

Chapter 6 - Settings

What you will learn in this chapter:

- About settings.
- How to change a setting.
- How to customize a setting.
- How to rename a setting.
- How to copy a setting.
- How to lock a setting.
- How to save and restore settings.

Introduction

In each of ShareScope's views – List, Graph, Details, etc. – there are 12 templates available for you to use. These templates enable you to save different configurations and apply them with a click of the mouse.

THIS IS A VERY IMPORTANT CONCEPT TO UNDERSTAND.

In the List view, for example, you might want to view different information for shares than you would for unit trusts or foreign exchange.

In the Historical Graph view, you might want to view price charts over different time frames or using different chart types (OHLC, Point & Figure, Ichimoku, etc.).

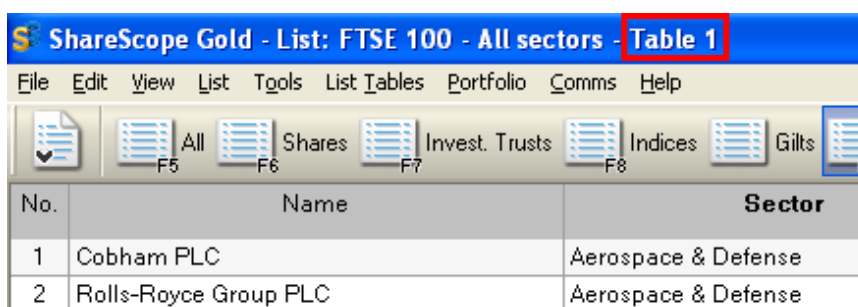
In List-based views (List, Portfolio, Data Mining etc.) these templates are called **Tables**. In other views (e.g. Graph), they are called **Settings**. In this chapter we will use the term Settings unless specifically talking about Tables.

In ShareScope, four or more of the settings for each view are pre-configured. You may choose to leave these the way they are but most customers prefer to change them to suit their own requirements. You can also rename settings to be more descriptive.

Each view will automatically use one of the 12 settings available. When you first start ShareScope, each view will use Setting 1 by default.

KEY CONCEPT: ShareScope will remember which setting you last used in each view. In the List view, ShareScope will even remember which List Table you last used for each fixed list. So, if you have created different tables for unit trusts and investment trusts, say, ShareScope will apply the correct table with the list.

You can easily tell which setting is in use. In ShareScope Gold, the current setting is displayed in the title bar of the *program*:

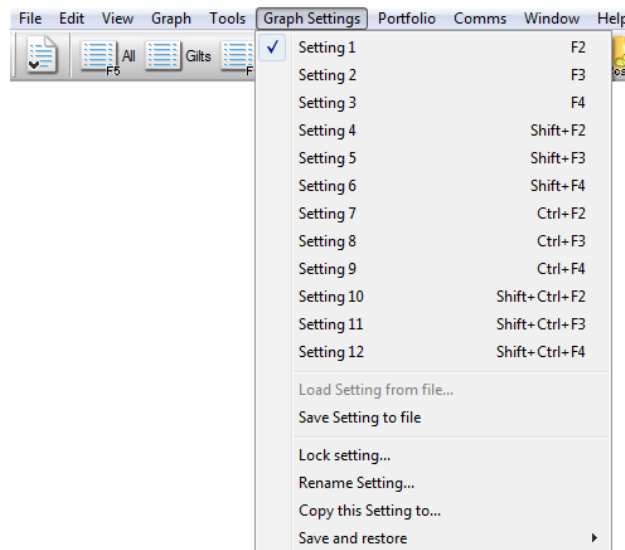


In ShareScope Plus and Pro, it is displayed in the title bar of each *window*. For example:



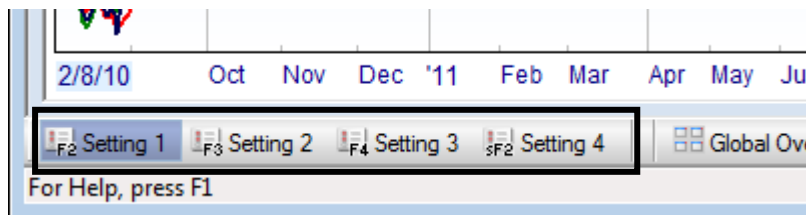
Change to another Setting

In each view, the sixth menu option on the menu bar will be the **Settings** menu. The name will change depending on which is the active view (e.g. List Tables, Graph Settings, Level 2 Settings). Click on this menu to see the list of settings:



The current setting will have a tick next to it. To change to another setting, click on the one you want.

Look also at the toolbar at the foot of the ShareScope window:



This is called the **Settings toolbar**. By default, the first four settings for the active view will be displayed on here. Simply click on a button to apply that setting. The current setting will be highlighted. You can add more settings buttons to this toolbar if desired (See **Customising Toolbars**). If you rename a Setting, the name will be displayed on the button. If the names are truncated, mouse over them to reveal the full name.

There are also keyboard shortcuts for each setting. You can see them on the buttons on the Settings toolbar and on the Settings menu as well. For example, pressing the **F2** key in any view will apply Setting 1.

Making changes to a Setting

Configuring settings is described in detail in the chapter for each view.

Any changes you make to the view will apply to the current setting only. Changes will be saved automatically when you exit ShareScope although there is also a **Save** option on the File menu.

Therefore if you want to make significant changes to the view but don't want to overwrite the current setting then you must make sure that you change to another setting.

Rename a Setting

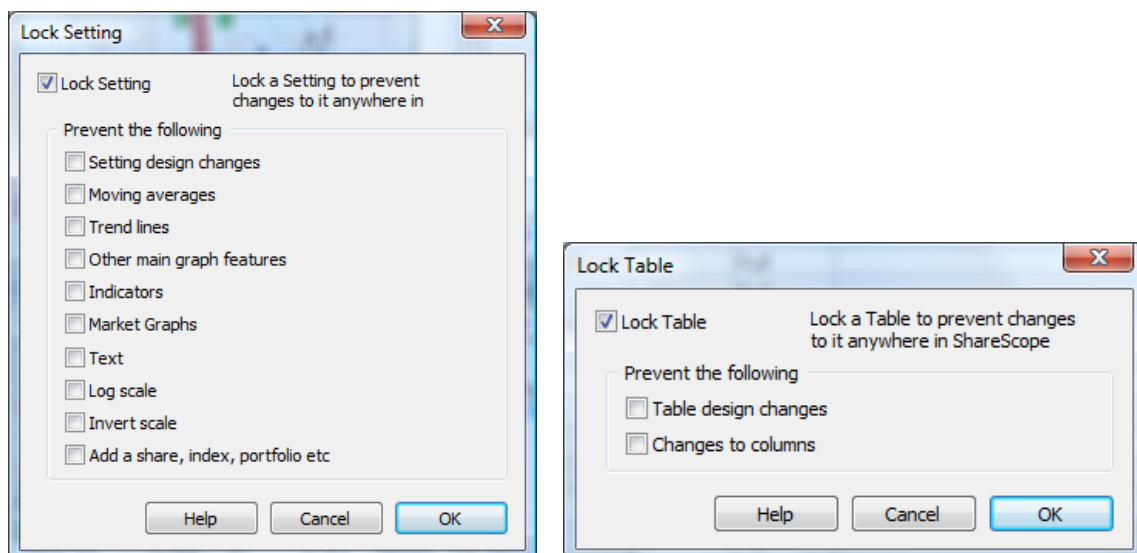
Renaming settings can help remind you which is which. The setting you wish to rename must be the current setting. Go to the Settings menu and click on **Rename this setting**. Enter the new name and click OK.

Copy a Setting

It can sometimes be easier to create a new setting based on an existing one. Select the setting that you wish to copy. Now go to the Settings menu and select **Copy this setting to**. A dialog will be displayed in which you must choose which of the spare settings you wish to copy to. By default, this setting will be renamed with the name of the copied setting plus the word “copy” at the end of it. You can type in a different name if preferred.

Lock a Setting

You can lock a setting to make sure that you don't change it inadvertently. In fact, you can lock individual components of the setting or the entire setting. Go to the Settings menu and click on **Lock setting** (or **Lock Table** if in a List-based view). The following dialog box will be displayed:



The **Lock Setting/Table** option will be automatically ticked. Next tick the specific options that you want to lock and then click on OK.

To unlock a setting, return to this dialog and untick the Lock option.

Save & Restore Settings

You can save a setting to a file which can be restored at a later time. This can be useful if you have used up all 12 settings in a view but want to create a new one. You can save a setting which maybe you don't use very often and then overwrite it. You can subsequently restore the saved setting file into any of your 12 settings.

To save a setting to a file, first make sure that you the setting you want to save is the current setting. Then go to the Settings menu and select **Save Setting to file**. The file will be given the name of the setting.

To restore a setting from file, first make sure that the setting into which you want to restore it is the current setting. Then go to the Settings menu and click on **Restore Setting from file**. A dialog will be displayed with a list of all saved settings files. Click on the one you want to restore and then click on OK.

Note that you can also delete settings files in this dialog.