



Getting Started with BarchartX

April 2007

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I've signed up for BarchartX (or, signed up for a free trial). Now what?

Within minutes, you will receive an email from "Barchart Subscriptions" welcoming you to our service. If you've signed up for a free trial, the first email you'll receive from us asks you to **Activate Your Trial**. Just click on the link in the email to do so.

Once the trial has been activated (or if you've upgraded your trial to full subscription status), you will receive another email communication that will list your username and password.

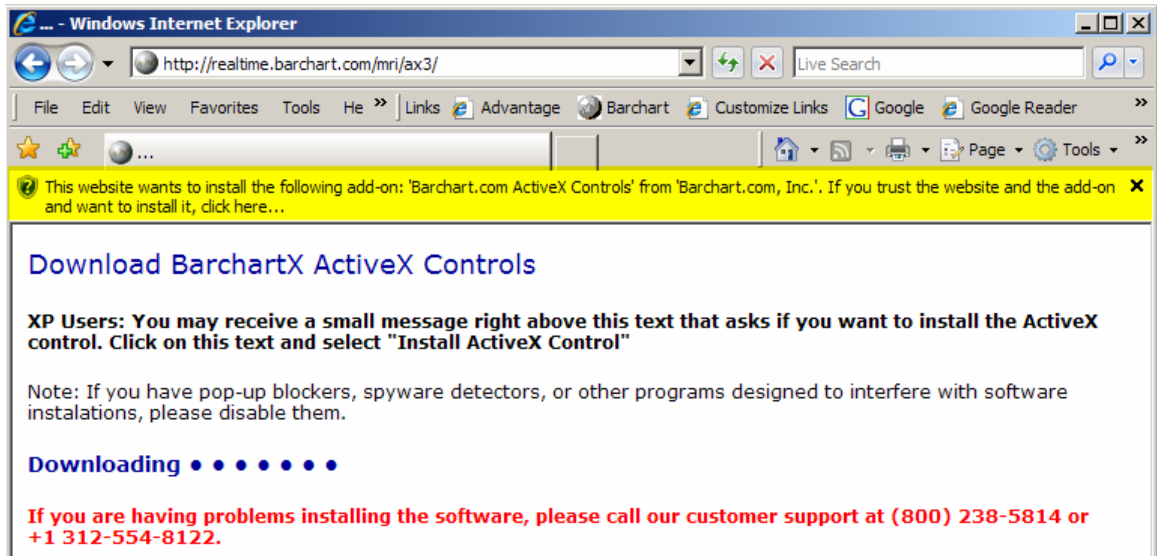
1. Go to <http://realtime.barchart.com/mri> and enter your username and password as prompted. If desired, you can check the box labeled **Remember my password** for easy access to your subscription the next time you visit.

Note: your username and password are case sensitive (UPPER / lower case), so please be careful when entering your login information.



2. The first time you access the application, you will be prompted to download and install the **BarchartX ActiveX Controls**. The BarchartX ActiveX Control is what allows streaming data into be displayed in the application. When prompted to do so, click the link to install this software.

Note: Windows XP users will receive this message at the top of the screen:



3. Click on that message, and select **Install ActiveX Control**, as shown here:



4. Depending on your PC's setup, you may be brought back to the first install screen, with the prompt:

[CLICK HERE TO INSTALL THE SOFTWARE.](#)

If you see this message, click the link **again**.

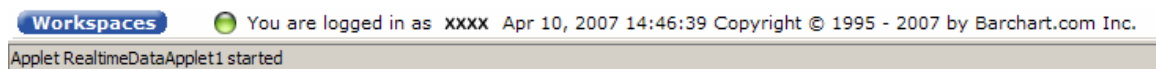
5. When you see the following dialog box, click **Install**.



6. After the ActiveX Control is installed, the software will launch and the BarchartX home page should display. If you have any problems with launching the software, please contact our Customer Support Group at (800) 238-5814 or at +1 312-554-8122, or email us at help@barchart.com.

Am I connected?

If you see a green globe at the bottom center of the home page, next to the moving time stamp, you are connected.



You should also see data under the "Watchlist Symbols" on the right side of the home page.

If the prices are not changing and the globe is not green, then we suggest changing your connection settings. Go to the **Tools** menu, then select **Connection Settings**. If you need assistance, please contact our Customer Support Group at (800) 238-5814 or

+1 312-554-8122, or email us at help@barchart.com.

Navigating around

There are many ways to navigate around the BarchartX application.

Top Navigation

First, there are five menu items listed at the top of your page:



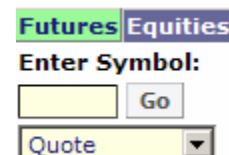
1. **Market Info** - contains predefined futures and equities market pages, including futures commodities listed by commodity group types (grains, currencies, indices, etc.), equities market pages (highs, lows, momentum, etc.), mutual funds, sectors and signals, and research and reports.
2. **Quotes** – holds your personal quoteboards and your saved quote pages.
3. **Charts** – holds your saved charts and chart templates. You can apply any of your saved templates to a new chart once it is launched.
4. **Tools** - contains links to custom settings, alerts, and downloading.
5. **Support** – view online help, perform symbol lookups, contact support.

Side Navigation

Next, there are important navigational items listed on the left side of the page.

1. Symbol Box

The Symbol box allows you to quickly get information on one futures or equities symbol at a time. Simply enter the symbol, choose what you want from the drop-down list, and click **Go**.



The green highlight on either “Futures” or “Equities” tells the application what type of symbol you will be entering. In the example shown here, “Futures” is highlighted green, so the application will expect any symbol entered to be a Futures symbol. To enter an Equities symbol, just click the “Equities” header (the header will turn green), then enter a stock ticker symbol in the box.

Use the drop-down list to identify what you want:

- **Quote** - Displays the quote page for that commodity or stock, along with chart embedded into the quote display. If you would like to display all active contracts for a commodity symbol, type in the symbol followed by an *. For example, ES* will give you all the Emini S&P contracts trading.

- **All Contracts** (Futures only) – displays all active contracts for the root commodity symbol entered.
- **Options** (Futures only) – displays options pages.
- **Spreads** (Futures only) – displays a spread matrix of all active contracts for the root commodity symbol entered.
- **Market Depth** (Futures only) – displays
- **Chart** - Launches a custom chart that can be modified with specific time frames, studies, overlays, trendlines, and so on.
- **Snap Quote** - Displays the last five days' daily quotes, moving averages and new highs/lows information.
- **Technicals** - Displays results of technical studies in text format.
- **Opinions** - Displays results of Barchart's proprietary Technical Opinions programs.
- **Performance** - Displays results of opinions trading recommendations.
- **Projections** - List of 44 commonly used technical indicators with the price projection for the next trading day, causing each of the signals to be triggered.
- **Profile** - Displays a profile of the company for stocks, or the contract specifications for commodities.

After selecting an item, click **Go** to retrieve that page. When the page is displayed, the left-hand frame below the symbol box will display a list of related pages (market pages if you select a stock, and related commodity contracts if you select a commodity).

Watchlist

The Watchlist allows you to keep a list of your most important contracts down the right-hand side of the application, with the Last price and Change for each.

Launch a quote page for any of these symbols just by clicking on the symbol.

To change your list of Watchlist symbols, click **Edit** and then enter the symbols you wish to add. Click **Set Watchlist** to save your changes.

To hide or display the Watchlist, click on **Tools** from the top navigation toolbar and then click either **Hide Watchlist** or **Show Watchlist**.

Edit	
YMH7	12,171 +19
SPH7	1,396.12 +4.72
CH7	389-4 -7-4
GCH7	666.5 +4.4
ECH7	1.3306 -0.0003
DXH7	83.23 unch
DJH7	12,171 +19
SIRI	3.12 unch
IBM	96.46 -0.16

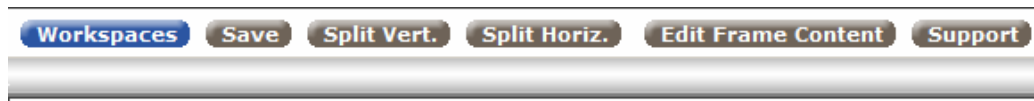
Workspaces

Workspaces are used to manage a series of information boxes, so that you can obtain the information you need each day in a quick and simple manner.

Workspaces can contain quotes, charts, time and sales, market depth, and quick lists of commodities grouped by market type.

To create a Workspace

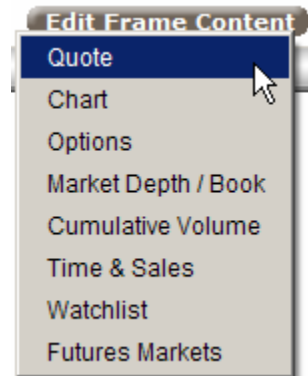
1. Click the **Workspaces** button in the lower left corner of the application, and select **New Workspace**.
2. Enter a name for your workspace, and click **Create New Workspace**. A blank workspace will be displayed with controls at the top, like this:



You can add any number of quotes, charts and information boxes by *breaking up the workspace into different sections*.

3. To add a horizontal break

- a. Click once in the white box you want to split, then click **Split Horiz.** This will create a horizontal bar down the middle of the screen allowing each new section to hold its own content. You can now add a quote or chart to either of these sections.
- b. Click once in the white space of the section you want to edit and then click on the **Edit Frame Content** button.
- c. From the drop down list, select the type of content you wish to display. A prompt will appear in the section of the workspace that is active, asking you to enter a symbol. Type the symbol, then press **Enter** or click the **Set Symbol** button.



4. To add a vertical break

- a. Click once in the section you want to split, then click **Split Vert.** This will create a vertical bar down the middle of the section, allowing each new section to hold its own content.

5. You can add as many horizontal and vertical lines as you want. Each new section can be filled with its own content by clicking on the Edit Frame Content button. Once you have your layout set the way you want it, click **Save**.

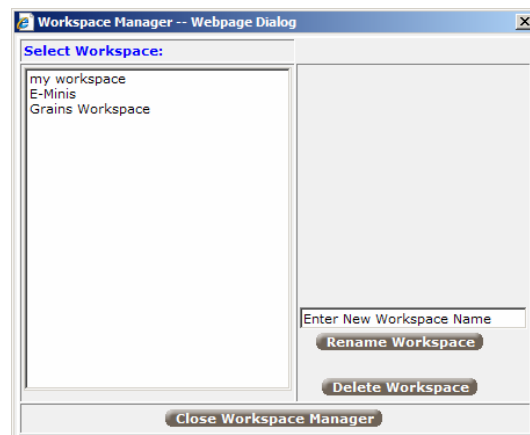
Note: If you close the workspace without saving it, all the content will be lost.

To recall a Workspace

To look at a previously saved workspace again, click the **Workspaces** button in the lower left corner of the screen, then select the workspace you wish to view from the list.

To rename or delete a Workspace

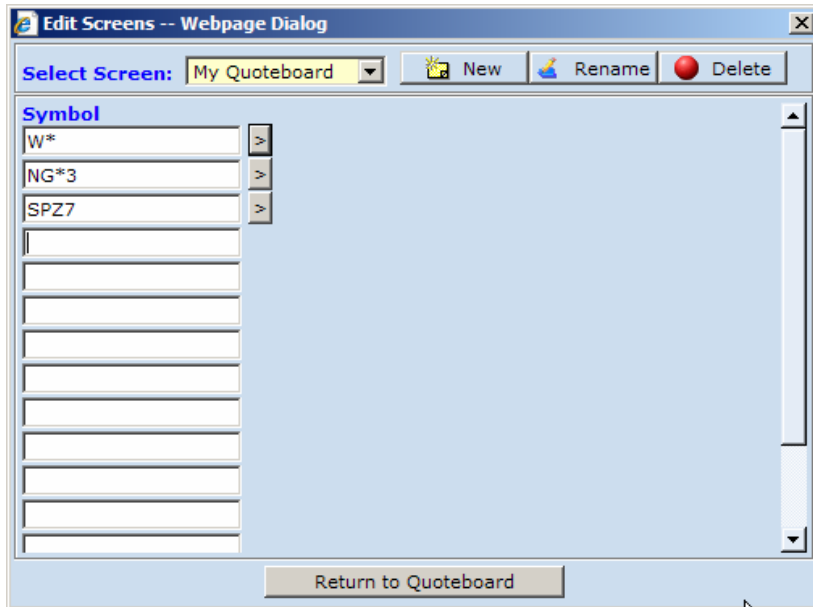
Click the **Workspaces** button in the lower left corner of the screen, then select **Workspace Manager**. The following screen appears, allowing you to complete your task:



Creating your first Quoteboard

A default quoteboard, called **My Quoteboard** has been created for you as a starting point. You may modify this quoteboard if you like:

1. From the **Quotes** menu, select **Personal Quoteboards**, then select **My Quoteboard**. The quote will pop open in a new window.
2. To change the symbols on the quoteboard, click the **Edit Symbols** button on the bottom right of the quote window.
3. Enter the futures and/or equities symbols in the dialog box that appears.



Futures contracts are entered using the following symbology:

[Symbol Root][Month Code][1-digit Year]

You may also use shortcuts to retrieve all active contracts, or a specified number of contracts for a symbol

For example:

USZ7 = December 2007 30 Year T-Bond

NGM0 = June 2010 Natural Gas

ND* = **ALL** active contracts for Nasdaq 100

GC*1 = **The front month** for Gold

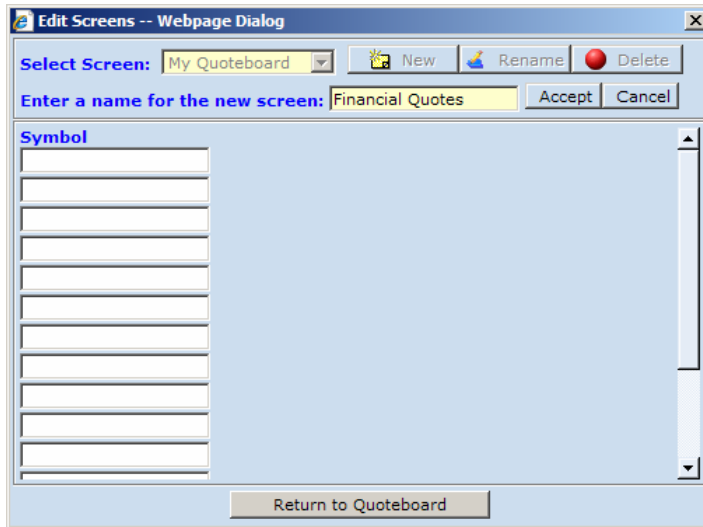
W*2 = **The front month, plus one month out** for Wheat

For equities, just enter the ticker symbol (IBM, DELL, etc.)

4. Click **Return to Quoteboard** to save your changes.

To create a new Quoteboard

1. From the top menu, click **Quotes**, then select **New Quoteboard**. The following dialog box appears:



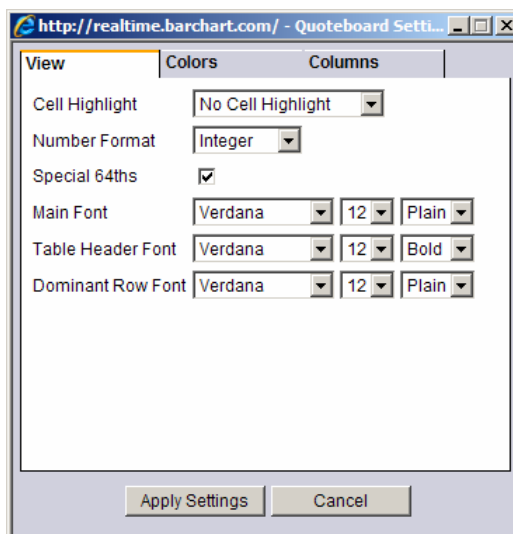
2. First, enter a name for this quoteboard, and click **Accept** when done. You will be asked to confirm the creation of a new quoteboard. Click **OK**.
3. Next, enter the futures and/or equities symbols in the dialog box that appears.
4. Click **Return to Quoteboard** to save your changes.

To change your Quoteboard preferences

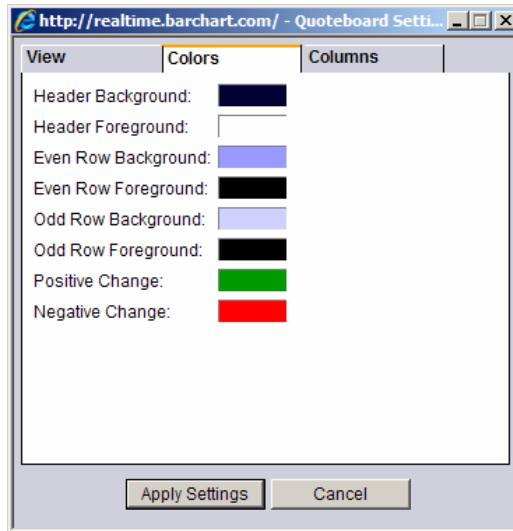
1. With the quoteboard open, click the **Preferences** button in the lower right corner.

There are three tabs in the preferences screen:

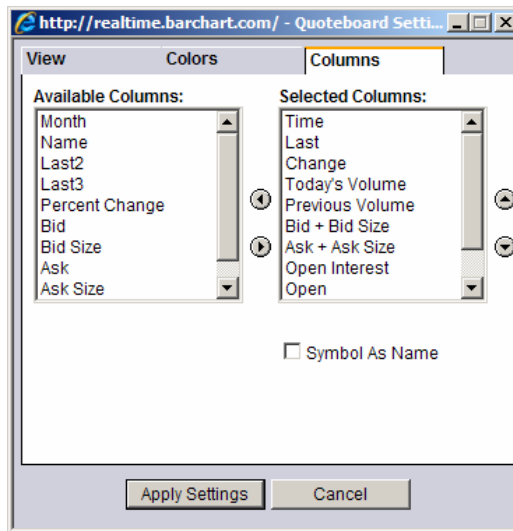
- a. **View** - Where you select the fonts and number format for the Quoteboard.



- b. **Colors** - Where you select the color schemes for the quoteboard.



- c. **Columns** – Where you identify the fields of data to appear on the quoteboard.



2. Make your desired changes. Please note that these changes apply to ALL personal quoteboards already created, and all future quoteboards you will create.
3. Click **Apply Settings** to save your preferences for this quoteboard.

I entered a symbol but nothing appeared...what's wrong?

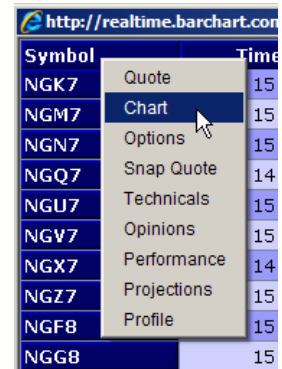
Make sure that you entered the symbol correctly (though it doesn't matter if you enter it in UPPER or lower case). The correct format will be the commodity symbol, followed by the contract month and contract year.

For example, the December 2007 S&P futures contract would be SPZ7.

How do I display a chart?

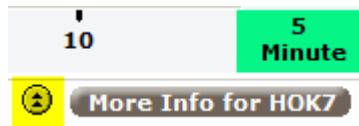
With a quoteboard showing:

1. Click on any symbol shown on the quoteboard. A sub-menu will appear as shown here:
2. Select **Chart**.



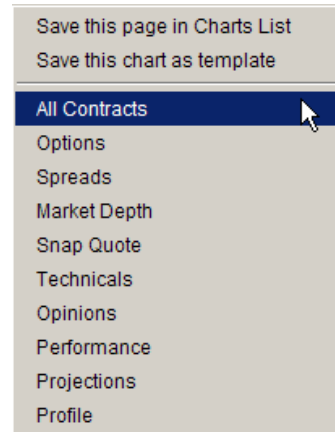
A chart will appear for the symbol.

The bottom right corner of the chart contains a **More Info** button, the time frame of the chart (shown here in green) and a circular icon (shown here in yellow) which can be used to pop the chart open in a new window.



The **More Info** button is used to display corresponding data for this contract, such as quotes for All Contracts, Options, Spreads, etc. You may also save the chart in your Charts List for easy retrieval at a later time.

Once you've made changes to the chart (time frame, colors, technical indicators, etc), you may also save this as a chart template. A template allows you to apply the same style to future charts.



The bottom left corner of the chart contains additional icons, which are described below. While in the application, hover your mouse over the icons to display their descriptions



Enter New Symbol – you are prompted for a new symbol to display on the chart.

Add New Pane – a new pane is created on the bottom of the chart, allowing you to apply a different study or display a different chart style.

Chart Templates – allows you to apply a saved chart style (template) to the

current chart

Add Technical Indicators – allows you to add one or more indicators to the chart.

Show Value Pane – toggles on and off the Value Pane, used to show price points for the crosshair.

The Chart Controls

You are in full control of how you want charts to appear in the BarchartX application. All chart controls are accessed by right-clicking on the chart. The following context menu appears:

To change the chart time frame:

Right-click on the chart, select **Change Time Increment**, then select the time frame from the options displayed.

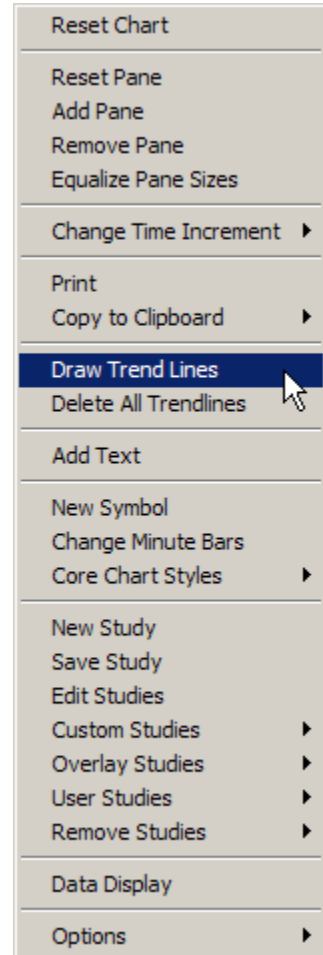
To change the chart style (Bar, Candle, etc)

Right-click on the chart, select **Core Chart Styles**, then select the style from the options displayed.

To reset the chart to the default settings

Right-click on the chart and select **Reset Chart**.

The chart will be returned to how it looked when you first started.



To expand/contract the time scale of the chart

Note: the time frame runs along the bottom of that chart.

1. Rest your cursor just below the bottom (scale) line until it becomes a line that points left and right.
2. Now, left-click and hold, dragging to the left to expand the chart (more space between the bars) and to the right contract it (less space between the bars).

To expand/contract the price scale of the chart

Note: the price scale runs on a vertical axis on the right of the chart.

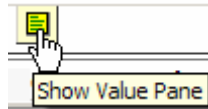
1. Rest the cursor on the price scale until it becomes a line that points up and down.
2. Left-click and hold, dragging up to contract the price scale (resulting in prices closer together) or drag down, where prices will be further apart (more accurate reading).

To display a crosshair on the chart

1. Move your cursor around the chart and hold down the left mouse button. The crosshair will show you what date you are on, and the price value of where the cursor is on that particular day.
2. To get the exact open/high/low/close to appear with the crosshair, right-click on the chart, select **Options**, and then select **Show Value Pane**.

OR

Click on the **Show Pane Value** icon in the lower right of the chart.



A box will then appear on the chart in the upper left portion of the top frame. You can now left-click on a day to get exact prices.

HOK7
4/10/2007
O: 1.8263
H: 1.8650
L: 1.8171
C: 1.8561
VMA:61706

How do I draw trendlines?

1. Right-click on a chart pane and select **Draw Trend Lines**. This will put you in Trend Line mode. The default setting is a simple trend line.
 2. Click once on a point on the chart, then put the mouse cursor at the point of the chart where you want the trendline to end and click a second time.
 3. You can change the trendline type by right-clicking on the chart while in trendline mode and selecting another trendline type.
 4. To get out of trendline mode, right-click on the chart and select **Trend Lines Off**.
-

Wow, there's a ton of choices in there...Add Pane, Add Text, Edit Studies ...

Powersignals is the underlying charting program that runs the charts in BarchartX. To see a complete list of the charting options and how to use them, click on the **Support** tab at the top, then **Online Support Center**, then **PowerSignals Charting**.