

FAQ Disclaimer

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Forward

Acknowledgements

Equis International wishes to thank the forum members, moderators, and administrators for their effort in supporting MetaStock® & QuoteCenter® software.

Revision History

Release Date	Description	Version
091105	Initial Release: Covers complete 1 st year of forum activity	1.09.01

Preface

The following guidelines are designed to help you get the most out of the Equis Forum for MetaStock & QuoteCenter. As a general rule, always make an effort to ensure that your question has not already been posted previously. You can do this by using the forum's search feature. In addition, make sure that you've at least attempted to research and understand the subject as explained in the User's Manual. Try Google, or Yahoo, or your favorite search engine. There are numerous sources. If you are still stuck, along with your post, list what you've tried to do to solve your own question. Don't take for granted those that spend their time trying to help out others in need.

Get to know the MetaStock User's Manual

People go out and spend thousands of dollars on MetaStock and data. The Equis staff went beyond due diligence to prepare the user's manual; yet, the majority of users never read it. YOU MUST READ THE USERS MANUAL if you want to fully exploit the features of MetaStock. You can't just read it once either; you must read it time and time again, because your skills and trading complexities will constantly be in a state of change.

Study the MetaStock Formula Primer

Although not mandatory reading for those people who just want to look at charts and play with the inbuilt indicators and explorations packaged with MetaStock, it is mandatory reading for all people who want to write their own code. The Primer starts with the basics of writing a simple indicator and then gradually gets more complicated. The Primer is available here: <http://forum.equis.com/viewtopic.php?t=524>.

How to use (and not use) MetaStock software

People who try to use MetaStock as an emotionally-free, mechanical trading system will inevitably fail. Regardless of your system, you will still have to burden the risk of your trading decisions. Although MetaStock is sold as a trading tool, it will not make all of the decisions for you. The idea of using MetaStock and its explorations is to narrow the list of all POSSIBLE trades from the list of ALL stocks.

The explorations that come with MetaStock have their own personalities, but it is YOUR personality that is important here. YOU need to decide which explorations best suit YOUR trading style. It's sort of like the dating game: you need to define your own style and use MetaStock to match it. After running some of the explorations you might decide that none of the built-in explorations suit YOUR style, so you would like to start coding your own strategies. Learning to do this is highly recommended, because products that come out of the box with the ability to return a list of trades that are guaranteed to be profitable are the Holy Grail... that is, they don't exist! MetaStock requires a lot of tweaking and customizing to suit each individual and THEIR trading style.

Once you have made your tweaks, you run them through the system tester to 'try them in the market'. The system tester will ASSIST you to refine the logic of your entry and exit strategies, and may with the assistance of the optimization process, ASSIST in the determination of variables. DO NOT abuse the optimization process for 'data mining' or curve fitting! Change the logic of your entry/exits, its a lot safer.

Stick with it. MetaStock is an exceptionally powerful TOOL to be used with discretion by the educated/patient investor/trader. It is not a black box system maker, but an aid for you to refine the list of ALL stocks down to a list of TRADABLE stocks.

MS cannot be mastered overnight. It takes a lot of time and a lot of thought to create and implement a system that works more than 50% of the time. Many of the people here at this forum have been working at it for years with varying degrees of success; the probability

that the upshot newcomer will strike success on their first trade is low, and the probabilities of quitting work for full time trading within 5 minutes of installing MS are even smaller.

Asking for help

After you have read the User's Manual (and completed the formula primer, if applicable) and you get stuck, then ask your questions here on the forum bulletin board. There are a lot of knowledgeable people who frequent here and enjoy helping others out. Some like the challenge to overcome a situation not seen before. Some like the opportunity to find a better way to implement an idea. Some just like to help.

But, the questions have to be reasonable. Asking, "Why doesn't my code work?" and not posting the code is not going to get you any answers from anyone. Asking open questions like "When should I enter/exit a trade?" will usually end up in a philosophical discussion about phases of Venus or something similar, but it will not get your question answered. Questions such as, "My code- posted below- gives me a divide by zero error when I open a chart with less than 2 millions days of data. I have tried replacing (line) with (line) to no avail. Can you please help?" will get rapid attention.

If you are having trouble with your code, make sure to POST YOUR CODE along with your question! There is nothing like trying to figure out why your indicator on your computer doesn't work whilst we have absolutely no visibility of your system. If you think you have discovered the holy grail of indicators and don't want to share with others then:

- ask for a private or separate email address to which you may mail your highly protected code; or,
- post only those sections of the code that are troublesome, making sure that you include all lines of code that affect the lines in question; or,
- just grow up and post your code. With the total amount of experience of the members of this forum, I think it would be fairly safe to assume that someone would have seen your code or something like it at some time in the past. They might be able to not only fix your code, but they may also be able to tell you how to / how not to use the code.

If you have asked a question, and you have received an answer, say THANK YOU to the people who helped. Gratitude goes a long way. If you don't understand the answer given, politely ask for further explanation. Maybe the original person or someone else can rephrase the answer so that you fully appreciate the response. If you found an answer elsewhere, please post the solution to your question so that our member might benefit too. If your question involved code or formulas, please be polite and post a full working copy of the code for everyone else to see too.

Giving credit

Give credit where credit is due. Many of the people who code here do it because they can or because they like to. Whatever the reason, the code they post belongs to them. If people post code with their copyright notice in it, then leave it in! That way, when you are helping someone else out of situation that you yourself had been in, then the originator's details will remain in the code as it gets further distributed. Don't post their codes on websites without due regard to the copyright implications. There have been many instances when code written by forum members has appeared on other sites without copyright information or author credit. This is simply called theft.

Conclusion

Failure to follow these simple guidelines will result in forum members simply ignoring your posts and/or the forum moderators removing or editing your posts.

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Chapter 1: Installation



Are there any known issues when running MetaStock 7.03 with Windows XP?

It should work fine as long as you do the following:

- Right-click on your MetaStock shortcut and select properties
- Click on the Compatibility tab and select 'Run this program in compatibility mode: Windows 2000'
- Click on 'Disable visual themes'
- Click OK

How to stop the logon screen from appearing at startup

For computers not on a network or domain:

- Click on "Start", click on "Run", and type "control userpasswords2"
- Click OK
- On the Users tab, clear the "Users must enter a user name and password to use this computer" check box and click "Apply"
- Select the user you want to log on & click OK. A dialog will appear that asks you what user name and password should be used to logon automatically, just click "OK"
- Go to Control Panel / User Accounts, and click "Change the way users log on or off", and uncheck both "Use the Welcome Screen" and "Use Fast User Switching"

Note: For Windows XP Home, do not try to auto-login as Administrator. This is because Windows XP Home Edition does not allow logging in as Administrator from Normal mode. Once you uncheck the option "Users must enter a user name" and click OK/Apply, Administrator account name will be displayed in the text box. Type-in a different user name and password in order to auto-login to that account.

Take care while entering the password. Typing an incorrect password makes XP freeze at startup (during authentication) due to incorrect password and then displays the Welcome Screen after few seconds.

Why do I need to insert my CD for verification after my initial installation?

This is a generic message that asks to insert the MetaStock Professional CD, even if you have the End-of Day version installed. There is a verification key on all the MetaStock program CD's not just MetaStock Professional. Approximately 90 days after installation you will be asked to insert the CD, so it can verify itself.

Note: It is not necessary to completely install MetaStock again. Just insert the CD, holding down the shift key to temporarily disable the Auto-run feature in Windows, as you close the CD-ROM tray, and then click OK. MetaStock should start normally, if the verification process is completed. However, there is a problem with the 8.0 EOD CDs (8.01 does not have this problem), in which it not reading the CD properly to perform this check.

Click the Lost CD button and send an email to support@Equis.com or call Support, with the certificate key provided. We will give you a number to enter that will permanently unlock the program.

When you click on the Lost CD button, there is a number displayed at the top of that dialog (I.e. 1A1-AA-111). This is the number that we need to calculate the verification key that you will enter into the same dialog, once we send it to you.

If you cannot conveniently locate the CD before your 7 days are up or if there is a problem trying the above steps, when this question appears, select the option that you lost the CD and you will receive a certificate number. Contact Support with your customer number or name and address as it would be listed in our database along with this certificate number and we can use this information to calculate a verification number and send it to you. You must be a registered customer to receive this information. If you purchased the software from one of our resellers, contact them and have them forward your certificate key to us to receive your verification key. Contact our sales department for registration information.

How do I go back to an older version of MetaStock?

Any of the smart charts, charts, layouts, or favorites that you have opened and saved in newer versions will not be usable in older versions. You can save the custom formulas like this:

- Going to Indicator Builder
- Click the Organizer button
- Select Export
- Select your custom formulas from each section
- Browse to a New folder outside of the Equis folder to Export your formulas to, and finish the export

Prior to re-installing an older version, you must completely uninstall the newer version.

Follow these steps:

- From the desktop, select control panel | add-remove programs and uninstall MetaStock
- Delete the Equis folder: usually C:\Program Files\Equis
- Locate your data folders and delete the MSSmart folder from each folder. Do not forget the MSSmart in C:\MetaStock Data\Data on Demand
- Search for EQNOTIFY.DLL and delete it
- From the start menu, click Run and type RegEdit
 - Click on the + next to HKEY_CURRENT_USER
 - Click on the + next to Software
 - Locate the Equis folder and delete it
- Restart your computer
- Reinstall the older version

Is it possible to run two versions of MetaStock on the same computer under different directories?

1. Create a folder on your hard drive\desk top for the different versions of MetaStock that will need to be installed to your system.
2. Next click onto Start | Run, type in RegEdit and hit ok.
3. This will bring up the registry editor window onto the screen.
4. Go into the folders HKEY_CURRENTUSER\Software\Equis, Right-click onto the Equis folder and Left-click onto Export from the drop down menu.
5. Using the drop down menu from Save In at the top, browse to the corresponding folder for the current version of The Downloader you have installed to your system.
6. Once the registry key has been exported, delete the Equis registry key.
7. Following the installation paths provided above install the next version of MetaStock.
8. Following steps 2-6 export the registry key, delete it then proceed to install the other versions, to make it easier you can create the shortcut to the program within the same folder as the exported registry file.

1. Click onto Start | Run, type in RegEdit and hit ok.
2. Go into HKEY_CURRENTUSER\Software\Equis, delete the Equis key, then close out of the Registry Editor.
3. Go into the corresponding folder for the version of MetaStock you want to run.
4. Within that folder will be a file called, for example, 9.0 Pro.reg, Double-click that file to import the registry.
5. When it is complete you can now open the corresponding MetaStock program.

Installing MetaStock Pro from the WinXP Pro administrator account

After installing MetaStock Pro from the WinXP Pro administrator account, I receive a message that the server cannot be found when I try to log on from another user account.

Solution 1:

Try to Right-click on the MetaStock desktop icon and choose 'run as'... then type in your admin info.

Solution 2:

Re-install under the appropriate user profile.

Solution 3:

Log-in as Admin and export the HKCU\Software\Equis key to a central location that both profiles can access, then log-in under each user profile and install the .reg file.

How to fix broken Research links

This problem occurs when you have multiple installations of MetaStock on the same computer or the remains of a previous MetaStock installation. To fix the problem:

- Download the current version of 'webres.dta'. Avail:
<http://forum.Equis.com/download.php?id=82>
- Place the file in "ALL" MetaStock or MSWIN folders located on your computer
Look for C:\Program Files\Equis\MetaStock copy it there;
Look for C:\Program Files\Equis\MSWIN copy it there;
Etc...

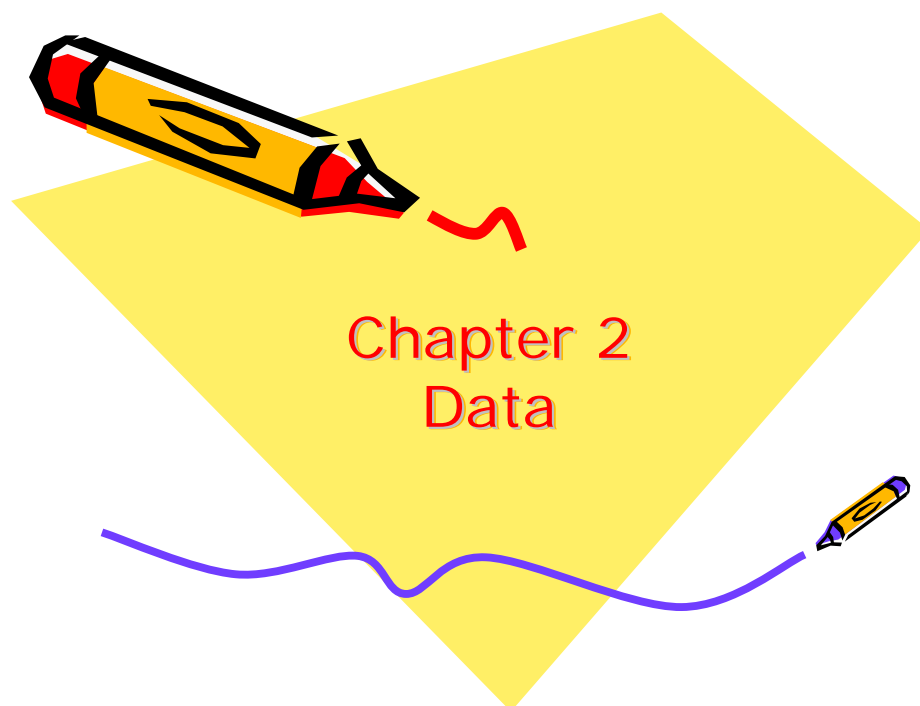
Can I install MetaStock on multiple computers?

Yes; you are allowed to install it on your laptop and on your desktop.

Why is the 'Optionable Stocks' folder empty following my recent upgrade?

Re-download the new symbols. Open MetaStock, then click on TOOLS | UPDATE SYMBOLS.

Chapter 2: Data



What is the cost of real-time data?

Any real-time data feed will cost you at least 90 dollars (USD) a month.

How to backtest expired e-mini contracts

Whenever you load a futures symbol from the data provider, you will be greeted with a dialog box that asks what range you would like to load. After that, the info can be saved in the DataOnDemand cache folder.

How to retrieve real-time historical information

There is no way to get historical intraday data into your real-time files; but, if you have a real-time folder with say, 'cscoc' hourly in it but only have a few rows of data:

- Open a 60 minute chart of 'cscoc'
- Right-click on 1 of the price bars and click copy
- Go to the downloader and open cscoc's datasheet in that real-time folder
- Paste the data
- Delete all the rows of data that were in there to begin with. Note: As you're deleting, you will occasionally get a warning box saying the days are not in order, click 'no' since you're deleting those rows. No need to worry about the start date, the downloader will back up the time.

What software is required to convert data into MetaStock format?

The Downloader program that comes with MetaStock can convert CSV data to MetaStock format. Select TOOLS | CONVERT in the Downloader.

How to load indexes such as NYSE, NAS, and S&P 500; Reuter's symbols .IXIC, .NYA, and \$SPY not found

Try updating your symbol database. Go in the downloader, click on TOOLS | UPDATE SYMBOLS. When the update is done close MetaStock and the Downloader, then restart. Next, try to open .DJI, if it tells you it is an invalid symbol then most likely your account is not set up to get indices and you need to call Equis support.

Remember: if you have the securities in the folder arranged by name, typing in 'spy' will not load the chart. Try changing the folder to 'view by symbol'.

How do I get eSignal to load Australian ASX data?

Go to Jose's web site at www.MetaStocktools.com and download the current list. Put it in Excel and create the text file list in the correct format which needs to be:

<ASX security name>,ASX Code,N/A,0,0

With eSignal, the ASX code must have an "-asx" after the code. e.g., BHP needs to be written BHP-ASX.

How much data (number of periods) needs to be loaded for plug-ins to work properly?

Minimum requirements:

- NCU - 300
- Power Pivot's - 1000
- Performance System – 500 to 1000
- Chart Pattern Recognition - 500
- SpyGlass – 500
- Adaptive Trading Solutions – 1000
- Bollinger Band – 550

How many periods are required to calculate the Trend Analysis Expert?

This Expert requires a minimum of 550 periods.

How to combine different futures contracts into one file

- Use downloader to make ASCII files of the contracts
- Open all contracts with WordPad and copy/paste into one common file
- Give all ticker names the same name, for example if you use ESH03 and ESM03 change ESM03 also in ESH03
- Save and use the downloader again to change it back into MetaStock format

Why am I able to get a partial weekly bar sometimes but not at other times?

Online data does not produce a partial weekly bar. However, local data will produce a partial weekly bar when compressed from daily to weekly.

How are weekly bars determined?

If you have MetaStock 7.03 or below, it will create an incomplete weekly bar. For example, if you run the exploration on Thursday then the program will compress the data from Monday through Thursday into one bar.

For MetaStock 7.2 and above, the program will use the last completed weekly bar, so if today is Thursday then last Friday is being used.

How to separate individual stocks into different folders

The easiest way is to use the downloader. Select FILE | NEW | SECURITY. When the dialog box comes up, there will a place to type in the symbol and change the folder name (leave the ' \MetaStock data\' part intact). Click SAVE and it'll tell you that folder does not exist. Respond by clicking YES.

Is free data available for the India stock markets?

Probably not, but check these sources:

- Check to see if data is available from your bank or stockbroker
- Try 'http://in.finance.yahoo.com' to see if they have free data

Otherwise you might have to use a pay-for-service data provider. Reuter's data integrity makes it worth the price, compared to searching for a freebie.

How to import non-subscription data

Usually when you get free data the key word is not "Download" but rather "Convert". You should find out how to convert your free data into something MetaStock can read. Check the User's Manual or use the F1 Help to search for "CONVERT", you will find out how to convert data and what formats the Downloader can convert.

How do I get indices and market indicators for EOD?

Check your subscription status. Basic EOD does not include access to the Indices. There is a 9.95/month additional fee.

Is it possible to setup a custom intraday periodicity?

It is not currently possible to set custom intraday periodicities such as 120 minutes.

Data refresh errors with eSignal

Every time I refresh data, today's volume is added to today's existing volume.

It is both an eSignal and MetaStock problem. Unfortunately, there is no fix for it. If you press refresh when the market is closed, the correct information will be present.

How to auto-refresh intraday data

If your data feed is real-time, the chart should update on its own. If the chart that's open is from your local EOD folder it will not. In that case, click the refresh button located on the lower right corner of your screen.

Frequency of MetaStock EOD updates

You can only update after the market closes. Actually, you can update at anytime but if you do it before the market closes you will still only have data from the close of the day before.

Real-time data has stopped updating

Go to the x-axis properties and change both the dates loaded and displayed to the current date; then, uncheck the 'retain scale' option and save your charts after you uncheck that option. Make sure your default template reflects this change also.

How to reset the EOD data vendor

MetaStock with Rueter's DataLink service shows a startup error: cannot connect to DBC data manager because Winros.exe could not be found.

You must have received MetaStock Pro version by accident. Just reinstall the program and select "no real-time vendor" when prompted. It will default the settings to Reuter's DataLink. If you still experience difficulty installing the software, please contact our Support department directly at 801-265-9998.

Comparing free and pay-service data

Comparison of free versus paid data services:

- Does your free data provider provide accurate data?
- Does your free data provider correct the data?
- Does your free data provider adjust for splits?
- Do you have to download each symbol separately?
- Do you have to import each symbol separately?

If you get inaccurate data, it will cost you in your trading; also, if you have to jump through hoops just to get your quotes, you are losing time in viewing charts.

Free eSignal data

eSignal sells their data; but, perhaps you can contact them directly and see if they have a sample CD with historical intraday data that you could practice on.

Working around markets with lunch breaks and real-time data (Japan and HK)

Using Japanese real-time data to draw daily candles gives me a correct candle until the PM-Session. From then on it takes the PM-Session opening price as the opening price for the daily candle. On the next day, MetaStock takes the correct opening to draw yesterday's candle.

- Click TOOLS | OPTIONS | REAL-TIME | CONFIGURE SERVER | LAST BAR LAG TIME. Set the lag time to match the lunch break.
- Make sure your Start/End times are 12:00 AM - 12:00 AM.

Using unsupported real-time data providers

This requires a third-party program such as MetaSERVER RT Pro. Avail: <http://www.dynastoresoftware.com/index.asp>.

Updating missing intraday data with eSignal

If I disconnect for a day, when I connect again my charts are missing a day's data. I have tried using the downloader, which attempts to update them but ends with "No securities were updated, errors occurred."

It sounds like you are using local data. These files only get updated when the data/file servers and the data manager are running. There isn't an easy way to fill in the gaps. The DownLoader can only update EOD securities, not intraday. You want to use DataOnDemand.

- Save the attached file to your DownLoader folder (C:\Program Files\Equis\The DownLoader, by default), then restart MetaStock
- Go into the Open dialog
- Select the eSignal button
- Select the desired symbol, select the periodicity in the lower left screen
- Click Open

These charts will automatically do the data management for you.

Understanding eSignal real-time data capabilities

eSignal supports both real-time and EOD data.

Yes, it's possible to save intraday data. However, if you lose or stop your connection for any time, the chart will just start plotting again from the reconnect time. The missing data stays missing. If you close and reopen the chart, the information will fill in.

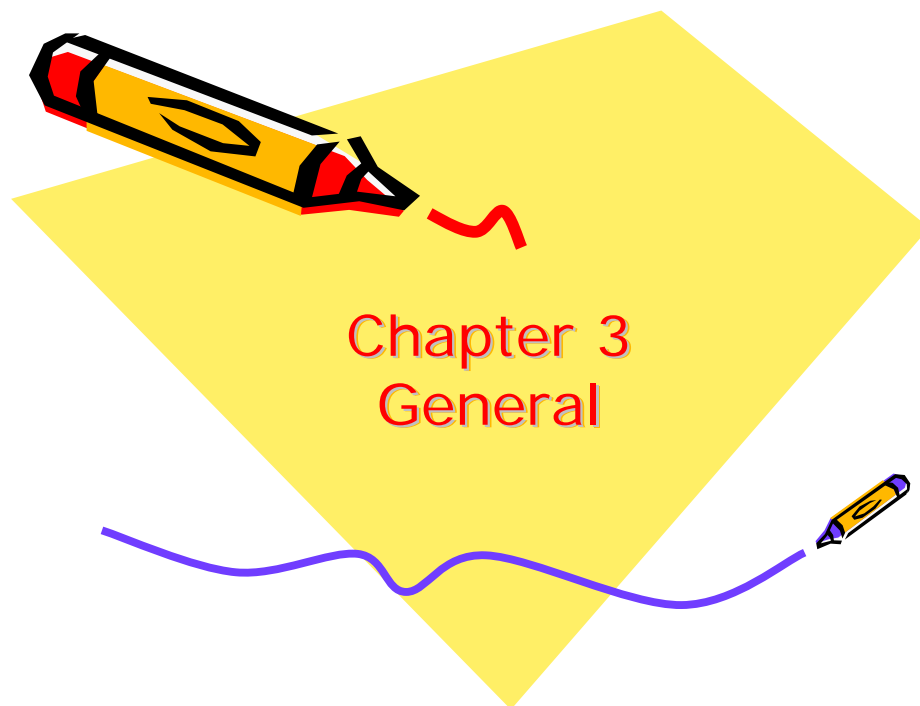
BTW, Reuter's has broad market securities that are only available from them, for just a little over a hundred bucks a year and worth it.

MetaStock comes with the stocks divided up in folders by industry, S&P 500, NAS 100, etc. You can change, add, and/or delete these directories. For EOD data, there is a historical data CD that comes with MetaStock that provides info current to about 2 months. When online, the data provider uses the DataOnDemand folder. You are limited to 6,000 securities per folder. There is a selection under tools to update the symbol base. You can use it anytime to add or subtract symbols; there's nothing to it.

How to setup Qcharts to read EOD data

Right-click on the MetaStock shortcut and select properties. In 'target' you will see: "C:\Program Files\Equis\MetaStock\MsWin.exe". Just add '/l/e' at the end so that it looks like this: "C:\Program Files\Equis\MetaStock\MsWin.exe" /l /e. Note: If you have a SUBSCRIPTION version of MetaStock this will not work.

Chapter 3: General



How to backup saved charts, layouts and templates

- Close MetaStock
- Once to your Desktop, Double-click onto My Computer
- Double-click onto the C: drive
- Double-click on the Program Files folder
- Double-click onto Equis
- Double-click on the MetaStock folder
- Within the MetaStock folder, there will be a folder called "Charts"
- Right-click onto the "Charts" folder and select copy from the drop down menu
- Right-click onto the location of where you want to back up this folder and select "paste"
- If you are backing up to the floppy drive, insert the floppy disk, Right-click onto the floppy drive in My Computer and select paste. Remove the floppy when the pasting procedure is complete

How to backup custom formulas

- Open the Tools menu and select Indicator Builder
- Click onto the Organizer button and select "Export formula files" and click Next
- The formula wizard will cycle you through all the Power Tools (Indicator Builder, System Tester, Explorer, and Expert Advisor)
- As the wizard cycle you through each power tool you are going to highlight the items you want to back up. If you are highlighting more then one make sure you are holding down the "CTRL" key as you highlight, other wise it will only highlight one item
- The last window of the Wizard will ask you to define the Destination Folder using the Browse point to the location you want to back up your formula files to (For example, A:\)

- After you have assigned the Destination Folder hit Finish, if you wish to password protect your formulas now is your chance when you are prompted to enter a password go ahead and do so. Note: If you choose to password protect your formulas and you forget your password there is no way for you (or us) to retrieve the information

How to backup the favorites and history folders

The Favorites "folder" is not a true folder. It is actually a *.dta file, and all it contains is shortcut links to the files you "placed" in it. In other words, if I have a file, FGLB in my C:\MetaStock Data\My Stocks folder, and I "place" it in the Favorites folder, all I am really doing is putting a notation of where FGLB is located (its pathname) in the Favorites.dta file. To back up FGLB, I have to backup the actual file itself in my C:\MetaStock Data\My Stocks folder.

Although you can take your Favorites.dta file and move it to your laptop into the MetaStock folder there, the pathnames it contains may not have valid pathnames to the data files on the laptop. If your files are all in the exact same location then the links in Favorites.dta should be OK.

The History is also not a true folder, just a *.dta file with similar links. Same situation.

How to compact the MetaStock database

The MetaStock database is stored in an Access file named "ST_DATA.mdb". This file can grow to quite a large size... in excess of 2 Gb. However, using the clean-up tool that comes with the System Tester does not affect the file size. In order to effectively reduce the file size, follow these steps:

- Make a backup copy of the database file for safety: ST_DATA.old
- Open the original database with MS Access, and select the table "AnalysisEvents"
- Delete all entries except for one record
- On the Access Toolbar, select TOOLS | DATABASE UTILITIES | COMPACT & REPAIR

Now, the file size should be about 6 Mb. What an improvement!

How to handle file incompatibility issues

MetaStock and The Downloader create temporary files when accessing security data files. These files are version specific, so if you have different versions of MetaStock and The Downloader the programs cannot access the data at the same time. For example, if you have a chart open in MetaStock 6.52 and try to access the datasheet in The Downloader 7.22, you would get an error message.

To delete all of the MetaStock temporary files, search the hard drive for: ~msfl.* and delete the files that are found.

How to make all charts look the same

Each new chart you open will look like your default template. To make all of your new charts look the same way do this:

- Start MetaStock
- Click File | Open
- Highlight the first security you want to open, and click Open
- When the chart appears on the screen, change the colors, plot the indicators you want to see etc to make this chart look the way you want all of your charts to look
- Click your Right Mouse button on the background of this chart. When the menu appears select Save As Default Template

Now any new chart you open will look exactly like your default template.

If you have opened a chart before it will not use the Default Template. It will use its own Smart Chart for the Display. You can replace the Smart Chart with the Default Template as follows:

- Click File | New | Chart
- Highlight any chart and click Open. This chart will open and look like your Default Template
- Click File | Save As
- Change the Save as type field to Smart Chart (In 6.52, Click Save As Smart Chart, to place an X in this box), and click OK. A message will ask if you want to replace your original Smart Chart. Answer yes.

If you have a lot of original files you may want to simply delete all of your Smart Charts at one time so the Default Template can replace them. You do this as follows:

- Click Start | Find | Files or Folders
- Click the Name & Location tab
- Type MSSmart into the Name field
- Set the Look-In field to the drive you want to search. For example you would set it to c: to search your hard drive.
- Click Include Subfolders to place an X in this box
- Click the Find Now button (Windows will now search your hard drive and display a list of every folder that contains the folder named MSSMART)
- Click Edit | Select All (This will highlight every MSSMART folder listed in the report)
- Click File | Delete and this will delete all of your Smart Charts
- Close the Find menu, start MetaStock and open your charts and they will now look like the Default Template

How to merge data

Open the downloader, click on tools, and then merge. Browse to the folder of the first symbol and select the first symbol. For the destination do the same thing and click on options, select keep destination and then "maybe" delete source. Finally, click OK. It should merge the data for both files.

How to select default periodicity

In the bottom left corner of the 'open' dialog box, there is a combo box from which to choose the periodicity.

How to display additional data

Right-click the time axis and set the days displayed and/or days loaded. Then you can scroll the horizontal axis to view older data.

How to keep the current template on subsequent charts

Make sure the 'use chart as template' option is not checked in the 'choose a security' dialog box in the extreme lower right corner. The 'use smart charts' option is selected by default.

How to save layouts in a particular order

I have opened a chart twice and formatted one to display daily data and the other weekly data. Then I select FILE | NEW | Layout and add both charts. Then I select FILE | SAVEAS | filename. However, when I close the layout and reload it, the positions of the daily chart and weekly chart are transposed.

Make sure the Auto-tile option is not selected. Then re-arrange and resave your layout.

How to save dates within a layout

Before you save the charts, go to properties for the x-axis and change the dates displayed. Save the chart, then the layout.

Saving chart settings on intraday charts

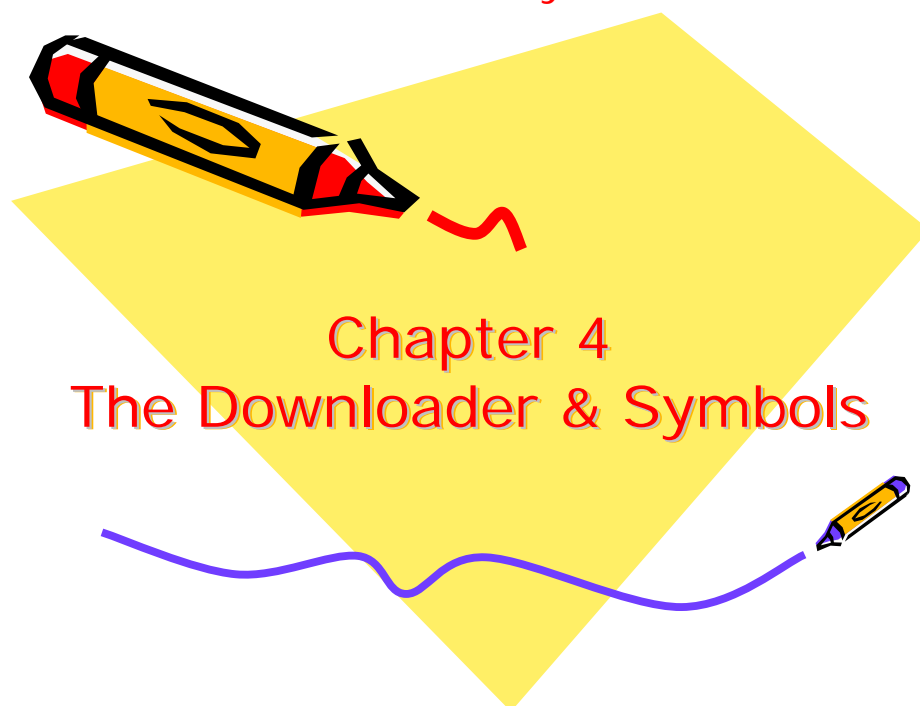
Select TOOLS | OPTIONS | CHART OPTIONS and set "Use chart as template". Then you can go through a series of charts and they will use the same format as the first chart. Just remember to turn it back to "Use Smart Charts" when done.

Synchronizing periodicities using templates

Can I make a template that always shows the daily and weekly charts for whatever security I choose?

In the lower right hand corner of the screen- in the 'choose security' box, select change all charts in layout.

Chapter 4: The Downloader & Symbols



How to add all S&P 500 stocks with the Downloader

- In The Downloader, click on TOOLS | UPDATE SYMBOL DATABASE
- Once the update has been downloaded, close and reopen the Downloader
- Click on FILE | NEW | SECURITY
- Change the folder path to what you would like to use, set the first date and then click on look up
- Under type, select "stocks-common"
- Under group, select "SP500"
- Click on select all, then OK | OK

How to update broad market data

In order to update broad market data beyond what is shipped on the historical data CD, you will need to ensure that your data package includes access to the broad market symbols. For Reuter's data, there is an additional fee of about \$100/ year for the "RTD International Indices" service.

Cannot open file(s) in the Downloader

MetaStock and The DownLoader create temporary files. Normally, these files are deleted when you close the program, but if it is shut down improperly, these files may not have been deleted.

To delete these temporary files, do the following:

- Make sure that MetaStock and the DownLoader (and Servers if using Pro) are closed
- Click on Start | Find | Files or Folders (Or Search, depending on the version of Windows)
- For Named: type in ~MSFL.*
- Make sure the Look in field is set to C:\ (Assuming your data is stored on your C:\ drive)

- Make sure "Include subfolders" is checked
- Click on the find now button
- Once the ~MSFL files are found, click on Edit | Select All
- Click on File | Delete
- Start MetaStock again

If the problem still exists, find out whether or not the trouble affects all of the securities or just a few. If you are able to open files in one directory but not another, you may have a corrupted file folder. In that case, the easiest solution would be to delete the folder and recreate it.

If the problem still exists, reinstall the Downloader.

Finally, contact Equis Support if all else fails.

Automatic symbol updates

Whenever there is a new listing, will the downloader automatically add it into my folders? Or I have to add it MANUALLY?

The 'update symbol database' option under tools updates the symbols that are available. It does not interact with existing symbol folders. You have to manually create or update new symbols on your local data. Unfortunately, there is no log generated during the symbol update function.

The Downloader is erratic

I am using MetaStock Pro with QCharts as the data service. Sometimes I cannot download data and sometimes I can. I get the error "no data received". What's going on?

Qcharts has some serious reputation for having servers down. You might try these steps:

- Delete your continuumclient.ini file and restart MetaStock
- Check the Qcharts website to see which servers are working properly
- Close everything and search for ~.MSFL* and delete all the files you find
- If you can update some folders but not others, you probably have a corrupted file. Delete the affected symbol folder.

How to create a custom symbol file

- Open a new ASCII file in a text editor (e.g. WordPad, Notepad).
- Type the list of securities to add to the symbol database using one of the following formats:

OPTION 1

<Security name>, <symbol>, <exchange>

Example:

Microsoft,MSFT,NASD

Apple Computer,AAPL,NASD

Oracle,ORCL,NASD

Iomega,IOM,NYSE

There should be no spaces before or after commas. Each individual security must be entered on a separate line in the text editor. The <exchange> and <security name> entries are completely optional.

OPTION 2

<Symbol>

Example:

MSFT
AAPL
ORCL
IOM

In this example above, the ASCII file contains only one field per line (I.e., the symbol). Since the <security name> is not provided, The DownLoader will attempt to provide a <Security name> from the existing Symbol Database. For example, since the Symbol Database in The DownLoader associates the symbol "MSFT" to the security name "Microsoft," the name "Microsoft" will automatically be used in the <security name> field. However, if The DownLoader does not find a match for the <symbol> in the existing list, the symbol itself will be used in place of the <security name>.

- Save the ASCII file with the extension ".SYM" (e.g. "COMPUTER.SYM")

Note that when you save the file in Notepad or WordPad, you should choose "All Files" from the Files of type drop list. If you do not, a ".TXT" extension will be added after the file name (e.g. "COMPUTER.SYM.TXT"). If this happens, rename the file in Windows Explorer so the Symbol Database will correctly recognize the file format.

- Place the ASCII file in the same folder as The DownLoader program.
(E.G. "C:\Program Files\Equis\The DownLoader")
- Open The DownLoader and display the Symbol Database.
- The name of the newly created Symbol Database file will be displayed in the type menu of the Symbol Database.

Intraday data with the Downloader

[How to download historical intraday data with the downloader?](#)

The Downloader is used for collecting historical EOD data.

However, you can use it to set up a local intraday chart to collect current intraday data. These files could eventually build up the historical data, over time. There are a few drawbacks, there is a 14 character symbol limit, you cannot collect any history, as it has to be accumulated over time and if at any time you lose your internet connection you will have gaps in the data.

You will need to create local intraday securities to collect the data. To create the local intraday files, follow the instructions below:

- Start the Downloader, select FILE | NEW | SECURITY
- Set the folder path to the location on the hard drive where you want to store and collect the data
- Type in the name and symbol in the given sections
- Set the Periodicity to intraday and set the interval to 1 minute (or the desired periodicity)
- It will ask you if you want to create the folder. Click Yes.
- Next it will ask if you want to select this folder for real-time updates, Click Yes.

[Where can I find symbol descriptions?](#)

The symbol descriptions are provided in symbol lookup in The DownLoader. You can access this as follows:

- Start the DownLoader
- Click File | New | Security
- Click the Look Up button
- Change the Type column to Future (RTD Symbols)
- Set the Group column to All
- Select Name for the search option
- Type the name of the security name you want to find, like Euro Dollar
- You will see several Euro Dollar listings and each will use a different ticker symbol

For example the Euro Dollar traded on the MCE exchange uses Ticker Symbol UD. Euro Dollar (Composite) traded on the IMM exchanges uses Ticker Symbol ED. Euro Dollar (Day) traded on the IMM exchanges uses Ticker Symbol 2ED. Euro Dollar (Globex1) traded on the IMM exchanges uses Ticker Symbol 1ED.

Files on the Historical Data CD are all continuous data, so the symbols are modified to be continuous symbols. E.g., the Euro Dollar (UD) traded on the MCE exchange is listed as Euro Dollar Continuous. The continuous symbol is @:UDc1#I; The Euro Dollar Composite (ED) traded on the IMM exchange is listed as Euro Dollar (Composite) Continuous. The continuous symbol is @:EDc1#I; The Euro Dollar Day (2ED) traded on the IMM exchange is listed as Euro Dollar (Day) Continuous. The continuous symbol is @:2EDc1#I; The Euro Dollar Globex1 (1ED) traded on the IMM exchange is listed as Euro Dollar (Globex1) Continuous. The continuous symbol is @:1EDc1#I.

What does the 'Update Symbol Database' feature do?

When you select "Update Symbol Database", it updates the list of available symbols - it does **not** update your local data folders. Since local data file locations are completely controlled by the user, the Downloader would have no idea where it would put each new security.

What this means in practice is that all Data on Demand groups will be current (I.e. Stocks Grouped by Sector will have the latest info). Local data folders would need to be managed manually. While this is easy enough to do if you only have a few folders, for something like the Stocks Grouped by Sector folder tree, it can be a headache. For this reason, we print a new data CD every couple months which has the current sector breakdown.

A list of updates can be viewed by clicking on "Additional Information" in the Collection Report box that comes up as soon as the download is done. This is the second line in that box right under "Message from Reuter's DataLink".

Where are the NASDAQ symbols?

<http://www.Equis.com/customer/support/download/Symbols.aspx>

Symbol folders

Since there are a maximum number of symbols that can be added to a folder, I set up multiple folders for my securities. They update without any problems; however, if I type in a symbol when I have another chart up, it has to be in the same folder for the new one to come up. Otherwise, I have to go to FILE | OPEN and change the folder to browse. Is this the way it's supposed to be or have I set it up wrong?

This is the way it is supposed to be. You could add securities from different folders to your favorites list. Before doing so, make a backup of the C:\Program Files\Equis\MetaStock\favorites.dta file. The problem that might occur is that when you

have more than 2000 securities in your favorites list, it sometimes becomes corrupted and you lose all your favorites.

Downloader limitations

Is there a limit to the number of securities that can be listed in the same folder, and if so, how can I correct this problem?

MetaStock 7.21 can only have 2000 securities per folder, but newer versions of MetaStock can hold 6000 securities per folder.

You can use the TOOLS | COPY feature in the Downloader to copy securities to a new folder. Next, just delete them from your original folder. When you get ready to download prices, just make sure you have your new folder added to the list.

Deciphering the Downloader error messages

About 15-20% of the 6600 stocks I'm downloading EOD data for have errors. Does this mean that I am receiving bad data?

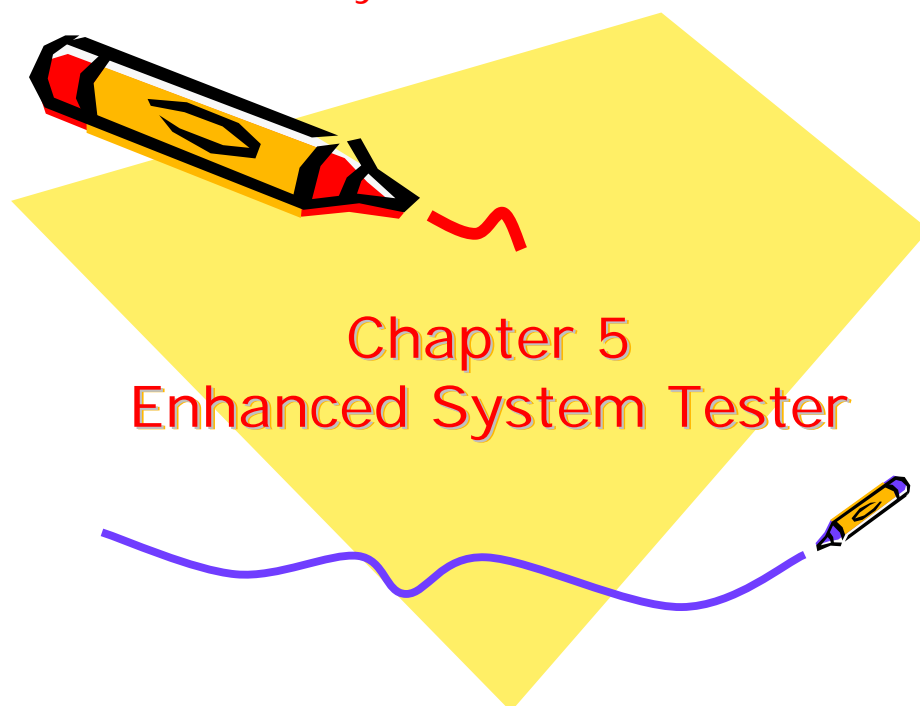
A common reason for not being able to update various securities is that symbols change or are deleted from the exchange. In this case, simply delete the invalid symbols. Make sure you have an up to date symbol file. Understand that some of the 'errors' might simply be a 'warning' that something needs your attention. In Downloader, go to TOOLS | TEST and select a folder. If you click on Options, every error code is listed there with the explanation for it. For example:

Error #1101: Security has not traded for at least the last 31 days.
This might mean that the companies have merged or gone out of business.

Error #1090: There was a large change in the close on that date.

Errors #1010 & 1035: Problems with the Company names.
These were caused because of a period included after 'Inc' in the company name. Change 'Sample, Inc.' to 'Sample, Inc' to clear up this error.

Chapter 5: Enhanced System Tester



Setting position limits

What is the implication of setting position limits when testing multiple securities?

Position Limit- Check this option to close any open positions before new positions are opened. You can specify that only one position can be open at a time, or you can allow up to 65,536 simultaneous open positions by un-checking this box.

The Enhanced System Tester tests each security individually. The position limit would apply only on a per-security basis, not as a global amount.

How to perform an intraday system test

To be able to do this you must have data on demand selected. When you start the system tester, in the add securities window remove all currently selected securities, click on add securities and change the periodicity to 5 minutes.

Defining real-time while using the System Tester

When running the Enhanced System Tester on real-time data, is the number of periods equal to the x-axis periodicity? If I specify 1000 periods and I'm viewing intraday at 1-minute, will the test be run on the last 1000 minutes?

For all practical purposes, Yes; it will be 1000 minutes. But, let's be more specific here... Let's imagine a formula where I back test over 1000 securities in real-time. If it was possible of course, the System tester would use what you have in cache for its calculation which means that if it takes an hour the first 100 securities will have used the 1000 minutes from an hour ago and the last securities will have used the last 1000 minutes.

Omitting margin from system test results

Why are there values in the Margin Column of the Equity Report when I'm not specifying any margin interest rate or margin requirement- both are set to 0%?

If you do not want to use any margin at all, set your options like this:

Long Initial: 100% (Means 100% of your money nothing else)

Long Maintenance: 0%

Short Initial: 200%
Short Maintenance: 101%

Why do some systems not plot the first trade?

The nature of some of the expert advisor formulas requires that an exit condition exist before an entry can occur. While this may seem unusual, the alternative would have required an excessive calculation time that would make the expert cumbersome and slow, especially with multiple charts. It was deemed worth the possibility of missing the first trade in exchange for the tremendous increase in calculation speed.

Why are my trades using only x% of my equity?

Why am I getting some trades using 99% of my equity and others only using 1-2%

I shall explain the way the system tester is currently designed. When your system generates a buy or sell signal, the order passes through 4 separate stages:

1) Considered - this means the system has generated the signal and you, the user are now considering whether to accept it or not. The enhanced system tester assumes you will accept all signals and passes the order on.

At this point, if you marked a strategic delay (in the system tester editor), the next order will be delayed the specified amount

2) Placed - this is the stage where the order is passed to the broker.

At this point, if you have marked a trade delay (in the simulation options), the next order will be delayed by the specified amount.

3) Opened - here is where the broker sends the order to the exchange.

At this point, if the order was any type other than market, a delay may occur until the specified condition occurs

4) Executed - the trade is finally transacted.

The problem you are encountering, when only a fraction of your equity being used in a trade, is caused by when the trade size is calculated. At the time the order is considered, MetaStock checks the available equity and determines how many shares can be purchased. This is the amount the tester tries to buy. If you are already in a trade, your available equity is however much is not tied up in the current trade.

This is working as the developers designed it. We have had some request to change this and we have contacted our developers about it. However, it will require an update to MetaStock for this to be changed. Till then, it is possible to run the test you want, but you will need to edit the system test to do so.

The trick is to remove the delay you have built into the system. Or rather, not to remove it, but change how it is implemented. Currently, the logic of your system is:

Signal event occurs
Order generated
Delay is implemented
Order is executed

This needs to be changed to:

Signal event occurs
Delay is implemented
Order generated

Order is executed

This change is fairly easy. Your formulas end with some condition that defines the buy signal. Before this condition, you may have several lines of variable declarations. This would look like this: { Optional: one or more lines of variables... } Condition the formula looks for Just change the above to:

```
{ Optional: one or more lines of variables...}
```

```
Ref( Condition the formula looks for, -1 )
```

With the above change, you can turn off all other delays, and you trades will be entered as if you had a delay set. Because the delay is in the formula, the trade size is calculated on the same bar the formula generates the signal, it will use all the equity.

How to limit a system test to specific hours

For example, how to limit formulas to trade between 9:30 am and 11 am only?

If you are using real-time data, you need to modify your formula and add a time statement.

For example, if the original signal was:

```
Cross(C,Mov(C,10,E))
```

Modify the signal like this:

```
Cross(C,Mov(C,10,E)) and  
(  
  (Hour())=9 and minute()>=30)  
  or  
  Hour()=10  
)
```

System Tester- Sprunger's Guide

Avail: <http://forum.Equis.com/download.php?id=295>

- Don't use "Realistic Market Prices"
- Make sure your "Position Limit" is set to 1
- Set Equity Default size to 100%
- Under Margin Requirements:
 - Long Initial = 100%
 - Long Maintenance = 0%
 - Short Initial = 200%
 - Short Maintenance = 101%

Alternatively, set all of your enter and exit positions to "Close" with a Delay =0.

System tester and expert advisor results do not match

This is a known concern. Some people consider this a bug, but the Equis product developers say it is working as designed. Really, both sides can be argued. What's more important here is that you understand why it happens and what it means...

When you run an equity test, the program calculates the number of shares you can purchase. For example, I have set my initial equity at \$10000 and my setting is to use 100% of available equity. Today I get a buy signal and at the close price the value of the share is \$10. The program calculates what I can buy on the next day at the open- 1000 shares. Now, the next day at the open there is a gap up or the price opens higher than 10 dollars for any reason... the program will say ok, yesterday I had an order to buy 1000 shares so $1000 * 10.000001$ is greater than \$10000 so I can't buy and therefore cancel the order.

Two suggestions:

- 1 - Use points only tests ... there are many reasons why...
- 2 - If you really want equity test use less than 100% of your initial investments, then set it at 90-95%.

Setting date parameters in the system tester

Some of the system tests require at least 40 or more bars of historical data. Is this accounted for when setting the date parameters in the system tester? How is this accounted for during the system test?

Let's say the buy signal is Close > 100 period simple average and my sell signal is the exact opposite. When I run my system tester and select my securities with 500 periods of data, I'm only really testing the system over 400 periods of data. This could be misleading if you compare to a system with a lesser requirement for historical data.

Here are a few report fields to really pay attention to:

- # of winning trades
- # of losing Trades
- Average Gain/loss

Make sure you look at these and not just the "Return" or the \$ figure. Remember, there is no absolute answer. At some point you will have to use statistics. Always make sure you have enough data to satisfy your basic requirements but you have to make concessions at some point. You know how it works now, so you will have to decide how you want to use the system tester based on that info.

System Tester- multi-system test reports

The system tester seems to only give results on a 'per security' basis...is there a way to display the equity accumulated across all of the simulated securities?

You can copy the summary page into excel and get the total values that way.

System Tester- character limits

Character limits:

7.22 and prior

Max # of formulas per folder = 1000

Max # of characters in any one formula = 2500 (1024 in System Tester)

Max # of characters in the name of a formula = 60 (70 in Enhanced System Tester)

Max # of characters in the password for a formula = 19

8.0 and newer

Max # of formulas per folder = 2000

System Tester- how to optimize code to stay within character limits

First off, be careful with optimizing results. Some people consider this to be a waste of time. However, if MetaStock allowed passing variables to custom indicators, then the problem might be largely solved. Until this is addressed, consider the following:

- Condense your existing code. There are many expert code writers willing to assist you on the forum.
- Consider using the Fml(), FmlVar() and/or ExtFml() functions. Processes using the OPT variables are 'kept' locally, while other components are processed remotely.
- Consider using Roy Larsen's external dll: GV.dll. This will allow you to get and set global variables.

System Tester- periodicity of test

Is there an easier way to get the data from my indicator on the last bar of the day?

- In the System Editor, on both the Buy Order and the Sell Short Order tabs, set the Strategic delay to 1 Day. Leave the Sell Order and Buy to Cover Order Strategic delay set to 0.
- When running a new simulation, under System Testing Options | More | Trade Execution, uncheck Realistic Market Prices.
- Set both the Buy Price and Sell Short Price to Open.
- Set Sell Price and Buy to Cover Price to either Close, or High/Low (with appropriate slippage).
- Set Delay order opening to 0 bars.

How to remove the 'Plot on Chart'

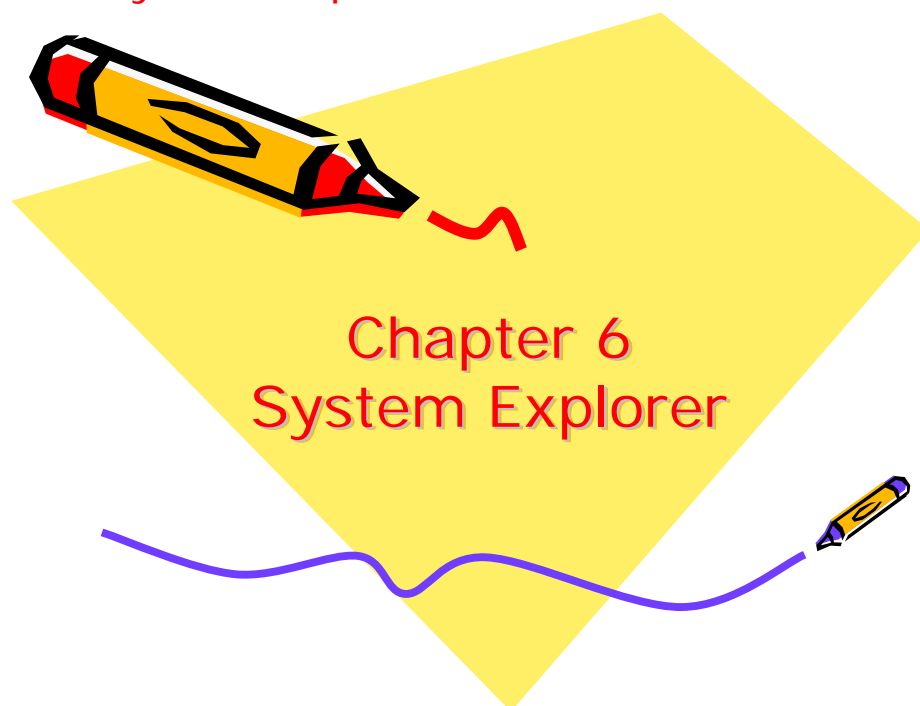
Click on EDIT | DELETE ALL and then select the components you would like to delete.

System Tester- missing the out-of-market times

In the lower right corner of the system test summary are 1) profitable, 2) unprofitable and, 3) out of market times. For some reason no totals are being returned.

If you use MS's trailing stop you must also choose a period value. Otherwise, it will kill the timings.

Chapter 6: System Explorer



Commission Settings

Commission settings can result in huge differences between Explorer results and System Tester results. There are several reasons, including: the exploration will always miss the first 2 trades. Also, the explorer would be as if you set your system tester to enter at the close with 0 delay. The system tester is there to give you an idea of the performance of a system, not the exact amount of money you would have made. Is the System Tester reliable? Yes; especially when the system test is run with no margin requirements, no commissions, delay of 1 using the open and as a points only test.

Setting the number of decimal places in Explorer

There is no way to display only 2 decimal places when making an exploration.

How can I change the periodicity used by an Exploration?

- Go to the Explorer
- Select the Exploration
- Click on EDIT | OPTIONS
- Change the periodicity of the Exploration

How to restrict the real-time data to a specific timeframe

I trade E-mini's on the Globex (this trades 24 hrs/day). I only trade between the hours of 10am to 3pm. Can I restrict the data that is shown on a graph so it still shows several days of data but only within the above time restrictions and can I back test just this data?

This will work with MS Pro... to back test only this data you will have to add conditions to your formula:

```
Hour() >= 10 and Hour() <= 15
```

For charting, select FILE | OPEN and select a security in the DataOnDemand folder. Then Right-click on it in the list and select properties. Change the start and end times.

Minimum number of records to load for explorations

The minimum number of records loaded depends on what you are looking for in your exploration and also the time frame you trade. It's true that a lot of explorations and plugins require at least 500 periods to work properly. But that's not always true...

To give you an example, let's say I only look at the last 3 months of data and my exploration looks for a cross of 2 moving averages that uses periods less than 10. Then I would only load 3 months worth of data. I don't really need more. If on the other hand I am more of a long term type of trader and I use much longer averages then I would load the appropriate amount of data, etc.

NEVER use "load minimum records", it might give you different results on exponential indicators. If you are using anything exponential you need a certain amount of data to smooth these indicators.

Selecting dates in the System Explorer

What is the best way to get the explorer to only look at shares that are traded on the day I run the explorer? A share may be inactive for some time but when I run the explorer that share may be returned as having met my selection criteria.

Just put a date filter in your exploration: `Year() >= 2005 and Month() >= 3`

There are other ways to do this too. Check the following website:

<http://www.tradernexus.com/nexusdate/>

Exploration is skipping securities

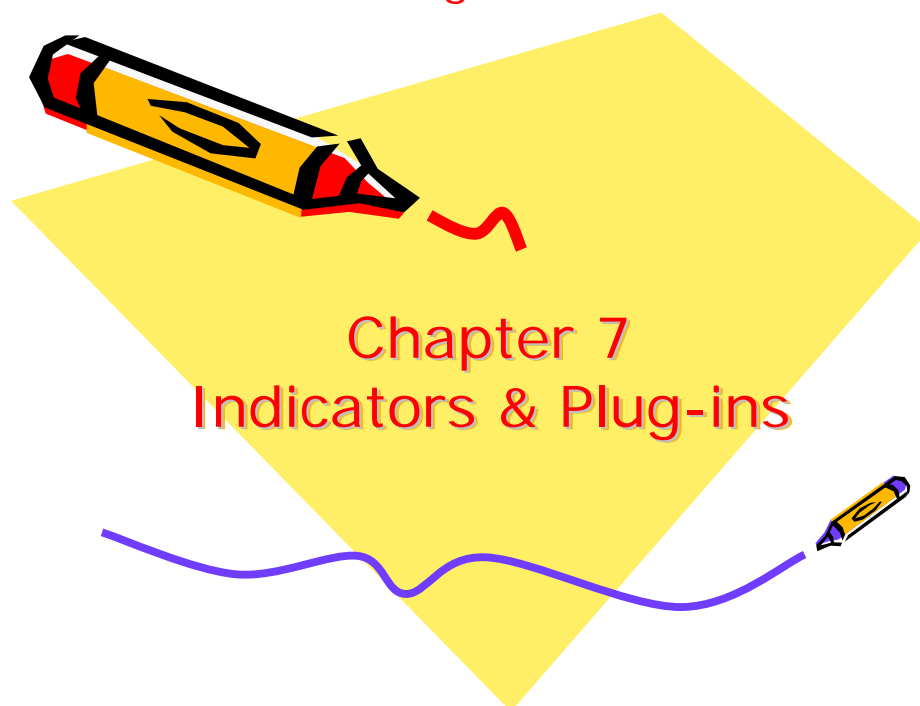
This could be the result of a damaged file; especially if limited to one particular folder. Try deleting the affected folder then recreate and update it again.

Why don't my explorations match my charts?

Most likely, your exploration is using an indicator that performs an exponential calculation (ex. RSI, ADX, exponential moving average, MACD, etc). Such indicators will have a different value depending on the amount of data they are calculated on.

Make sure that you load the same amount of data on your charts as the amount in your exploration options.

Chapter 7: Indicators & Plug-ins



What is the best indicator?

All indicators used are derived from five simple core pieces of information: OHLCV. It doesn't matter how complex the adaptation of these simple numbers, the fact remains that all indicators, all formulas, all explorations, all system tests, etc. rely on OHLCV data. To clarify, moving averages (adaptive or not) are based on this data, OBV is based on this data, RSI is based on this data, Bollinger Bands are based on this data, ATR is based on this data, etc.

What this means is that before you (or anyone else) tries to implement some fancy, all-singing, all-dancing trading system you must understand how the system is 'interacting' with these five core data elements. Take for example, a very smart person who realized the limitations of MetaStock rewrote an indicator so it worked faster. The code still looked for the same things: Price and MA crossovers, but was just presented in a slightly different way. It worked great because the number of calculations required was reduced.

Do you see the differences in the following code written by MG Ferreira?

```
C>Mov(C,20,S)
```

and:

```
C*20 > Cum(C)-Ref(Cum(C),-20)
```

It demonstrates the importance of fully understanding what the indicators mean, how they are derived and, finally, how they can be exploited. Every indicator has its capabilities and limitations. Before people make trading decisions based on indicators, they must take some time to really understand down what road they are sending their money.

Note: DO NOT blindly copy someone else's code and trade it, then complain when you lose! Beware of black box systems, and password protected indicators!

What about that plug-in?

People always ask if XYZ plug in works well ... the real problem is that any plug in would work great if you actually understood how it worked and if you had experience with it. If you knew what type of market and securities, if you knew the small details that would cancel a bad signal, etc ...

Study the plug-in, in such depth that you actually know as much about it as its creator; or, simply create your own. Now, creating your own plug in does not mean "yeah I will call it {your name here}'s plug in and sell it for gold". Instead, creating your own plug-in will actually make you study it as you develop it. As you are testing it, you will learn how it reacts to different markets and to different trends. As you find its short comings you will learn its personality and train yourself to recognize certain red flags.

The real point here is to say that training is the best thing you can get and since this forum aspires to be the best thing we can give to MetaStock users, check out the training section. You must be registered to see this section of the forum, but it is always free to our registered users.

How to assign colors to indicators

Here is an example to change the color of the price bar. However, it can be adapted to volume, etc.

```
x: =mov(c,21,s);
```

```
up: =if(x>ref(x,-1),x,0);  
dn: = if(x<ref(x,-1),x,0);  
flat: = if(x=ref(x,-1),x,0);  
up {color me green};  
dn {color me red};  
flat {color me black};
```

Buy and sell arrows show the wrong price?

The position of the buy and sell arrows have nothing to do with the purchase price of the buy and sell. The arrow simply tells you that a buy or sell condition has occurred on the current bar.

How do I create my own function?

Is it possible to create custom functions? I have many things I like to use in all my systems, and if they were functions I could just call them.

You could create indicators that would only represent a "function" and then use the formula call function to refer to it. For example, you can create an indicator called "test" that does a lot of calculations and then reuse it in all of your custom indicators like this: fml("test"), rather than retyping all the code again. This will however not pass any input you might have programmed in your original indicator and will use the default values.

Note: using the Fml() function does slow down the calculation of an indicator.

Working with password protected indicators

You can export your formulas, experts and indicators using the Organizer. One of the last steps in that process will be to add a password. Once you export to a folder, turn around and import it back. You will see that it is password protected.

When you try to edit the expert it will ask you for the password. If you do not want to have to type a password, you will have to recreate the Expert.

Note: you cannot un-password protect indicators that you did not create.

How to duplicate indicators

Search the User's Manual for the section titled "Recycling your work with templates". See also, saving a default template.

Plot into the future

Unfortunately, this cannot directly be done. An indicator cannot be plotted past the last point of data. However, a temporary solution to the "null plot beyond data series" problem:

- Right-click on the price chart
- Edit Data
- Highlight whole of last data row in The Downloader
- Copy & Paste above line into the next empty data row below
- Continue step #4 to create a synthetic data set into the future as needed
- Save & exit

How to stop redundant buy & sell signals

See the forum formula section.

How to save trend lines in a template

Make sure that 'use chart as template' is checked. Also, look at the Choose Security option and click 'use smart charts' under the option tab. Now you're dealing with each security on its on.

Chapter 8: Expert Advisor



How to eliminate error messages in the Expert Advisor

I have a 200-day EMA commentary in the Expert Advisor. The security that I loaded contains less than 200 bars of data. It results in this error message: *Error* Function did not return a value. How do I eliminate this error message?

```
writeif(lastvalue(cum(1))>200,"The 200 day EMA is at writeval(mov(c,200,e))", "")
```

The code uses the writeif() function to check the condition of lastvalue(cum(1))>200 which counts the number of bars in the open chart. If the last value of this is greater than 200 then there must be more than 200 bars of data in the chart. This makes the expression TRUE and the statement is printed to the screen with the value of the 200 day EMA. If there is less than 200 bars in the chart the output is nothing.

How to prevent multiple arrows from showing on the Expert Advisor

I just need one arrow to show at the initial entry point. Instead, every time my entry requirement is met, I get a new arrow.

Make sure to review training lesson 4 on latches:

```
buy: = c > mov(c,10,e);  
sell: = c < mov(c,10,e);
```

```
buy and barssince(ref(buy, -1)) > barssince(ref(sell, -1))
```

Can I write alerts to a text file?

This would require the MetaStock Developers Kit (MDK). Avail:

<http://www.Equis.com/Partners/Developers.aspx>

How to run the expert advisor on a portfolio of stocks

Unfortunately, this is not easily possible; Expert advisors are attached, so yes you could be *running* the expert on many, but you could only be *reading* one at a time... For example,

you could have the Equis MACD expert attached to all components of the DOW 30 running in real-time, but you could only read 1 at a time. So, if you're reading the 'IBM' commentary and then try to read 'MMM's commentary, 'IBM's commentary closes. You could print out the commentaries individually. Creating a layout with all your portfolio of stocks and attaching the expert to each and saving it, makes the process a one click operation.

Perhaps experts need not be attached to work. It appears that separate commentaries can be combined into one; see: <http://forum.equis.com/viewtopic.php?p=1471>

How to create alerts

You can use the 'expert alert editor' in the expert alert section to send emails, send pager alerts or phone calls. Here are 2 excellent examples:

<http://www.hayseedville.com//exalerts.htm>

<http://www.hayseedville.com//callalerts.htm>

Why do I keep getting the same alert over and over?

MetaStock sends a message every time the alert conditions is tested and found to be true. Normally, the alerts are tested for each tick that comes in. You can change it to be tested only after a bar is completed by changing the following option:

TOOLS | OPTIONS, under the real-time tab, uncheck the 'Recalculate Expert Live' option

How to display more than one Expert System

Method 1: If {Bullish} else {Bearish}

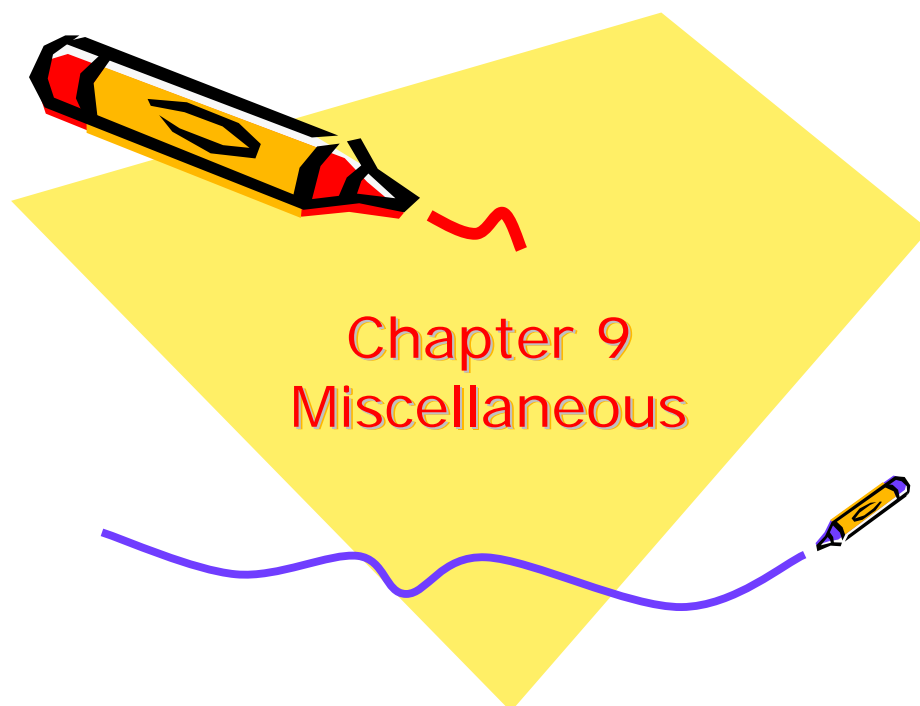
or this...

Method 2: If{Buy} else If{Sell} else {Neutral}

Then under the Highlights section, you can create another system to display.

Alternatively, you can create binary indicators, plot them in their own windows and change the colors, then save as a template.

Chapter 9: Miscellaneous



Candlestick characteristics

Candlesticks have different traits when an expert is attached. For example:

- Solid candles will show negative closes
- Hollow candles will show positive closes
- Colors will come from the highlights of an expert depending on the condition that is specified

Remember, candlesticks were created based on the relationship of the open and close of the same bar value. When the close is greater than the open, the bar is solid. When the close is less than the open, the bar was hollow. Colors were never important.

The colors you see for each bar is based on the color properties of the chart which allows you to set an up color and a down color... solid vs hollow has nothing to do with colors. If you set these up and down colors, the program will compare today's close to yesterday's close. If today's close is greater than yesterday's close then up color, else down color.

How to change the color of candlesticks

Follow this procedure:

- Start MetaStock and display a candlestick chart
- Click Format | Prices
- Set the UP and DOWN fields to black and click OK
- Click Tools | Expert Advisor
- Click New
- Click the Name tab
- Type Candlestick Color Change into the Name field
- Click the Highlights tab

- Click New
- Type UP CANDLE Into the name field
- Set the color to Green
- Type C>O into the Condition field and click OK
- Click New again
- Type DOWN CANDLE Into the name field
- Set the color to Red
- Type C<O into the Condition field and click OK
- Click OK to Close the Expert Editor menu
- Then click Attach to attach this Expert to the Chart
- The candlestick chart will now display Green and Red

How do I correct wrong opening prices with real-time data?

This seems to be a problem related to markets that have lunch breaks like Japan and Hong Kong. The candles are correct during the AM-Session and on the next day. But give the opening of the PM-Session as Opening for the day as soon as the PM-Session starts.

More discussion pending...

How to save chart as .gif or .jpg file

Right-click on picture and click copy. Then, open MS Paint or some similar program. Click edit, then paste or save as... and name it and change 'save as type' to jpg or gif.

How to sort Canadian stocks by industry

You might have to create the folders yourself. It will take some time, but is relatively simple using the downloader. Perhaps you are familiar with <http://www.investcom.com/>. The rest of the sector components are listed there under the S&P/TSX Canadian Sector Indices.

Why are there letters on my charts instead of buy and sell arrows?

You need to re-install the Equis True Type Font in Windows:

- Close MetaStock
- Click Start | Settings | Control Panel
- Double-click the Fonts icon
- Click on File | Install New Font
- In the lower, left corner, Change to the MetaStock program folder (usually C:\Equis\Mswin or C:\Program Files\Equis\MetaStock)
- Highlight Equis (True type) that will appear in the List of Fonts column and click OK
- Restart MetaStock and open your charts

Experiencing prolonged load times and system testing times

Consider the following:

- Delete all the experts you don't care about
- Close MetaStock and the downloader and do a search for ~msfl.* Delete all the files you find that way then try running your test again

Maximum number of intraday records

Is there anyway to increase the maximum number of intraday records? Currently, I can only store a history file of about 2weeks of intraday tick data.

The maximum number of records that MetaStock Pro can write to an intraday file is 65,532. This is the same limitation as Excel. Unfortunately, there is no way around it. Your only option is to create multiple files.

How to save line studies

In the lowest right hand corner of the screen is the 'choose security ' box. Make sure you have the 'keep line studies' feature checked. Also, consider setting up your line studies as a template. To do this, spend as much time as you need to make your chart exactly the way you want it to be. Then, right-click on it and select "save as default template". It will ask if you want to replace the existing template. Click on yes. From now on your line studies will appear on new charts.

Why does using zoom cause my chart indicator to move?

Your Moving Average may not be using the same scale as your Price Graph. You can change this as follows:

Right-click the moving average line and select 'scaling' from the menu that appears.

Now look at the price scale on your chart. Is it on the left of right of the screen?

The Scaling Menu for Moving Average will provide scaling options and you want to select a merge choice to merge with your price graph scale. For example if your price graph scale is on the right of the screen select merge with scale and right and click OK.

Once the moving average and the price graph are using the same scale the positions should remain the same when you zoom.

Note: if this doesn't work it could mean the smart chart for this chart is damaged. Replace the smart chart as follows:

Start MetaStock. Click FILE | NEW | CHART. Highlight the troublesome chart and click OK. Plot both Moving Averages in the new chart. If this works it means your original chart is damaged. Continue as follows:

Click FILE | SAVE AS... Smart Chart and click OK. A message will ask you want to replace your existing Smart Chart. Answer yes, then click FILE | CLOSE.

Why do the security names on the Chart not print?

The security name will not print if the name is too long. There are several ways to get the security name to print:

- Change the name of the security to a shorter name.
- When printing, change to a smaller font, File | Print | Page Setup | Header Footer.
- Right-click on chart, Chart Window Properties | Title. Change center to none to allow more space to print.

Indexing through stocks in full window mode

Ctrl + tab.

How to turn off grid lines

Right-click on the x-axis or y-axis and select properties. Remove the check mark on 'show grid' and click OK.

How to keep a text box visible on the chart

[Text disappears from some of my charts as soon as I hit enter, but is ok on others.](#)

If you plotted any of your indicators with the 'overlay without scale' option selected and typed your text near that indicator, your text will not be attached to a scale and will not be seen on your chart. When you type your text in a chart, it takes the nearest objects scaling.

So make sure that where you start typing is near an object that has a fixed scale, such as the prices. You can then drag the text box to the desired location. Otherwise, type your text away from any indicator/trend lines or price bar.

How to set default periodicity on template

Select 'use template's periodicity' in options after clicking on file open, open with template.

Switching between layouts

When you have 2 layouts (both with 3 charts) open at the same time, I can scroll through each chart with Ctrl-Tab. Is there a way to switch from layout 1 to layout 2?

Add two buttons to the custom toolbar- one for each layout. Then, with both layouts open, clicking a button brings the relevant layout to the front.

Why do some indicators appear erratically on the chart?

This will occur if the indicators are not merged to the right scale.

How to restore the workspace after making it full screen

- Close any open dialog boxes
- Press the Escape key to make sure that you are not in a pull down menu
- Hold down on the ALT-V
- This will open the View menu of the program
- Uncheck Full Screen

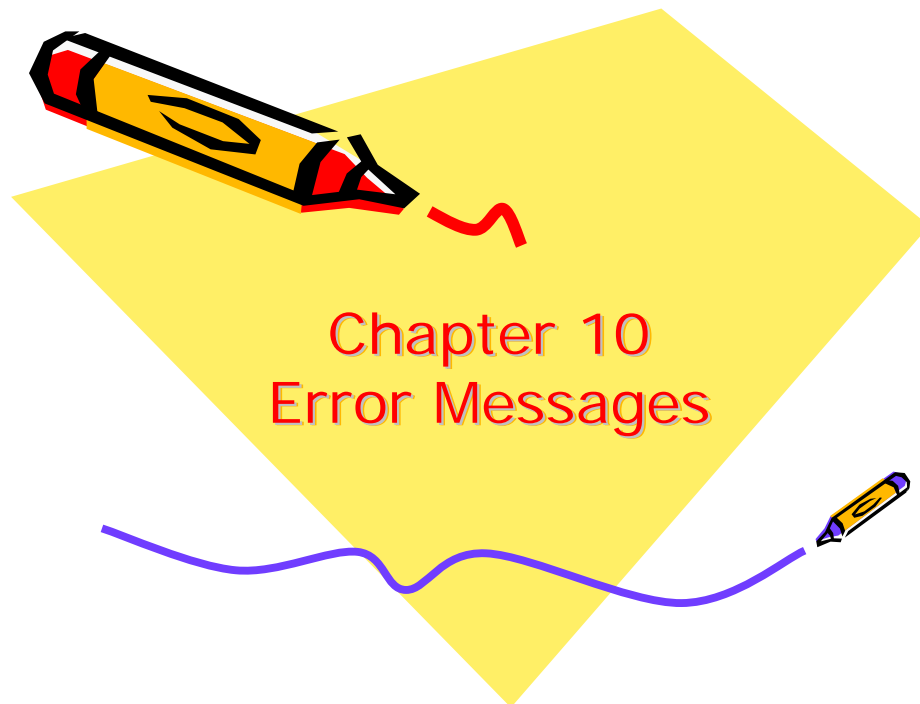
Adding functions to the custom toolbar

You can apply templates at the push of a button on the customizable custom toolbar. Also, you can add application links to programs such as NotePad which is really handy for editing formulas etc. Check in the User's Manual for further details.

MetaStock and dual CPU processors

MetaStock and most other software are not designed to take advantage of a dual processor setup. With that said, a computer of at least 2ghz p4 or AMD equivalent, 512mb DDR ram, 7200 rpm hard drive, 64 mb video accelerator card, and a high speed internet connection is sufficient for online trading and analysis.

Chapter 10: Error Messages



Error: JIT debugger failed

I just built a new indicator and when I tried to apply it, the indicator caused MetaStock to freeze. Up popped a message that said, 'JIT Debugger failed with the following error: Class not recognized. Please check the documentation topic 'Just-in-time debugging errors' for more information.'

It could be that the indicator is corrupted; or, that the MetaStock installation has become corrupted. The latter is more likely. For example, MetaStock installs its own .NET, Jet, JIT and various other frameworks. One of these frameworks could be interacting Visual Studio, Visual Basic, and/or Visual Web Development applications from Microsoft. Somehow, MetaStock's been corrupted and Visual Studio's JIT is trying to load up to debug the error. The solution will be to reinstall MetaStock.

Enhanced System Tester optimization error

When I run the System Tester with optimization variables, I get the following error:

Description: Invalid argument.
Build: 9.0
File: ST_RecordsetIterator.cpp
Line: 259
Error Type: 0
Error Code: 2

Ensure that you are using the OPT variables in the correct context. Check the User's Manual for examples.

Error: Function did not return a value

This message is really not an error- even though it says Error. It simply indicates that one of the functions written up in the commentary page or formula can't provide a value because it didn't receive all the data it needed to calculate it, or if there wasn't enough data present. For instance, a formula that required Volume would produce this error if the Expert

were attached to an Index chart, which typically doesn't have the Volume. It could also happen if the calculation needs the Open price to be available in a chart that doesn't have the Open price, or if a certain number of periods need to be loaded, and there are less than the required minimum.

Error: General protection fault in module DIBENG.DLL

Reference: <http://support.microsoft.com/support/kb/articles/q235/6/18.asp>

This error message can occur if an incompatible display driver is installed on the computer. To resolve this issue, set the display driver to use the 'Windows Standard VGA Display Driver' included with Windows; or, update the display driver for the video graphics adapter installed on your computer. To update the display driver, contact the manufacturer of your video adapter.

Error: Error code 10h

The 10h message is a printer driver error that means the printer driver is not resetting the Math Co-processor to handle its own exception errors.

Contact the manufacturer of the printer and get a different version of the printer driver. You may need to install an older version of the printer driver or install the generic driver provided in Windows for your printer, to see if it helps.

A work-around that has worked for many people is to open Microsoft Word, print a document, leaving the document open, and minimize Word. You can then continue to work in MetaStock.

Why does Mswin.exe hog my CPU resources?

After a while it just pegs itself in the 90% range even if I close all charts. A pop up reads "Warning! This application is having difficulty keeping up with current real-time data flow. Terminate any nonessential applications or reduce the number of real-time symbols being maintained by this application."

Click on TOOLS | OPTIONS | REAL-TIME | CONFIGURE SERVER | FILE UPDATES

Make sure you do not have any folders selected there. Also, check your Expert formulae for excessive use of the MetaStock PREV function.

Why should this folder be unchecked? Because all the securities in that folder are updating real-time, so if you happen to have 50 symbols in that folder, you have 50 securities that update real-time for every single tick of data. Most computers can only handle a handful of these securities, if even that.

Error: Cannot connect to MetaStock Community

If you have MetaStock 9.0 or below and have installed MS FrameWork 1.1 SP1 and cannot connect to the MetaStock Community then you will need to follow these instructions:

Download and extract the following zip file in your MetaStock folder (usually C:\Program Files\Equis\MetaStock): <http://forum.Equis.com/download.php?id=83>

Then click on Start, Run and type the following:

```
"C:\Program Files\Equis\MetaStock\Regasm" /codebase "C:\Program Files\Equis\MetaStock\MetaStock.community.dll"
```

This is all one command, copy and paste the whole thing- including the quotation marks.

Error: Please enter no more than 7 characters

- Go to Start | Settings | Control Panel
- Double-click the Modem icon
- Click On Dialing properties
- Completely erase the area code and phone number
- Enter only your local area code, for example 801 (7 characters or less)

Error: XMaster file is damaged

My CPU overheated and the MetaStock files that I was working on were damaged when the computer shut itself off. Once I got the computer back up, I copied the charts in my active trade's folder to a safe location, then reinserted the MetaStock Data CD. Once Installshield started I had an option to repair the data files. That worked. After updating the symbols again and d/l'ing the current data I'm back up.

How to handle a 'divide by zero' error

A divide-by-zero error will occur whenever there is a denominator in the formula that could end up having a value of zero (even if there is no chance it will ever happen), such as this sample

formula: $\text{Close}/(\text{High}-\text{Low})$

In this formula, if High-Low equates to zero (because the High and Low are equal), then a divide-by-zero error occurs.

To avoid divide-by-zero errors, the division that is giving the problem has to be identified and then rewritten to trap the zero, for instance, using the same sample formula above, we could do this:

Z: =If(H-L=0,.00001,H-L);

Close/(z);

Thus, when the zero would normally occur we substitute a value very near zero, .00001, to avoid the error. This does introduce a minimal, probably non-significant, error into the calculation, but it is often worth it.

What does the number stand for directly following the divide by zero error? It is the number of times that the calculation ran into the zero value.

Error: MSWIN has encountered a problem and needs to close

MetaStock 7.01 seems to randomly produce the following error message: 'MSWIN has encountered a problem and needs to close'. I then get an option to notify Microsoft or not. Unfortunately, MetaStock 7.01 is one of the buggiest releases to date. If you are registered, request the 7.03 update from Equis Support as soon as possible. In the mean time, try deleting all of the MetaStock temporary files. Search you hard drive for: ~msfl.*

Generic fix for general problems- TRY ME FIRST!

MetaStock and The DownLoader create temporary files during operation. It normally deletes these files when you close it, but if it is shut down improperly, these files may not have been deleted.

To delete these temporary files, do the following:

- Make sure that MetaStock and the DownLoader (and Servers if using Pro) are closed
- Click on Start | Find | Files or Folders (Or Search, depending on the version of Windows)
- For Named: type in ~MSFL.*
- Make sure the Look in field is set to C:\ (Assuming your data is stored on your C:\ drive)
- Make sure "Include subfolders" is checked
- Click on the find now button
- Once the ~MSFL files are found, click on Edit | Select All
- Click on File | Delete
- Start MetaStock again

System Tester- summary window not visible

Using MetaStock Pro 9.0, the Enhanced System Tester's summary window does not display the pie chart for disk usage nor does the Test View's Summary window display the bar chart. In their place is a small box with a red 'X' on the upper right corner.

Install the latest versions of Microsoft XML (version 3 SP5 and version 4 SP2, one does not replace the other). These are avail: www.microsoft.com/downloads. Just type XML in the keyword field. Also, in WinXP, make sure 'Teechart5.ocx' is registered. You can register the file by running: regsvr32 "C:\Windows\System32\teechart5.ocx".

Error: MSWIN.exe runtime error

Solution 1:

Hold the CTRL+SHIFT keys on your keyboard and at the same time start MetaStock. Click yes on all of the prompts.

Caution: Editing the registry may cause irreparable damage to software programs and data files. Equis assumes no responsibility for such losses.

Solution 2:

- Rename the Equis folder (c:\program files\Equis) to EquisOld
- Go to START | RUN | RegEdit | OK
- Delete the following registry entries:
- HKEY_CURRENT_USR\Software\Equis
- HKEY_LOCAL_MACHINE\Software\Equis
- Close the registry editor
- Reinstall MetaStock
-

Note: if you had custom formulae, charts, templates, layouts, you will have to import them from the EquisOld folder.

Error: Unable to enter password in Chinese

This is a Chinese Language pack issue.

FOR REUTER'S DATALINK

- Go to START | RUN | RegEdit | OK
- Go to HKEY_CURRENT_USER\Software\Equis\Common\Reuter's DataLink
- Double-click on the Reuter's DataLink folder, so on the right hand side you can see all the keys in that folder are listed.
- Right-click on the Password file and Left-click onto Modify
- Remove all the digits listed in Value Date and type in your password, in all upper case letters, in English

- Click OK

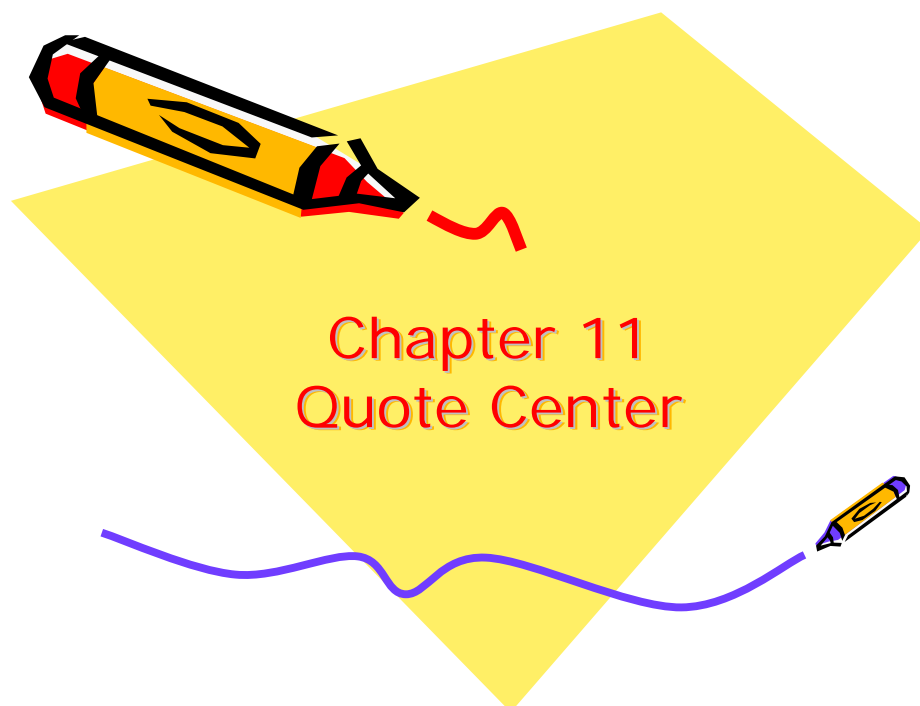
FOR QUOTE.COM

- Go to START | RUN | RegEdit | OK
- Go to HKEY_CURRENT_USER\Software\Equis\Common\8.0\Vendor\Qcharts (HKEY_CURRENT_USER\Software\Equis\Common\7.2\Vendor\Qcharts,if using version 7.21)
- Double-click onto the Qcharts folder, so on the right hand side you can see all the keys that are listed.
- Right-click on the Password file and Left-click onto Modify
- Remove all the digits listed in Value Data and type in your password, in all upper case letters, in English
- Click OK

NVidia display issues

- Install the most current drivers: <http://www.nVidia.com/content/drivers/drivers.asp>
- Right-click on the desktop and select PROPERTIES | SETTINGS | ADVANCED | TROUBLESHOOT to make sure your slider is set to full
- Try using a lower display resolution

Chapter 11: QuoteCenter



How to startup a QuoteCenter workbook

To automatically open up your last workbook, select VIEW | WORKSTATION SETTINGS | Checkbox 'Load Last Workbook on Startup'.

How to auto-save QuoteCenter workspaces

To automatically save your workspaces, select VIEW | WORKSTATION SETTINGS | Checkbox 'Auto Save Workspace Changes' or 'Auto Save Workspaces every xx Min'.

Working with custom QuoteCenter workspaces

There are a few different ways to create a new workspace. By far, the easiest is to use the FILE | NEW SPLITTER WORKSPACE command. This will allow you to EDIT | ADD DISPLAY and keep the windows within the workspace in proportion to the other worksheet displays. It's hard to explain, but easy if you can figure it out. Once you have added your first display, say MarketWatch, resize the MarketWatch window. Now, add a new display, say NewsWatch. See?! It will automatically fill in the remaining space on the worksheet. These windows can be resized without overlapping existing windows, Cool!

Managing the QuoteCenter splitter workspace

To create a new pane:

- From the File menu, select New Splitter Window or click
- Press and hold SHIFT
- Grab a horizontal or vertical pane border and drag to create a new pane

To resize a pane:

- Drag the pane border and release when at the desired size

To delete the pane:

- Right-click on the pane frame
- Select Delete Pane then Top/Bottom or Right/Left from the cascading menu

How to reorder QuoteCenter workspace tabs

- Right-click on a workspace tab
- Select Reorder tabs.... The Reorder Tabs dialog appears
- Drag the tabs to place them in desired order
- Click OK when done

How to omit QuoteCenter symbol prefixes

In order to enter a symbol without prefixing "us;" to it, click on the flag at the bottom of QuoteCenter and set the default country and vehicle class. If these are set to US and Corporate Class, you do not have to enter a prefix. e.g., typing SPX or us;SPX will give the same thing; typing '@ES.1' or 'us@ES.1' and get the same thing.

Using QuoteCenter symbols in EOD files

To download the most current data using QuoteCenter Symbols in the Downloader, you need to have QuoteCenter running in the background.

Forex data availability in QuoteCenter

Forex data is included with all QC data packages.

Dynamic Data Exchange (DDE) in QuoteCenter

Use the DDE to transfer real-time information to other applications such as Excel.

Note: QC must be running in the background for the worksheet to update.

[Click here for the DDE Guide](#)

[Click here for the DDE Excel Worksheet Example](#)

QuoteCenter derived fields

Derived Fields allow you to create your own custom-defined data fields. For example, you can subtract one field from another and define as your own name.

Notes: 1) Derived field indicators are created in the BF directory; and, 2) After deleting a derived field entry it will remain listed in the BF directory until QC is restarted.

[Derived Fields Tutorial](#)

QuoteCenter reports function

Even though it's documented in the F1 help file and available from TOOLS | REPORT, the feature is not enabled for use.

Working with symbol lists in QuoteCenter

A symbol list is a group of symbols created for use with multi-symbol services such as MarketWatch, NewsWatch, Quoteline and DynaQ. Only one version of the list needs to be maintained, regardless of the number of services in which the list is used. Therefore, edits to a symbol list in one service, change the list for all services where it is currently loaded. However, to permanently change the list, you must save it.

Create a symbol list

- Once symbols have been added to the service, right-click and select Symbol List > Save from the menu. The symbol list dialog will appear.
- Type a name for the new symbol list you have just created (symbol lists use the .BVL file extension)
- Click OK. The name appears on the service's title bar and the list is saved to a file.

Load a saved symbol list

All symbols currently entered in the service will be replaced using this method.

- Right-click in the service, select Symbol List > Load... from the menu. The Load Symbol List dialog appears.
- Select the name of the symbol list you want to use in the display
- Click OK

Editing symbol lists

- Select Symbol List > Edit... from the right-click menu. The Edit Symbol List dialog appears.
- To add a symbol, move the cursor to the point where you wish to insert a symbol. Type the new symbol and press Enter.
- To delete a symbol, select the symbol and press the Delete key.
- Click OK when finished editing the list. Note: You do not need to type source info.

Load Dynamic Symbol Lists

You are now able to download symbol lists that are stored in the Central System Portfolio Database such as index constituents, industry groups and sectors.

- Right click and select Load Chain from the menu
- Select either Real-time Ranking Lists or Central System Indices and Portfolios

Setting up QuoteCenter alerts

- Right-click on your chosen security or data field and select Alert from the menu
- From the Limit Alert tab of the Alert Editor, enter the information for the alert
- Click the Alert Information tab and select the desired alert notification methods
- Click OK

Setting primary exchange over composite in QuoteCenter

When this option is turned on, all quotations for the entire workstation are quoted from the prime exchange only. The ticker is still consolidated, but data elements that are exchange-specific are restricted to the prime exchange.

- Double-click on the country flag found on the status bar
- Select Show Primary Exchange over Composite checkbox
- Click OK

Saving styles of selected controls in QuoteCenter

A user can set the fonts, window position (for pop-ups), properties as well as commands. For example, if you want the time & sales service to always display just the last sale, volume, time, set the preferences then save that style. The user can have multiple styles for each service. Several styles are included by default with the installation.

To Save a Style for an embedded service:

- Set the service to how you want it displayed
- Click Edit on the menu bar
- Select Save Style of Selected Control
- Enter a name for the style (to set the style as your default, click the Set as Default check box)
- Click OK

To Save a Style for Pop-Up:

- Set the pop-up service to how you want it displayed.
- Right click on the services title bar and select Save as Default (or Apply Style to Pop-up). You can apply any saved style to a pop-up service by selecting from the Apply Style to Pop-up list available from the right-click menu)

Hotkeys in QuoteCenter

MetaStock QuoteCenter is installed with a set of pre-assigned Hot Keys for your use. These keys can be overwritten and you can make your own assignments using other keys. To see

the list of Hot Keys that come pre-assigned with your workstation, click Tools -> Hot Key Assignment from the menu bar.

When making Hot Key assignments, you can use functions keys and other key combinations using the Shift, Ctrl, and Alt keys. The default hot keys can be overwritten with new assignments, but cannot be removed. You can set the action of the hot key to perform one or more different actions.

To assign a hot key:

- Click Tools -> Hot Key Assignment...from the menu bar.
- When the Hot Key Assignment dialog appears, click on the New button.
- The Assign Hot Key dialog appears. Using your keyboard, enter the key combination you want to assign. Click OK.
- The Specify Actions dialog appears. Enter a description in the box provided at the top right. Select the style or command assignment from the scroll box on the left, and click the Assign>>> button.
- If required, click on the newly Assigned Action and select which symbol the service should use from the radio buttons in the lower left corner.
- Select additional actions as needed.
- Click OK then click Close and test your Hot Key.

Editing a hot key:

- Only hot keys you have assigned on your workstation can be edited. Hot Keys that come assigned with the workstation cannot be edited but can be overwritten by using the Assign a Hot key shown above.
- Open the Hot-Key Assignment editor under Tools -> Hot-Key Assignment...
- Select the hot key you want to alter and click the Edit button.
- Enter a new description in the box provided at the top right and make your required edits.
- Click OK, then close and test your Hot Key.

You may also use the Remove button to delete a hot key that you have created. If the key came pre-assigned with the workstation, the hot key will revert to the original assignment when you click remove.

Double-click assignments in QuoteCenter

MetaStock QuoteCenter allows you to quickly assign double-click actions to data fields. Double-click actions assigned to a data field will be universal for that field across all services. Two methods are available to assign a double-click:

Assign from Reuters Navigator

- Right-Click on the Reuters Navigator command that you want to assign
- Select Assign Double-Click...
- Pick a data field on which to make the assignment
- Click OK with the assignment has been completed

Assign from a Data Field

In our example, we will add a double click assignment to the symbol field in a MarketWatch display that will launch a ZoomDynaQ display.

- Within a MarketWatch, right click on the symbol field and select Assign Double-Click for: Symbol (FLD_SYMBOL). The menu item is context-sensitive and will indicate which field you have selected. If the field already has an assignment, you will be given the option to delete the current assignment.
- The Specify Actions dialog appears. Select an action Style or Command and click the Assign >>> button. In the example shown below the Style ZoomDynaQ Quick App has been selected.
- Select which symbol to use by when you double-click.
 - o Use Broadcast symbol will use the symbol in the Broadcast box.
 - o Use Double Click Symbol will use the symbol on which you double-click. This is the default option and will be used if not other selection is made.
 - o Always use this symbol allows you to set a specific symbols to use.
- Click OK to complete the assignment.

Visual links in QuoteCenter

Visual Linking is a powerful tool used to get quick access to frequently used data or features. The Visual Linking wizard makes it easy to enhance the functionality of services and to perform tasks with a single click of a button. No programming experience is necessary as the wizard automatically writes the code for you. It is important to note that setting a visual link will override double-click assignments for data in the display.

In the following example, we will show you how to link from a MarketWatch to an Athena chart. You can set multiple links to any service in your workspace.

- Click on the icon located on the Main toolbar
- Click and hold the left mouse button in the MarketWatch and drag the mouse into the Athena graph. Release the left mouse button.
- The Create a Link dialog box appears indicating the type(s) of link available. Select a chart type and click on the OK button to complete.
- Double-click on the symbol in MarketWatch. The mouse action sends the Visual Linking command to Athena to retrieve a chart for that symbol.

MarketWatch information symbols

What is the significance of the different colors used in the information (i) column? Do they represent levels of importance of current news? Just select HELP | INDICATOR LEGEND.

MarketWatch categories

This is perhaps one of the best features I have learned about to date. Before now, I was creating multiple MarketWatch lists on my workspace to track different groups of symbols. Not necessary...

Create a MarketWatch list of symbols. Say 6 symbols. Go to the first symbol and right-click SYMBOL | INSERT. Now, on the new empty line, press the SPACEBAR and enter a name for the group of symbols that follows. Say 'group 1'. Now, repeat this process by moving down to the middle of the list. Create a 'group 2'. You will find that you can sort, arrange, move the symbols in a group independently of the other groups.

Real-time ranking lists in QuoteCenter

In MarketWatch right-click and select LOAD CHAIN | REAL-TIME RANKING LISTS... then you will have a bunch of options to sort real-time market data. e.g., top \$ gainers, top % gainers, volume gainers, etc. The list is dynamic.

Once you have the symbols tracking, you can select what information you want to track. e.g., net gain, daily % change, EPS, P/E, etc. These parameters are customized under TEMPLATE | SELECT FIELDS.

U.S. Indices in QuoteCenter

To track U.S. indices in real-time: right-click on MarketWatch workspace | SYMBOL LIST | LOAD | US_INDICES | OK

S&P groups in QuoteCenter

This option will list groups only, not individual securities. To track general groups real-time: right-click on MarketWatch workspace | SYMBOL LIST | LOAD | NORTH_AMERICA | OK

Industry-specific chains in QuoteCenter

This option will list individual securities contained within a specific sector. To track a specific sector of stocks real-time: right-click on MarketWatch workspace | LOAD CHAIN | CENTRAL SYSTEMS | SEARCH e.g., S&P | OK

Note: to search just for S&P 500 sectors, type 'S&P 500' in search string and check 'Description begins with search string'. The search will only list 50 results at a time. To view additional results, continue clicking 'More' until the option is no longer available.

Setting the correct time in QuoteCenter

If you see a difference between the last time that a price is recorded on Athena and on the MarketWatch, you can correct the times by setting the properties of the time axis in Athena and by right-clicking on any workstation element, then PROPERTIES | DATALAYER. Under the Database tab there is a section called Time Zones. Select CUSTOM OFFSET and type in the GMT +/- time zone. For CST, it is -5.

Time axis compression in QuoteCenter

Right-click time axis | PROPERTIES | ATHENA BASIC | GENERAL

Fully Compressed: Discards periods with no data. A week of compressed daily data typically shows five periods, the weekends being discarded.

No Compression: Places gaps on the chart for periods with no data. A week of expanded daily data shows seven periods, regardless of holidays.

See the F1 help file for more information.

How to perform dynamic sorting in MarketWatch

Right-click | PROPERTIES | MARKETWATCH | RANK | AUTORANK
Check 'enable' and select your field.

This can then be saved as a template for future lists.

Function keys in Athena

While viewing an Athena chart, try pressing a function key e.g. F1. Functions can be assigned to perform an operation on the chart. To see the defaults or make your own assignments: right-click on Athena workspace | PROPERTIES | ATHENA | KEYMAPPING.

The 'lock' symbol in Athena

The lock symbol in the bottom right corner is a Auto-tracking Off notification. If you change the X Axis focus of the chart, to look at past data for example, new data will be suspended (the lock symbol is present). To return to active mode, select "Snap To Auto Tracking" from the Athena toolbar.

How to access the Athena Expert

Even though it's documented in the F1 help file, the feature is not enabled for use.

How to add a level line (and other chart indicators) in Athena

Note: This is an unsupported feature of QC Athena.

- Select 'add level line' on the toolbar
- Left-click on the chart where you want the line
- Right-click | Undo add marker | Right-click | Redo add marker...
Presto, the line will appear!
- Right-click line as usual to set properties
- Don't forget to turn off drawing mode

How to add a pane that shows the volume in Athena

Right-click | Add Price Display...

How to add chart studies in Athena

- Right-click on the chart to bring up the menu
- Select Add Analysis...
- Choose type of study and which pane to locate study using the option buttons
- Click the Next button
- Modify study properties, if required.
- Click Finish to draw the chart

Menu commands in NewsWatch

To bring up a list of NewsWatch commands, type a backslash '\' to bring up a dialog box for entering commands.

Semi-automatic updates in NewsWatch

- Create your own list in MarketWatch
- Press the link button on the tool bar
- Left click anywhere from within MarketWatch and drag the cursor into NewsWatch

Now, to see dynamic news related to one of your symbols, just double-click the symbol.

Note: Still searching for a way to do this with an entire list of symbols...

How to search for news stories in NewsWatch

Within the NewsWatch, right-click and select Search Wizard to show the Search dialog.

Search by symbol in NewsWatch

Click the Symbols button and enter a symbol or enter multiple symbols in the Include/Exclude columns or click the Symbol List button to select a saved list.

Search by keyword in NewsWatch

To narrow a search to include or exclude keywords or phrases, click on the Keywords button and enter text in the Search String edit box. If you want to add more than one keyword, use the following Boolean operators - and or not. Use the asterisk (*) as a wildcard. For complete phrases use 'quotes' around the phrase.

Search by source in NewsWatch

- Click on Wires/Cats...
- Double click on a source to show categories within the source
- Click a category, then >> button to search by a specific category
- Click OK
- Click Search to begin search. The latest 50 stories will be retrieved. The number of stories retrieved can be changed using the box in the lower left corner of the dialog box. After your stories are returned – to retrieve more, right-click and select Get next batch.

Selecting which NewsWatch wire services are displayed

The feature is not enabled for use... yet?

Saving fixed NewsWatch stories for quick retrieval

To set the default news story popup:

- Load the news story e.g., 01301 (corporate earnings calendar);
- Right-click the news story title bar and select SAVE AS DEFAULT;
- Retrieve using VIEW | POPUP CONTROLS | NEWS STORY.

To create a dedicated news story workspace:

- FILE | NEW SPLITTER WORKSPACE
- EDIT | ADD DISPLAY | NEWS STORY | OK
- Right-click on the workspace and select STORY NUMBER...
- Using the example above, type in 01301 | OK
- FILE | SAVE AS | type in the workspace name here
- FILE | SAVE WORKBOOK

How to populate a QuoteCenter Portfolio

Method 1:

You cannot link MarketWatch to Portfolio, but you can select MarketWatch entries (including labels/headers) by holding down the shift or ctrl key while left-clicking the mouse and then DRAG SELECTIONS into Portfolio. A copy will be created of all the symbols.

Method 2:

- Right click | Insert Group
- Fill in name and desc. and click OK
- Double click on the name (Internal Code)
- Right Click | Insert Symbol
- Fill-in the blanks (for short trades enter a negative number of shares)
- Can also right click and insert totals

How to keep track of the time that a security is held in the QuoteCenter Portfolio

No known method...

How to edit and create forms in QuoteCenter

In the C:\Program Files\Equis\QuoteCenter\FormDisplay Templates folder, you can open one of the .bfl files. You can look at one and hopefully see the layout. A " > " is a space...

How to adjust the scroll speed of the QuoteCenter Ticker symbols

Indirectly, look at the settings under 'filter options'. The more strict the exclusions, the fewer the updates you will receive.

What are the scrolling steps in QuoteCenter Ticker properties?

Pending...

How to bring up the QuoteCenter Analytics menu

From the Analytics command line, use the bracket key to bring up the Analytics menu e.g., "[menu".

Retrieving QuoteCenter historical fundamentals

A compendium of fundamental data and valuation ratios on companies are available through MetaStock QuoteCenter. Using the Reuters Navigator, double-click on the Fundamental/Performance Analysis folder. Select from company fundamentals pages such as Earnings Estimates Analysis, Institutional Holdings, Insider Trading Summary, Annual & Quarterly Balance Sheet and Income Statements, Financial ratios, Liquidity ratios, etc. Additionally, this data is available by double clicking on data fields throughout the system. A list of these Hot Links fields is provided in the appendix of this guide.

You can also get historical fundamental information by going into the Analytics window. This is a great resource for technicals, fundamentals, mutual fund history, bonds, etc. If you want to look at the historical fundamental information you would open a analytics window. You then simply type what symbol you want to look at. For example; bby (For best buy) and /f for fundamentals. So it would look like this bby/f.

With the great historical information you can go back further than the 4 years displayed. You would simply put bby/f/dat2000 or whatever date you want to be the first year displayed. You can go back as far as there is data available. This screen shows Revenue, EPS and DIV information.

Tracking mutual fund performance in QuoteCenter

I know you wouldn't expect a whole lot about mutual funds in a real-time product but, there is a lot of great information about them in QC. If you go into the Analytics screen you can get access to a lot of information there. You can get info like Beta, R Squared, Load or No Load, and admin costs.

If you open a new screen and want to look at mutual fund information then go to 'fund symbol/fnd' and you will get total return info and how the money is spread out amongst the fund; e.g., 92% equity and 8% cash.

A practical example:

- Pick a mutual fund such as: fgrix/fnd
- To see holdings of the fund: symbol/fnd/hld
- To see administrative information of the fund: symbol/fnd/adm
- To see contact information: symbol/fnd/add

What is ZoomDynaQ?

ZoomDynaQ is the display that gets Level II data.

How does eSignal data compare to QuoteCenter data?

Fundamentals

QuoteCenter has extensive fundamental and market data-- including items such as Financial Statements, Earnings Analysis, Index Membership, Corporate Actions, Dividend, Revenue & Earnings per Share information going back 5 years

eSignal has VERY limited fundamental data. There are basics such as PE ratios, but they do not offer access to Financial Statements or the other in-depth analysis and information that QuoteCenter offers.

History

Tick	QuoteCenter - 30 days	eSignal - 10 days
IntraDay	QuoteCenter - 250 days	eSignal - 180 days
Daily	QuoteCenter - 20+ years	eSignal - 10 years
Fundamental	QuoteCenter - 23 years	eSignal - limited

Quote Screens

QuoteCenter's Quote Screen, called MarketWatch has 700 data fields. You can get information as detailed as:

- Shares outstanding less insider controlled, treasury, and 5% owners
- Analyst comment lines 1, 2 & 3
- Capital expenditures for recently reported quarter
- EBITDA (earnings before interest, taxes, depreciation & amortization)
- Foreign exchange effects for recently reported quarter
- Insider buy & sell transactions
- Institutional shares bought/sold during preceding quarter
- MACD Spread
- Market Maker: 1
- Near 52 week high./low
- Number of employees
- Price to Book Value
- Tax rate: 5 year average

eSignal only has 110 data fields that do not go into the detail that is offered with QuoteCenter.

News

QuoteCenter offers the most comprehensive real-time news package available in the retail space. QuoteCenter comes standard with:

- PR Newswire & Businesswire
- Reuters Top News (not available with eSignal)

Available at an additional cost (not available with eSignal):

- Reuters North American Securities News (\$65/month)-- there is 3 years of history on this news. This service offers breaking news and analysis of the 1,500 largest US companies, accounting for more than 80% of US market capitalization and covers another 1,000 companies depending on market conditions.
- National News Services (\$45/month)-- these proprietary local language services help you make money by providing detailed news coverage of a country or region's companies, financial markets, macroeconomic indicators and government policy. It provides market-moving scoops and exclusives on companies, governments and markets written by local journalists with years of experience covering their subject and deep local knowledge.

eSignal offers in terms of news (all at an additional charge):

- Dow Jones News (\$115/month)
- PR Newswire (\$5/month)
- Fly on the Wall (\$25/month)

FOREX

QuoteCenter Forex data is included with all packages. There are templates and trading systems designed specifically for currency trading in MS Pro 9.1 & MS Pro FX. There is also a custom designed Forex workspace in the QuoteCenter program. There are roughly 800 banks that contribute to the FX quotes that are fed through QuoteCenter's datafeed.

eSignal charges an additional \$50 a month for Forex data, making the eSignal package with Forex data \$165/month. QuoteCenter with Forex data is still \$135/month. eSignal only has 194 contributing banks. There are no FX specific systems offered by eSignal.

Active Symbols

QuoteCenter comes with 500 active symbols; the upgrade to 1,000 is \$50/month. eSignal basic comes with only 200 active symbols. eSignal upgrades are available at the following prices:

- 500: + \$50
- 1000: + \$50
- 2500: + \$50

Dynamic Data Exchange (DDE)

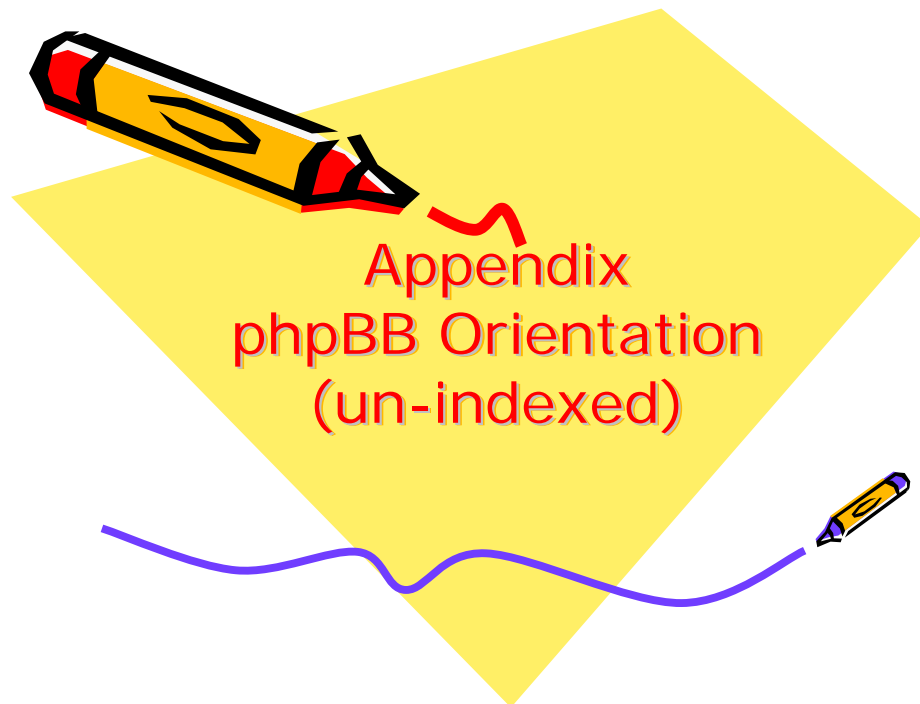
All 700 data fields available in QuoteCenter can be transferred directly to Excel where they will update in real-time.

List Management

QuoteCenter has incredible list management and access to extensive real-time ranking lists, including:

- Dollar Gainers
- Dollar Losers
- Money Flow Gainers
- Non Block Tick Volume Gainers
- Non Block Tick Volume Losers
- Percent Gainers
- Percent Losers
- Selected Percent Gainers
- Selected Percent Losers
- Tick Volume Gainers
- Tick Volume Losers
- Volume Gainers
- Volume Losers

Appendix: phpBB Orientation



Login and Registration Issues

Why can't I log in?

Have you registered? Seriously, you must register in order to log in. If you have registered and are not banned and you still cannot log in contact forumadmin@equis.com.

Why do I need to register at all?

To avoid hot linking and to protect registered users from spammers, you need to be registered to be able to download files, post questions on the forum. It only takes a few minutes to register so it is recommended you do so.

Why do I get logged off automatically?

If you do not check the 'Log me in automatically' box when you log in, the board will only keep you logged in for a preset time. This prevents misuse of your account by anyone else. To stay logged in, check the box during login. This is not recommended if you access the board from a shared computer, e.g. library, internet cafe, university cluster, etc.

How do I prevent my username from appearing in the online user listings?

In your profile you will find an option 'Hide your online status'; if you switch this on you'll only appear to board administrators or to yourself. You will be counted as a hidden user.

I've lost my password

Don't panic! While your password cannot be retrieved it can be reset. To do this go to the login page and click 'I've forgotten my password'. Follow the instructions and you should be back online in no time.

I registered but cannot log in

First check that you are entering the correct username and password. If you are sure the login info used is valid then send an email to forumadmin@equis.com.

I registered in the past but cannot log in anymore

The most likely reasons for this are: you entered an incorrect username or password (check the email you were sent when you first registered) or the administrator has deleted your account for some reason. If it is the latter case then perhaps you did not post anything? It is usual for boards to periodically remove users who have not posted anything so as to reduce the size of the database. Try registering again and get involved in discussions.

User Preferences and settings

How do I change my settings?

All your settings (if you are registered) are stored in the database. To alter them click the Profile link (generally shown at the top of pages but this may not be the case). This will allow you to change all your settings.

The times are not correct

The times are almost certainly correct; however, what you may be seeing are times displayed in a time zone different from the one you are in. If this is the case, you should change your profile setting for the time zone to match your particular area, e.g. London, Paris, New York, Sydney, etc. Please note that changing the time zone, like most settings, can only be done by registered users. So if you are not registered, this is a good time to do so, if you pardon the pun!

I changed the time zone and the time is still wrong

If you are sure you have set the time zone correctly and the time is still different, the most likely answer is daylight savings time (or summer time as it is known in the UK and other places). The board is not designed to handle the changeovers between standard and daylight time so during summer months the time may be an hour different from the real local time.

My language is not in the list

The most likely reasons for this are either the administrator did not install your language or someone has not translated this board into your language. Try asking the board administrator if they can install the language pack you need or if it does not exist, please feel free to create a new translation.

How do I show an image below my username?

There may be two images below a username when viewing posts. The first is an image associated with your rank; generally these take the form of stars or blocks indicating how many posts you have made or your status on the forums. Below this may be a larger image known as an avatar; this is generally unique or personal to each user. It is up to the board administrator to enable avatars and they have a choice over the way in which avatars can be made available. If you are unable to use avatars then this is the decision of the board admin and you should ask them their reasons (we're sure they'll be good!)

How do I change my rank?

In general you cannot directly change the wording of any rank (ranks appear below your username in topics and on your profile depending on the style used). Most boards use ranks to indicate the number of posts you have made and to identify certain users. For example, moderators and administrators may have a special rank. Please do not abuse the board by posting unnecessarily just to increase your rank -- you will probably find the moderator or administrator will simply lower your post count.

Posting Issues

How do I post a topic in a forum?

Easy -- click the relevant button on either the forum or topic screens. You may need to register before you can post a message. The facilities available to you are listed at the bottom of the forum and topic screens.

How do I edit or delete a post?

Unless you are the board admin or forum moderator you can only edit or delete your own posts. You can edit a post (sometimes for only a limited time after it was made) by clicking the edit button for the relevant post. If someone has already replied to the post, you will find a small piece of text output below the post when you return to the topic that lists the number of times you edited it. This will only appear if no one has replied; it also will not appear if moderators or administrators edit the post (they should leave a message saying what they altered and why). Please note that normal users cannot delete a post once someone has replied.

How do I create a poll?

Creating a poll is easy -- when you post a new topic (or edit the first post of a topic, if you have permission) you should see a Add Poll form below the main posting box. If you cannot see this then you probably do not have rights to create polls. You should enter a title for the poll and then at least two options -- to set an option type in the poll question and click the Add option button. You can also set a time limit for the poll, 0 being an infinite amount. There will be a limit to the number of options you can list, which is set by the board administrator.

How do I edit or delete a poll?

As with posts, polls can only be edited by the original poster, a moderator, or board administrator. To edit a poll, click the first post in the topic, which always has the poll associated with it. If no one has cast a vote then users can delete the poll or edit any poll option. However, if people have already placed votes only moderators or administrators can edit or delete it; this is to prevent people rigging polls by changing options mid-way through a poll.

Why can't I access a forum?

Some forums may be limited to certain users or groups. To view, read, post, etc. you may need special authorization which only the forum moderator and board administrator can grant, so you should contact them.

Why can't I vote in polls?

Only registered users can vote in polls so as to prevent spoofing of results. If you have registered and still cannot vote then you probably do not have appropriate access rights.

Formatting and Topic Types

What is BBCode?

BBCode is a special implementation of HTML. Whether you can use BBCode is determined by the administrator. You can also disable it on a per post basis from the posting form. BBCode itself is similar in style to HTML: tags are enclosed in square braces [and] rather than < and > and it offers greater control over what and how something is displayed. For more information on BBCode see the guide which can be accessed from the posting page.

Can I use HTML?

That depends on whether the administrator allows you to; they have complete control over it. If you are allowed to use it, you will probably find only certain tags work. This is a safety feature to prevent people from abusing the board by using tags which may destroy the layout or cause other problems. If HTML is enabled you can disable it on a per post basis from the posting form.

What are smilies?

Smilies or Emoticons, are small graphical images which can be used to express some feeling using a short code, e.g. :) means happy, :(means sad. The full list of emoticons can be seen via the posting form. Try not to overuse smilies though, as they can quickly render a

post unreadable and a moderator may decide to edit them out or remove the post altogether.

Can I post images?

Images can indeed be shown in your posts. However, there is no facility at present for uploading images directly to this board. Therefore you must link to an image stored on a publicly accessible web server, e.g. <http://www.some-unknown-place.net/my-picture.gif>. You cannot link to pictures stored on your own PC (unless it is a publicly accessible server) nor to images stored behind authentication mechanisms such as Hotmail or Yahoo mailboxes, password-protected sites, etc. To display the image use either the BBCode [img] tag or appropriate HTML (if allowed).

What are announcements?

Announcements often contain important information and you should read them as soon as possible. Announcements appear at the top of every page in the forum to which they are posted. Whether or not you can post an announcement depends on the permissions required, which are set by the administrator.

What are sticky topics?

Sticky topics appear below any announcements in view forum and only on the first page. They are often quite important so you should read them where possible. As with announcements the board administrator determines what permissions are required to post sticky topics in each forum.

What are locked topics?

Locked topics are set this way by either the forum moderator or board administrator. You cannot reply to locked topics and any poll contained inside is automatically ended. Topics may be locked for many reasons.

User Levels and Groups

What are Administrators?

Administrators are people assigned the highest level of control over the entire board. These people can control all facets of board operation which include setting permissions, banning users, creating user groups or moderators, etc. They also have full moderator capabilities in all the forums.

What are Moderators?

Moderators are individuals (or groups of individuals) whose job it is to look after the running of the forums from day to day. They have the power to edit or delete posts and lock, unlock, move, delete and split topics in the forum they moderate. Generally moderators are there to prevent people going off-topic or posting abusive or offensive material.

What are user groups?

User groups are a way in which board administrators can group users. Each user can belong to several groups (this differs from most other boards) and each group can be assigned individual access rights. This makes it easy for administrators to set up several users as moderators of a forum, or to give them access to a private forum, etc.

How do I join a user group?

To join a user group click the user group link on the page header (dependent on template design) and you can then view all user groups. Not all groups are open access -- some are closed and some may even have hidden memberships. If the board is open then you can request to join it by clicking the appropriate button. The user group moderator will need to approve your request; they may ask why you want to join the group. Please do not pester a group moderator if they turn your request down -- they will have their reasons.

How do I become a user group moderator?

User groups are initially created by the board administrator who also assigns a board moderator. If you are interested in creating a user group then your first point of contact should be the administrator, so try dropping them a private message.

Private Messaging

I cannot send private messages

The forum administrator has disabled private messaging for the entire board.

phpBB 2 Issues

Who wrote this bulletin board?

This software (in its unmodified form) is produced, released and is copyrighted phpBB Group. It is made available under the GNU General Public License and may be freely distributed; see link for more details.

Why isn't X feature available?

This software was written by and licensed through phpBB Group. If you believe a feature needs to be added then please visit the phpbb.com website and see what the phpBB Group has to say. Please do not post feature requests to the board at phpbb.com, as the Group uses Source Forge to handle tasking of new features. Please read through the forums and see what, if any, our position may already be for features and then follow the procedure given there.

Whom do I contact about abusive and/or legal matters related to this board?

You should contact the administrator of this board. ForumAdmin@equis.com.

Attachments

How do I add an attachment?

You can add attachments when you post a new post. You should see an 'Add an Attachment' form below the main posting box. When you click the Browse button the standard Open dialogue window for your computer will open. Browse to the file you want to attach, select it and click OK, Open or double-click according to your liking and/or the correct procedure for your computer. If you choose to add a comment in the 'File Comment' field this comment will be used as a link to the attached file. If you haven't added a comment the filename itself will be used to link to the attachment. If the board administrator has allowed it you will be able to upload multiple attachments by following the same procedure as described above until you reach the max allowed number of attachments for each post.

The board administrator sets an upper limit for file size, defined file extensions and other things for attachments on the board. Be aware that it's your responsibility that your attachments comply with the boards acceptance of use policy, and that they may be deleted without warning.

Please note that the forums owner, webmaster, administrator or moderators can not and will not take responsibility for any loss of data.

How do I add an attachment after the initial posting?

To add an attachment after the initial posting you'll need to edit your post and follow the description above. The new attachment will be added when you click Submit to add the edited post.

How do I delete an attachment?

To delete attachments you'll need to edit your post and click on the 'Delete Attachment' next to the attachment you want to delete in the 'Posted Attachments' box. The attachment will be deleted when you click Submit to add the edited post.

How do I update a file comment?

To update a file comment you'll need to edit your post, edit the text in the 'File Comment' field and click on the 'Update Comment' button next to the file comment you want to update in the 'Posted Attachments' box. The file comment will be updated when you click Submit to add the edited post.

Why isn't my attachment visible in the post?

Most probably the file or Extension is no longer allowed on the forum, or a moderator or administrator has deleted it for being in conflict with the forums acceptance of use policy.

Why can't I add attachments?

On some forums adding attachments may be limited to certain users or groups. To add attachments you may need special authorization, only the forum moderator and board admin can grant this access, you should contact them.

I've got the necessary permissions, why can't I add attachments?

The board administrator sets an upper limit for file size, file extensions and other things for attachments on the board. A moderator or administrator may have altered your permissions, or discontinued attachments in the specific forum. You should get an explanation in the error message when trying to add an attachment, if not you might consider contacting the moderator or administrator.

Why can't I delete attachments?

On some forums deleting attachments may be limited to certain users or groups. To delete attachments you may need special authorization, only the forum moderator and board admin can grant this access, you should contact them.

Why can't I view/download attachments?

On some viewing/downloading forums attachments may be limited to certain users or groups. To view/download attachments you may need special authorization, only the forum moderator and board admin can grant this access, you should contact them.

Who do I contact about illegal or possibly illegal attachments?

You should contact the administrator of this board. If you cannot find who this is you should first contact one of the forum moderators and ask them who you should in turn contact. If you still get no response you should contact the owner of the domain (do a whois lookup) or, if this is running on a free service (e.g. yahoo, free.fr, f2s.com, etc.), the management or abuse department of that service. Please note that phpBB Group has absolutely no control and cannot in any way be held liable over how, where or by whom this board is used. It is absolutely pointless contacting phpBB Group in relation to any legal (cease and desist, liable, defamatory comment, etc.) matter not directly related to the phpbb.com website or the discrete software of phpBB itself. If you do email phpBB Group about any third party use of this software then you should expect a terse response or no response at all.

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