



ShareScope^{Plus} ShareScope^{Pro}

Getting Started Tutorial

ShareScope Plus and Pro can look daunting when you first open them but you'll soon discover just how easy they are to use. We recommend you follow this tutorial first – it will teach you the basic structure and features of ShareScope in around 20 minutes. Plus and Pro share a common interface. For simplicity, we will refer to “ShareScope” in this document.

Starting up ShareScope

When you start up ShareScope Pro a number of windows may automatically display on your screen:

New features in ShareScope Plus/Pro

Explains any new features included in the current release of software. This document also provides links to previous release notes as well. It is well worth reading this document as it may contain features not yet in the User Guide. Close the window for now – you can find it later on the **Help** menu.

Comms Setting

In order to update your end of day stock market and fundamental data, ShareScope needs to be able to communicate with the outside world.

When you first open ShareScope it will prompt you to check that the communication settings are correct. Click **OK** to display the **Comms Setting** dialog. By default, ShareScope is configured to communicate using your internet account and should not require further configuration by you. Click on OK to close this window.

Tip of the Day

This is a great way to learn about the features of ShareScope. A new tip will be displayed each time you start ShareScope. You can switch this off if preferred. This feature resides on the **Help** menu. Close it for now.

Intraday feed levels

Allows you to select what level of feed you would like to receive for each of the markets. Click on **Next** when this dialog appears and make your selection in the next dialog. The **Maximum** level is every bit of data, **Normal** is 15 second snap shot prices and **Minimum** is one minute price data. Click on **Finish** when you have made your selection. You can access this dialog again at any stage in the future by going to the **Update** menu at the top of the screen and clicking on '**Select intraday feed levels**'.

The basic structure of ShareScope Pro

ShareScope Pro has a multi-window format – enabling you to view different types of information simultaneously: graphs, lists, company results, trade information, news, and Directors' dealings.

The layout on the screen when you first open the program is called 'Main Layout' and consists of a list table and three graph windows. The two graphs at the bottom of the layout are linked to the list of shares, so whichever share is highlighted in the list, the same share will show in the two graph windows. You can move to the next share in the list by pressing the **Spacebar** and all three windows will change to display the next share in the list. Press **Shift** and **Spacebar** to move back up the list.

Examples of other layouts have been set up as defaults. Click on the **9 Graphs**, **One Share** or **Portfolio** buttons at the bottom of the screen to see some of the other default layouts. You can have up to 12 layouts – go to the **Window** menu at the top of the screen, then to **Window layouts** to view the other layouts. You can also add more layout buttons to the toolbar – for information on how to do this, see the Toolbar section in the on-screen **Help**.

There are four main screens in ShareScope – the List screen, Historical Graph screen, Intraday Graph screen and Details screen. You can cycle between these screens for the selected share by pressing the Enter key on your keyboard. Use the Esc key to scroll through in the reverse order.

Other screens that are available are the **Share's News** screen (press \ on your keyboard, then \ again to return to where you were); **Directors' Dealings** screen (press . (full stop) on your keyboard and again to return); or the **Trades and Quotes** screen (press ' (apostrophe) on your keyboard and again to return to where you were). Of course you can add new windows for each of these screens if you want to.

To add a new window to a layout, right click anywhere in the screen and go to **New Window**, then select the type of window you would like to see. You can resize the windows by moving your cursor to the edges of the window and when the cursor changes to a double headed arrow, left click and drag your mouse to move the edge of the window. To move the entire window to a new position on the layout, left click on the blue title bar of the window and drag the window.

You can link windows together so that information for the same selected share is shown simultaneously in any number of windows that you have linked together on the same layout. To link a window, select the window first, then go to the **Window** menu at the top of the screen and select **Link window**. In the dialog that appears select the window you want to link this window to. The window you linked will now show data for the same share as the window you linked it to.

Finding a Share

To find a share from any screen in ShareScope simply start typing the first few letters of its name. A dialog box is displayed with a selection of shares that match the letters you typed. There are three ways of searching for shares in ShareScope Pro:

1. Search by typing the name of the share and getting ShareScope to start searching from the first letter ('Start from first letter' option)
2. Search by typing the EPIC code ('Use EPIC codes')
3. Use either any part of a share name OR the EPIC code, depending on what you have to hand (untick both search options)

The dialog will only show shares from the list you are currently using. The name of that list appears at the top of the selection dialog box. Select the share you want from the displayed list, and, if requested, specify the share type you want to view. The selected share will now be showing on your screen.

Updating your data

When you first install the program you will have nearly all of the historical data and may only be missing the last few days' or weeks' data. There is no intraday data or news stories in the program when you first open it.

End of Day Data

The UK end of day data is made available from 6pm each week night. To download the data, click on the **Update data** button on your toolbar. Alternatively you can press **F9** on your keyboard. US end of day data can be downloaded in the same way after 10.30 pm. Fundamental and Unit Trust data is available usually mid-morning and Investors Chronicle Views every Friday at noon.

Intraday Data

To receive Intraday data, you need to press the **Connect** button on your toolbar (or go to the **Update** menu and click on **Connect to intraday feed**). The program will backfill all of today's data, up until the time you connected (or 15 minutes ago, if you have ShareScope Plus). Check your status in the bottom right hand corner of the screen. When the backfill has finished your status should read Connected. So long as you remain connected you will continue to receive the intraday data. If you disconnect and then connect up again later in the day the program will backfill the missed intraday data again.

Once you are connected you can backfill previous days' worth of intraday data. Go to the **Update** menu and select **Backfill intraday data**. You can backfill between 10 and 20 days data. Select the market(s) that you want to see previous intraday data for, then select the day(s) and click on the **Request** button. While you are backfilling data you can not request further data to backfill; you can only backfill data when your status says Connected.

List Screen

The list screen can be fully customised to just show the information you are interested in. To customise the columns that are shown, right click on any existing to column heading to see what options are available to you. You can add a wide range of different columns, divided into General columns, Intraday columns, Price columns, Result columns, and others. You can rename the column headings (**Change heading...**) or remove any columns currently in the list that you do not want (**Remove column**).

The title bar of the list window will tell you what list of shares you are currently viewing. To change to a different list, right click in the window and go to **Change List**, then select a different list or portfolio to view; alternatively use your list toolbar buttons (such as **All** or **Shares**) to change the current list.

You can further limit your lists to show just the shares that have reached a new high or low, or show shares from a particular sector. To do this, right click in the middle of the list and go to **New Highs/Lows** and click on **New Highs** or **New Lows**, or go to **Select sector** and click on **Choose the sector...**

ShareScope allows you to set up 12 tables containing different columns that you can view the same list of shares in. At the bottom of your screen are three Table buttons, these are shortcuts to the first three table settings. Click on each of these to see the same list of shares but with different columns displaying different types of information. To access all 12 settings, go to the **List Tables** menu at the top of the screen. ShareScope will automatically remember any changes you make to the List Tables.

Intraday Graph

So long as you are connected to the Intraday feed you should see two blue charts on your screen; these are Intraday graphs. Look in the title bar of the graph windows and you will see where it says 'Intraday Graph'. These show the price movement of the share during the day and are currently set to show just one day's data. The graphs can show up to 10 days intraday data, however when you first install ShareScope you do not have any intraday history so you will need to backfill the intraday data in order to show more than the latest day. The graphs are currently showing you the bid (darker blue shading) and offer (lighter blue shading) prices with a blue mid line through the middle. The dots represent the trades – green for buy, red for sell and blue for unknown trade types. The volume of each trade is shown in the histogram below the graph. To zoom in on a specific period on the graph, left

click and drag your mouse cursor to highlight the period you wish to view, then let go of the mouse cursor. To return to the full day, double-click with your mouse in the middle of the graph.

Right click in the middle of the graph to view the options available on the graph context menu. From this menu you can add **Moving Averages, Trend Lines, Indicators, Market Graphs, Stop-Loss** (Other main graph features) and numerous line studies. To change the way the bid, offer and trade data is displayed on the graph go to **Graph design** in the context menu.

As with List Tables, there are 12 Graph Settings in ShareScope. If you have clicked in the graph window then the three toolbar buttons at the bottom of your screen will now read Setting 1, Setting 2, Setting 3. Click on each of these to view different examples of how you can display the data. To view all 12 Graph Settings, click on the **Graph Settings** menu in the main menu bar.

Historical Graph

The last window on the Main Layout is the historical graph. This shows the entire price history that ShareScope holds of the selected share. You will see that in the title bar this is just referred to as a Graph. The top left corner tells you how the data is displayed – this may say ‘Pounds 4 week bars (dyn.)’. This means that the values on the left and right hand side of the graph are in pounds, that each bar on the graph represents 2 months worth of data and that the data is displayed dynamically. With dynamically displayed data, ShareScope will choose the best way to display the data. If you zoom in on a small period of the graph (left click and drag over a section of the graph to zoom in on that period) then the number of months or days per day will change. Double click to return to the full history. If you want to only see the last few months or years on the graph you can set ShareScope to always display just the selected period. Right click in the graph, go to **Limit date range** and select **Set Date Range** to modify and apply your settings.

The default settings for the graph show a moving average, trend line with confidence lines and a volume histogram. The volume data only starts from June 2000 and is not available before this date. To change the moving averages or add analytical indicators, right click in the middle of the graph to see the available options on the graph context menu. To customise how the data is displayed and the colours on the main chart, select **Graph Design** from the context menu.

There are 12 separate Graph Settings for Historical graphs as well. Use the Settings buttons on the bottom toolbar to view the example set-ups, and use the **Graph Settings** menu to access all 12.

Details Screen

To access the Details screen, select one of the windows on your screen and use either the **Enter** or **Esc** keys to cycle through the four main windows.

The Details screen comprises of List boxes, Results tables, Historical Price graphs and Results graphs. This screen is again fully customisable by right clicking in the window and using the options on the context menu. These options include adding new boxes to the window, adding items to the boxes or customising the boxes. There are also 12 Details Settings that you can use to organize different information – use the toolbar buttons at the bottom of the screen to view some examples, or go to the **Details Settings** menu at the top of the screen to view all 12. Any changes you make will be saved when you close the program down.

Portfolio Screen

You can create up to 1,000 portfolios or watch lists in ShareScope to maintain your investments and to make comparisons of their performance against any share, index or other portfolio.

When creating a portfolio you have the option to change any of your existing windows on the screen into a portfolio, or you can add a new window to your layout.

To change an existing window into a new portfolio:

1. Click on the **Select Portfolio** button on the top toolbar, or right click in the window and go to **Change window**, then click on **Select Portfolio** in the menu.
2. Click on **<<new>>** in the dialog box
3. Type in a name for your portfolio and click on **OK**.

To add a new window containing a new portfolio:

1. Right click in the screen and go to **New window**, then click on **Select Portfolio** in the menu.
2. Click on **<<new>>** in the dialog box
3. Type in a name for your portfolio and click on **OK**.

A blank portfolio will be created in the window. To access this and any future portfolios you create, click on **Select Portfolio** and choose the portfolio you want to view from the list. Alternatively, to return to the last viewed portfolio use the **Current Portfolio** option.

To add shares to your portfolio, right click in the blank screen and select **Add share to Portfolio**. Type in the name of the share in the **Find a share** dialog to add it to your portfolio. You can also access this dialog by pressing **Ctrl** and **A** on your keyboard. To add shares to your portfolio from a different list

or screen, right click in the screen and select **Add share to portfolio** from the context menu.

The portfolio screen replaces the list screen in the view cycling – so press Enter or Esc to scroll through from Portfolio to Historical Graph to Intraday Graph to Details and back to the Portfolio list.

To record a transaction against a share in your portfolio, left click on the share first to select it. Right click in the portfolio window and select **Buy** or **Sell** from the context menu. A **Record a transaction** dialog will open, displaying the last closing price as a guide. Enter the number of shares and any broker charges and stamp duty paid. You can back-date your transactions so you can add in any current holdings that you may have acquired in the past.

The transaction information is stored in the Transactions screen – each portfolio has its own. To view this screen right click in the window and select **Transactions**. If you have a keyboard with a number pad on the right, use the **+** key to change to the Transactions view and the **-** (minus) key to return to the portfolio view.

You may notice that the Summary line, just above the column headings, is different in both screens. In the Portfolio screen the summary line tells you information about the shares in the portfolio – the average price and up/down movement as well as the capitalisation. In the Transaction screen the Summary line gives you information about your holdings – the value and increase or decrease in value as well as any potential or realised profit (or loss). You can get the Transaction Summary in the Portfolio view as well. In the Portfolio view, right click in the middle of the window and select **Investment Portfolio** from the context menu.

Data Mining

Data Mining is ShareScope's powerful stock screening utility. It enables you to search the stock market for shares that meet specific criteria. To access Data Mining, right click and go to either **Change Window** or **New Window** to select **Data Mining**.

The Data Mining screen is comprised of three areas:

- The Control Panel where the Data Mining filters are selected and configured
- The List of shares identified by the filter
- The Graph which shows the distribution of the shares according to three of the search criteria.

For information on selecting, editing and creating Data Mining filters see the User Guide or ShareScope's **Help** facility. You may also be interested in purchasing our Data Mining Training CD – more information about this is available on our website.

The Data Mining screen also replaces the list screen in the view cycling – so press Enter or Esc to scroll through from Data Mining to Historical Graph to Intraday Graph to Details and back to the Data Mining view.

ShareScope Help

All ShareScope features and menu items are explained in ShareScope's on-screen **Help** which can be accessed in a number of ways:

- Using the **Help – Contents and Search** facility on the **Help** menu you can search for specific words or phrases.
- Many dialog boxes include a **Help** button which will display the relevant Help page. Similarly, many dialog boxes include a “?” button in the top right corner. Click on this button and then click on any item within the dialog box to display context-sensitive Help.
- Use the **F1** key to display context-sensitive **Help**. For example, if you hover the mouse over an item on a menu, and then press F1, the relevant Help will be displayed.
- Don't forget also: Tip of the Day, What's New, InfoCentre and the User Guide. You can also discuss ShareScope and investing techniques with other members on our discussion boards. You will find a link on the Help menu within ShareScope.

If you require any further assistance, please do not hesitate to contact the ShareScope Support team:

ShareScope Plus Support

call 0845 045 0111

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ShareScope Pro Support

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