resulting list shows the most recent entries based on the filters checked.

My Subscriptions



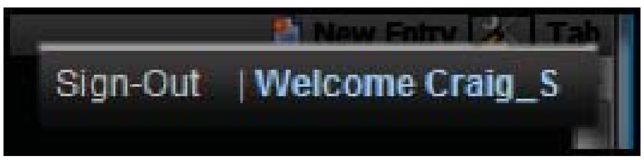
The fourth link on the Blocks.com toolbar is the *My Subscriptions* link. This opens a submenu of all the blogs subscribed to. Any blog can be added to the subscription list by clicking the *Subscribe to Blog* link on the right sidebar of the particular blog.



Clicking one of the blogs in the subscription list navigates the Reader to that blog. This lists all of the entries on the blog with the more recent entries first. On the right sidebar is the archive for accessing entries from past months.

Sign-Out/Sign-In

If the link reads *Sign-In* then clicking it allows a sign in to Blocks.com. When signed in it will read "Welcome X" with X being the account user name. When signed in it is possible to access *My Blog* and *My Subscriptions*, post comments and make new entries.

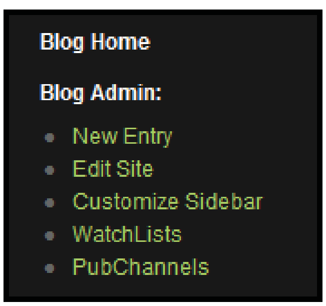


If the link reads *Sign-Out* then clicking it signs the currently signed in account out.

Right Toolbar

Along the right of all blogs is the Right Toolbar with several items and links.

Blog Home



Clicking the *Blog Home* link navigates to the blog associated with the account.

Blog Admin

Blog Admin only appears when signed into Blocks.com and looking at the blog associated with the sign in. There are five links under *Blog Admin*.

New Entry

Clicking *New Entry* link is the same as clicking the *New Entry* button. For more information on making new blog entries refer to the "Creating Blog Entries" section on page 116.

Edit Site

This navigates to the edit page for the blog. Here the title, sub-title, about, theme and header image for the blog can be reviewed or changed. The options to allow (or not) comments, anonymous comments or auto comment approval are listed below the header image.

Clicking *Save* saves any changes made. Clicking *Create Custom Theme* opens an HTML window where code can be used to create custom changes to the blog theme.

Customize Sidebar

Clicking the *Customize Sidebar* link allows the addition, editing and removal of Sidebar Widgets from the blog.

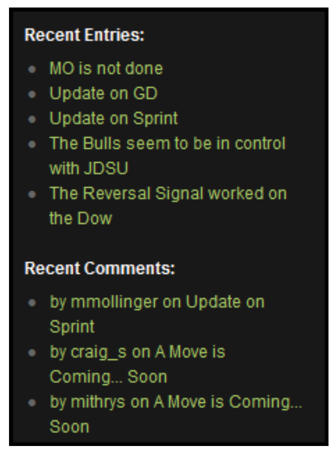
WatchLists

Any WatchLists posted to the blog are listed under the *WatchLists* header. Clicking any linked WatchList opens the WatchList in the reader.

PubChannels

PubChannels are different channels that can be specifically published to. The blog owner can create channels and maintain memberships to channels from this area.

Recent Entries

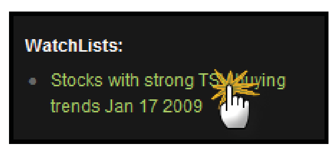


The links under *Recent Entries* list the last five entries made to the blog. Clicking the headline on the list navigates to the entry.

Recent Comments

Under *Recent Comments* are links to the most recent comments left on entries. Clicking any of these links navigate to the comment on the entry.

WatchLists

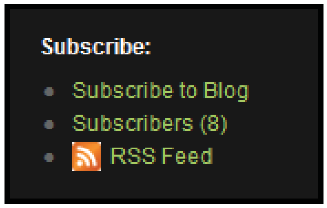


If any WatchLists are posted on the blog they are listed under the *WatchLists* header. Clicking on the *WatchList* name link opens the list in the Reader. When the list is open in the Blog Reader, click on any symbol to make that the Active Symbol in StockFinder.

Subscribe

There are three links under the *Subscribe* heading.

Subscribe to Blog



Clicking this link adds the blog to the *My Subscriptions* list.

Subscribers

Clicking the *Subscribers* link brings up a list of subscribers to the blog including a link to their blog, if available.

RSS Feed

Clicking *RSS Feed* opens the RSS Feed code needed for other RSS Feed readers.

Top Categories

Blog entries can be assigned categories. The *Top Categories* list ranks the categories used on the blog by frequency. Clicking a category on the list opens all the entries assigned that category.

Categories

This lists all the categories used in entries with the font size indicating how often the category is used. Click any category to bring up the entries assigned that category.

Archive

All entries from previous months are archived and available via these links. Click a month to open a list of all the entries from that month.

About

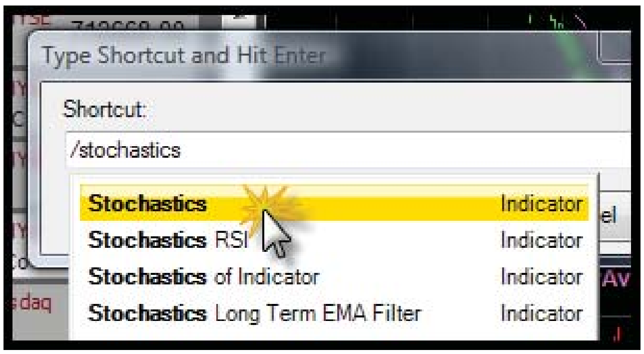
About displays the information entered by the blog Author. Usually it includes some history, background and the blog’s purpose.

13 Shortcuts and Hot Keys

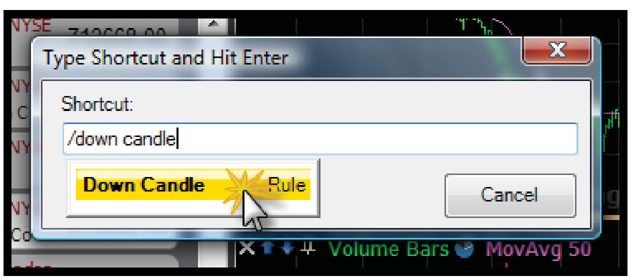
StockFinder has several shortcuts and hot keys so accomplishing common tasks takes less steps and effort.

Quick Search Shortcut

When looking at the Layout (with no other windows open) type a forward slash (/) to initiate the Quick Search.



The *Quick Search Shortcut* gives access to all of the shortcuts, Layouts, charts, indicators and Rules available in the program. To add or open any item type part of the name after the "/".



For example, the easiest way to add the *Down Candle* Rule is to type "/down candle" and choose it from the filtered list. To add the stochastics indicator, type "/stochastics". To open a new candlestick chart type "/candlestick" then pick the candlestick chart from the filtered list.

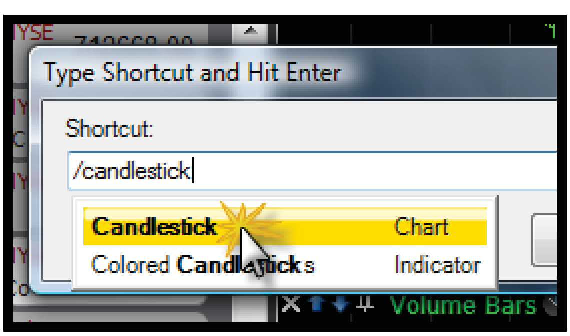


Chart Shortcuts

Pressing the key in the Shortcut column causes the action. If there are two or more keys shown, they should be pressed together. The term "wheel" refers to the mouse wheel.

Chart Shortcut	Action
/	Opens Quick Search
1	Change to 1-day (daily)
2	Change to 2-day
3	Change to 3-day
4	Change to 4-day
5	Change to weekly
6	Change to 6-day
7	Change to 7-day
8	Change to 8-day
9	Change to monthly
Ctrl 1	Change to 1-minute
Ctrl 2	Change to 2-minute
Ctrl 3	Change to 5-minute
Ctrl 4	Change to 15-minute

Chart Shortcut	Action
Ctrl 5	Change to 30-minute
Ctrl 6	Change to hourly
.	Toggle pointer mode
[	Scroll back in time 1 bar
]	Scroll forward in time 1 bar
Ctrl D	Draw trend line
Ctrl B	Toggle Price Plot Styles (bar, candle, line, etc)
Ctrl G	Toggle Price Scale Method
Ctrl R	Add Rule from library
Ctrl I	Add indicator from library
\	Move chart back in time
Shift 1 to 9	Zoom chart in or out
F1 to F12	Bring coresponding tab to foreground
Spin Wheel	Zoom chart in or out
Ctrl + Spin Wheel	Move chart back or forward in time
Shift + Spin Wheel	Slow zoom chart in or out

Chart Shortcut	Action
Ctrl Shift + Wheel	Move chart back or forward in time 1 bar at a time
Left-Click blank chart area	Activate pointer

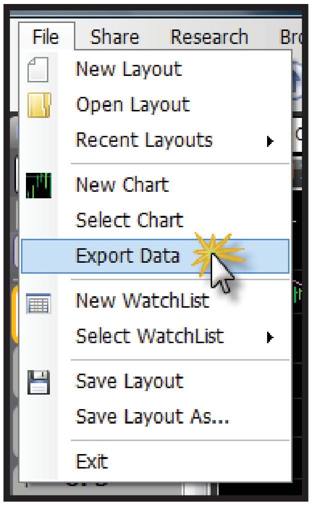
WatchList Shorcuts

Pressing the key in the Shortcut column causes the action. If there are two or more keys shown, they should be pressed together. The term “wheel” refers to the mouse wheel.

WatchList Shortcut	Action
Space	Go to next symbol
Ctrl Space	Go to previous symbol
Shift Space	Go to next symbol passing same rule
Home	Go to top symbol in list
End	Go to last symbol in list
Wheel	Scroll list up or down

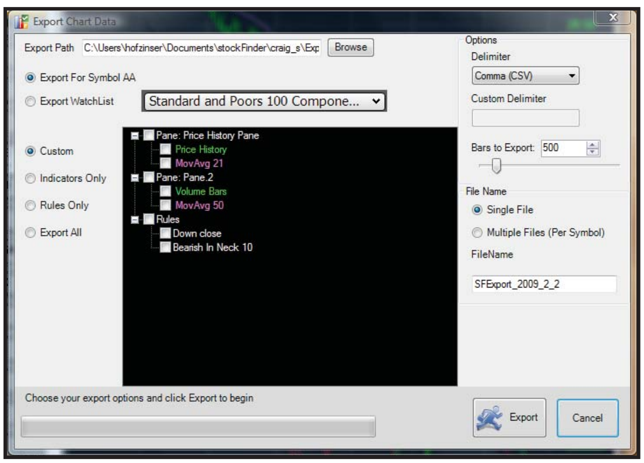
14 Export Data

StockFinder's Export Data exports any plot or Rule on a chart to an outside file (typically a table that can be opened in a spreadsheet program).



For indicators with open, high, low and close data it exports the historical data for all four data point values. For other plots it exports the plot's historical values. For Rules, it exports if historically the Rule was TRUE or FALSE. For RealCode indicators it exports the value and any assigned Custom Labels.

Clicking *File* from the Top Menu then clicking *Export Data* opens the *Export Chart Data window*.

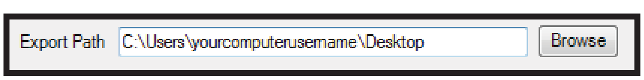


Export Options

The *Export Chart Data* window contains several options.

Export Path

The *Export Path* sets where the file containing the exported data is saved. Clicking the *Browse* button opens a *Browse for Folder* window for selecting the folder to export to.



Export Source

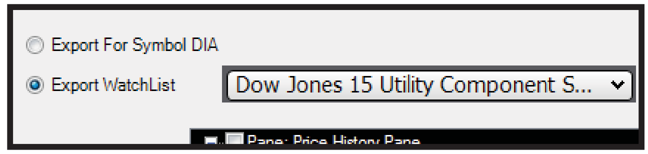
Data for a one symbol or a WatchList of symbols can be exported.

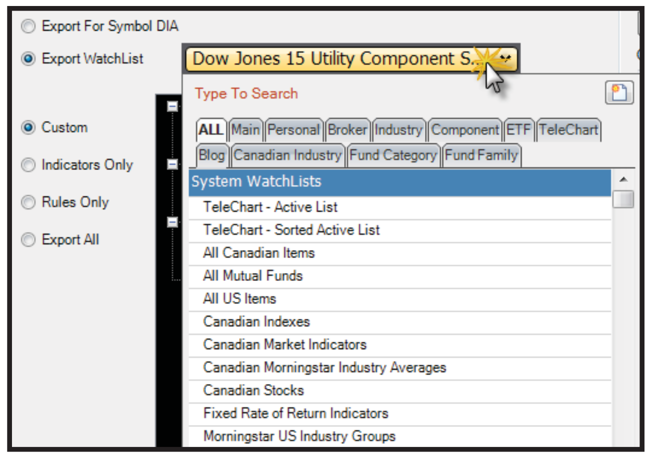
Export For Symbol

If *Export For Symbol* is selected, only the data for the Active Symbol (shown after the *Export for Symbol* label) is exported.

Export WatchList

If *Export WatchList* is selected, all of the symbols in the WatchList shown to the right of the label are exported. Clicking the WatchList opens a *WatchList Picker*. Select the desired WatchList to export from the list.



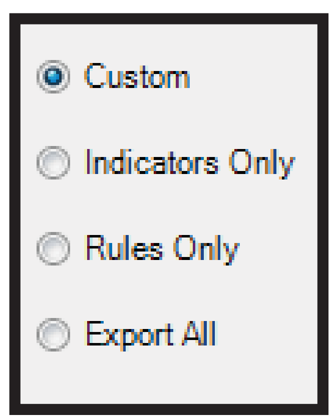


Data to Export

Below the *Export Source* choices are four options for what data to export.

Custom

When the *Custom* option is selected a pane of options appears to the right. This shows all of the panes, plots and Rules available on the current chart. Checking items makes them part of the export. Checking an entire pane exports all of the data in that pane.

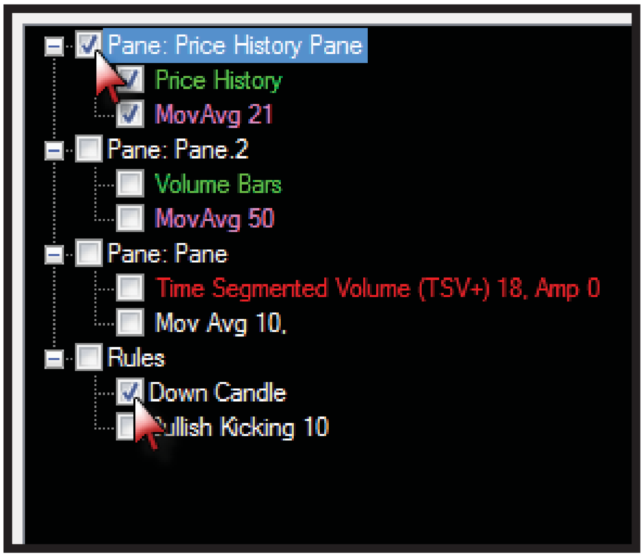


Indicators Only

When the *Indicators Only* option is checked only the plots on the chart are exported. This includes the *Price History* plot values.

Rules Only

When the *Rules Only* option is selected, only the Rules on the chart are exported.

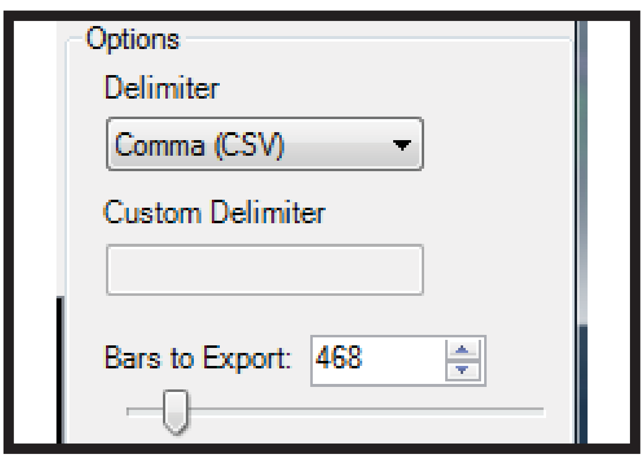


Export All

When the *Export All* option is selected all indicators and Rules on the chart are exported.

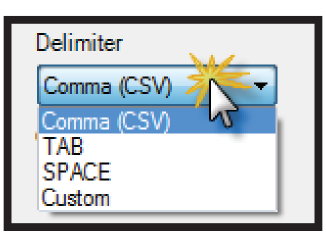
Options

On the top-right side of the *Export Chart Data* window there are three option settings.



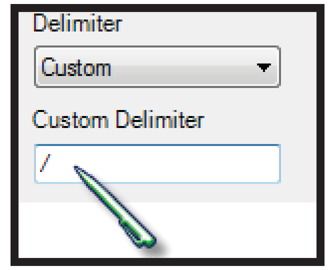
Delimiter

The *Delimiter* setting sets how each piece of datum is separated in the export file. Most spreadsheet programs read all of the delimiter options available. A comma delimiter is the most common CSV format for spreadsheet programs. *Comma (CSV)* is the recommended *Delimiter* if the exported file(s) are meant for an outside spreadsheet program.



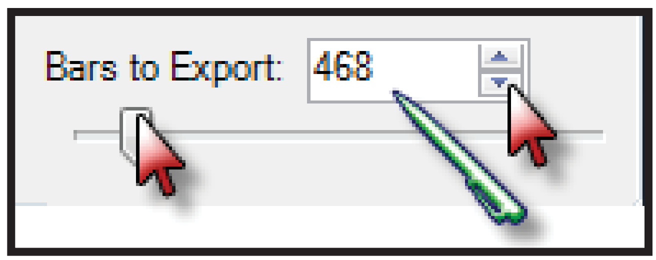
Custom Delimiter

If *Custom* is selected for the *Delimiter*, a custom delimiter can be entered in the *Custom Delimiter* field. The character entered in the field is the character used in the export file to separate each piece of datum.



Bars to Export

The *Bars to Export* setting sets how much history is exported. The time frame of the chart sets the bar time frame for the export. The *Bars to Export* can be changed by either moving the slider below it, manually entering a number in the field or using the up and down spinner buttons to the right of the field.

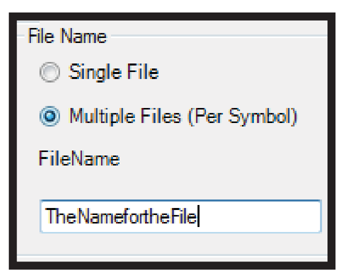


The exported data uses the most current data backward when determining the number of bars to export. For example, when exporting minute data with a *Bars to Export* setting of 500 it exports the current minute and the previous 499 minutes of data.

File Name

Below the *Options* are the *File Name* settings.

Single File



If *Single File* is selected along with *Export WatchList*, all of the symbols in the selected WatchList are exported together into one file. If *Export For Symbol* is selected, one file is exported regardless of whether *Single File* or *Multiple Files* is chosen.

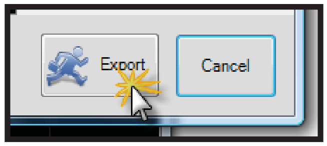
Multiple Files (Per Symbol)

If *Multiple Files (Per Symbol)* is selected along with *Export WatchList*, each symbol in the WatchList is exported to its own file. The file name for each symbol matches the *FileName* setting followed by the ticker for that symbol (i.e. FileName_AAPL.txt).

FileName

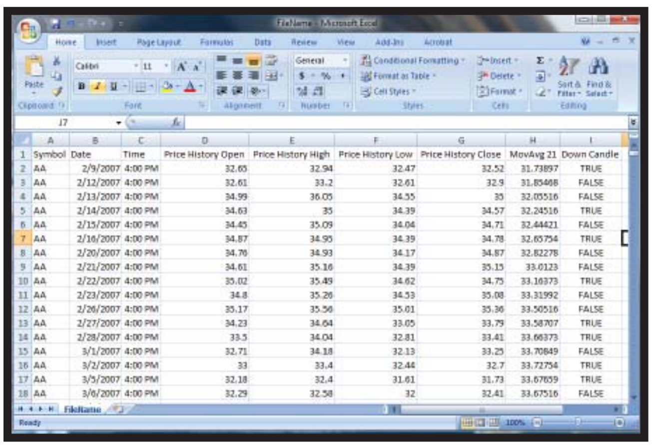
The name entered in the *FileName* field is used for the export file. All exported files are text (.txt) or Comma Separated Value (.csv) files. If a single file is exported the file name will be *FileName.txt*. If Multiple Files is selected then each file will use the *FileName* and the ticker for the symbol (i.e. FileName_IBM.txt).

Exporting



Once all of the settings are confirmed in the *Export Chart Data* window, click the *Export* button to create the file or files. When the export finishes either the single file will automatically open inside the installed spreadsheet program for the computer or the option to view the files appears if *Multiple Files* is selected.

The data in the export file or files can be manipulated or changed without affecting the source data used by Stock-Finder.

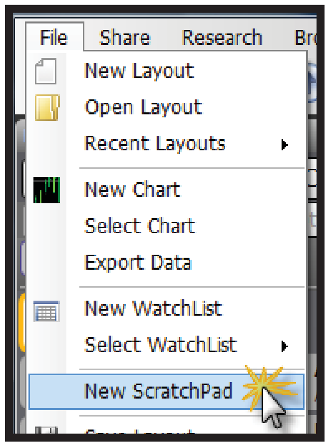


Symbol	Date	Time	Price History Open	Price History High	Price History Low	Price History Close	MovAvg 21	Down Candle
AA	2/9/2007	4:00 PM	32.65	32.94	32.47	32.52	31.73897	TRUE
AA	2/12/2007	4:00 PM	32.61	33.2	32.61	32.9	31.85468	FALSE
AA	2/13/2007	4:00 PM	34.99	36.05	34.55	35	32.05516	FALSE
AA	2/14/2007	4:00 PM	34.63	35	34.39	34.57	32.24516	TRUE
AA	2/15/2007	4:00 PM	34.45	35.09	34.04	34.71	32.44421	FALSE
AA	2/16/2007	4:00 PM	34.87	34.95	34.39	34.78	32.65754	TRUE
AA	2/20/2007	4:00 PM	34.76	34.93	34.17	34.87	32.82278	FALSE
AA	2/21/2007	4:00 PM	34.61	35.16	34.39	35.15	33.0123	FALSE
AA	2/22/2007	4:00 PM	35.02	35.49	34.62	34.75	33.16373	TRUE
AA	2/23/2007	4:00 PM	34.8	35.26	34.53	35.08	33.31992	FALSE
AA	2/26/2007	4:00 PM	35.17	35.56	35.01	35.36	33.50516	FALSE
AA	2/27/2007	4:00 PM	34.23	34.64	33.05	33.79	33.58707	TRUE
AA	2/28/2007	4:00 PM	33.5	34.04	32.81	33.41	33.66373	TRUE
AA	3/1/2007	4:00 PM	32.71	34.18	32.13	33.25	33.70849	FALSE
AA	3/2/2007	4:00 PM	33	33.4	32.44	32.7	33.72754	TRUE
AA	3/5/2007	4:00 PM	32.18	32.4	31.61	31.73	33.67659	TRUE
AA	3/6/2007	4:00 PM	32.29	32.58	32	32.41	33.67516	FALSE

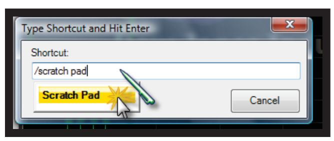
15 ScratchPad

The ScratchPad is a place to store text and/or images within a Layout. It can be used to keep notes or transfer and display information from other sources. The ScratchPad can display Rich-Text files created in ScratchPad (or other programs) and can open / save any text or rtf file on your computer. The contents of a ScratchPad will be saved and loaded with the Layout.

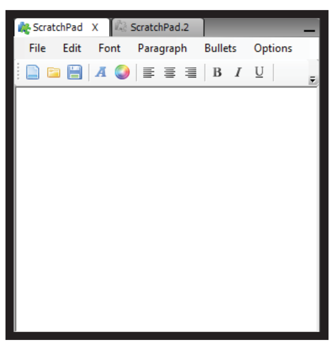
Adding a ScratchPad



To add a ScratchPad window to any Layout, click File and choose New ScratchPad from the menu. Typing the shortcut /Scratch Pad also opens a new Scratch-Pad. New ScratchPad windows appear below the Main WatchList. Multiple ScratchPad windows can be opened in the same Layout. They appear tabbed with each other below the Main WatchList window.



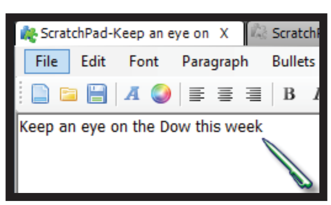
Adding Content



Text and images can be added to any ScratchPad by either typing directly into the ScratchPad area or by copying and pasting content from another source.

Typing

Clicking inside the ScratchPad shows a cursor. Any text can be typed into the ScratchPad. This works like most popular word processor programs. All text can be edited and formatted within the window.

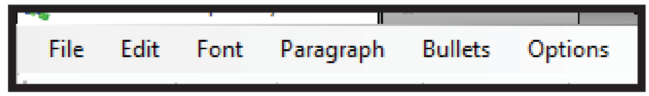


Copy/Paste

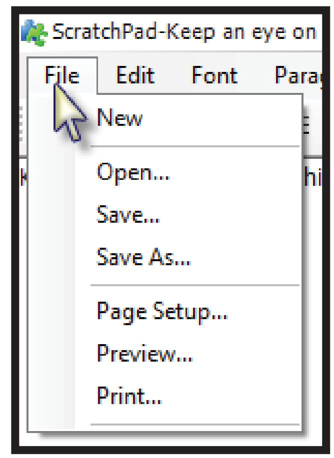
Text and or images can be copied from other programs to the Windows Clipboard. Once content is in the Clipboard, click inside the ScratchPad (if it does not have the focus) and use the Window shortcut CTRL-V or the Paste action in the File menu to paste the content from the Clipboard into the ScratchPad. Content pasted in, like content entered directly, can be formatted once in the ScratchPad.

Top Menu

The Top Menu presents six different menus.



File



Clicking the File menu opens a list of seven options.

New

Clicking New may open the Save ScratchPad window asking to save the current ScratchPad file. Clicking Yes opens the folder browser to name and save the current file. Clicking No closes the current file and opens a new one. The Save ScratchPad window appears if the current ScratchPad file has been changed from the new ScratchPad.

Open

Clicking Open menu opens the folder browser to the default ScratchPad folder. Select any Rich Text file from this or any other folder to open the file in the ScratchPad window.

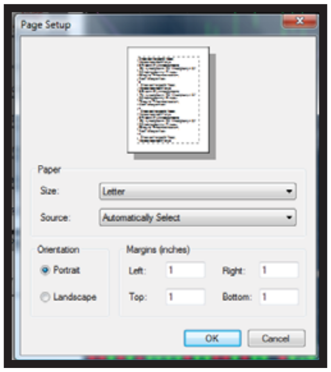
Save

Clicking Save opens a folder browser to select a folder and file name to save the current ScratchPad file. If the current file has already been saved previously, clicking Save overwrites the previous saved version with the current one. ScratchPads are saved as .rtf (Rich Text) files.

Save as

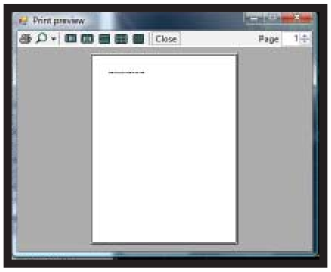
Clicking Save opens a folder browser to select a folder and file name to save the current ScratchPad file. ScratchPads are saved as .rtf (Rich Text) files.

Page Setup



Clicking Page Setup opens the Page Setup window. This window contains the print options for the current ScratchPad file. The type of paper, source, orientation and margins can all be set from this window.

Preview

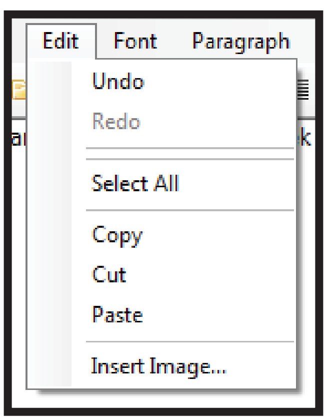


Clicking Preview opens the Print Preview window. This window shows a preview of how the ScratchPad file will look if printed using the current settings established in the Page Setup. Clicking the Print (small printer) icon prints the current file. The file prints using the default Windows printer. Clicking the down arrow right of the Zoom (magnifying glass) icon opens a menu with different zoom settings. The zoom setting determines the view of the preview. The five buttons right of the Zoom menu change the view from one up to a six page view for the preview. Clicking the Close button closes the Print Preview window.

Print

Clicking Print prints the current file. The file prints using the default Windows printer.

Edit



Clicking the Edit menu opens a list of seven options.

Undo

Clicking Undo reverses the most recent change made to the ScratchPad file.

Redo

The Redo option is only available after an Undo action occurs. Clicking Redo reverses the recent Undo action.

Select All

Clicking Select All selects all the contents of the current file. Select All is also possible using the Window shortcut CTRL-A. Once the content is selected it can be copied using the Window's shortcut CTRL-C (or the Copy action under the File menu) or replaced with the contents of the Window Clipboard with the shortcut CTRL-V (or the Paste action under the File menu). Individual content in the file can be selected by clicking and dragging to highlight the particular content.

Copy

When content is selected in the file, clicking Copy copies the content to the Window Clipboard.

Cut

When content is selected in the file, clicking Cut removes the content in the file and copies it to the Window Clipboard.

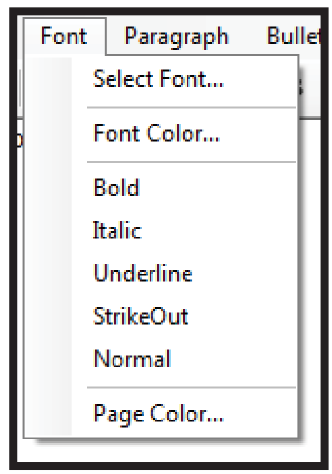
Paste

Clicking Paste inserts any copied or cut content in the Window Clipboard where the cursor sits in the ScratchPad file.

Insert Image

Clicking Insert Image opens a folder browser. Locate and select an image file to insert it in the current ScratchPad file. JPEG, GIF, PNG and Bitmap files formats are valid ScratchPad image formats.

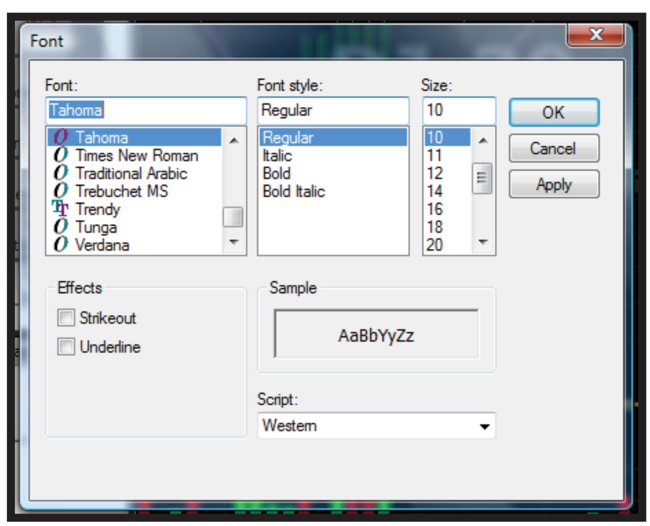
Font



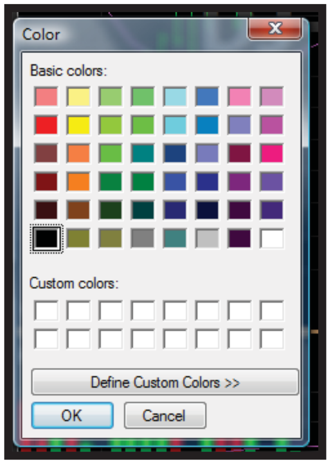
Clicking the Font menu opens a list of eight options.

Select Font

Clicking Select Font opens a standard Font selection window. If text is selected when Select Font is clicked, the font settings chosen in the Font window changes the font settings for the selected text. If no text is selected when Select Font is clicked, the font settings are used for new text entered. The Font window sets the font, size, style, script and effects for text.



Font Color

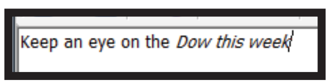


Clicking Font Color opens a standard Color window. If text is selected when Font Color is clicked, the color of the selected text will reflect the color chosen in the Color window. If text is not selected when Color is clicked, the next text typed will use the color selected in the Color window. The Color window allows the choice of basic colors or the creation of custom colors. Clicking the OK button closes the Color window.

Bold

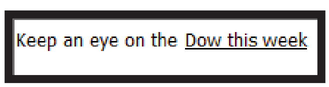
Clicking Bold makes any selected text bold. If the selected text is already bold, clicking Bold removes the bold status. If no text is selected when Bold is clicked, the following text typed will be bold.

Italic



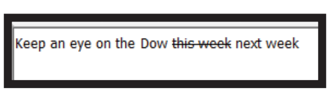
Clicking Bold makes any selected text bold. If the selected text is already bold, clicking Bold removes the bold status. If no text is selected when Bold is clicked, the following text typed will be bold.

Underline



Clicking Underline makes any selected text underlined. If the selected text is already underlined, clicking Underline removes the underlined status. If no text is selected when Underline is clicked, the following text typed will be underlined.

Strike Out



Clicking Strike Out makes any selected text appear stricken (the text has a horizontal line through it). If the selected text is already stricken, clicking Strike Out removes the stricken status. If no text is selected when Strike Out is clicked, the following text typed will be stricken.

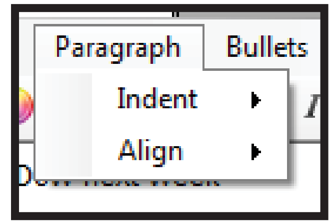
Normal

Clicking Normal removes any text effects from selected text (bold, underline, italic or strike out). If no text is selected when Normal is clicked, the following text typed will be effect-free.

Page Color

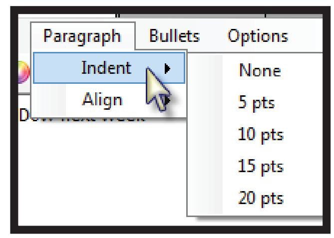
Clicking Page Color opens a standard Color window. Color selected in the Color window sets the background color of the current ScratchPad. The Color window allows the choice of basic colors or the creation of custom colors. Clicking the OK button closes the Color window.

Paragraph



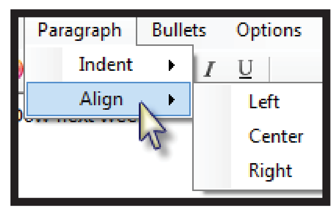
Clicking the Paragraph menu opens a list of two sub menus.

Indent



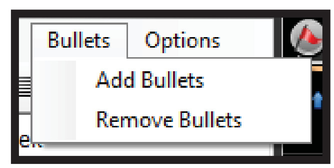
Floating the mouse over the Indent menu opens a list of indent amounts. If content is selected when an indent amount is clicked, the selected text will indent the chosen amount. If no content is selected when an indent amount is clicked, the following typed text will be indented the chosen amount.

Align



Floating the mouse over the Align menu opens a list of three text alignment options. If content is selected when an alignment is clicked, the selected text will be aligned as chosen. If no content is selected when an alignment is clicked, the following typed text will be aligned as chosen.

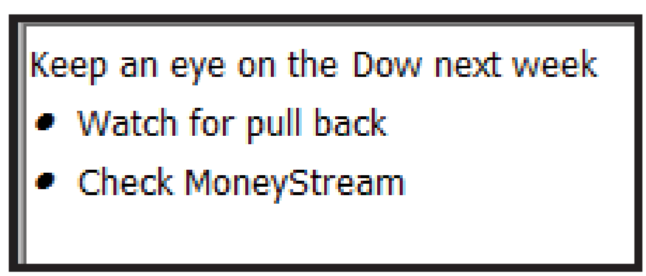
Bullets



Clicking the Bullets menu opens a list of two options.

Add Bullets

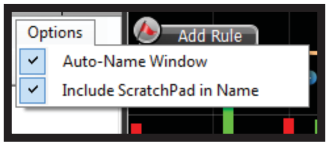
Clicking Add Bullets makes either the current paragraph or the selected text bulleted (a small block dot appears to the left of the line). Bullets are typically used for denoting lists.



Remove Bullets

Clicking Remove Bullets makes the current bulleted paragraph or selected bulleted text normal (no bullets).

Options



Clicking the Options menu shows two toggle options for the current ScratchPad. Clicking either option toggles the option on or off.

Auto-Name Window

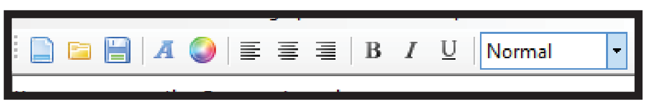
When Auto-Name Window¬ is checked (toggled on) the current ScratchPad file will name itself based on the first line of text entered in the file. Using the Save As option under the File menu allows a new name to be used when saving the file. When not checked (toggled off) no name is auto-assigned to the file.

Include ScratchPad in Name

When Include ScratchPad in Name is checked (toggled on) the file name for the current ScratchPad will default with “ScratchPad-“ at the beginning of the file name. When not checked (toggled off) this does not occur.

Icon Menu

The Icon Menu offers quick-button access to many of the options available in the Top Menu.



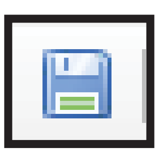
New

Clicking the New button is the same as choosing the New option under the File menu (page 129).

Open

Clicking the Open button is the same as choosing the Open option under the File menu (page 129).

Save



Clicking the Save button is the same as choosing the Save option under the File menu (page 129).

Font

Clicking the Font button is the same as choosing the Select Font option under the Font menu (page 130).

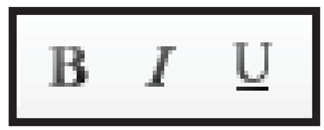
Color

Clicking the Color button is the same as choosing the Font Color option under the Font menu (page 131).

Justify

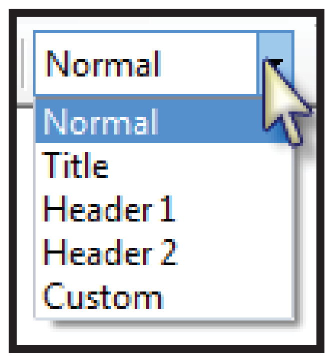
Clicking any of the justify buttons either sets the justification of selected content or, if no content is selected, sets the justification of the following text typed. The first button left justifies, the middle center justifies and the third right justifies.

Font Style



Clicking any of the three font style buttons either sets the style of selected text or, if no text is selected, sets the style of the following text typed. The B button sets bold, the I sets italic and the U sets underlined.

Styles



The Styles menu sets the style of selected text or, if no text is selected, sets the style of the following text typed. Default and saved styles appear at the top of the menu. If not using one of the built in styles, custom will be displayed in the drop down.

Index

Symbols

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