ionic
INFORMATION

ShareScope

Gold, Plus, Pro

Getting Started Tutorial

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Disclaimer

Whilst every effort has been made to keep this tutorial up to date, the number and rapidity of enhancements to ShareScope means that there may sometimes be omissions and inaccuracies. We apologise for any confusion this may cause, and refer you to the "What's New?" section of the on-screen Help within the program itself, which is updated with every new version.

The calculations and rankings given in this guide and in ShareScope should be used for guidance only. Ionic Information does not make any recommendations or endorsements with regards to specific investments or investment strategies. Please check all figures independently before taking action.

Support

Every effort has been made to make ShareScope easy and intuitive to use, but computers and the stock market can be complicated. Our free lifetime support is there to help you:

ShareScope Gold support
Tel: 0845 045 0111 (or alternatively 020 7549 1104)
Email: support@sharescope.co.uk
09:00 – 18:00 Monday to Friday

ShareScope Plus Support
Tel: 0845 045 0111 (or alternatively 020 7549 1104)
Email: support@sharescope.co.uk
09:00 – 18:00 Monday to Friday

ShareScope Pro Support
Tel: 0845 456 0545 (or alternatively 020 7549 1103)
Email: pro@sharescope.co.uk
08:00 – 18:00 Monday to Friday

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ShareScope
Getting Started Tutorial

ShareScope is designed to be extremely easy to use. It does, however, have a vast array of features. We strongly recommend that you follow this tutorial first – it will teach you the basic structure and features of ShareScope in around 20 minutes.

Starting up ShareScope

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

New Features in ShareScope

This explains any new features included in the current release of the software. This document also provides links to previous release notes as well. It is well worth reading this document to find out about useful new additions to the program. Close the window for now – you can find it later in the **Help** menu (see page 14 for information about Help).

Comms Setting

If you have a demonstration copy of ShareScope you can ignore this step.

In order to update your stock market data, ShareScope needs to be able to communicate with the outside world.

When you first start ShareScope it will prompt you to check that the comms 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.

If you do not have an internet account, you will need to configure ShareScope to use a modem. Click on the **Help** button in the bottom right corner of this dialog box for further instructions. This dialog can subsequently be found under **Comms Setting** on the **Comms** menu.

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 in the **Help** menu. Close it for now.

Intraday feed levels *(ShareScope Plus/Pro only)*

This allows you to select what level of data 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 tick-by-tick live data, **Normal** is 15-second snapshot prices and **Minimum** is 1-minute snapshot price data.

You can only receive the Minimum level of data in ShareScope Plus. In ShareScope Pro we recommend you use the **Normal** level.

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 **Comms** menu at the top of the screen and clicking on **Select intraday feed levels.**

Updating your data

If you have a demonstration version of ShareScope you can ignore this step. Although the demo includes historical data, you cannot update unless you are a registered subscriber.

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

End of day data

The **Update Data** feature will update ShareScope's end of day database to include all data up to and including the previous day's closing prices as well as news stories and fundamental data. To download the data click on the **Update Data** button (with the PC and green arrow) on the toolbar. Alternatively you can press **F9** on your keyboard. You will notice that the Update window includes the latest date of the data being downloaded, the close value of the FTSE 100 and a daily message from ShareScope. The following data is available:

- UK end of day data is available from 18:00 every week night.
- Daily fundamentals are available from 12:00 every trading day.
- US stocks *(ShareScope Plus/Pro only)* and US indices are available after 22:00.
- Unit trust data is available daily at 22:00 *(ShareScope Plus/Pro)* or every Friday at 12:00 *(ShareScope Gold)*.
- Nikkei and Hang Seng indices are available at noon every trading day.

Every time you update, ShareScope will download all data not already downloaded. ShareScope uses the update process to deliver its **InfoCentre** documents. Some of these display automatically after an update.

Intraday data *(ShareScope Plus/Pro only)*

To receive intraday data you need to press the **Connect** button (depicting lightning) on the toolbar. Alternatively you can go to the **Comms** menu and select **Connect to intraday feed.** ShareScope will backfill all of today's data up until the time you connected (or 15 minutes ago if you have ShareScope Plus). You can check your status in the bottom right-hand corner of the screen. When the backfill has finished your status will read **Connected.**

So long as you remain connected you will continue to receive the intraday data. If you disconnect (e.g. by clicking on the toolbar button again) and then reconnect later in the day, ShareScope will backfill the missed data.

Once you are connected you can backfill intraday data from previous days. Go to the **Comms** menu and select **Backfill intraday history.** Select the markets for which you want to see the data, then select the days and click on the **Request** button. Note that you can only backfill data when your status says Connected.

The basic structure of ShareScope Gold

ShareScope Plus/Pro members, please go to "The basic structure of ShareScope Plus/Pro" on page 5.

ShareScope has several types of screen, each dedicated to showing different kinds of information, and learning to find your way around is the first step to making ShareScope a productive tool for your investment activities.

The three main screens in ShareScope Gold are listed below and each will be covered in more detail.

List	The List screen displays a given list of stocks and other securities (Gilts, Unit Trusts, etc) covered by ShareScope.
Historical Graph (often referred to simply as the **Graph**)	The Graph displays the price history of the share currently selected in the List screen.
Details	The Details screen displays results and forecast information for the selected share.

Press the **Enter** key to switch from one screen to the next in the order List > Graph > Details > List. Use the **Esc** key to scroll through in the reverse order.

As you will have gathered, the Graph and Details screens display information for the share that is currently selected on the List screen. Whilst viewing the Graph or Details screens, press **Space** to display information about the next share in the list. Press the **Shift** key and **Space** at the same time for the previous share in the list.

Finding a Share

To find a share from any screen in ShareScope Gold:

1. 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 have typed. The name of the list you are using appears at the top of the Find a Share dialog box. Only shares from this list are available for selection.

2. Double-click on the share you are interested in.

The Graph or Details of the selected share will be displayed, or if you are viewing a List screen, that share will be highlighted. Note that Find a Share does not work when there is a menu or other dialog box open on the screen.

Now let's look at each of the main ShareScope screens in more detail. Please go to "List screen" on page 7.

The basic structure of ShareScope Plus and Pro

Multi-windows

ShareScope Plus/Pro has a multi-window format. This enables you to view different types of information simultaneously: graphs, lists, company results, trade information, news, and directors' dealings etc.

To make a particular window active, click in the blue title bar. You may notice that some of the menu headings and toolbar buttons at the bottom of the screen change depending on which window is currently active. If you want to maximise a window to fill the entire ShareScope screen double-click on the title bar or press the **=** key. Repeating the action returns the window to its previous size.

Window Layouts

The arrangement of windows in the ShareScope screen are known as **Window Layouts** and can consist of one or more windows. The layout on the screen when you first open the program is called "Main Layout" and consists of a List Table, two Intraday Graphs, a Historical Graph and a Details window.

ShareScope provides a number of pre-set Window Layouts. Click on the **9 Graphs, One Share** or **Portfolio** buttons at the bottom of the screen to see some of these. You can have up to 12 layouts. Go to the **Window** menu at the top of the screen, then to **Window layouts** to view all 12. Most of these have been left blank for you to customise. You can also add more layout buttons to the toolbar – for information on how to do this, see the **Toolbars** section in the on-screen Help.

You can easily 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 window to a new position on the layout, left-click on the title bar of the window and drag the window.

Linking windows

You can link windows together so that information for the same selected share is shown simultaneously in any number of windows on the same layout.

Looking at the Main Layout (from the **Window** menu select **Window layouts : Main layout**), the two graphs at the bottom of the layout and the Details window are all are linked to the list of shares. You will see that their title bars all have the same number on the left "01" and say "(Linked)". Whichever share is highlighted in the list, the same share will show in the other three windows.

You can move to the next share in the list by pressing **Space** and all of the linked windows will change to display the next share in the list. Press **Shift** and **Space** together to move back up the list.

To link one window to another, first select the window, 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. There is of course also an **Unlink** option.

Restoring the default Window Layouts

Once you have finished this tutorial you may wish to re-set your Window Layouts to how they were when you started ShareScope up for the first time. If you haven't closed ShareScope down since starting the tutorial, select **Window : Window Layouts : Save and restore : Restore all window layouts.** ShareScope will revert to how it was at the beginning of your session.

If however you have made changes and exited the program in the meantime, ShareScope will have saved your changes. In this case select **Window : Window Layouts : Default window layouts** and ShareScope will be restored to how it first appeared. Please be aware that with this option you will lose any layout changes you have made.

Main screens in ShareScope Plus/Pro

The four main screens are listed below and each will be covered in more detail.

List	The List screen displays a given list of stocks and other securities (Gilts, Unit Trusts, etc) covered by ShareScope.
Historical Graph (often referred to simply as the **Graph**)	The Historical Graph displays the price history of the share currently selected in the List screen.
Intraday Graph	The Intraday Graph charts the price movement and trades of the currently selected share throughout the day.
Details	The Details screen displays results and forecast information for the selected share.

The **Enter** key switches from one screen to the next in the order List > Historical Graph > Intraday Graph > Details > List. The **Esc** key scrolls through in the reverse order.

Click on the List window and try this out for yourself. As you use **Enter** or **Esc** to go through the screens, you will notice that these Graph and Details screens display information for the share currently highlighted on the List screen.

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 have typed. There are three ways of searching for shares in ShareScope Plus/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** option).
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 Find a Share 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.

List screen

We will start by looking at the List screen. If you're using ShareScope Gold, press **Esc** to move to the List screen. If you are using ShareScope Plus/Pro, for the purposes of this tutorial we will work with a single maximised window. Double-click on the title bar of the List window to maximise it. Don't forget that you can always double-click again to restore the window to its previous size.

The List screen acts as the source list for the Graph and Details screens so, for example, if the List screen shows the FTSE 100 sorted by capitalisation, then this is the order in which shares will be displayed in the Graph and Details screens. Chartists in particular find this an easy way to scan through price charts looking for trading signals.

The title bar of the List will tell you which list of shares you are currently viewing. You can customise the List screen to show only the information you are interested in.

By default, the List screen in ShareScope Gold lists all the securities for which ShareScope contains data. These are: all ordinary shares, convertibles, preference shares, warrants, investment trusts, gilts, commodities, exchange rates, unit trusts and indices. You can limit the list to show any of these sub-categories. The first six buttons on the main toolbar provide a shortcut to some of these options but for the full list, click on the **View** menu.

In ShareScope Plus/Pro, the default list is the FTSE 100. You will notice that there are toolbar buttons for some of the lists, for example Indices. For all available options look under **View : Change List.**

You can easily add new toolbar buttons for the categories that you look at most frequently. Right-click within the toolbar and select **Customise Toolbars**. 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.**

A nice feature of ShareScope is its pop-up graphs. Hover the cursor over a value in the **EPS** column, for example, and you will see a small graph appear. Note: if you are using ShareScope Plus/Pro click on the **Table 3** button at the bottom of the screen to go to a List Table showing EPS. Pop-up graphs give a snapshot of the share's historical and forecast performance and are available for EPS, EPS growth, PEG, P/E, Profits, Turnover, Dividend and Yield. In fact you can hover the cursor over many fields in the List screen (and in other ShareScope screens) to display tool tips giving extra information.

You will notice that the List screen contains a number of columns containing details about the share price and other selected fundamental (financial) information. The information that is displayed is entirely up to you. You can configure ShareScope to display only the information that you use to make investment decisions. There are nearly 200 different types of column that you can add to a List screen. Right-click within a column heading to see the list of available options.

By default, ShareScope will display shares for which it contains historical data but which are no longer listed on the stock exchange (for whatever reason). These are coloured green. To remove these shares from the list, click on the **View** menu and select **Show historical shares** to remove the tick.

ShareScope provides 12 templates that you can use to organise different information. These are called **List Tables.** Look at the shortcut buttons at the bottom of the ShareScope screen. Click on each of the buttons (e.g. **Table 2** and **Table 3**) in turn to see examples of different types of data displayed. Click on the **List Tables** menu to access all 12 – many of them are left blank for you to populate. ShareScope will automatically remember the changes you make to a List Table.

To access the functions available to you whilst in the List screen, right-click within the list to display the **List context menu.** You can also access this menu by clicking on the **List** menu. To change the look and design of the List Screen, select **List Design.**

Now press **Enter** to move on to the Historical Graph screen.

Historical Graph

The Historical Graph is the screen displayed when ShareScope Gold is run for the first time. In ShareScope Plus/Pro this screen is initially displayed in the bottom right-hand corner. You can also click on the **Graph** button on the toolbar (denoted by a picture of a graph) to display the Historical Graph screen.

The Historical Graph shows the price history that ShareScope holds for the selected share. By default the entire price history that ShareScope contains for that share is displayed. However, you can zoom in to a specific period of the price history by clicking and dragging the mouse cursor to indicate the period you wish to view. Click and hold the mouse cursor anywhere on the chart, drag the cursor to a new position and then release it to see how this works. Double click on the graph to return to the full price history.

You will notice a small window within the Graph screen showing the Legend. This gives useful information about the share, its price history and the graph itself. If you move the cursor around the screen, you will see how this information changes according to the cursor's position. You can move this window or close it as required. For more information see the on-screen Help.

The top left corner of the Historical Graph 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 4 weeks' worth of data and that the data is displayed dynamically. With dynamically displayed data, ShareScope will choose the best way to display the data. As you zoom in on the graph you will see this change. You can also set ShareScope to always display the same period (for example the last six months). This is the **Limit Date Range : Set Date Range** option on the **Graph** context menu (see below).

The default setting for the Historical Graph shows OHLC bars with trend and confidence lines, a 20-period moving average and a volume histogram. Note that the volume data only starts from June 2000 and is not available before this date.

Right-click anywhere within the graph screen. This brings up the **Graph context menu** which displays the options available for configuring the Historical Graph. To customise how the data is displayed and the colours used on the chart, select **Graph Design** from the context menu. Close this dialog for now by clicking **Cancel.**

Just like the List Tables, ShareScope provides 12 **Graph Settings.** This enables you to apply different views to the same price chart without having to change the configuration each time. At the bottom of the screen you will see that there are shortcut buttons for some of these (e.g. **Setting 1, Setting 2**). Click on the **Graph Settings** menu to access all 12 and have a look at some of them. ShareScope will automatically remember the changes you make to them.

Here are some examples of how members use Graph Settings:

- To look at the same price chart with different time frames, e.g. one month, 3 months, 6 months, one year.
- To show different moving average (MA) combinations e.g. 10/30 MAs, 30/50 MAs, 100/200 MAs.
- To show different technical indicators e.g. swing charts and point & figure.

You can add a vast array of technical indicators to ShareScope's Historical Graph and these can be accessed via the options on the **Graph** context menu.

We will now look at the Intraday Graph. Press **Enter** to change to this screen. In ShareScope Gold the Details screen comes next (see page 10).

Intraday Graph

ShareScope Plus/Pro only

The Intraday Graph shows the price movement and trades of the currently selected share throughout the day. You need to be connected to the intraday feed to see this information. Press the **Connect** toolbar button (depicting lightning) if you are not already connected.

Look in the title bar of the graph and you will see that it says “Intraday Graph” and tells you which list of shares is being used, the sector, the Graph Setting and whether the window is linked (see page 5).

Like the Historical Graph, the Intraday Graph has a Legend showing extra information such as the mid, bid and offer prices for a given time.

Initially Intraday Graphs are set up to show just one day’s data but they can show up to 10 days’ worth. When you first install ShareScope you do not have any intraday history so you will need to backfill the data in order to show more than the latest day (see page 4).

The graph is 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. To return to the full day, double-click with your mouse in the middle of the graph.

As in other screens, right-click in the middle of the graph to view the options available on the context menu. From this menu you can add Moving Averages, Trend Lines, Indicators, Market Graphs, Stop-loss (from the **Other Main Graph Features** option) and numerous line studies. To change the way the bid, offer and trade data is displayed on the graph select **Graph Design.**

As with Historical Graphs, there are 12 Graph Settings for the Intraday Graph.

You can also use the **Intraday Graph** toolbar button (depicting a red and blue graph) to view this screen.

Press **Enter** to move on to the Details screen.

Details screen

The Details screen displays a detailed breakdown of underlying financial performance, structure and stability. The screen is comprised of list boxes, results tables, historical price graphs and results graphs.

Just as with the Historical Graph and List screens, the options available for the Details screen can be accessed using the context menu. This is always the fourth menu from the left on the menu bar on any screen. It can also by accessed by right-clicking anywhere in the central part of the current screen. The options for the Details screen include adding new boxes to the window, adding items to the boxes and changing the design of the boxes.

There are 12 **Details Settings** you can use to organise different information – use the toolbar buttons at the bottom of the screen to view some examples. For instance, the **Main** setting (the default) gives you a comprehensive description. To view all 12 settings, go to the **Details Settings** menu at the top of the screen. Any changes you make will be saved when you close ShareScope.

You can also click the **Details** toolbar button (depicting a magnifying glass) to display this screen.

Press **Enter** to return to the List screen, thereby completing the cycle of screens.

Portfolios

Creating a portfolio

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

Note that in ShareScope Plus/Pro you have the additional options of changing any of the windows on the screen into a portfolio, or adding a new window to your layout. For now though we will use the existing window.

To create a portfolio:

1. Press **F12**. This is a shortcut key for going to the **View Portfolio** dialog.
2. Click on the **New portfolio** button in the dialog box.
3. Type in a name for your portfolio and click on **OK.**

You have now created a blank portfolio which you can access in future by pressing **F12.** You could also go to the **Portfolio** menu, choose **Select portfolio** and then choose the portfolio you want to view from the list. There is also the **Portfolio : Current portfolio** option **(or F11)** – the current portfolio will always be the one you looked at last.

The Portfolio screen replaces the List screen in the view cycling – so press **Enter** to scroll through from the Portfolio screen to Historical Graph to Intraday Graph (if applicable) to Details and then back to the Portfolio screen.

Adding shares to your portfolio

There are various ways of adding shares to a portfolio. Once you have created a portfolio, right-click in the portfolio screen and select **Add share to portfolio.** This will display the Find a Share dialog (see pages 4 (ShareScope Gold) and 7 (ShareScope Plus/Pro)). Type in the name of the share to add it to the portfolio. You can also do this by pressing **Ctrl** and **A.**

Have a look at the status bar at the top of the Portfolio screen. It tells you the following information:

- The name of the portfolio.
- The number of shares in the portfolio.

- The average price of the shares in the portfolio.
- The average increase/decrease in price (daily) of the shares.
- The percentage increase/decrease in price (daily) of the shares.
- The total capitalisation of companies owned/held in the portfolio.
- The average capitalisation of companies owned/held in the portfolio.
- Currency of the portfolio.

Recording transactions

To record a transaction against a share in your portfolio go to the Portfolio screen and left-click on the share to select it. Now right-click and select **Buy** from the context menu. ShareScope automatically enters the previous day's close price as a guide. Enter the number of shares and any broker charges or stamp duty paid. You can back-date your transactions so that you can create any portfolios you already have.

The transaction information is stored in the **Transactions** screen – each portfolio has its own. To view this screen, right-click in the portfolio screen and select **Transactions.** Use **F11** to return to the Portfolio.

You may notice that the summary line just above the column headings is different in the two screens. In the Portfolio screen, the summary gives 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/decrease in value as well as any potential or realised profit or loss. You can also get the Transactions Summary in the Portfolio screen by selecting **Portfolio : Investment Portfolio.** Now click on the **All** toolbar button (ShareScope Gold) or the **FTSE 100** button (ShareScope Plus/Pro) to return to the List screen (showing these shares).

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 use the **Data Mining** toolbar button (depicting a pickaxe and shovel).

The Data Mining screen is comprised of three areas:

- The control panel on the right 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 ShareScope's **Help** facility (see page 14). You may also be interested in purchasing our *Become an Expert at Data Mining* CD – more information about this is available on our website.

Like the Portfolio screen, the Data Mining screen also replaces the List screen in the view cycling – so press **Enter** to scroll through from Data Mining to Historical Graph to Intraday Graph (if applicable) to Details and back to Data Mining. For now click on the **All** (ShareScope Gold) or **FTSE 100** (ShareScope Plus/Pro) toolbar button to return to the List screen.

Level 2

Level 2 is the professional data screen used by stockbrokers and City traders. Level 2 is included in ShareScope Pro by default. If you have ShareScope Gold or ShareScope Plus you can subscribe to Level 2 as an optional extra. See our website for subscription details. If you don't have Level 2 please go to the next section.

To view the Level 2 screen, click on the **Level 2** toolbar button (showing a black and yellow screen) or press the **#** (hash) key. You will see a black screen with a yellow strip across it. Now you need to connect to the live Level 2 data feed. There is a toolbar button for this (the black/yellow screen with lightning), alternatively you can select **Connect to Level 2 data feed** from the **Comms** menu.

The Level 2 screen shows you the "order book" with the actual prices and volumes of shares being bid for or offered on the LSE. The "yellow strip" shows the best buy and sell prices, the number of orders at those prices and the volume of shares available. There are also graphs showing prices and volume.

As with all other ShareScope screens, you can right-click to access the context menu. The **Level 2 design** option allows you to customise the appearance of the screen and to specify what information is displayed.

You can find out more in the *Introduction to LSE Level 2* InfoCentre document and in the on-screen Help. You may also be interested in our *Using Level 2 to Improve Your Trading* CD – more information about this is on our website where there is also a short video about Level 2.

Press the **#** key to exit the Level 2 screen and return to the previous screen.

Additional screens in ShareScope

In addition to the screens we have covered so far, ShareScope offers even more information to help you with your investment decisions. The following options are available for the currently selected share.

Directors' dealings

ShareScope lists directors' dealings and holdings, as well as major shareholdings and major shareholders' dealings. This is particularly useful in tracking individual companies, but can also be used to see what a particular investment company is investing in. You can access this information by pressing . (full stop) from any screen. Press it again to return to where you were.

News
To read news stories about a share press **** on your keyboard and **** again to return. Note that there will be no news stories until after your first update. Double-click on a story to read it.

Share's dates
Press > to see the important dates (e.g. AGM) for a company. Press > again to return.

Price List
Press **/** to see a list of daily OHLC prices for the selected instrument. Press **/** again to return.

Trade Summary *(ShareScope Plus/Pro only)*
Pressing **?** displays an up-to-the-minute breakdown of trade count, value and volume for a share in terms of buys, sells, and unknowns for the selected share. Press **?** to return.

Trade List *(ShareScope Plus/Pro only)*
ShareScope provides a full history of trades and quotes for the currently selected share. Press the **'** (apostrophe) key to go to this screen and again to return to the previous screen.

For more detailed information on all of these screens, please see the on-screen Help (details below).

As you will have discovered, wherever you are in ShareScope, most information is never more than a mouse click or key press away. In fact there is often more than one way of accessing information (i.e. menus, toolbar buttons and shortcut keys) so that you can use the method that best suits you.

ShareScope Plus/Pro members, don't forget that once you have finished this tutorial you can restore your window layouts to their orignal configuration. See page 6.

ShareScope Help

All ShareScope features and menu items are explained in ShareScope's on-screen Help. This 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-hand 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 **Tip of the Day** and **What's New.**

- **InfoCentre** contains educational articles to help you get the most out of ShareScope. To access this feature select **View : InfoCentre.**
- You can also discuss ShareScope and investing techniques with other members on our discussion boards. You will find a link to these on the **Help** menu.

If you require further assistance please contact the ShareScope Support team:

ShareScope Gold/Plus Support
call 0845 045 0111 (or alternatively 020 7549 1104)
email support@sharescope.co.uk
09:00 – 18:00 Monday to Friday

ShareScope Pro Support
call 0845 456 0545 (or alternatively 020 7549 1103)
email pro@sharescope.co.uk
08:00 – 18:00 Monday to Friday

What else can you do with ShareScope?

We have only covered a tiny fraction of ShareScope's functionality in this tutorial. To get the most out of ShareScope, we suggest you look at the on-screen Help. The What's New pages are a good starting point. ShareScope Support can also help. Features available in ShareScope include:

- Alarms – there are extensive options for setting alarms on intraday prices *(ShareScope Plus/Pro only)* and closing prices.
- Events – display key transactions and events on your Historical and Intraday Graphs including news items.
- Import – add data to ShareScope either manually or from a file.
- Export – save data from ShareScope to use in another program, e.g. Excel.
- Customisation – all screens and toolbars can be customised so that you can set up ShareScope to suit your needs.
- Use heat maps in List screens to give an at-a-glance overview of the market.
- Automatic update – this facility checks whether your data is up-to-date and updates it if it is not.
- Set up Cash Accounts to keep track of cash associated with your investments.
- Comprehensive Capital Gains Tax coverage including a CGT calculator.

Notes

Shortcut keys

Function key		Shift	Ctrl	Shift and Ctrl together
F1	Context sensitive Help	Help arrow		
F2, F3, F4	List Tables or Graph Settings	List Tables or Graph Settings	List Tables or Graph Settings	List Tables or Graph Settings
F5	All shares, indices etc	FTSE 100	Non-index	Convertibles
F6	Ordinary shares	FTSE 250	AIM	Income shares
F7	Investment trusts	FTSE Small Cap	Warrants	Capital shares
F8	Indices	FTSE Fledgling	Preference shares	Other shares
F9	Update data	Details	Historical Graph	Current cash account
F10	Select the menu	Context menu		Context menu
F11	Current portfolio	Imported data	Directors' dealings	Select cash account
F12	Select portfolio	Data Mining	Email	Triggered alarms

General

a–z (and 0–9)	Find a Share or Search (in News screen)
Enter	Historical Graph > Intraday Graph > Details > List > Historical Graph
Esc	Historical Graph > List > Details > Intraday Graph > Historical Graph
Space	Next item in current list
Shift and Space	Previous item in current list
/	Numerical price history for selected share (and **/** again to close)
****	News for selected share (and **** again to return to previous screen)

|	News screen (all stories)
. (full stop)	Directors' dealings for selected share (and return to previous screen)
, (comma)	View current list (except Transaction screen)
' (apostrophe)	Trade List (and again to return to previous screen) *ShareScope Plus/Pro*
#	Level 2 screen (and again to return to previous screen)
>	Company dates
+ (on number pad)	Transactions screen
- (on number pad)	Current portfolio
=	Maximise/minimise current window *(ShareScope Plus/Pro)*
Ctrl and A	Add share to current portfolio
Ctrl and B	Back up ShareScope
Ctrl and C	Copy to the clipboard
Ctrl and D	Design dialog
Ctrl and P	Print
Ctrl and Q	Quotes list (and return to previous screen) *ShareScope Plus/Pro*
Ctrl and R	Restore window layout from disk *(ShareScope Plus/ Pro)*
Ctrl and S	Save
Ctrl and T	Trade list (and return to previous screen) *ShareScope Plus/Pro*

Graph screens

Left/right arrows	Move cursor back/forward one trading day
Shift and left/right arrows	Scroll graph left/right
Shift and click and drag	Draw a straight line
Ctrl and click and drag	Draw a partial trend line
Alt and Enter	Add a text box
Tab	Select next line or text box
Delete	Delete selected line or text box

Shift and Delete	Delete all lines and text boxes
Shift	If a share's price has been adjusted, show unadjusted price on status bar (Historical Graph)
Shift and 1	Display 1 month on the graph (Historical Graph)
Shift and 2	Display 3 months
Shift and 3	Display 6 months
Shift and 4	Display 1 year
Shift and 5	Display 2 years
Shift and 6	Display 5 years
Ctrl and 1	Show 1 day bars (Historical Graph)
Ctrl and 2	Show 2 day bars
Ctrl and 3	Show 3 day bars
Ctrl and 4	Show 4 day bars
Ctrl and 5	Show 1 week bars
Ctrl and 6	Show 2 week bars
Up/down arrows	Compress or expand the vertical scale of graph
Shift up/down arrows	Move the graph up or down the vertical axis
Ctrl and X	Fix position of crosshairs

List screens

Left/right arrows	Scroll columns left/right (if they don't fit on the screen)
Double click on column heading	Sort list by that column (double-click to reverse order)
Shift Home/End	Select first/last item in current list
Page down/up	View next/previous page of current list

Portfolio and Transaction screens

Delete	Delete selected share or transaction
Ctrl and Z	Undo – e.g. if you have deleted an item or made a transaction in error
Ctrl and Y	Redo – i.e. after undoing it

Portfolio screen only

Shift and Delete	Delete all items

Transaction screen only

+	View “Latest” lines
, (comma)	CGT report for current year
<	CGT report for selected share

News screen

Enter	View selected story
Esc	Show all news stories
a–z (and 0–9)	Search news

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