



Getting Started with Professional

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Getting Started with Barchart Professional

Written by Pete - a member of our support staff

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

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

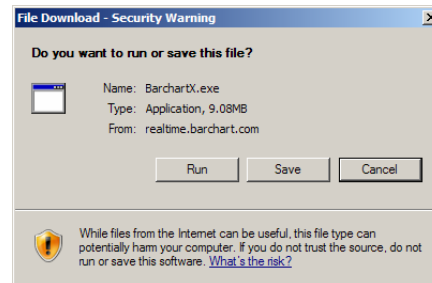
Once the trial has been activated (or if you've upgraded your trial to full subscription status), you will receive another email communication that will list your username and password.

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

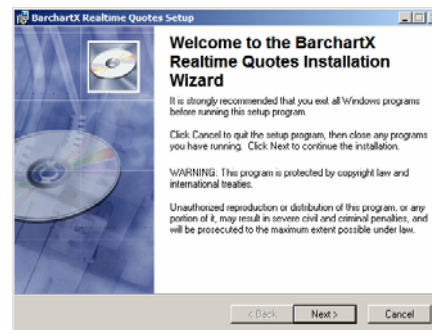
Note: your username and password are case sensitive (UPPER / lower case), so please be careful when entering your login information.



2. If this is your first time using the application, you will be asked to download and install the software. Just click the link in the email. The following dialog box will appear:



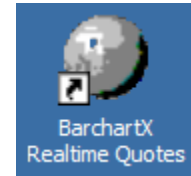
3. **Save** the BarchartX.exe file on your desktop. Once it's saved, look for the BarchartX.exe file on your desktop and double-click on it to install. You'll see the installation Wizard:
4. Follow the prompts to install the software.



So, now that I've downloaded and installed the software, what's next?

Go ahead and connect to Professional:

1. Double-click on the BarchartX icon on your desktop, shown here:
2. Or, you can go to the **Start Menu**, select **Programs**, select **BarchartX**, then select the **BarchartX Realtime Quotes** program.



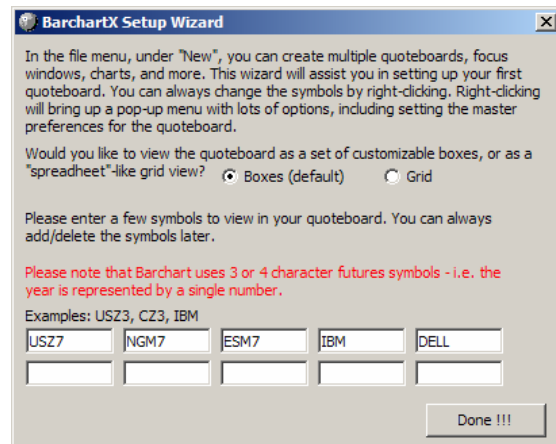
The Barchart Splash screen will appear, showing the program is loading. After a brief time, the login box will appear. Type in your username and password. If done correctly, Professional will open and you will see the Quoteboard Setup Wizard.

Creating your first Quoteboard

The "Setup Wizard" will show the first time you log into the program. You may use this to begin your first Quoteboard if you like.

However, if you decide to skip this part, you can get back to the Setup Wizard by clicking on **Help** and then **Setup Wizard**.

Just select the type of quoteboard you want to create (Boxes or Grid), then enter the futures contracts and/or equities symbols you wish to see. Futures contracts are entered using the following symbology:



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

For example:

USZ7 = December 2007 30 Year T-Bond

NGM0 = June 2010 Natural Gas

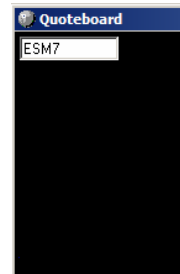
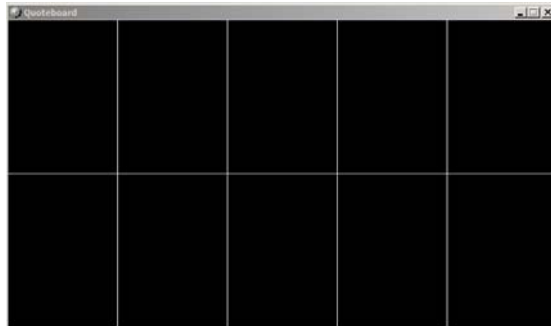
NDU7 = September 2007 Nasdaq 100

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

To create a Quoteboard without using the Setup Wizard

1. Click **File** at the top left of the program menu, then select **New** and then **Quoteboard**.

The default settings for the Quoteboard are going to be Data Box view with 10 boxes, as shown here. I'll tell you how to change these settings later.



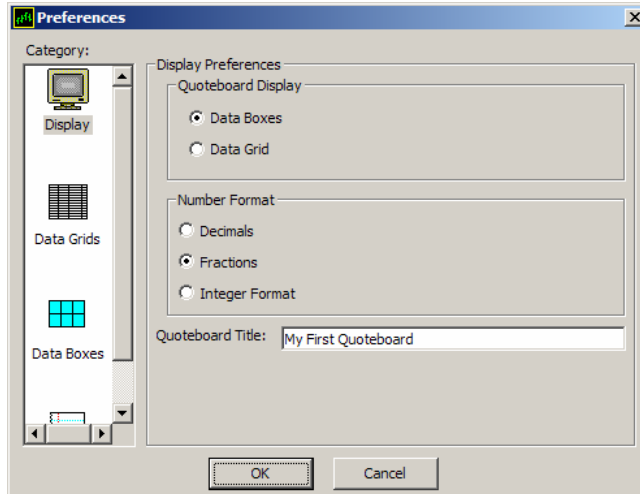
2. To enter symbols, simply click on any of the blank boxes, and start typing the symbol, pressing **Enter** when done.
3. Once you have all the symbols set, you can easily change any symbol. Just right-click on that box and select **Change Symbol**.

To change your Quoteboard preferences

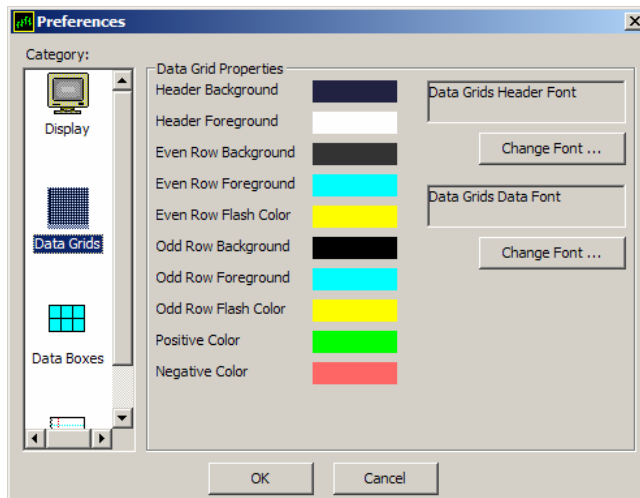
1. Right-click on the Quoteboard and select **Preferences**.

There are four options in the preferences screen:

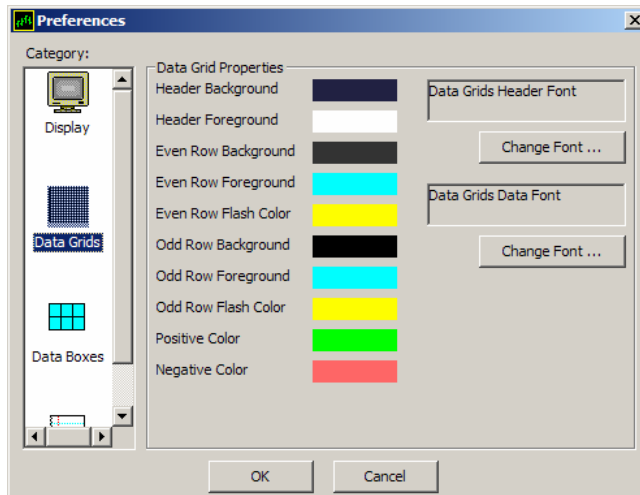
- a. **Display** - Where you select which Quoteboard view you would like (Grids or Boxes), the number format you would like to use, and what title you would like to give the Quoteboard.



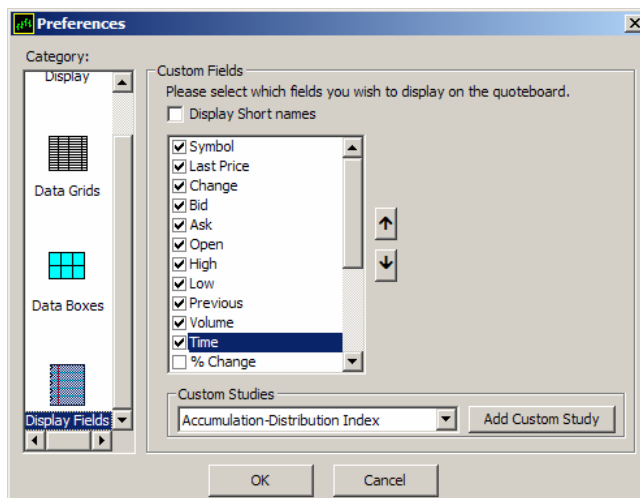
- b. **Data Grids** - Where you select the color schemes and fonts you want to use for the Data Grid view.



- c. **Data Boxes** - Where you select the number of boxes, color schemes and fonts for the Data Box view. You can also change where the Market Stochastics Meter is displayed (or remove it altogether if you like).



- d. **Display Fields** – Where you identify the fields of data to appear on the quoteboard, including the addition of custom studies.



2. From the **Display** category, choose the view that you like best, add a name for the Quoteboard.
3. Depending on whether you chose Grids or Boxes as your preference, select either the **Data Grid** or **Data Boxes** category to change the color scheme/font.
4. For either view, choose the Display Fields section to modify the data points to display in the quoteboard.
5. Click **OK** to save your preferences for this quoteboard.

Changing symbols on quoteboards

1. In either Grid or Box view, right-click on a blank space (to add a symbol) OR right-click on an existing symbol (to replace a symbol).
2. Select **Change Symbol**.
3. Type the symbol in the white blank space, and press **Enter**.

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

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

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

I'm satisfied with the way the Quoteboard is set up. What about charts?

With a quoteboard showing:

1. Right-click in the box (if you're in Data Box view), or right on the symbol (if you're in Grid view) and select **Custom Chart**.

A chart will appear for the symbol. The word "Daily" appears at the bottom right of the chart indicating the time frame.

You can also create a chart by accessing the **File** menu, selecting **New**, then selecting **Chart**. Just type the symbol you want when the blank chart appears.

To change the chart time frame:

1. Right-click on the word **Daily** at the bottom right of the chart, and select the time frame from the options displayed.
2. You may also change the time frame by right-clicking anywhere on the chart, select **Change Time Increment**, then select a time frame from the options displayed.

To expand/contract the time scale of the chart

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

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

To expand/contract the price scale of the chart

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

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

To set the number of bars displayed on the chart

1. Rest your cursor just below the bottom (scale) line until it becomes a line that points left and right. Type the number of bars you want on the chart and press **Enter**.

For example, if you type 30, the bar settings box will appear with that number, and when you hit **Enter**, the number of bars is set at 30.

You can also type in a start and end date. As you start typing a number, the bar settings boxes appear. Put a start date in the first box and an end date in the second box and click **Enter** on your keyboard to set the dates.

To display a crosshair on the chart

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

You can get a more accurate view of a price bar if you drag the cursor until the vertical (up and down) crosshair lines up against a price bar (the bar will turn blue, while light gray in the vertical crosshair will show where the bar begins and ends).

Carefully drag and move your cursor up the bar: the bottom of the bar will be the low price for that day, the top will be the high price. The bar pointing to the left will be the opening price while the bar on the right will be the price it closed at.

How do I reset the chart to the default settings?

Right-click inside the chart and select **Reset Chart**. The chart will be returned to how it looked when you first started.

Wow, there's a ton of choices in there...add pane, line mode, volume and open interest, and...

Powersignals is the underlying charting program that runs the charts in Barchart Professional. To see a complete list of the charting options and how to use them, click on **Help**, then **Topics**, then **PowerSignals Charting Documentation**.

How do I draw trendlines?

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

We do not provide education on how to use all the studies. However, we provide a brief definition of all the studies in the help section of Professional.

1. Click **Help** from the menu at the top, then click **Topics** to open the help files.
2. Open the **Contents** tab on the left, then click on **Studies Documentation**. A list of all the studies appears.