



Getting Started Manual

Beyond Charts

June 2014

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Foreword

Beyond Charts is a foundation product that at its core is a technical analysis and charting product but has been designed to be a global portfolio management system that, in time, will incorporate the full functionality for:

- Advanced technical analysis and charting.
- Multiple integrated mechanical trading methodologies.
- Generic portfolio management.
- Specific portfolio management for the integrated trading methodologies.
- Support for multiple world stock exchanges.

In its current version, as at June 2014, it includes intermediate charting capabilities, analysis tool and a vector language called Beyond Charts Formula Language that is compatible with the MetaStock™ Formula Language.

Throughout this manual and in all Beyond Charts sourced material we have used the words “active investor”. These words best describe the majority of Beyond Charts customers. Where the terminology of “investor” is used, the reference is generally to people who do not have the knowledge, tools and time to actively invest in the stock market or are passive in their investment approach.

We welcome your feedback and suggestions.

Important Notice

Because the “financial advice” information in this publication is general in nature, it may not be relevant to your individual circumstances. Before making any investment or financial planning decisions, you should consult a professional adviser who can help you decide whether your decision is appropriate for you.

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1

GETTING STARTED

The following topics are covered in this chapter:

- Installing Beyond Charts
- New Beyond Charts Releases

This Beyond Charts Getting Started Manual focuses on the practical steps involved in getting up and going with Beyond Charts and navigating your way around Beyond Charts.

1.1 Installing Beyond Charts

Please follow these instructions closely to ensure a trouble-free installation.

The download and installation of Beyond Charts is completed via the Beyond Charts website at: <http://download.beyondcharts.com>

When prompted, save the Installation Package to your desktop, or another easily found location.

After downloading, locate the file that was downloaded called “BeyondChartsInstaller.msi” and double click it to run the Installation Package.

Beyond Charts and the associated Beyond Charts Data Downloader will be installed simultaneously.

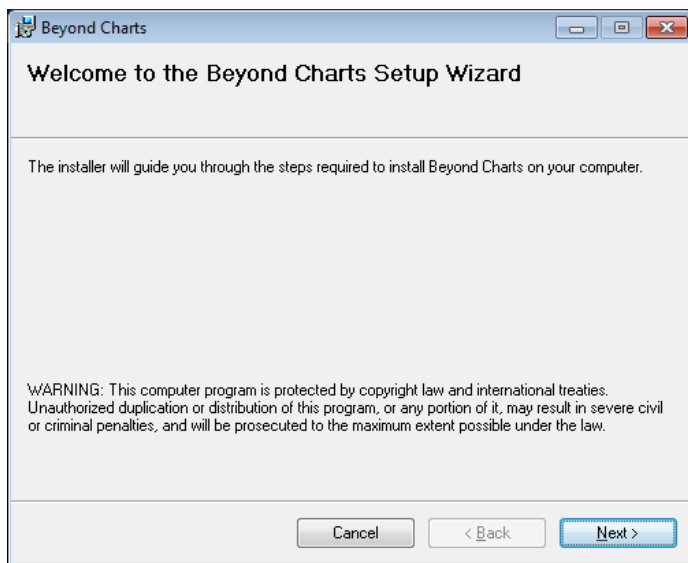


Fig.1.1

Follow the instructions and select [Next>].

1 GETTING STARTED

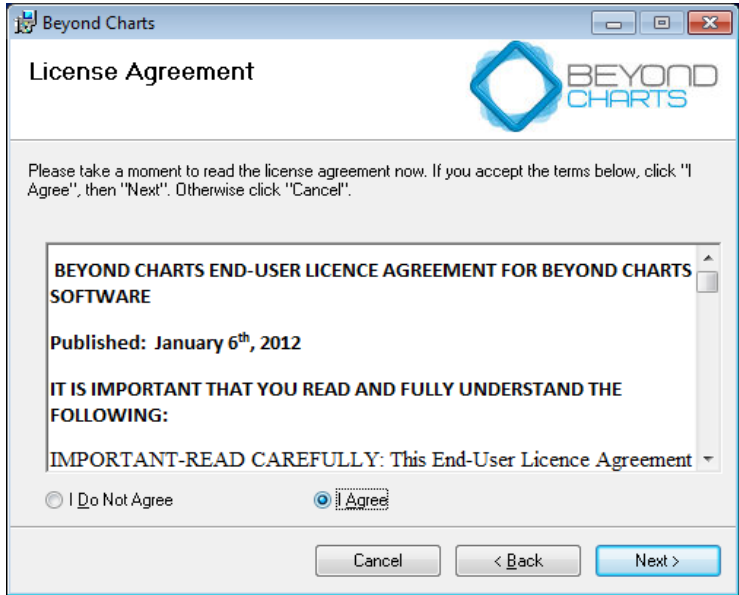


Fig.1.2

Select I Agree after reading the License Agreement and select [Next>].

1 GETTING STARTED

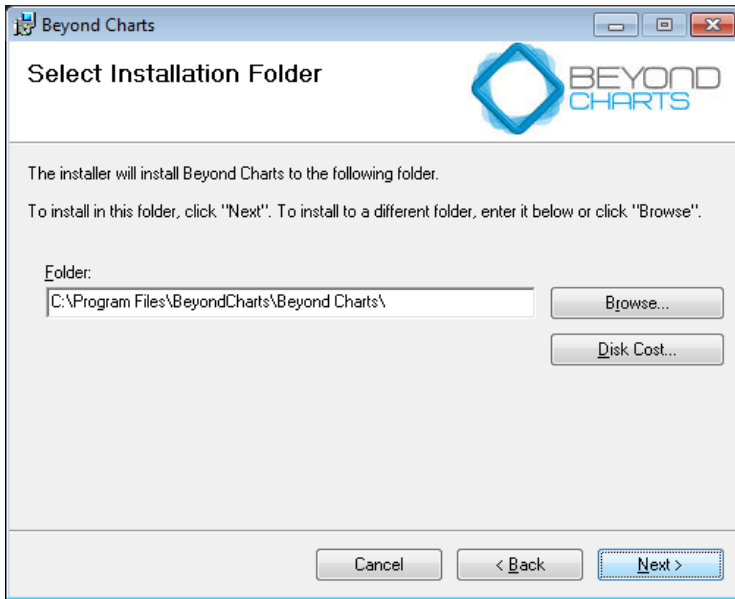
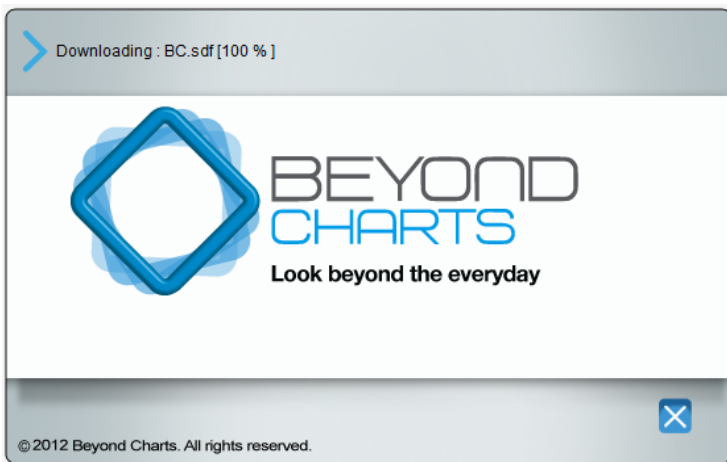


Fig.1.3

It is suggested that you select the default folder as shown then select [Next>].



1 GETTING STARTED

Fig.1.4

Continue to follow the instructions until you reach the Finished Installation screen.

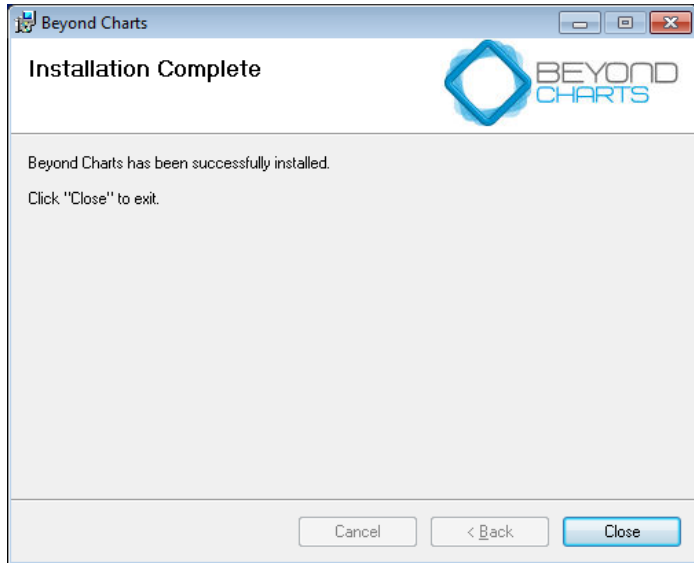
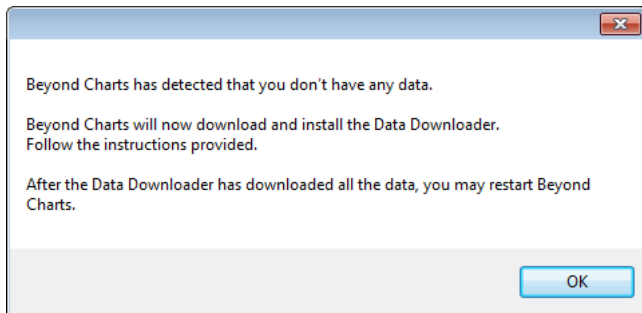


Fig.1.5

You can now run the Beyond Charts shortcut located on your desktop. On first running, the Beyond Charts data downloader will be installed to download your historical databases.



1 GETTING STARTED

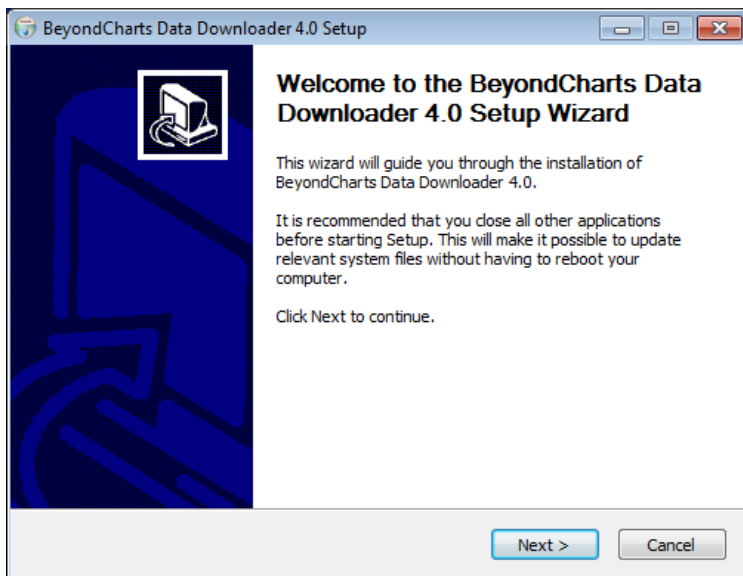


Fig.1.6

Click [Next >] to continue. The Beyond Charts Data Downloader will be installed.

1 GETTING STARTED

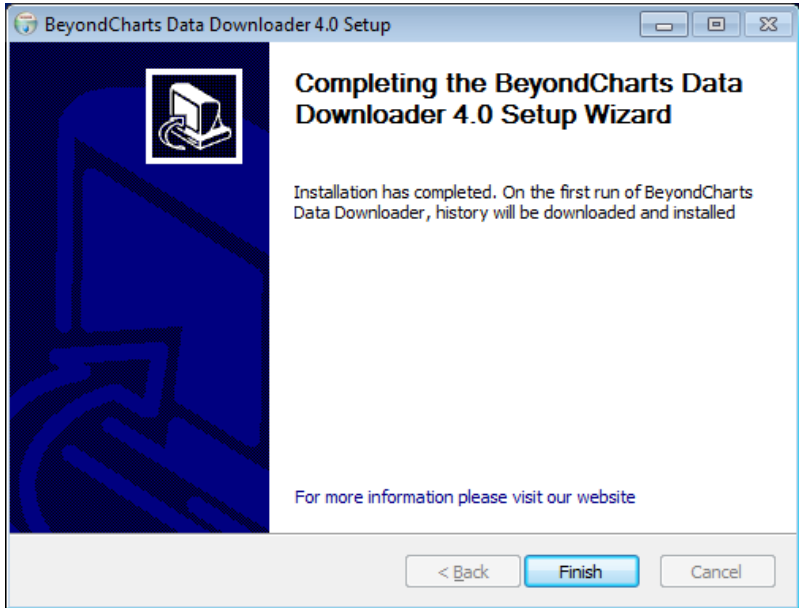


Fig.1.7

Click [Finish] to complete the software installation process. The following screen will be displayed:

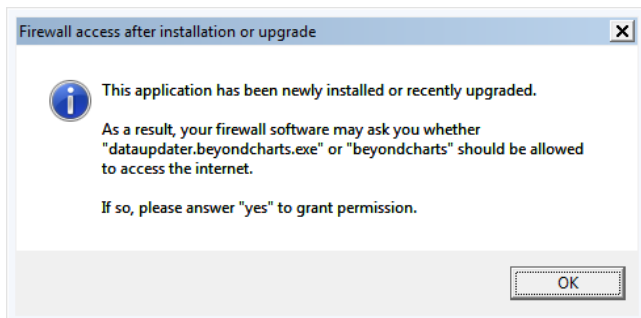


Fig.1.8

1 GETTING STARTED

Click [OK]. The Beyond Charts Data Downloader will be launched and the following screen displayed:

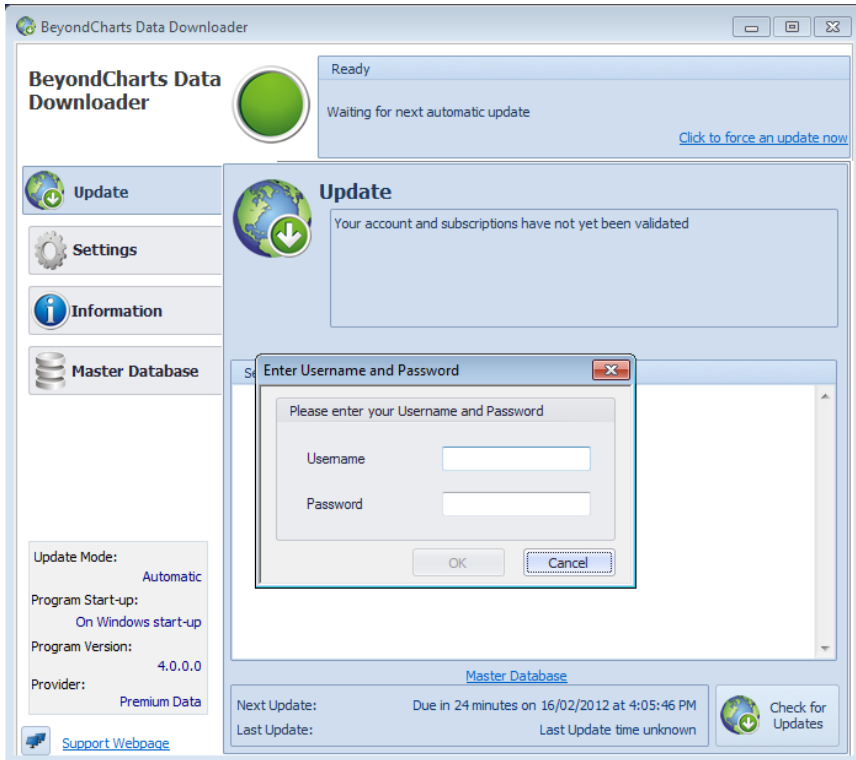


Fig.1.9

Before updating your Beyond Charts database for the first time you need to enter your User ID and Password (as provided in your welcome email) into the **Beyond Charts Data Downloader** program.

Once entered, click [OK]. The **Beyond Charts Data Downloader** will then download the Beyond Charts historical database over the internet. The historical database dates back to the early 1980's for the ASE and 2004 for the JSE so may take a while to download depending on the speed of your internet access.

1 GETTING STARTED

This completes the Beyond Charts, Beyond Charts Data Downloader installation process.

You should now have the following icon on your desktop:

- **Beyond Charts**

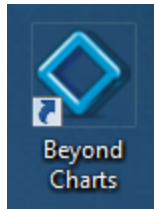


Fig.1.10

The first time that you open Beyond Charts you will need to agree to the EULA and you will then be prompted to Activate Beyond Charts. You will need to be connected to the internet to complete activation. Double click on the Beyond Charts icon on your desktop and you will be presented with the following screen:

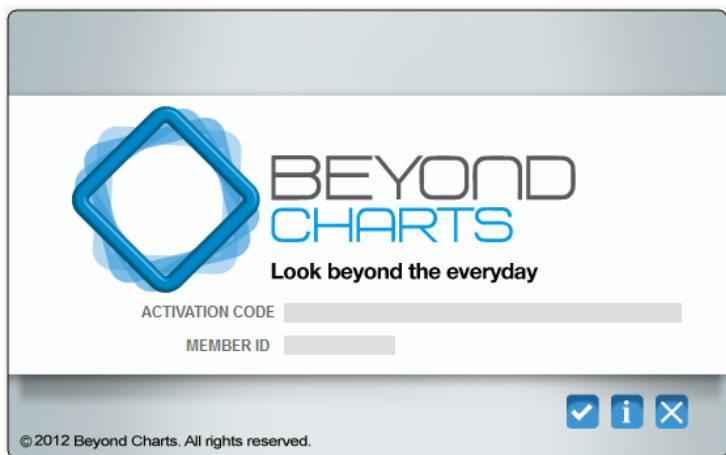


Fig.1.11

1 GETTING STARTED

Enter the Activation Key and Member ID that is provided in your welcome email. Once entered correctly, the [Activate] button will appear.

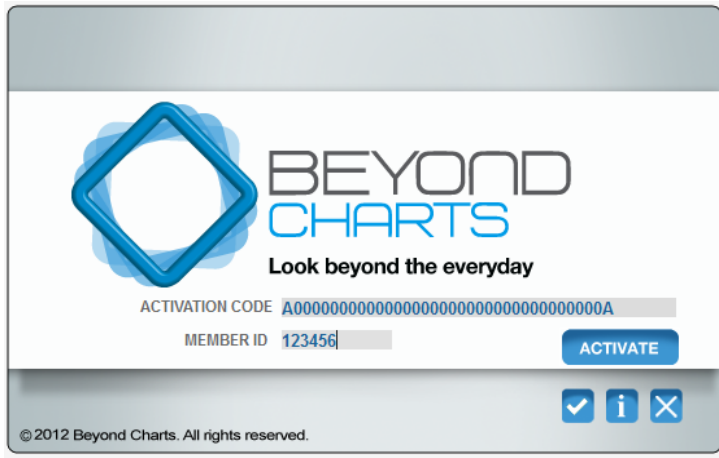


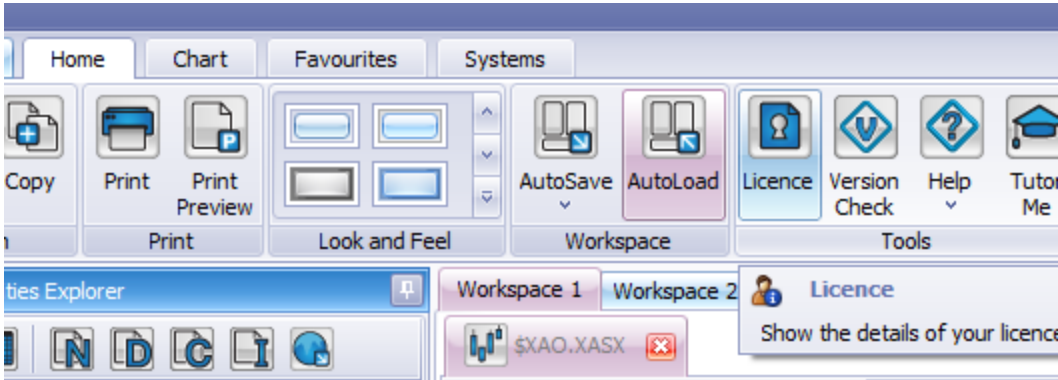
Fig.1.12

Click [Activate].

Beyond Charts on Multiple Computers

You can use Beyond Charts on a maximum of two computers at any given time. In case you need to use Beyond Charts on a third computer, you need to first deactivate one of the two computers by clicking the Licence button on the Home tab of the menu ribbon then clicking Deactivate. This will release your licence key and will allow you to install on a third computer.

1 GETTING STARTED



Note that your information and preferences will not be synchronized between the computers that you use. You have to manually update each computer by mirroring the settings and preferences or by backing up the updated information and importing on the other computer.

1.1.1 Beyond Charts Data Downloader

Beyond Charts Data Downloader is used to initially download your historical database and to append the latest EoD (End of Day) data for each trading day to the supplied historical database.

The default setting for the Beyond Charts Data Downloader is to update the Beyond Charts database automatically every day to collect the latest price data and then append the data to your existing historical price database. It is programmed to collect markets that close at different times of the day (e.g. World Indices close at varying times) after the respective market has closed.

Should there be a requirement to update the Beyond Charts database manually please follow these steps:

- Click once on the **Beyond Charts Data Downloader** icon in the system tray of the taskbar (which is located in the bottom right-hand corner of your screen).

1 GETTING STARTED



Fig.1.13

- In the **Beyond Charts Data Downloader** window click once on the **Check for Updates** button in the bottom right corner. If data updates are available the Beyond Charts database will be updated.
- Close the **Beyond Charts Data Downloader** window after the update has completed.

To change the update **Settings** (e.g. to 'manual' instead of 'automatic'), open the Beyond Charts Data Downloader, click on **Settings** and then select **Update Mode**. Change the settings accordingly.

Beyond Charts Data Downloader also does other important tasks automatically like maintain your price database for stock splits and consolidations, add new stocks, delete delisted stocks and move stocks between sectors.

1.2 New Releases of Beyond Charts

Beyond Charts has a development team that is continuously improving Beyond Charts by adding new functionality and improving existing functionality.

From time to time these improvements will be automatically released to Beyond Charts users via Beyond Charts's automated upgrade functionality which will determine whether users have the latest version of Beyond Charts or not, and then upgrade users that are not on the latest version. This way our customers will always have the latest available version of Beyond Charts.

Also, the list of changes and the latest available version number will always be listed in the Beyond Charts **Version Check** which can be found at the extreme bottom left corner of the Beyond Charts screen..

Beyond Charts does not charge additional upgrade fees to existing customers for new versions of Beyond Charts, as do many other technical analysis software providers.

2

Beyond Charts Navigation

This chapter covers navigating your way around Beyond Charts.

The following topics are covered in this chapter:

- Tutor Me video help and assistance
- Menus, Windows and Panels
- Understanding and using the Beyond Charts Panel Clusters

2.1 Beyond Charts Basics


There is some basic Beyond Charts functionality to become familiar with to get up and going.

Active investors only use a small percentage of the total functionality available within Beyond Charts. You are encouraged to play around with the different functionality of Beyond Charts. Beyond Charts has a "Tutor Me" icon on the HOME tab. This icon will launch the Beyond Charts online video education centre to tutor the user via video and voice content. The videos provided cover all Beyond Charts functionality. Ensure that this online education site is visited frequently until Beyond Charts navigation is mastered.

It is a design goal for Beyond Charts to minimise the number of icons and menus around the charting area, hence the minimal icons. This is achieved by using sliding panels and using the mouse right click feature.

2.2 Menus

Along the top of the Beyond Charts screen there are three tabs entitled Home, Chart and Systems.

 The tabs can be collapsed to show only the tabs by double clicking on any one of the tabs. To 'unhide' the menu ribbon double click on any one of the three tabs again.

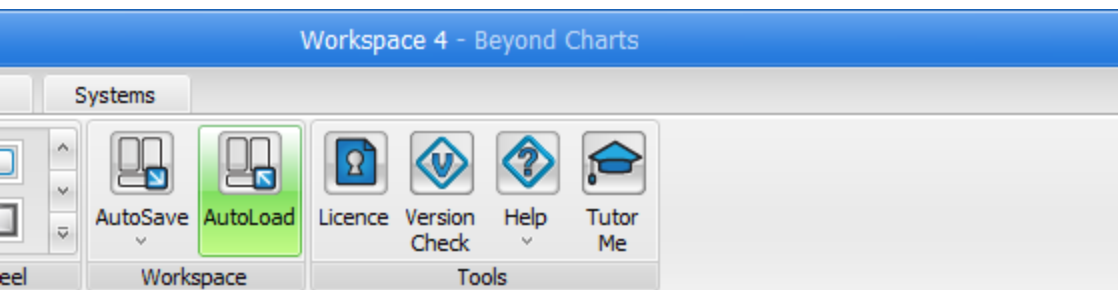



Fig.2.1

2 Beyond Charts Navigation

The **Home** tab typically contains functionality that has to do with the 'big picture' of using Beyond Charts, such as settings that affect the entire Beyond Charts environment, look and feel, or functionality that is common to all areas of using Beyond Charts.

 The Licence icon in Figure 2.1 allows you to view and deactivate your Beyond Charts Licence on one computer so that Beyond Charts can be used on a second computer. Click Licence and Deactivate to release your Activation Key.

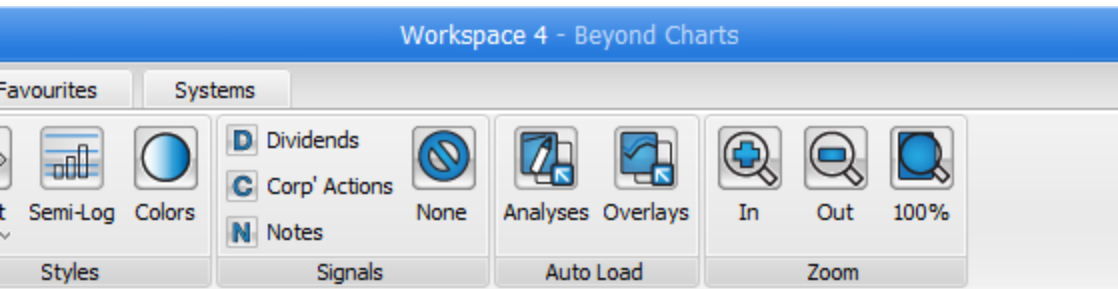


Fig.2.2

The **Chart** tab contains functionality that pertains to using charts such as Daily, Weekly and Monthly data mode, Chart Styles, Signals, Saved Analyses and Zooming.

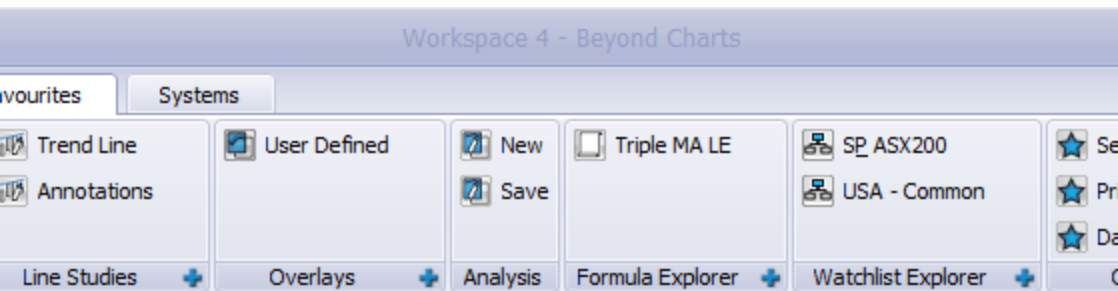


Fig.2.3

2 Beyond Charts Navigation

You can store the features that you use the most in the **Favourites** tab on the menu ribbon at the top.

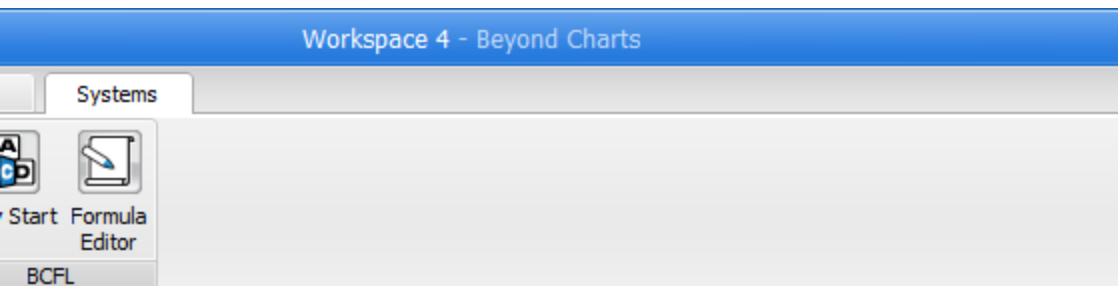


Fig.2.4

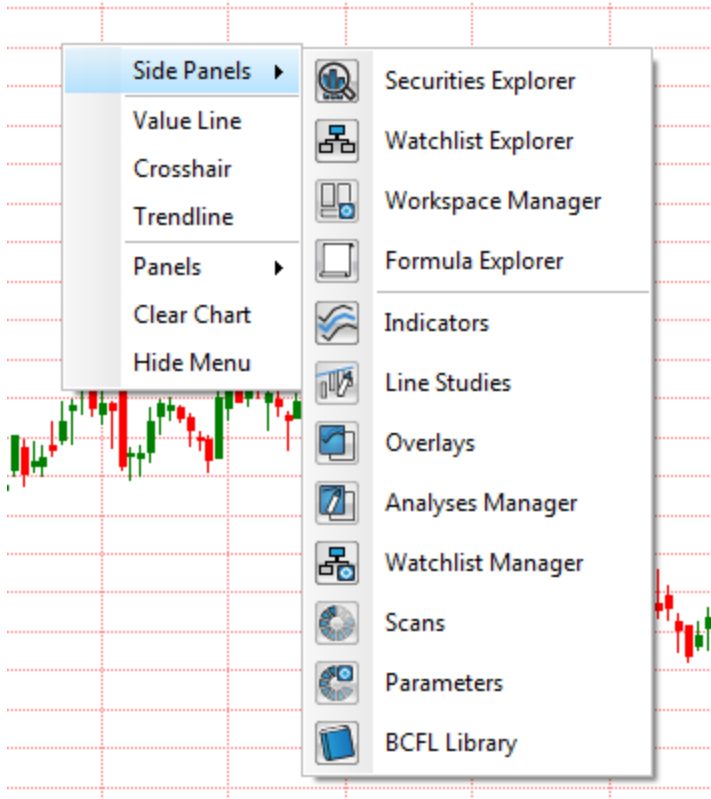
The **Systems** tab contains functionality relating to running trading methodologies and back testing. As new methodologies and scripting languages are added you will find their icons here.

2.3 Panels

Note the vertical tabs on either side of the Beyond Charts screen. These tabs slide out to reveal panels. To open a panel, hover over it with your mouse or click the tab itself.

You can access all the side panels quickly and easily by simply right-clicking on any white space on a chart. Selecting a side panel from the right-click menu will slide in and automatically “pin” the side panel so that it doesn’t slide back against the side of the screen. Simply click the pin at the top right corner to “unpin” the panel.

2 Beyond Charts Navigation



On the left side of the screen there are three panels if using Beyond Charts and four panels if using Beyond Charts+:

- Securities Explorer
- Watch List Explorer
- Workspace Manager
- Formula Explorer

On the right side of the screen there are seven slide-out panels when using Beyond Charts and eight when using Beyond Charts+:

- Indicators

- Line Studies
- Overlays
- Analyses Manager
- Watch List Manager
- Scans,
- Parameters
- BCFL (Beyond Charts Formula Language) Library

2.3.1 Panel Menus

At the top of every Panel is a Panel Menu. Most functions in a Panel can be accessed through the Panel Menu or the mouse Right Click menu. The main function in any Panel can also be accessed by double clicking the item; for example, applying an Indicator.

2.3.2 Pinning Panels

In the top right corner of every panel is a horizontal pin or tack icon. Clicking once on the pin will cause the slide-out panel to be 'pinned' in place thereby preventing the panel from auto closing. The pin will change to a vertical position when the panel is pinned open.

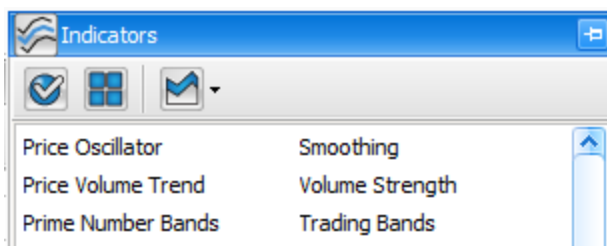


Fig.2.5

Notice that the act of pinning a slide-out panel also causes all the vertical tabs to appear at the bottom of the panel, now as horizontal tabs. Hover your mouse pointer over any one of them and a tool tip will be displayed with the panel name.

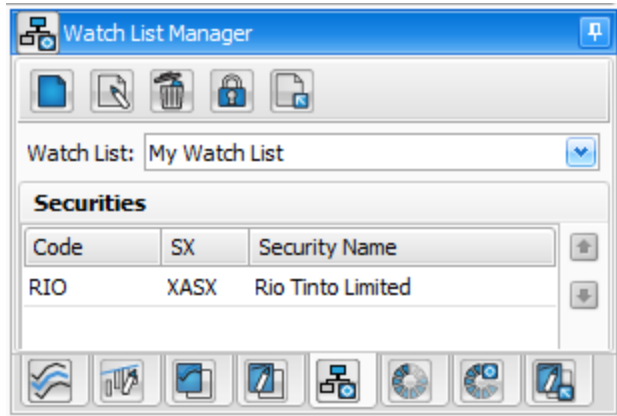


Fig.2.6

By clicking on any of the tabs you are able to view the associated panel.

To close, or undock a slide-out panel, click once on the vertical pin and move your mouse away from the panel. The slide-out panel will auto close.

If you do not dock the slide-out panel, then as soon as you move your mouse away from the panel, the panel will auto close.

2.4 Windows

All information windows in Beyond Charts are opened in individual Windows. The current available Windows are:

- Charts
- Data Sheets
- Share Information
- Dividends
- Corporate Actions

2 Beyond Charts Navigation

- Notes
- Signals
- Formula Editor

Each of these windows can generally be opened from the Securities Explorer, Chart, Data Sheet or Scan Results windows using the individual window menus.

The main windows are described in the following sections.

2.4.1 Charts

A Chart window displays the price history for a selected security. Charting a selected security and basic charting functions are covered in [section 3](#).

2.4.2 Data Sheet

The Data Sheet is a table that contains technical and fundamental data for a list of selected securities.

Any column can hidden, shown, sorted or filtered using the tools in the right click menu on the header.



The columns displayed can be adjusted by right clicking any column header and selecting the Column Chooser. Add columns by Dragging and Dropping columns from the Column Chooser to the desired Header location. Remove columns at any time by dragging the column header away from the header area and dropping anywhere.

The Data Sheet can be a very powerful tool, enabling you to quickly filter and sort a long list of items by your desired criteria.

2.4.3 Scan Results

The Scan Results window displays the signals generated from a Scan. For example a Relative Strength Scan.

The functionality and information in this window is very similar to the Data Sheet, with the addition of columns related to the Signal.

2.4.4 Share Information window

The Share Information Window, Fig.2.7 displays a variety of technical and fundamental information for the selected Security. The data is divided into groups:

- Security,
- Last Price Statistics,
- Last Price,
- ICB Classification,
- GICS Classification, and

- Fundamentals.



You can collapse any group by clicking the [-] icon next to the group title. Clicking the [-] will expand the group again.

2 Beyond Charts Navigation

Security	
Type Description	Ordinary Fully Paid
Type	Fully Paid Ordinary/...
Instrument	Stocks
SX	XASX
Security Name	BHP Billiton Limited
Code	BHP
Last Price Statistics	
Last Price	
Ex Dividend	-
Trading Status	Traded
Turn Over	624,926,468
Volume	17,346,470
Close	36.100
Low	35.700
High	36.240
Open	36.050
Date	15/02/2012
ICB Classification	
GICS Classification	
Fundamentals	
Short Sell Status	True
Dividend Franking Level	100.00
Payout Ratio	0.259
PE Ratio	9.086
EY	11.006
EPS	3.9733
DY	2.854
npv	1.0303

Fig.2.7

2.4.5 Dividends window

The Dividends window displays the entire dividend history for the selected Security. The dividend details include:

- Ex Div date.

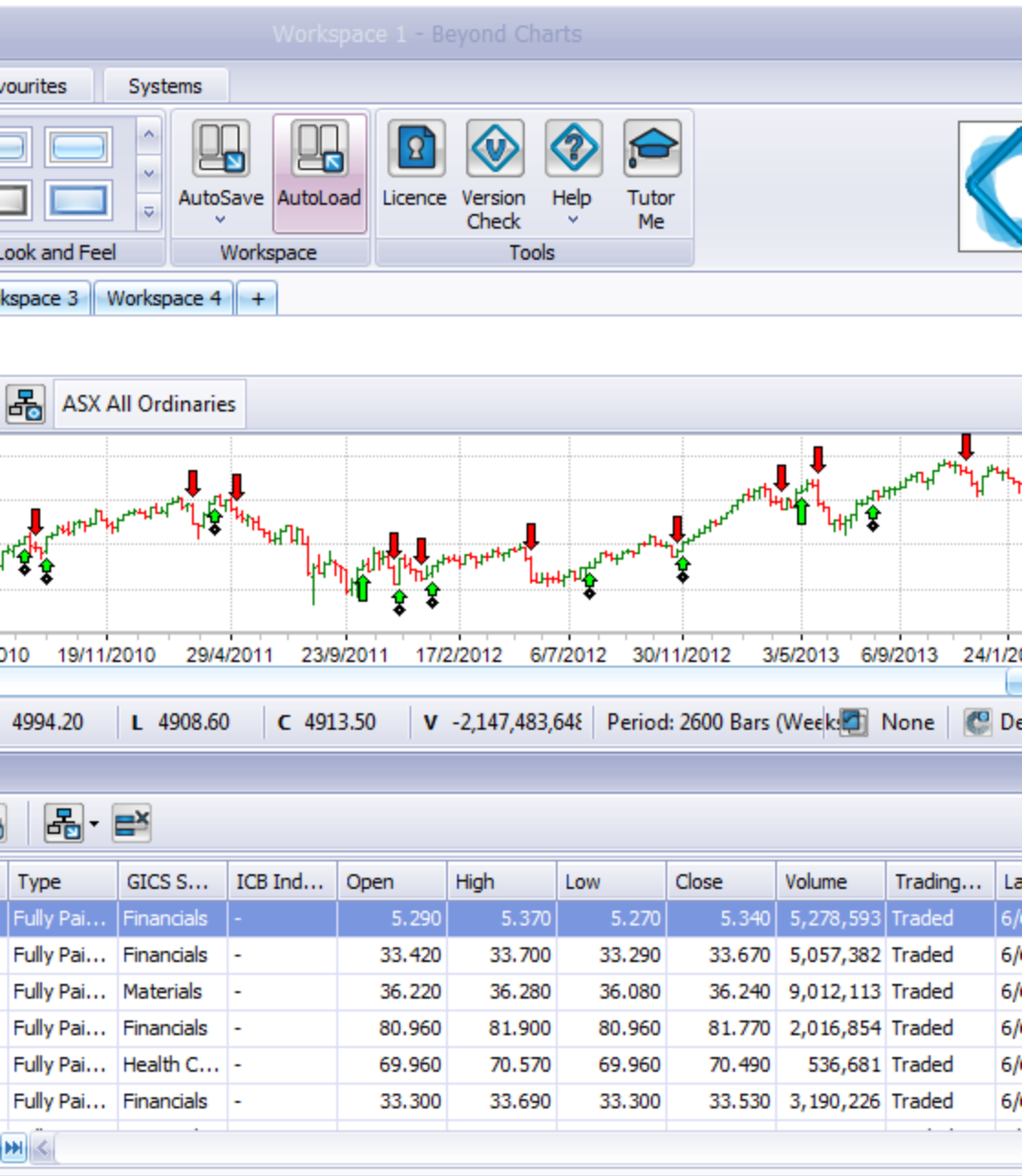
- Div Paid date.
- Dividend amount in dollars.
- Franking %.
- Dividend Type, i.e. Final, interim or special

2.4.6 Window Layout

Windows can be arranged so that they are either:

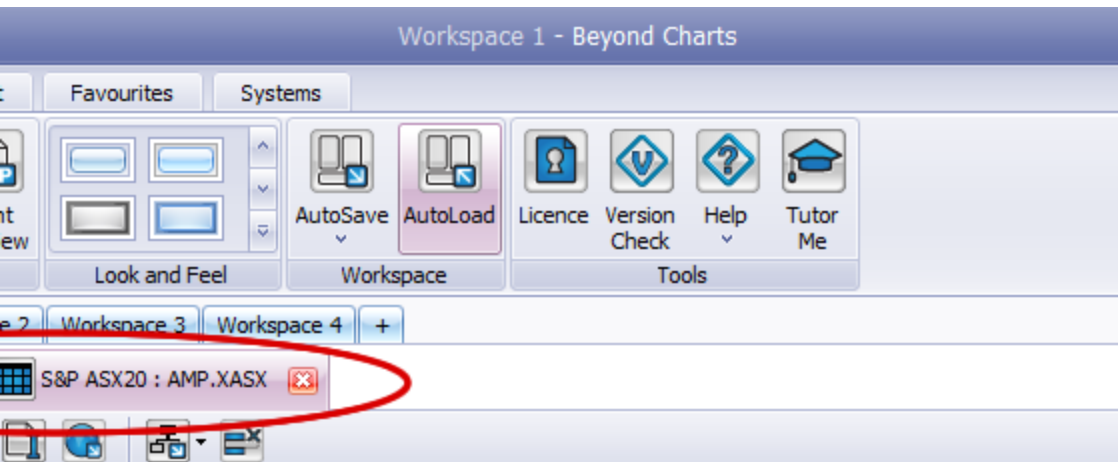
- Vertically or Horizontally tiled, or
- Tabbed in groups, or
- A combination of the above, tiled tabbed groups.

2 Beyond Charts Navigation



2 Beyond Charts Navigation

Fig.2.8



Exchange	Type	GICS S...	ICB Ind...	Open	High	Low	Close	Volume	Trad
ASX	Fully Pai...	Financials	-	5.290	5.370	5.270	5.340	5,278,593	Trad
ASX	Fully Pai...	Financials	-	33.420	33.700	33.290	33.670	5,057,382	Trad
ASX	Fully Pai...	Materials	-	36.220	36.280	36.080	36.240	9,012,113	Trad
ASX	Fully Pai...	Financials	-	80.960	81.900	80.960	81.770	2,016,854	Trad
ASX	Fully Pai...	Health C...	-	69.960	70.570	69.960	70.490	536,681	Trad
ASX	Fully Pai...	Financials	-	33.300	33.690	33.300	33.530	3,190,226	Trad
ASX	Fully Pai...	Financials	-	5.860	5.905	5.850	5.870	5,118,979	Trad
ASX	Fully Pai...	Financials	-	11.150	11.160	10.900	10.930	9,492,551	Trad
ASX	Fully Pai...	Materials	-	59.500	59.770	59.180	59.400	1,268,395	Trad
ASX	Fully Pai...	Financials	-	13.290	13.320	13.220	13.300	2,076,339	Trad
ASX	Fully Pai	Energy	-	14.450	14.610	14.380	14.580	1,758,839	Trad

Fig.2.9

When a Window is first opened, it is positioned according to two general rules:

- Charts, Data Sheets and Scan results are typically tabbed together inside a single window on the left side called the **Document Manager**.

2 Beyond Charts Navigation

- The other smaller function windows are opened as separate windows, to the right side of the current windows.

You can reposition any window by simply dragging it to a new position. Tabs are dragged using the Tab as shown in Fig 2.8 with BHP and S&P ASX20, while untabbed windows are dragged using their Title Bar. Do the following:

- Click one of the tabs and drag it onto another Window or the same window; the blue arrows will appear as shown in Fig 2.9.
- Drop the window onto one of the arrows. To tab it, drop it in the middle tab icon. To put it on the left, drop it on the left arrow, etc.

For example, if you have two tabs in a group as shown in Fig 2.8 and want to tile them, simply drag and drop one of the tabs onto the bottom blue arrow, as shown in Fig 2.9, to tile the selected tab as the bottom window. The result is the chart shown in Fig 2.7 above.

2 Beyond Charts Navigation

Workspace 1 - Beyond Charts

Favourites Systems

Look and Feel Workspace Tools

AutoSave AutoLoad Licence Version Check Help Tutor Me

Workspace 3 Workspace 4 +

S&P ASX20 : AMP.XASX

Exchange	Type	GICS S...	ICB Ind...	Open	High	Low	Close	Volume	Trade
ASX	Fully Pai...	Financials	-	5.290	5.370	5.270	5.340	5,278,593	Trade
ASX	Fully Pai...	Financials	-	33.420	33.700	33.290	33.670	5,057,382	Trade
ASX	Fully Pai...	Materials	-	36.220	36.280	36.080	36.240	9,012,113	Trade
ASX	Fully Pai...	Financials	-	80.960	81.900	80.960	81.770	2,016,854	Trade
ASX	Fully Pai...	Health C...	-	69.960	70.570	69.960	70.490	536,681	Trade
ASX	Fully Pai...	Financials	-	33.300	33.690	33.300	33.530	3,190,226	Trade
ASX	Fully Pai...	Financials	-	5.860	5.905	5.850	5.870	5,118,979	Trade
ASX	Fully Pai...	Financials	-	11.150	11.160	10.900	10.930	9,492,551	Trade
ASX	Fully Pai...	Materials	-	59.500	59.770	59.180	59.400	1,268,395	Trade
ASX	Fully Pai...	Financials	-	13.290	13.320	13.220	13.300	2,076,339	Trade
ASX	Fully Pai...	Energy	-	14.450	14.610	14.380	14.580	1,758,839	Trade
ASX	Fully Pai...	Telecom...	-	5.300	5.310	5.230	5.230	36,420,...	Trade
ASX	Fully Pai...	Financials	-	34.320	34.640	34.240	34.550	4,663,371	Trade
ASX	Fully Pai...	Consum...	-	42.270	42.530	42.150	42.420	2,232,729	Trade
ASX	Fully Pai...	Consum...	-	37.190	37.190	36.840	37.040	1,500,655	Trade
ASX	Fully Pai...	Energy	-	41.700	41.960	41.600	41.740	1,975,162	Trade
ASX	Fully Pai...	Energy	-	14.500	14.580	14.450	14.530	2,624,420	Trade
ASX	Trust Unit	Financials	-	10.730	10.760	10.680	10.720	3,484,796	Trade

Fig.2.10

2.4.7 Window Relationships

There is a powerful feature available in Beyond Charts where multiple “Child” windows can have a relationship with a single “Parent” window; that is they will follow and obey what a Parent window does.

Chart, Data Sheet and Scan Result Windows are Parents. The other windows are generally a Child.

Establishing a relationship between a Parent and a Child window enables the Child to follow the Parent and display information about the same Security. As a new security is selected or displayed in the Parent, the Child will also change to that Security.

The relationship between a Parent and a Child is shown by the colour band along the left side of each window. This band will pop out if you hover your mouse over it.

The following examples show how the Dividend, Corporate Action and Share Information windows are all children of the Chart parent; indicated by the orange vertical band. When the Chart changes from AMP to BHP, the information in the child windows also changes from AMP to BHP.

2 Beyond Charts Navigation

Workspace 1 - Beyond Charts

Favourites Systems

Look and Feel Workspace Tools

AutoSave AutoLoad Licence Version Check Help Tutor Me

Workspace 3 Workspace 4 +

Corporate Actions : BHP.XNYS

Ex Date	Factor	Re...	...
20/5/2014	1	n/a	...
2/4/2014	1	n/a	...
5/3/2014	1	n/a	...
4/9/2013	1	n/a	...
6/3/2013	1	n/a	...
5/9/2012	1	n/a	...
29/2/2012	1	n/a	...
7/9/2011	1	n/a	...
9/3/2011	1	n/a	...
8/9/2010	1	n/a	...
3/3/2010	1	n/a	...
2/9/2009	1	n/a	...
25/2/2009	1	n/a	...
3/9/2008	1	n/a	...
27/2/2008	1	n/a	...
12/9/2007	1	n/a	...
28/2/2007	1	n/a	...
6/9/2006	1	n/a	...
1/3/2006	1	n/a	...
7/9/2005	1	n/a	...
1/9/2004	1	n/a	...

Share Information : BHP.XNYS

Security

- Type Description
- Type
- Instrument
- SX
- Security Name
- Code

Last Price Statistics

- 52 Week High Price
- 52 Week Low Price
- 52 Week High Date
- 52 Week Low Date
- Close to Close Move %
- Close to Close Move

Last Price

- Ex Dividend
- Trading Status
- Turn Over
- Volume
- Close
- Low
- High

2 Beyond Charts Navigation

Fig.2.11

2 Beyond Charts Navigation

Workspace 1 - Beyond Charts

Favourites Systems

Look and Feel Workspace Tools

AutoSave AutoLoad Licence Version Check Help Tutor Me

Workspace 3 Workspace 4

Dividends : AMP.XASX

...	Pai...	Am...	Fr...	Div...
3/3...	10/...	0.115	70	Fin...
2/9...	11/...	0.115	70	Fin...
4/3...	11/...	0.125	65	Fin...
3/9...	12/...	0.125	55	Fin...
27/...	5/4...	0.14	50	Fin...
5/9...	14/...	0.15	30	Fin...
28/...	8/4...	0.15	60	Fin...
6/9...	15/...	0.15	50	Fin...
23/...	14/...	0.16	50	Fin...
7/9...	16/...	0.14	50	Int...
6/3...	9/4...	0.16	85	Fin...
15/...	17/...	0.24	85	Int...
3/3...	4/4...	0.24	85	Fin...
10/...	12/...	0.22	85	Int...
21/...	18/...	0.28	100	Spe...
9/3...	12/...	0.21	85	Fin...
25/...	24/...	0.19	85	Int...
27/...	26/...	0.18	75	Fin...
26/...	25/...	0.14	75	Int...
24/...	26/...	0.14	75	Fin...
27/...	26/...	0.13	75	Int...

Corporate Actions : AMP.XASX

Ex Date	Factor	Reason	...
21/5/2007	0.973...	Specia...	...
21/5/2007	0.962...	Retur...	...
19/5/2006	0.95781	40c re...	...
20/5/2005	0.9478	40c re...	...
18/12/2003	0.7452	Spin o...	S...
22/10/2003	0.9877	1:1 en...	...

AMP

Fig.2.12

To change the parent of a child, click and drag the vertical band from a child to the new parent window or from a parent to the child window. This allows you to have a number of different child windows open and connect them to a parent as desired.

2.5 The Main Panels

2.5.1 Securities Explorer

The Securities Explorer contains a list of all the Securities that are available in your Database. The Securities Explorer is one of the panels that is accessed from the slide out panels on the left side of the Beyond Charts screen.

You can filter the displayed list by:

- Ticking or un-ticking the Instruments across each available exchange in the Instruments dropdown window.
- Selecting one or multiple items from a Classification in the Classifications dropdown window. You can choose from GICS or ICB industry classifications. USA stocks are classified by both, ASX stock by GICS only and JSE stocks by ICB only..

You can then search the list by using the 'Search by Code or Name' box.

2 Beyond Charts Navigation

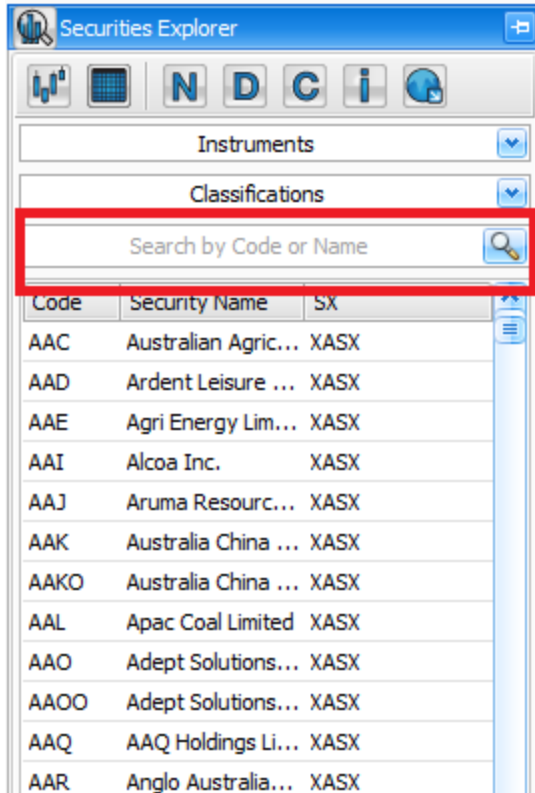


Fig.2.13

To find the stock, index or commodity that you would like to chart, type the code, any part of the code or any part of the name into the textbox. If the exact code is typed, it will be highlighted.

If you don't know the stock, index or commodity code, type in as many characters of the Security's name as you know then select the applicable Security from the list that is shown.

For example, if searching for a well used index such as the Dow Jones Industrial Index, typing in 'Dow Jones I' will automatically filter down the search as the letters are typed until just a small list is left from which to choose.

Tip: Index codes are prefixed with the '\$' sign, e.g. the code for the Dow Jones Industrial Index is '\$DJIA', the S&P500 is '\$SPX' and the All Ordinaries Index is '\$XAO'.

2.5.2 Watch List Manager

Beyond Charts supports the use of **Watch Lists**. A Watch List is a list of Securities (Stocks, Indices, Commodities, Sectors) that you would like to be grouped together for any purpose. The Watch List Manager is one of the panels that is accessed from the slide out panels on the right side of the Beyond Charts screen.

The **Watch List Manager** panel is the main tool for creating and maintaining a Watch List. The Watch List can be created from:

- Individual Securities,
- A GICS/ICB classification/Exchange/Instrument combination, and
- other Watch Lists.

Once a Watch List has been created, it can be selected from the **Watch List Explorer** so that all the securities in the Watch List can be analysed, or it can be added to another Watch List.

Each Watch List can be maintained (add and delete codes) via the **Watch List Manager** or through a **Data Sheet**.

2.5.3 Workspace Manager

Beyond Charts allows users to save and maintain multiple workspaces via the Workspace Manager. The Workspace Manager is one of the panels that is accessed from the slide out panels on the left side of the Beyond Charts screen.

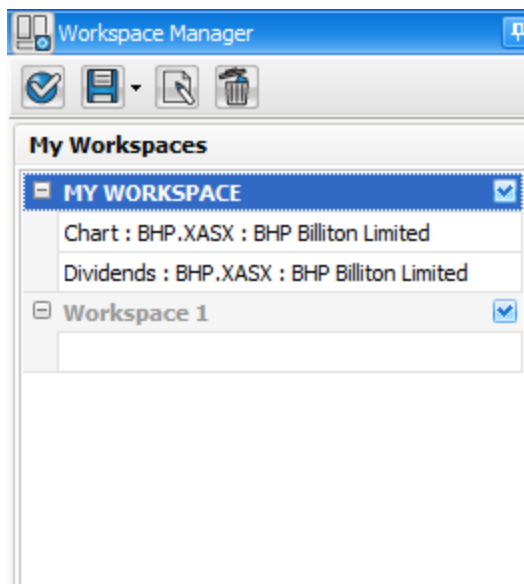
This gives the user the flexibility to have individual workspaces setup for different areas of their trading, for different portfolios and even for analysis.

2 Beyond Charts Navigation

Users can then decide whether to load some or all of these workspaces when the program loads by 'ticking' or 'unticking' the workspace once saved in the Workspace Manager.

Within the Workspace Manager, users can also manually Apply (Load), Save individual or Save All workspaces, rename and delete workspaces they have saved.

Workspace functionality is covered in greater detail in the Beyond Charts Reference Manual - Chapter 5.



2.5.4 Watch List Explorer

The Watch List Explorer contains two lists of available Watch Lists. The Watch List Explorer is one of the panels that is accessed from the slide out panels on the left side of the Beyond Charts screen where the Securities Explorer is also found.

2 Beyond Charts Navigation

The “My Watch Lists” are those Watch Lists created by you either directly, such as through the Watch Lists Manager, or from add-on modules.

The Industry Watch Lists contain the Security constituents for each of the Indices. These are defined by external industry groups, such as Standard & Poors. The Industry Watch Lists are updated automatically as part of the data download into Beyond Charts as the constituents are officially altered.

2.5.5 Indicators

The Indicators panel contains all the available Technical Indicators that you can apply to a chart. The Indicators panel is one of the panels that is accessed from the slide out panels on the right side of the Beyond Charts screen.



[The list can be sorted from A-Z or Grouped using the panel menu button.](#)

When you click on an Indicator, the associated parameters and visual settings will appear in a section at the bottom of the panel. This allows you to alter the Indicator before you apply it.

Most of the popular indicators are available in Beyond Charts. Beyond Charts will continue to add more indicators over time and invite our customers to request specific indicators to be added by emailing us with their requirement.

2.5.6 Line Studies

The Line Studies panel contains a number of tools for studying price patterns in charts. These are typically used for advanced technical analysis. The Line Studies panel is one of the panels that is accessed from the slide out panels on the right side of the Beyond Charts screen.

When you click on a Line Study, the associated parameters and visual settings will appear in a section at the bottom of the panel. This allows you to alter the Line Study before you apply it.

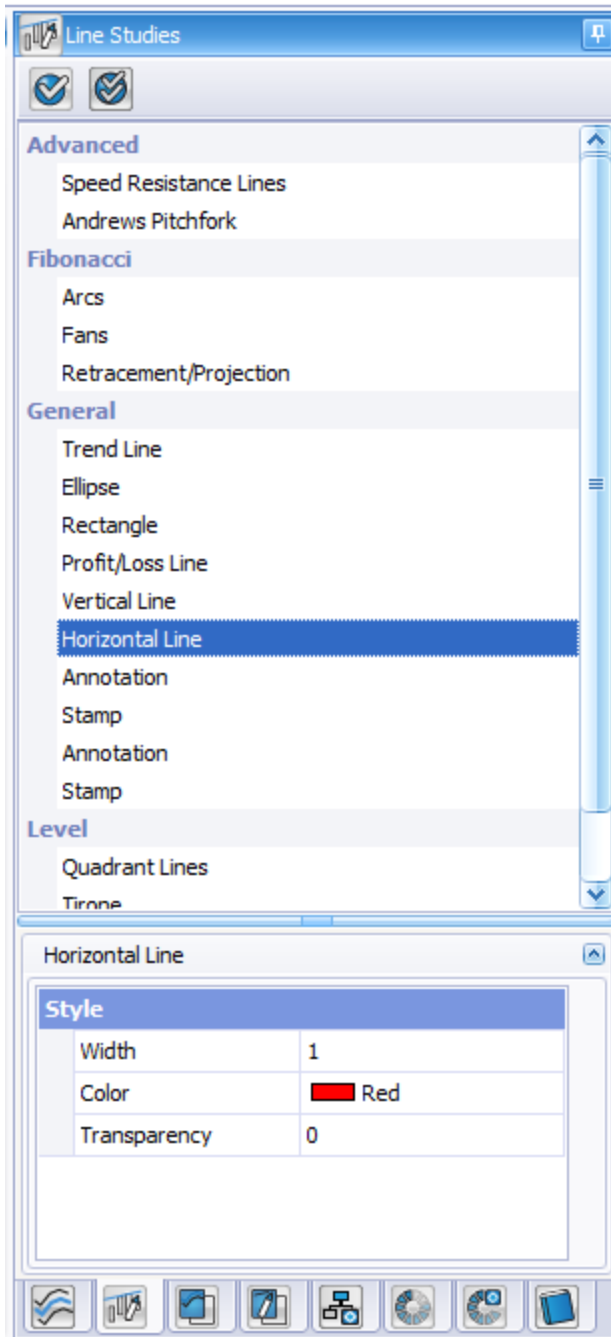


Fig.2.14

2.5.7 Overlays

An Overlay is used to save a template of applied indicators, with set parameters, that can be applied to a chart of any Security. The Overlays panel is one of the panels that is accessed from the slide out panels on the right side of the Beyond Charts screen.



Overlays are different from saved Analyses. Analyses pertain to only one Security whereas an Overlay can be applied to any Security.

Overlays are organised into **Overlay Groups** with each Overlay Group containing up to 10 Overlays. Each Overlay in an Overlay Group is assigned a function key (Fn Key), F2 to F11, on the keyboard.

You may create as many Overlay Groups as you like and each individual Overlay may contain an unlimited number of indicators with custom parameters and custom chart appearance. The total number that you create will ultimately be limited by practicalities.

2.5.8 Analyses Manager

The Analysis Manager is used to save applied indicators and Line Studies, with set parameters, that are specific and applicable to only one stock, index or commodity. The Analyses Manager panel is one of the panels that is accessed from the slide out panels on the right side of the Beyond Charts screen.



Overlays are different from saved Analyses. Analyses pertain to only one Security whereas an Overlay can be applied to any Security.

If the Security has no associated Analyses, the panel will be empty.



To display all the Analyses for all Securities, turn the Filter off in the panel menu. The Analyses will be grouped by the Security code.

2 Beyond Charts Navigation

You may create as many Analyses for a Security as you like and each individual Analyses may contain an unlimited number of indicators and Line Studies with custom parameters and custom chart appearance.

2 Beyond Charts Navigation

3

Charting in Beyond Charts

This chapter covers using charts in Beyond Charts.

The following topics are covered in this chapter:

- The Beyond Charts Value Line
- Working with Charts
- Chart Length
- Drawing Trend lines
- Chart Styles
- Saving and Loading saved Analysis

3.1 Charting a Security

Using the Securities Explorer search for the Security that is to be charted. If the exact code is typed, it will be highlighted in the list similar to as shown in Fig 3.1 below.

If you don't know the security, type in as many characters of the security's name as you know then select the applicable Security from the list that is shown.

You can open a Chart by:

- Selecting the Chart icon on the Panel Menu at the top of the panel.
- Pressing the [Enter] key on your keyboard, or
- Double clicking a row in the search results table.

Once the chart is open it will have its own window. You may now sequentially step through to the next instrument in that window by pressing the PgDn (Page Down) key on your keyboard or the Up and Down arrows at the top right corner of the chart window..

Or you may open another chart in a separate window via the **Securities Explorer** and keep the open chart.



You may select multiple rows, by using the Shift or Ctrl keys. The resultant chart will be limited to those Securities rather than the entire filtered range.

A chart can be closed simply by clicking on the red X in the top right corner of any chart of window in Beyond Charts.

3.1.1 Changing the Security in an existing Chart window.

Rather than stepping through the entire list of Securities to find a particular one, there is a quick way to change the displayed security in a Chart window.

Select the Chart window by clicking anywhere on the chart window and start typing the Security Code or any part of the Security Name using the keyboard. A Security Chooser window will automatically open and start searching for the text.

3 Charting in Beyond Charts

For example, if you would like to change the currently charted stock to BHP Billiton and do not know the stock code merely start typing 'B', 'H', 'P'. The **Security Chooser** window will be displayed as shown:

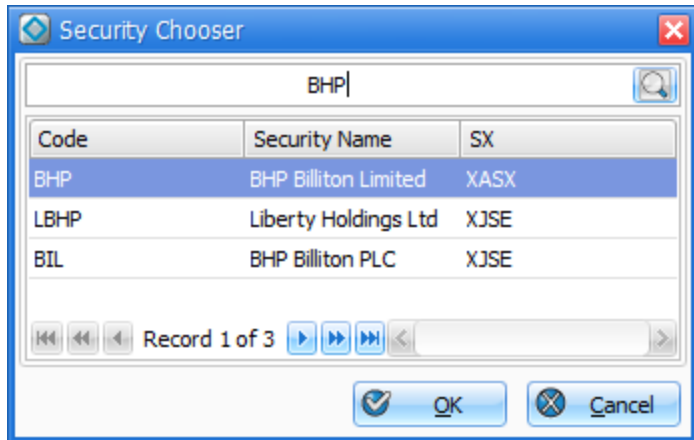


Fig.3.1

You may now either chart the selected security by pressing [Enter] on the keyboard or double clicking the selected row. The Chart of the previous security will now be replaced with your newly selected Security.

Whatever indicators were displayed for the previous chart will be maintained for the newly opened chart unless the chart has some previously Saved Analysis..

3.1.2 Opening Charts from a Watch List

Creating and maintaining Watch Lists is detailed in [section 3.4](#).

Open the **Watch List Explorer** panel and select a Watch List from either the "My Watch Lists" or "Industry Watch Lists" section at the top. In Fig.3.2 , the Watch List 'My Watch List' is highlighted as the selected Watch List.

3 Charting in Beyond Charts

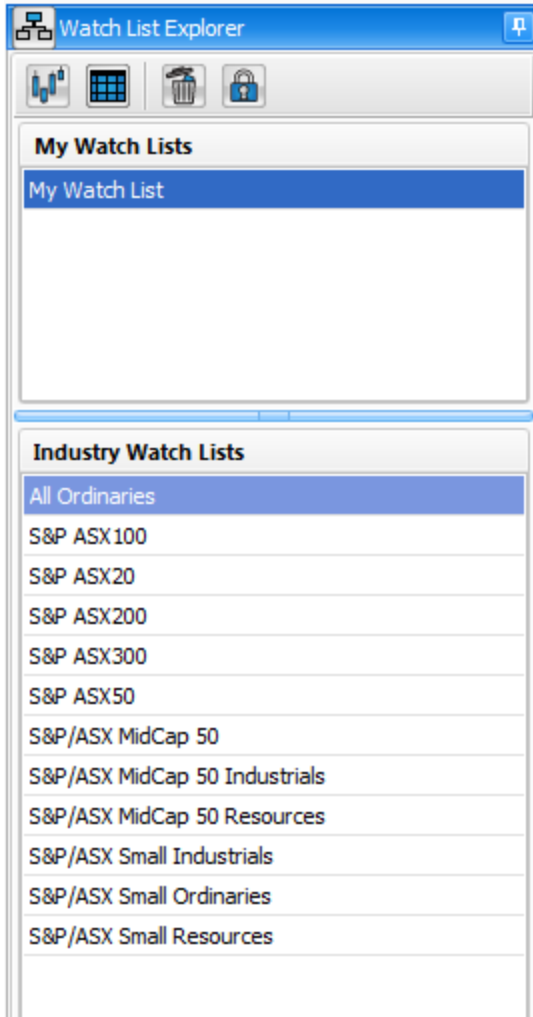


Fig.3.2

You can open a Chart of the selected Watch List by:

- Selecting the Chart icon on the Panel Menu at the top of the panel.
- Pressing the [Enter] key on your keyboard, or

- Double clicking the Watch List.

The opened chart contains all the Securities in the selected Watch List, in the same Window. You may now sequentially step through all the stocks in the selected Watch List in that window by pressing the PgDn/PgUp key on your keyboard or by using the Up and Down arrows at the top right corner of the chart window..

3.2 Adding indicators to a Chart

To add an indicator, ensure that you have opened a chart, and then open the **Indicators** panel.

- Select the indicator that you would like to apply to your chart.
- Adjust the parameters and visual style of the indicator.
- Click Apply from the panel menu or simply double click the indicator.

Some indicators will be inserted below the price chart and others will be overlaid over the price chart. Which indicators will be inserted and which overlaid are auto-programmed into Beyond Charts and will occur when the Auto selection is selected as shown below. The Auto selection can be overridden by ticking “Insert” or “Overlay” on the Auto Menu.

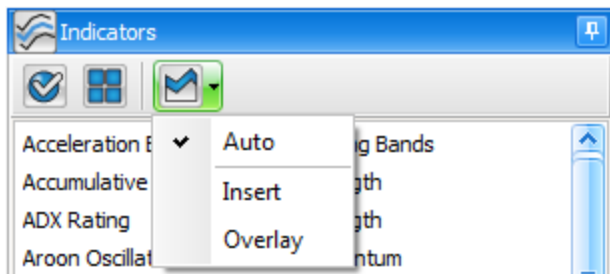


Fig.3.3

3.3 Adding Line Studies to a Chart

To add a Line Study, ensure that you have opened a chart, and then open the Line Studies panel.

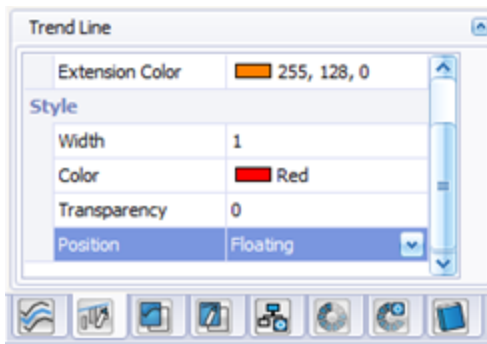
3 Charting in Beyond Charts

- Select the Line Study that you would like to apply to your chart.
- Adjust the parameters and visual style of the indicator.
- Click Apply from the panel menu or simply double click the indicator. The cursor will switch to drawing mode and display a “+”.
- Click and drag the cursor on the chart to specify the start and end points. Let go of the mouse button when you want to stop drawing the Line Study.

Users can choose to lock certain line studies to a series (price, indicator or BCFL indicator) via the position property within the Modify Parameters section in either the Line Studies panel or from modifying directly on the chart.

By setting the property to Locked, it will lock the line study to the primary series in the panel it is applied to. This would be the price series in the price panel regardless of the amount of other indicators applied in the same panel. For locked line studies applied to indicator panels, it would lock to the primary or first listed indicator in that panel. If the user wanted to apply a locked line study to a non primary series within a panel, they are required to select the desired series prior to applying the line study from the Line Studies panel.

When a line study's position property is set to floating, it can be applied anywhere on a panel the user chooses.



Text on Annotations may be modified by double clicking it or by right clicking and selecting Edit. Clicking out of the Annotation textbox or pressing ESC will exit edit mode.

3.4 Creating a Watch List

To set up your own separate Watch Lists, open the Watch List Manager panel on the right side of your Beyond Charts screen and pin it open, as shown in section 2.3.2.

Click on **New** at the top of the **Watch List Manager** panel and type the name of your new Watch List.

Now open the **Securities Explorer** panel and pin it open too. Find the first stock that you would like to keep in the Watch List and right click on it and select Watch List then select your desired Watch List or define a new Watch List as shown in Fig 3.4, or drag it from the **Securities Explorer** and drop it anywhere over the **Watch List Manager** panel. It will be placed in the appropriate selection of the **Watch List Manager** panel, as shown in Fig 3.4.

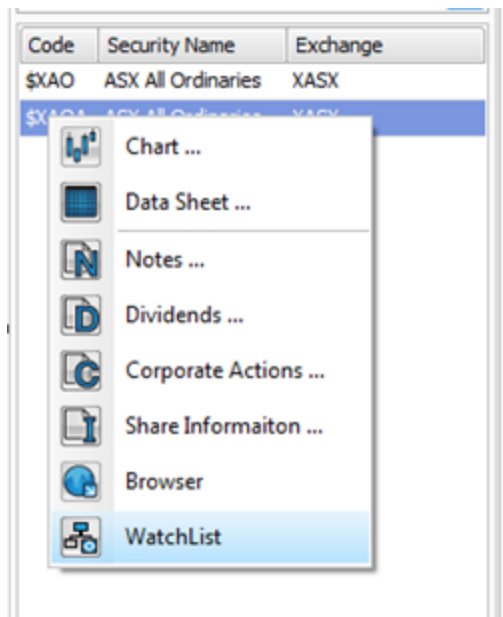


Fig 3.4

3 Charting in Beyond Charts

Workspace 4 - Beyond Charts

Chart Favourites Systems

Print Preview Look and Feel Workspace Tools

AutoSave AutoLoad Licence Version Check Help Tutor Me

Workspace 4

Watch List Manager

Watch List: new

Securities

Code	SX	Security Name
BHP	X...	BHP Billiton Limited


Share Info 1 of 1

Classifications

Name	Level	Classification	SX	In
------	-------	----------------	----	----

Watch Lists

XASX

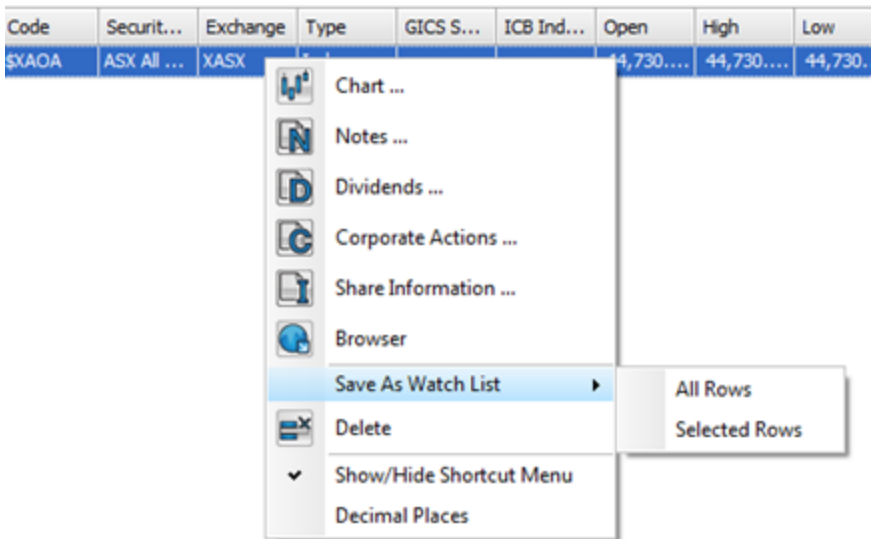


3 Charting in Beyond Charts

Fig 3.5

You can also drag a Classification from the drop down menu in the Securities Explorer across to the Classifications section of the Watch List Manager. After dropping, you can adjust the Exchange(SX) and Instrument of the Classification by clicking on the relative cell in that row.

To add a stock to your Watch List from a datasheet, select the stock(s) you want to add then click the Watch List icon, or right-click it then select Save As Watch List.



The **Watch List** can be deleted or renamed, and each entry in the Watch List can also be removed individually.

Whole Sectors or other Watch Lists can be placed in a single Watch List. You can maintain as many Watch Lists as you would like.

Once a Watch List has been created it will appear in the **My Watch Lists** area of the **Watch List Manager** for easy access.

3.5 Creating and applying an Overlay

To create an Overlay, ensure that you have opened a chart, and then open the Overlay panel.

- Apply the Indicators and adjust the chart colours, Style, Data Mode, etc to create the desired ‘template’ exactly how you want it to be saved. Remember that the individual security information is not important.
- On the Overlays panel, select the Overlay (FKey) in the Overlay Group to which you want to save the ‘template’. If the Overlay Group doesn’t exist, create a new one using the New button on the panel menu.
- Press the Save button on the panel menu.

The Overlay is now saved to the selected Overlay and given the name ‘User Defined’



i You can rename the Overlay by selecting ‘rename’ from the panel menu.

Once an Overlay has been created, it can be applied by:

- Selecting the Overlay and clicking Apply on the panel menu.
- Double clicking the Overlay name
- Pressing the associated Function Key (Fn Key 2-11) on the keyboard.



i Try creating two different Overlays and switching between them using the Fn Keys.

If you have several Overlay Groups, applying an Overlay from that group will assign that Overlay Group to the Fn Keys. Future Fn Keys will thus use the Overlays in the same group.



i When Beyond Charts first starts, the first Overlay group, in alphabetical order, will be assigned to the Fn Keys.

When you first start using Beyond Charts you will have no Overlays.

3.6 Creating and Applying an Analyses

To create an Analyses, ensure that you have opened a chart of the Security you want to analyse, and then open the Analyses Manager panel.

- Apply the Indicators and adjust the chart colours, Style, Data Mode, etc to create the desired ‘template’ exactly how you want it to be saved.
- Apply the Line Studies exactly how you want them to be saved. Remember that the Analysis will only apply to this Security.
- On the Analyses Manager panel, press the [New] button on the panel menu. A ‘New Analysis’ will be created under the Code for the Security.



You can rename the Analysis using [Rename] on the panel menu.

If you change or add to the charted analysis, you can save over an existing Analysis by:

- Selecting the Analysis on the Analysis Manager panel.
- Clicking [Save] on the panel menu.

Once an Analysis has been created, it can be applied by:

- Selecting the Analysis and clicking [Apply] on the panel menu.
- Double clicking the Analysis name.
- Right click on the Analysis and select [Apply].

An Analysis can be automatically loaded onto a chart of a particular security. To turn this feature on:

- Press [Auto Load] on the Chart menu, and

If you have multiple Analyses for a Security, the Analysis loaded automatically by default can be set:

- Right click the Analysis and select [default] from the menu.

3.7 Working with Charts. The Basics.

3.7.1 Right mouse button menu.

The Beyond Charts user should get used to using the right mouse click feature in Beyond Charts. For Apple iMac users this will require that you set up your Apple mouse to support right clicking.

The standard menu items on the right mouse click are shown below.

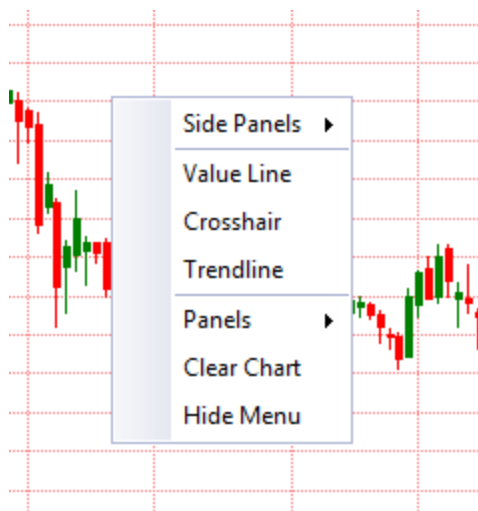


Fig.3.4

The right mouse click will display the same selection of menu items but some selections will be greyed out depending on where the right click is performed in Beyond Charts. For example, the 'Modify Indicator' is greyed out above because an indicator was not selected when the right click mouse operation was performed for this screen shot.

3.7.2 Value Line

The **Value Line** can be used extensively in Beyond Charts. Once a chart is displayed, activate the **Value Line** with a right mouse click and select **Value Line**.

The **Value Line** displays the date and OHLC prices of a Security and values of any indicators that may be displayed. It can be dragged across the screen with the mouse or moved day by day by using the left and right cursor keys on your keyboard.

A smart feature is that the values displayed are colour coded to the same value of their respective indicators and will auto sort on the **Value Line** according to which indicator has the higher value. This makes it very simple to determine a cross-over of one indicator over another.

In the chart below it is clear that the 9 day EMA has crossed below the 21 day RoC and also crossed below the RoC zero line because the **Value Line** shows the blue value of -0.738, representing the RoC, placed below the green value representing the 9 day EMA of the RoC.

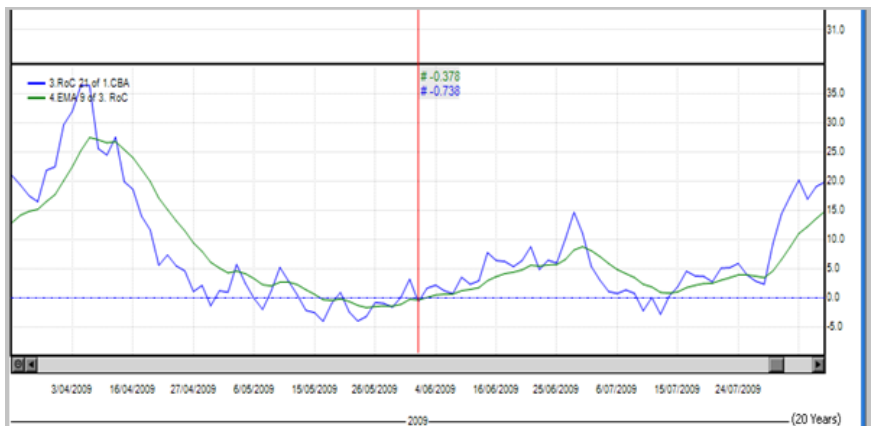


Fig.3.5

3 Charting in Beyond Charts

To clear the Value Line, select it with a single left mouse click and press the Delete key on your keyboard or right click on the Value Line and select “Delete Value Line”.

3.7.3 Chart Period

The Period icon on the Chart tab has been implemented to speed up using charts during day to day use of Beyond Charts. Most of the stocks on the ASX, bar the top 20, have not been listed longer than 20 years and many less than 10 years.

Typically 5 Years will cover 99% of one’s analysis however there are times that long term analysis may need to be conducted. For example, the DJI (Dow Jones Industrial Index) and SPX (S&P 500) have over 100 years and 80 years, respectively. Charting these indices with ‘All Data’ could be a bit slower, depending on your computers processing power.

3.7.4 Applying and modifying indicators

Review [section 3.2](#) on how to open the **Indicators** panel and add an indicator.

When a new indicator is applied to a security chart a new indicator panel may be inserted below the bottom panel. There is no limit to the number of indicator panels that can be inserted besides the practicalities of screen size and chart clarity.

To apply an indicator of an indicator, first ensure that the indicator is selected on the chart panel before applying the next indicator. This is most often used for applying a moving average on an indicator.

For example in Fig.3.6 , to apply an Exponential Moving Average (EMA) to object 3, the 21 period RoC (in the 2nd graph), the RoC blue indicator line must be selected before opening the **Indicators** panel. The RoC indicator line can be selected by either a single left mouse click on the legend in the top left corner of the RoC graph or by a single left mouse click anywhere on the RoC blue indicator line.

3 Charting in Beyond Charts

Once selected, the indicator line will be highlighted as shown in Fig.3.6 . Open the **Indicators** panel and Apply the Exponential Moving Average. The last used period for the EMA will be applied on this occasion.

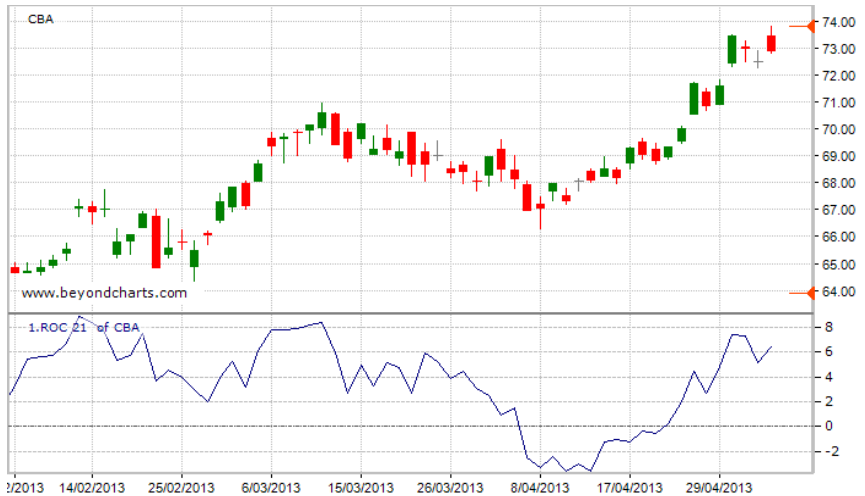


Fig.3.6

The EMA is applied to the selected indicator panel, as shown in Fig.3.7 .

If the RoC had not been selected the EMA would have been applied to the top price chart, that is, object 1.

3 Charting in Beyond Charts

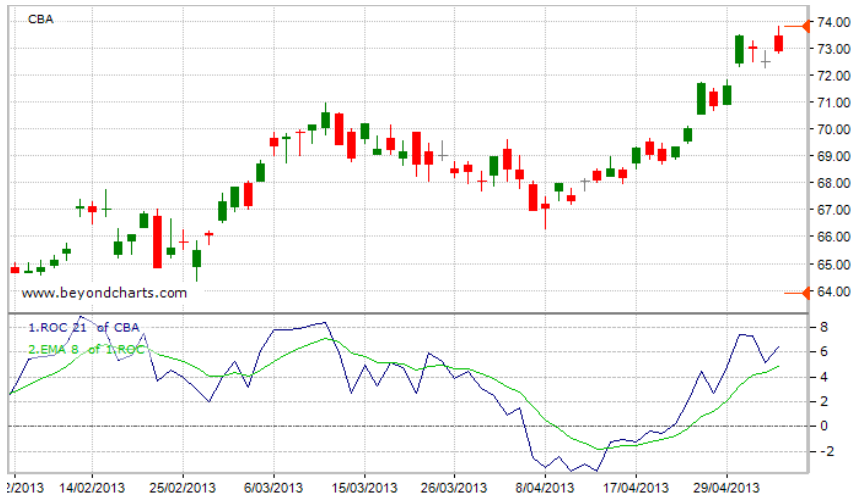


Fig.3.7

Once an indicator is applied its parameters can be modified by:

By right clicking on the particular legend item in the top left corner of each Chart panel and selecting Modify Indicator from the menu.

By right clicking on the Indicator itself and selecting Modify Indicator from the menu.

3 Charting in Beyond Charts

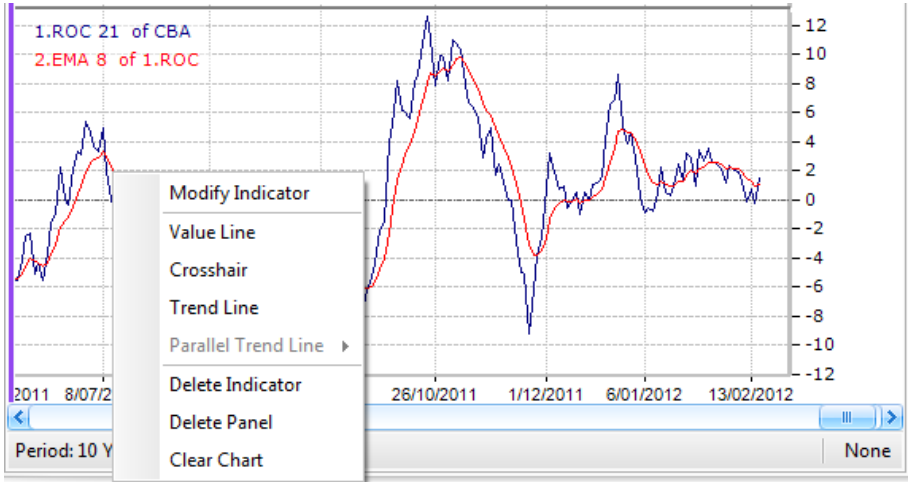


Fig.3.8

To delete an indicator from a graph you can either:

- Select the indicator with a single left mouse click and press the Delete or Backspace key on your keyboard.
- Right click on the indicator line and select “Delete Indicator”.
- Right click on the legend and select “Delete Indicator”.

All indicators and Line Studies be cleared without closing the chart by selecting “Clear Chart” from the right click menu.

3.7.5 Chart Styles

There are a number of chart types available in Beyond Charts and more will be added in future releases. The chart types currently available are:

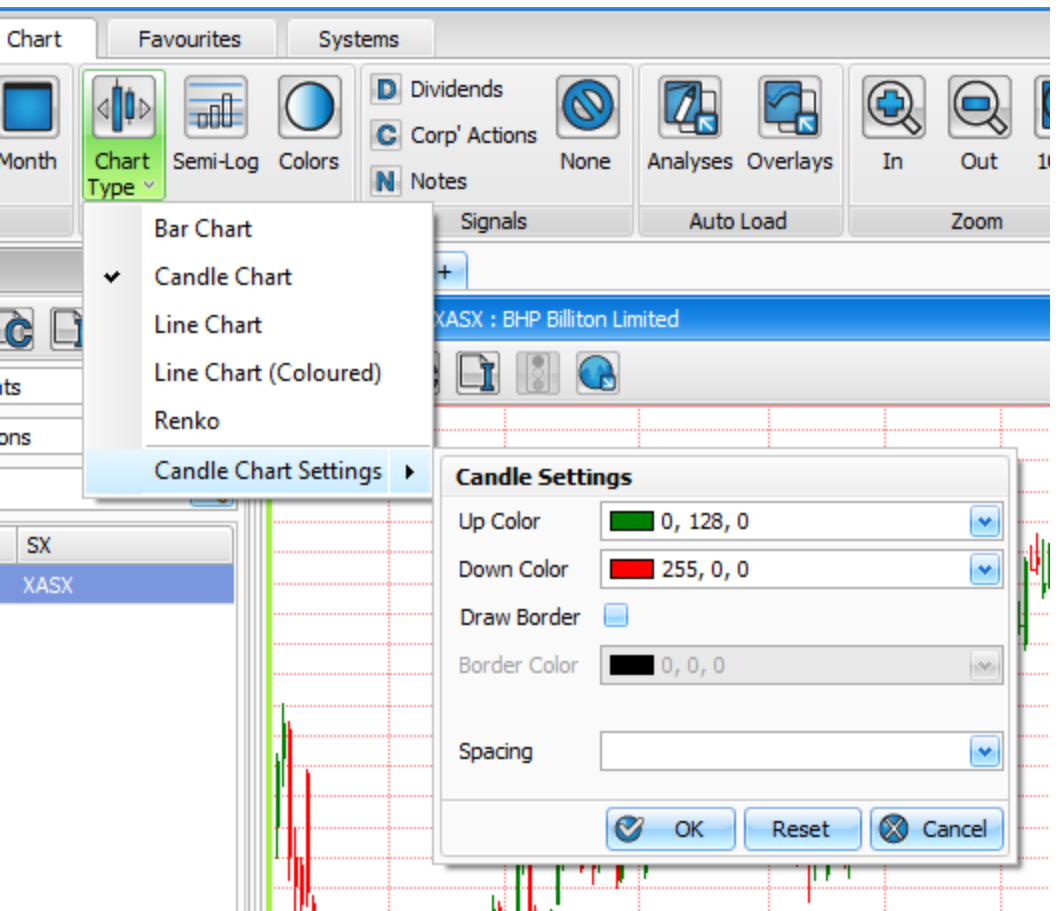
- Line charts, single colour and with bull and bear colours.
- Bar charts, also known as OHLC charts.

3 Charting in Beyond Charts

- Candlestick charts.
- Renko Charts.

To change the chart style, click on the Chart Style icon on the Chart tab and select the chart style that you would like to use.

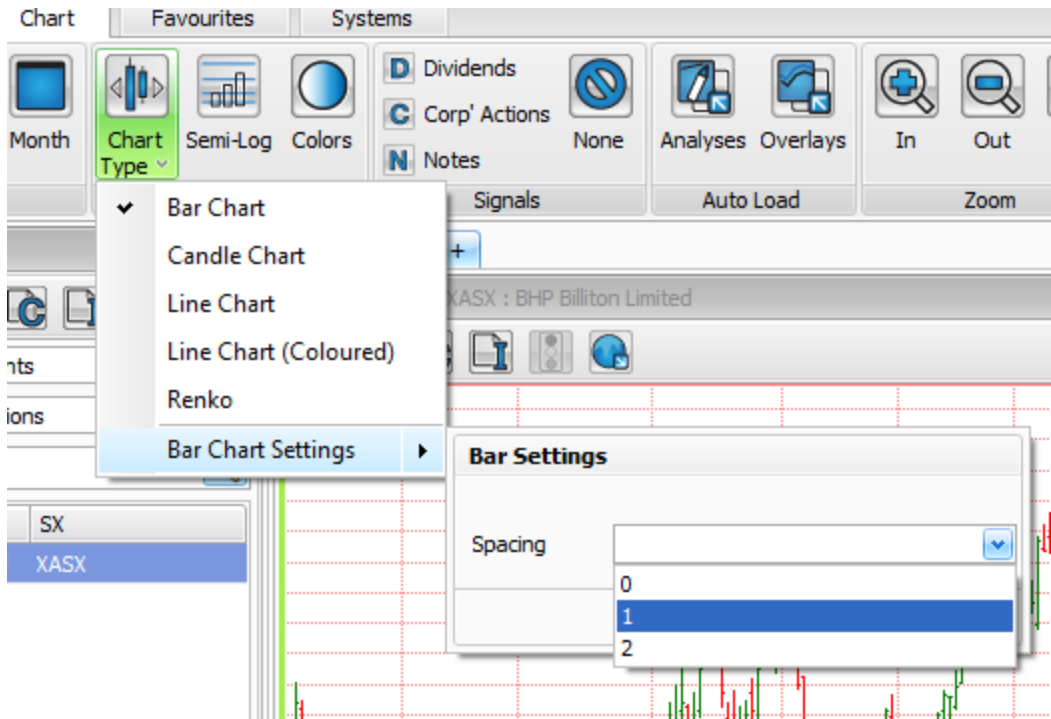
Candle Chart users have the ability to modify the candle colours and spacing (0,1,2) to their preference via the Candle Chart Settings option once Candle Chart is selected as the Chart Type.



3 Charting in Beyond Charts

Bar Chart spacing (0,1,2) may be modified to their preference via the Bar Chart Settings option once Bar Chart is selected as the Chart Type.

Users can change the Up & Down color along with the border color if desired.



3.7.6 Using Trend Lines in Beyond Charts

To **draw a freehand** trend line on a chart, right click anywhere on an open chart and select "Trend Line", as shown in Fig.3.8 . The cursor will change to a large "+" sign. Draw the freehand trend line with a left mouse click at the starting point of your desired trend line and drag your mouse with the left mouse continuously pressed and then let go at the point that you wish to end your trend line. Trend lines can also be drawn on indicators that are inserted in panels below the price chart.

3 Charting in Beyond Charts

To **draw a horizontal** trend line, repeat the same steps as drawing a freehand trend line however whilst drawing the trend line press the SHIFT key on your keyboard. This will lock the trend line as a horizontal trend line regardless of where the mouse is moved.

To **modify** the length and **change the angle** of a drawn trend line, select the trend line with a single left mouse click anywhere on the trend line – each end of the trend line will display square object boxes. Select one of the object boxes and then drag and drop the end where you would like to place it.

To **extend or retract** a trend line in situ at the **same angle**, select the trend line, then select one of the object boxes, then press the CTRL key on your keyboard then drag the end to where you would like to place it. The same angle will be maintained regardless of where the mouse is moved.

To **move** a trend line and maintain its aspect, i.e. length and angle, hover your mouse over the trend line and then left mouse click on the trend line and drag and drop it where you would like to place the trend line.

To

To create a **inverted trend line** of an existing trend line, hover your mouse anywhere over the trend line and then right click on the trend line.

3 Charting in Beyond Charts

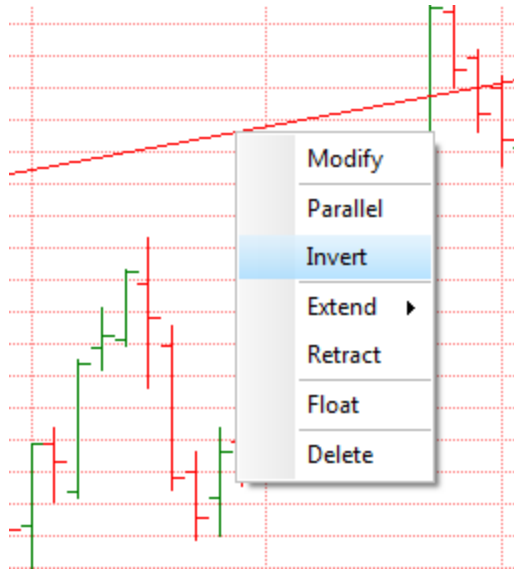


Fig.3.9

Select “Inverted” and an inverted trend line will be placed on the chart at the opposite angle and length as the selected trend line. The trend line can be moved into position whilst maintaining its aspect.

To create a replica **parallel trend line** of an existing trend line, hover your mouse anywhere over the trend line and then right click on the trend line.

3 Charting in Beyond Charts

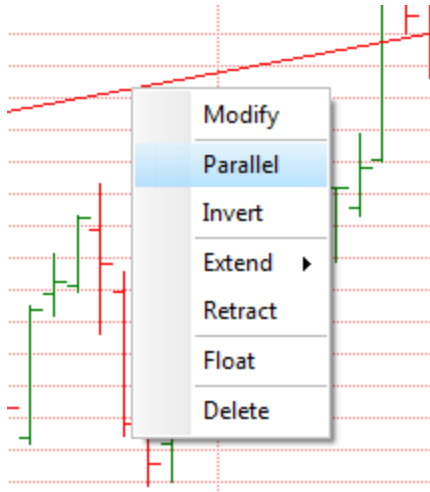
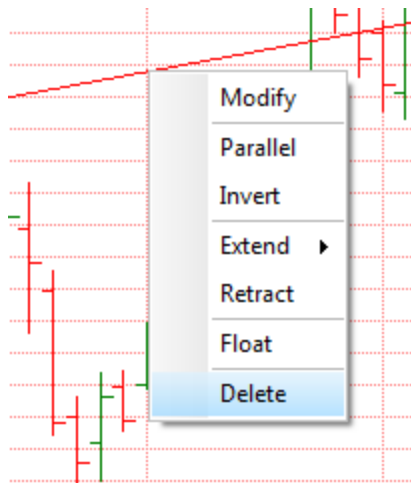


Fig.3.10

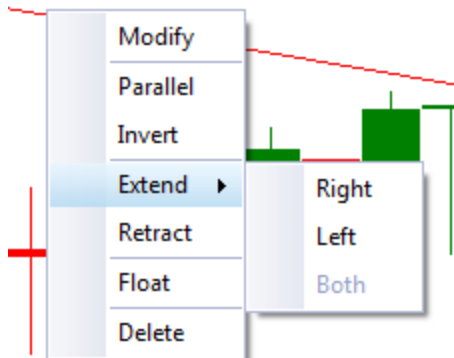
Select “Parallel” and a replica trend line will be placed on the chart at the same angle and length as the selected trend line. The trend line can be moved into position whilst maintaining its aspect.



3 Charting in Beyond Charts

To **delete a trend line**, hover over the trend line and select “Delete” as shown above. Alternatively, select the trend line and press the Delete key on your keyboard

To **add dynamic extensions** that stretch to infinity from both or either ends of a drawn trend line, right click the trend line, select Line Study on the pop up menu, then select Modify. On the dialog box, choose your desired extension/s through the Extensions property (Left, Right, Both or None). Users may also change the colour of the extension line by changing the Extension Colour property to their desired colour.



As with other properties, changing them once applied to the chart is for that instance only. To set the property permanently so that it is applied to any trend line that is drawn, set the desired property in the parameters window within the Line Studies panel.

3 Charting in Beyond Charts



To lock a trend line to the series (price, indicator or BCFL indicator), right click the trend line, select Line Study then select Modify. On the dialog box, change the value of Position to Locked. Setting it to Floating will allow users to position the trend line anywhere on the chart at any angle.

4

ADDITIONAL READING

Technical Analysis

- Bedford, Louise. Charting Secrets. Wrightbooks (Wiley), 2004
- Murphy, John J. Technical Analysis of the Financial Markets. NYIF, 1999.
- Murphy, John J. The Visual Investor, Wiley. 1996.
- Pring, Martin. Technical Analysis Explained Edition 3. McGraw Hill, 1991.
- Weinstein, Stan. Secrets for profiting in Bull and Bear Markets. McGraw Hill, 1988.

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