User Guide

for

MetaStock Data & MetaData Manager

(Powered by PrimeCharts)

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PrimeCharts

Introduction

Welcome to the MetaStock Data and MetaData Manager User Guide. Thank you for choosing *the* stock market data solution. This guide will cover the how-to of:

▸   Installing the software

▸   Getting started

▸   Accessing your data in MetaStock

▸   Keeping your data up-to-date

▸   Using our MetaData Manager to optimise the data you have available inside MetaStock

▸   Integrating Web-provided data for intraday price updates of most exchanges

New Features

Intraday Web Updates
No matter what version of MetaStock you have, you can now receive intraday Web updates on the latest bar of your daily data. This enables you to get in earlier on a trade, or lock in profits by closing a trade during the day. This is highly preferable to waiting until the end-of-day updates to check for signals, and acting on these only the following trading day. The updates are delayed by approximately 15 to 30 minutes - exchange dependant.

More exciting features discussed overleaf ...

Security Management
Stock exchange items are now listed alphabetically by sector and series. A Series is a custom list of securities that you can maintain. So you could, for example, create a series of the securities you own, or that you are interested in buying. This makes navigating securities in MetaStock much easier.

The strongest feature of the MetaData Manager application is the ability to organise the available data in a format that makes locating and charting securities the easiest for you. Due to MetaStock's limited folder management capabilities, many programs just have all the data in a single folder, or in a set of A-Z folders based on the starting character of the security. We provide these options, along with providing the data in a number of pre-defined folders (or series) and a number of user defined series you can create yourself.

The pre-defined folders are based on the stocks that make up popular indices and many users limit their choice to the constituents of such indices. As part of the pre-defined series, we also have market sector lists (see Section 4.1 How MetaStock Data Is Organised).

Auto Update Duration
The new security management feature lets you select many combinations of securities. You can have securities in folders listed alphabetically, in folders by market sector, in folders based on various key indices and in a number of custom folders. As these multiple folders duplicate the number of copies of various securities (e.g. you may have a security in the Alphabetic folder, in the Sector folder, in two different indices folders and in one of your custom folders – 5 copies of this security are on your hard disk), you can now choose which folders to update. The more you choose, the longer your update process takes and the more hard disk space you use. If this is not a consideration, you can select all options and have maximum convenience in locating securities.

1.0 Installing MetaStock Data Utilities - including MetaData Manager

1. On the computer on which you wish to install the MetaStock data utilities open your internet browser, go to http://online.primecharts.com and log in. If you have not set up a PrimeCharts Online account, click on the Set Up New Account link to do so.

2. Once logged in to the PrimeCharts Online Web site navigate to the Downloads tab and download the iSetup tool to your computer desktop.

    Of the two links available on our Web site the compressed (.zip) format will provide a quicker download as the file size is smaller. If you are not experienced in unzipping compressed files, and your Internet security allows you to do so, then rather download the executable (.exe) file.

3. When you click on the download link you will be prompted to Run, Save or Cancel. Select Save and save the iSetup file to your computer desktop. If you downloaded the zipped form of iSetup, then unzip its contents to your computer desktop.

4. You will need a serial number and password for the installation using the iSetup tool. You can obtain all your latest serial numbers from the Serial Numbers quick-link on the left of the Home Page (once you have logged in). This is the first screen you see after logging into the online site. You will be e-mailed your serial number/s and password.

5. If you have not already done so, select the PDF Manuals tab and download the PrimeCharts Installation Guide! Download any other documents that may be relevant.

6. Follow the instructions in the PrimeCharts Installation Guide to ensure your MetaStock data utilities are installed correctly using the iSetup Tool.

2.0 Getting Started

After installing your MetaStock data utilities using iSetup, your computer Desktop will have the following new icon shortcuts:

Auto Update (meta)
Run this program to automatically download and update any outstanding days' data. Copy this shortcut to your Startup folder to automate the download and update process each time you switch on your PC. Alternatively, just click on this icon when you wish to download and update any outstanding data - see Section 3.0 Keeping Your Data Up-To-Date.

Auto Update(meta)

iModem (meta)
Used by Auto Update to fetch data from EasySoft-INDS via the Internet. You can also use this program to do Program Refreshes over the Internet.

iModem(meta)

MetaData Manager
Used to control what data is updated and how it is organised. Also used to select and control your intraday Web updates should you use this feature.

Metadata Manager

You may also access these programs from your computer's Start program menu by navigating Start-All Programs-PrimeCharts and clicking on the various shortcuts, that should resemble the list shown below.
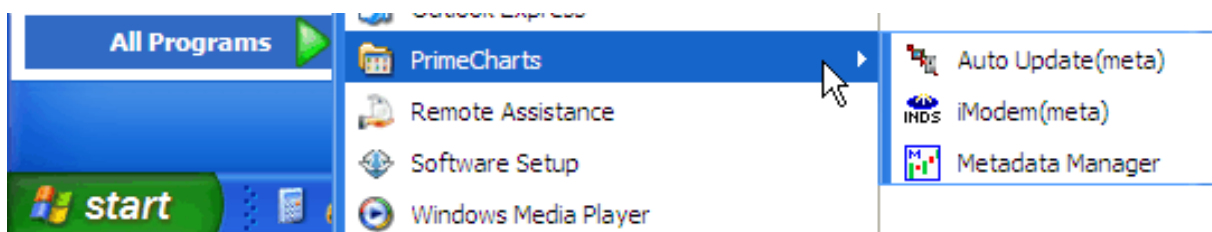
3.0 Keeping Your Data Up-To-Date

It is important that your stock exchange data be updated on an on-going basis so that the charts you view contain the very latest data. This is accomplished from anywhere in the world, using the Internet, via a daily update from EasySoft-INDS. The mechanics of doing this are described in detail in our Data Update Guide. To view this guide login to the PrimeCharts Online Web site and navigate to the Documentation tab.

http://Online.PrimeCharts.com/

The daily-data service and intraday updates are provided on a monthly subscription basis. The cost, along with payment options, for the stock exchanges you wish to analyse will have been indicated when you obtained our software.

If you are using the software on an initial trial basis, you will have been provided with a complimentary subscription to this service so that you can fully test the software in a real life environment. At the end of your trial period, should you wish to continue updating your stock exchange data, you will need to subscribe to the desired stock exchange/s via us.
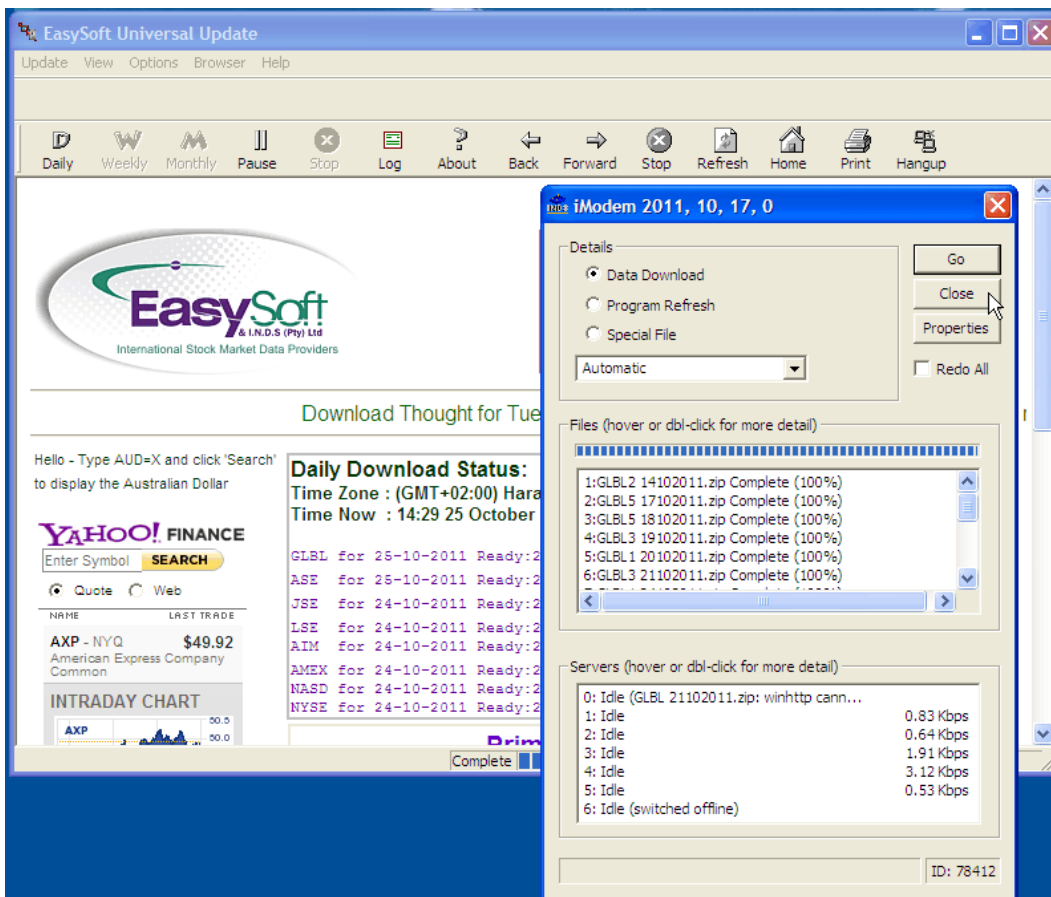
4.0 Using MetaData Manager

You can use the MetaData Manager application to:

▸   group your securities into easy-to-manage series,

▸   select which database folders to update, and,

▸   select which securities are to be updated intr-day - during the trading day.

Before going through the steps to launch, navigate and use your MetaData Manager please read the following section under the heading: **How MetaStock Data Is Organised**. This section will inform your use of MetaData Manager.

4.1 How MetaStock Data Is Organised

The historical data is by default installed in the metadata folder on your computer's C drive. The data for each exchange is stored in the appropriate sub-folder of the metadata\sx folder. For example:

▸   Data for the London Stock Exchange (LSE) is stored in the 'c:\metadata\sx\UK' folder; and,

▸   Data for the Johannesburg Stock Exchange (JSX) is stored in the 'c:\metadata\sx\JSX' folder.

Data for each security can be stored in multiple locations off the exchange folder. The master folder per exchange is the A-Z folder, which stores the list of securities in alphabetical order. For example:

▸   the Barclays security on the London Stock Exchange would be stored in the A-Z-LSE\B folder - its full folder address being: c:\metadata\sx\UK\A-Z-LSE\B; and,

▸   the Nedbank security on the Johannesburg Stock Exchange would be stored in the A-Z\N folder - its full folder address being: c:\metadata\sx\JSX\A-Z\N.

You would find Billabong in the ASX exchange at the following folder address: c:\metadata\sx\ASE\A-Z\B; and, Microsoft in the USA at c:\metadata\sx\USA\A-Z-NASDAQ\M.

Note: The securities would be visible from within your MetaStock program using the folder browse functionality. Individual security names would not be visible when viewing folder structures in your Windows folder browser.

The securities can also be stored by sector in the Sectors folder. For example:

▸   Barclays would be in the Sectors - LSE\Financials folder, along with all the other banking securities; and,

▸   Nedbank would also be in the Sectors\Financials folder, along with all the other banking securities.

Stock exchanges list certain securities in exchange-specific categories, for example, the FTSE 100. The MetaData Manager application allows you to store such pre-defined series of securities for easy reference.

You may wish to keep one or more custom lists of securities ... perhaps items on your watchlist, or holdings in your portfolio. You can use the MetaData Manager application to set up these series, which will then be in the Series subfolder. For example, if you created a series called 'My Shares', it would be located in the 'C:\metadata\sx\UK\Series\My Shares' subfolder. The advantage of creating such a subfolder? When you chart one of these items in MetaStock you can navigate to the next one by simply pressing the Right-Arrow command on the base of the chart. This saves time and effort required to open a security via the usual file-browse method. Additionally, you can quickly select this series to receive intraday Web price updates.

> *It is not necessary to update all securities in all folders. If you do not use a certain folder then you can simply switch off updating the items therein. This would speed up the processing time for the Auto Update program.*
>
> *A master copy of each security is held in the A-Z data folders. When you switch off the update of items in Sectors and Series folders these items are deleted from the database. If you choose these items for update at a future stage, a copy is made from the always-updated A-Z data and placed in the relevant folder structure.*

4.2 Activating and De-Activating MetaData Manager

1.   Navigate to your computer Desktop. If your MetaData Manager icon is not on your computer desktop, then use your Windows Start menu to navigate to the MetaData Manager program.

2.   Open and initiate the MetaData Manager program by double clicking on the icon (or selecting it from your Start menu).

Metadata Manager

The following window will appear and initiate MetaData Manager. Until you de-activate MetaData Manager it will actively ensure your selected intraday data is kept up-to-date.
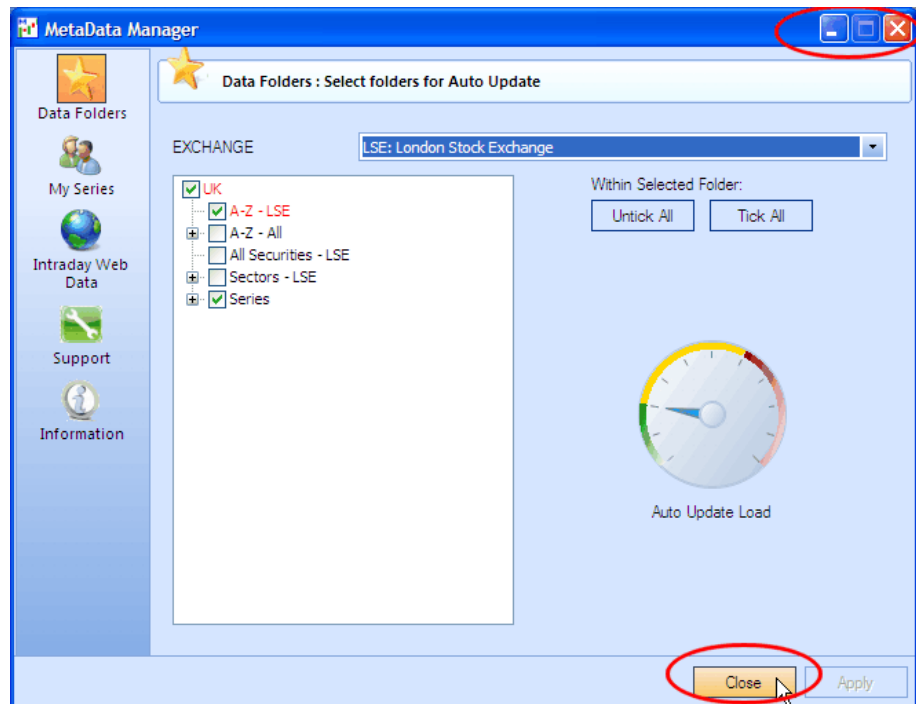
3.   Click **Close** (or Minimise) to minimise and keep MetaData Manager active/running in the background. (Buttons circled in red.)

The MetaData Manager icon will remain in the notification area of your computer taskbar (next to the PC time) as long as MetaData Manager is running.

4. If you try to open and initiate the MetaData Manager program by double clicking on the icon (or selecting it from your Start menu), but it is already open and running, then the following message will appear.
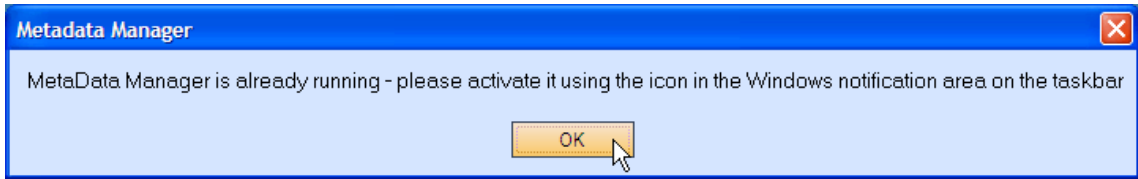
5. If MetaData Manager is open, but minimised, you can maximise the window to work in MetaData Manager. Double-click on the MetaData Manager icon in the notification area of your taskbar, or right-click on the icon and select **Open**.
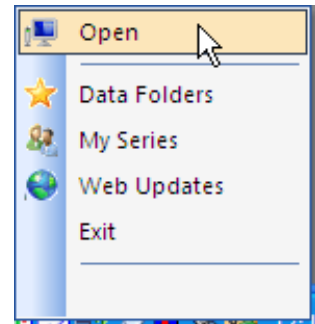
6. To de-activate MetaData Manager, i.e. to shut down the intraday data update process, right-click on the MetaData Manager icon in the notification area of your taskbar and select **Exit**.
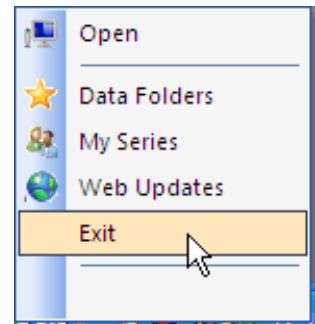
4.3 Choosing Which Folders To Update

1. Run MetaData Manager. If it is already running you may need to double-click on its icon in the notification area of your taskbar.

2. **Choose** the **stock exchange** you want to adjust in the list box at the top of the Data Folders page.
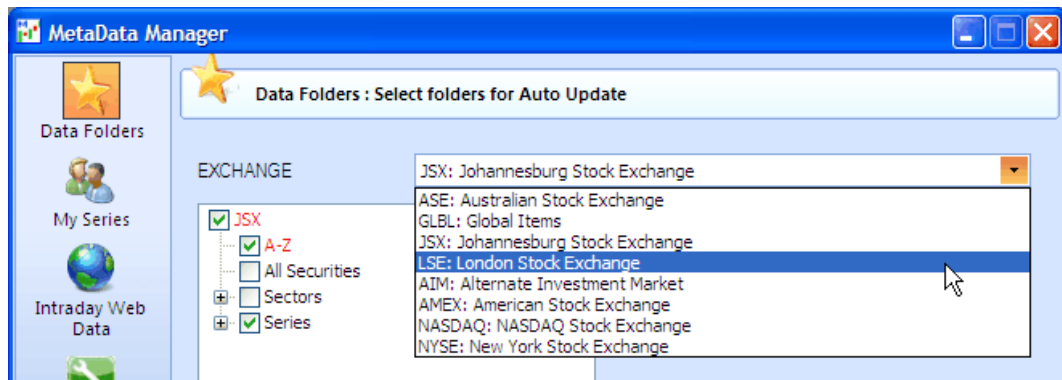
3. **Choose** which folders you wish to update by ticking the boxes in the **Sectors** and Pre-defined **Series** lists.

 If you wish to update just one or two sub-folders, for example, Financials under Sectors, you need to tick both the main folder 'Sectors' (see red circle in the picture) and the sub-folder 'Financials'. If you do not wish to update any sub-folders simply un-tick the main folder (e.g. Sectors) and none of the sub-folders (e.g. Financials) will be updated, whether they are ticked or not.

 Note: Once you have created a personal series containing at least one security it will be listed and may be selected for auto update.

PrimeCharts
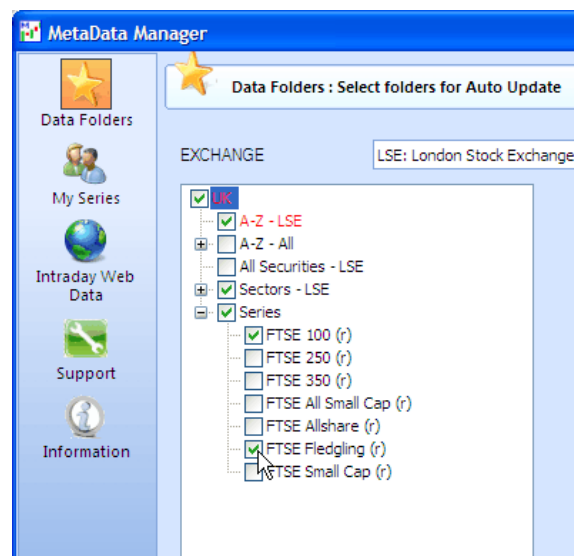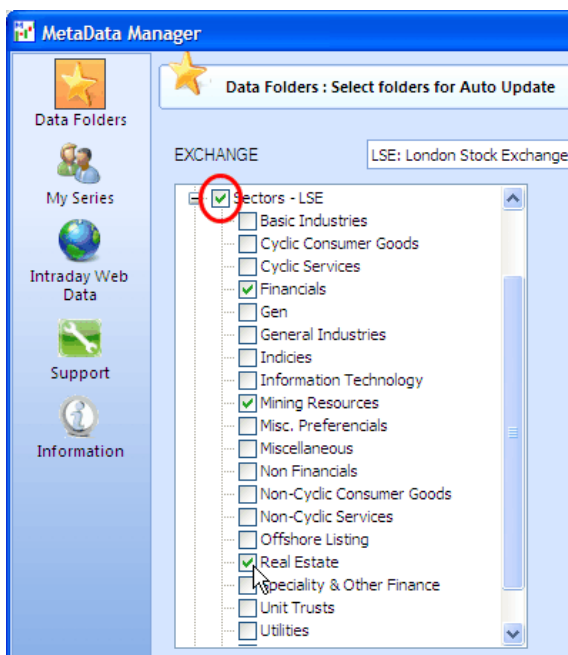
4.   If you wish to tick a folder and all its sub-folders, click on the **folder** to **highlight** it and click the **Tick All** button.
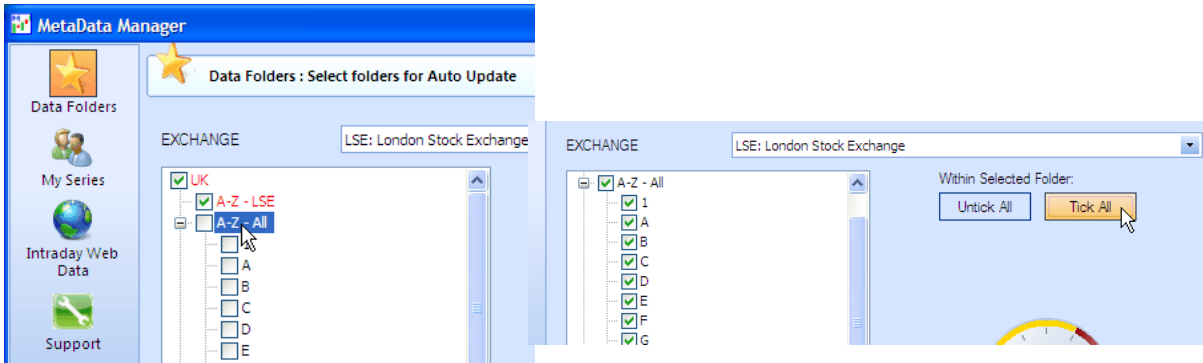
5.   After you have finished adding new folders by ticking extra boxes click **Apply** to make the data in the new folders accessible to Metastock. This will also ensure that the newly added folders are part of the daily auto update process.

Note: When adding many folders, for example to the Sectors folder structure, the process may take some time and it would not be practical to attempt to access any of these folders in your MetaStock program until the build process has finished.

The **Auto Update Load** dial indicates the increase or decrease based on the folders added or removed. The larger arrow indicates the existing load and the smaller arrow indicates the proposed load when the folder selection has been applied. (Arrows circled in red in this example)

![PrimeCharts logo]
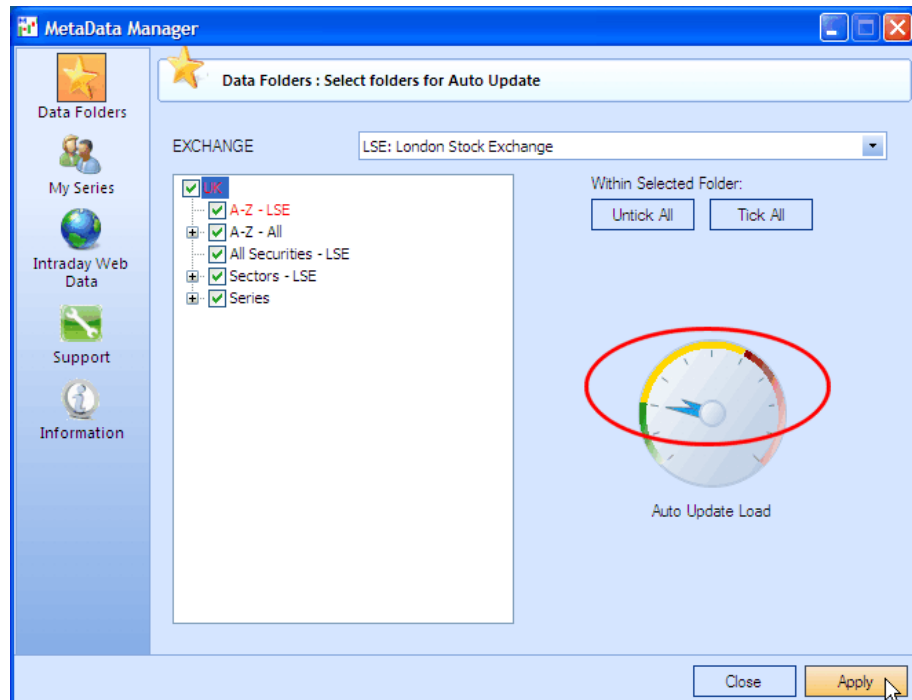
4.4 Managing Pre-Defined and Your Own Series

1.   Run MetaData Manager. If it is already running you may need to double-click on its icon in the notification area of your taskbar.

2.   Click on the My Series icon within MetaData Manager.
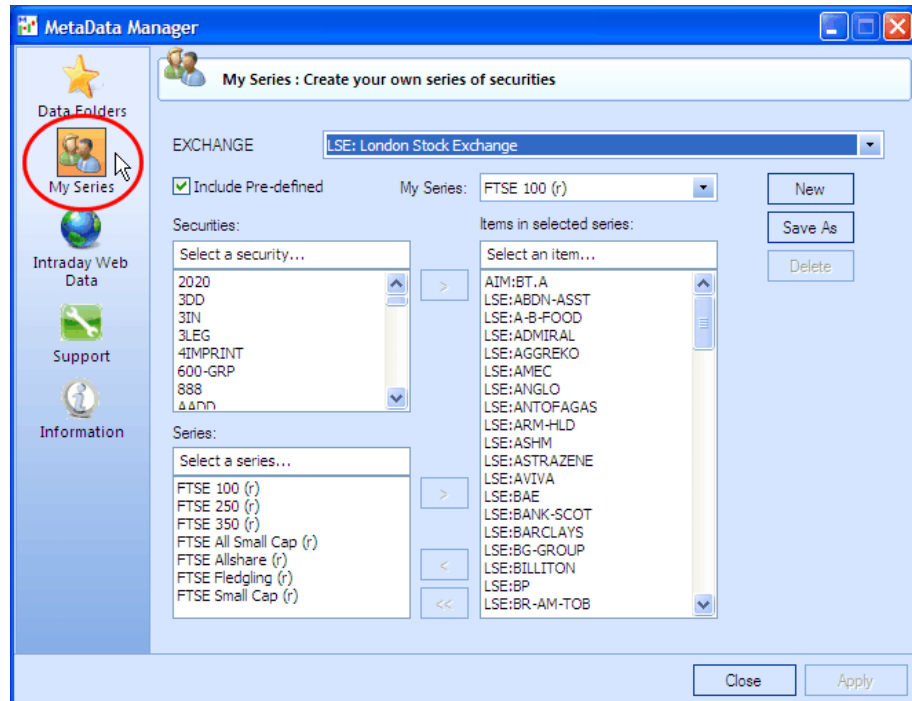
3.   Choose the stock exchange on which you would like to view and/or create series in the list box at the top of the My Series page.
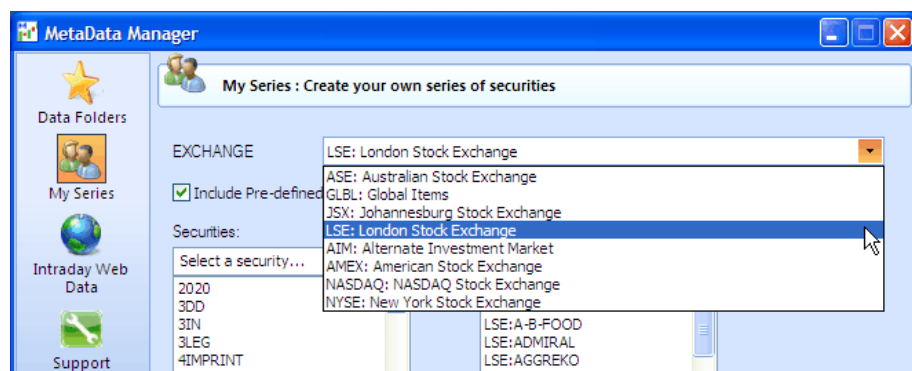
4.   Under the section entitled Securities all securities from the selected exchange are listed. Under the section entitled Series all pre-defined and user-defined series for the selected exchange are listed.

In the example below all the securities for the London Stock Exchange (LSE) are listed alphabetically starting with the numeric listings and going onto the A's. The pre-defined FTSE series for the LSE are listed in the series section. If you have created any personal series these would be listed along with the FTSE series.
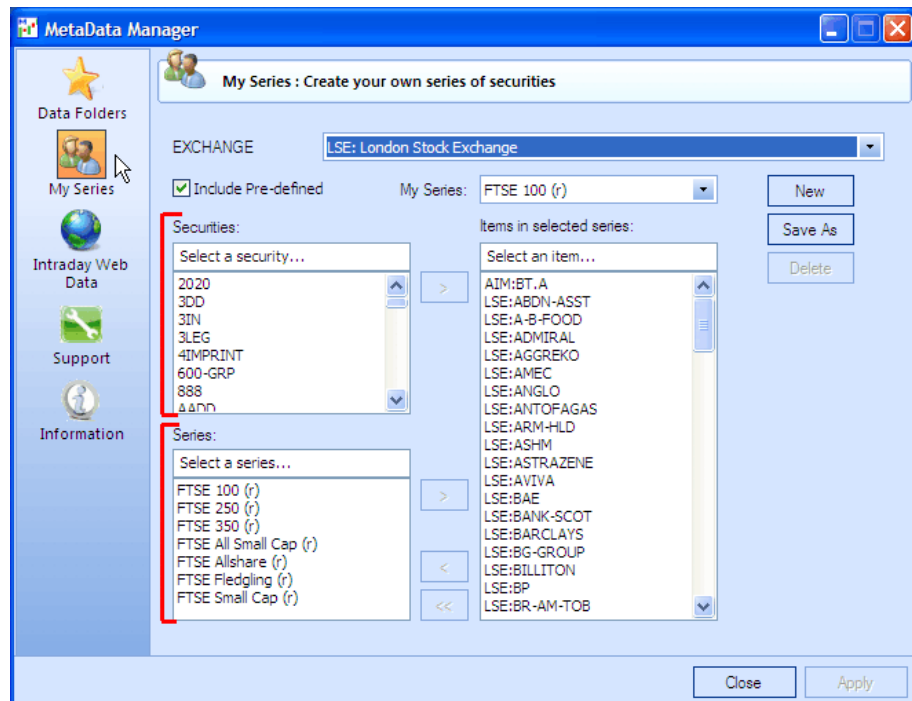
5. To view the items comprising a series select the relevant series from the My Series list. Once the series has been selected its items will be listed in the box below, entitled 'Items in selected series'.
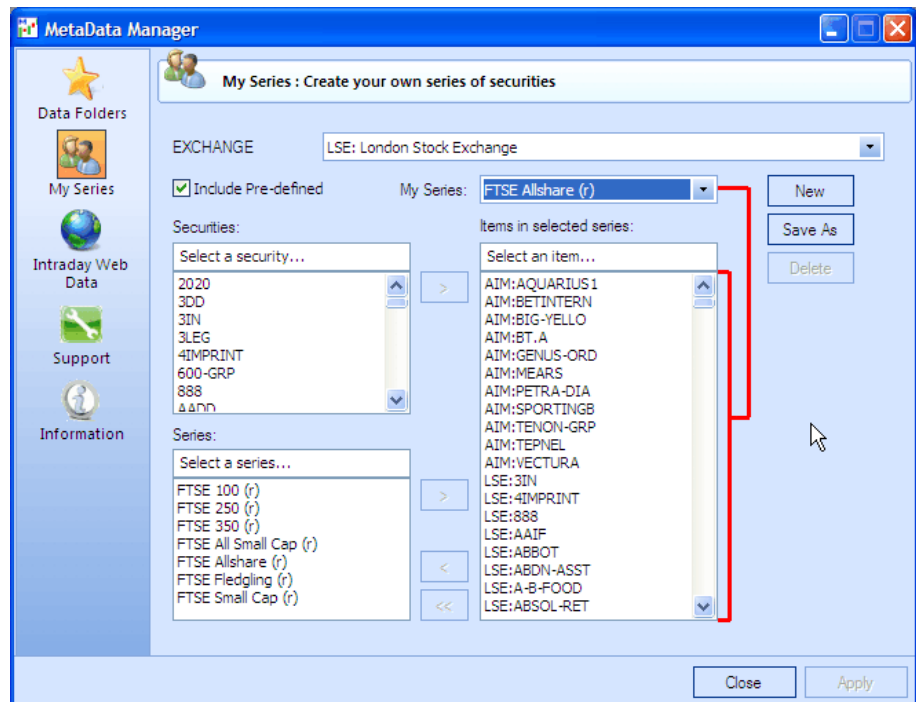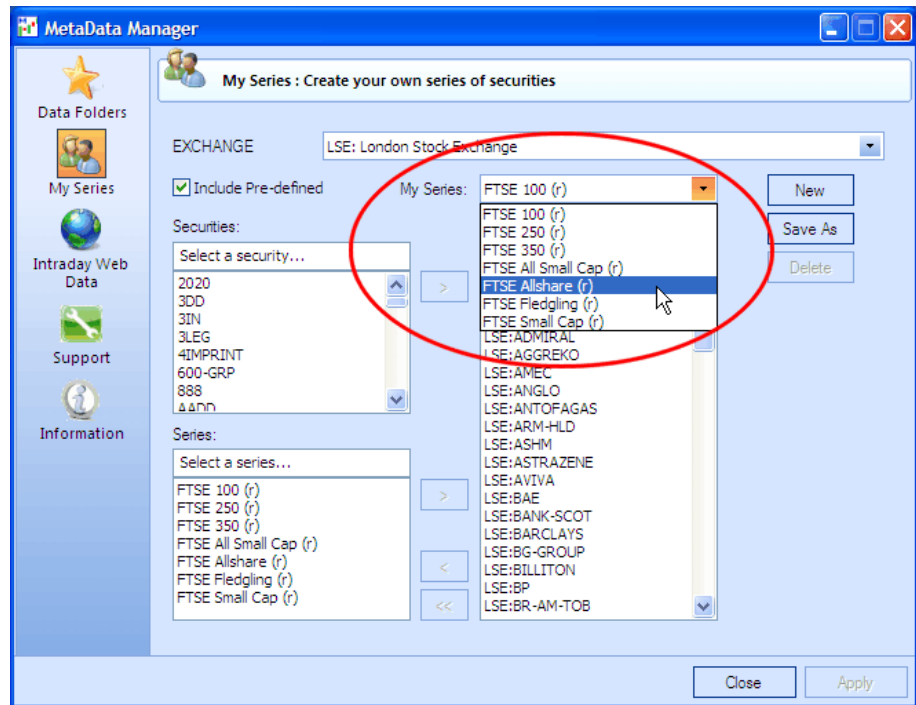
Note: Pre-defined series may not be altered or deleted. The name of each pre-defined series has the suffix (r), which denotes its read-only status. If you add this suffix to a series that you personally create and save, then you will not be able to alter or delete your own series. Notice that the Delete, Add (a security), Add (a series), Remove (a selected security or series from the items list), and Remove All buttons are not active.

![PrimeCharts]
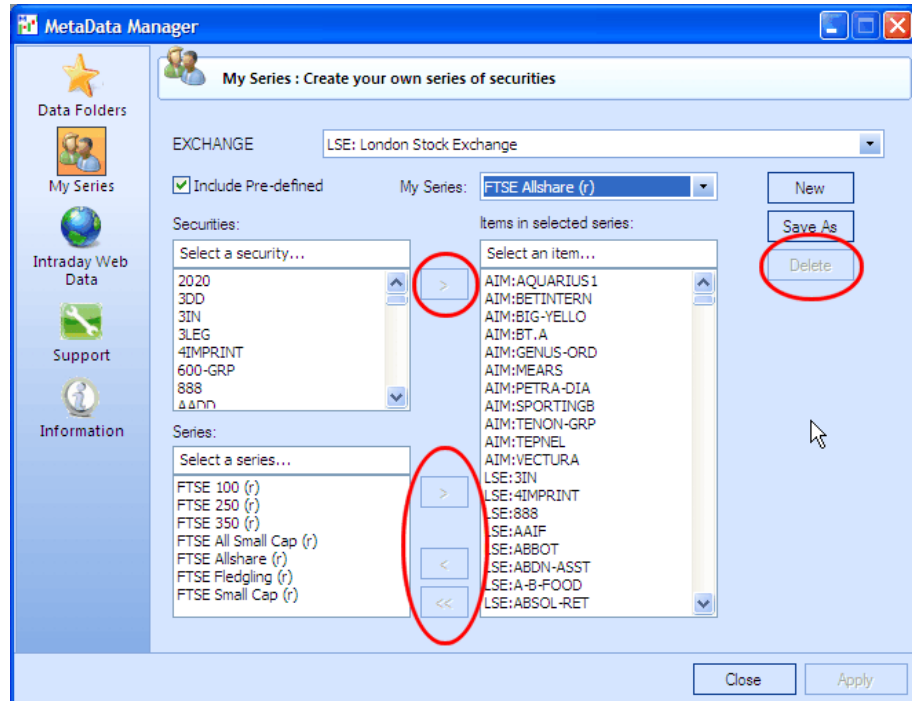
6. If you do not wish to view the pre-defined series **un-tick** the **Include Pre-defined** option.
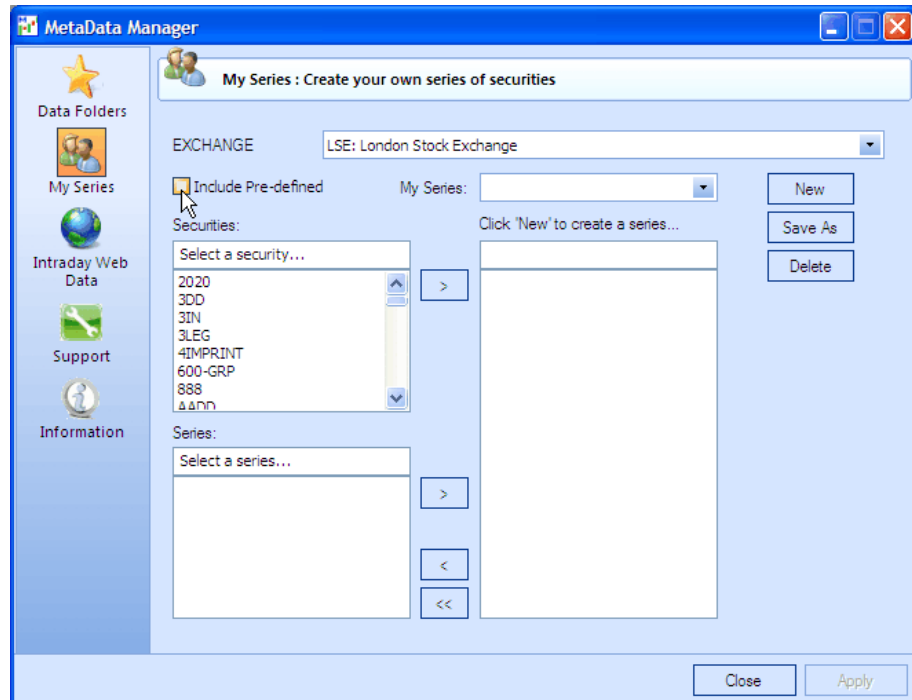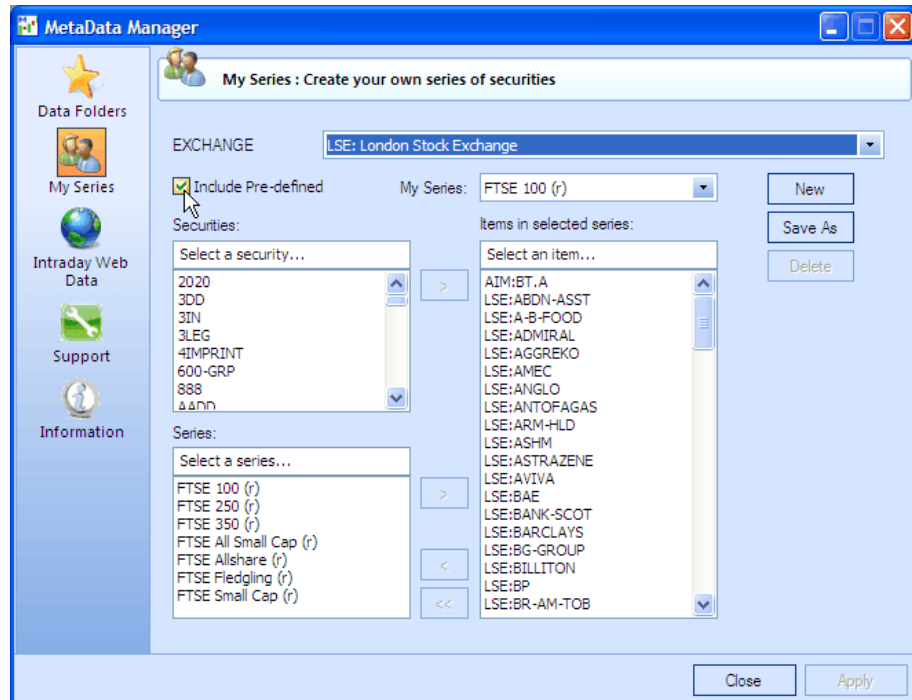
Note: If at this stage you have already created a personal series, then it would still be visible in the My Series list even though the pre-defined series are no longer visible.

![PrimeCharts logo]

Creating and Managing Your Own Series

7.   Click **New**.
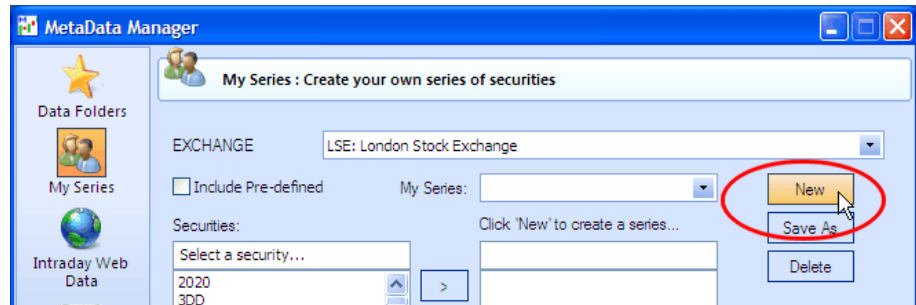
8.   Type a **descriptive name** for your series, for example My Shares, and click **OK**.
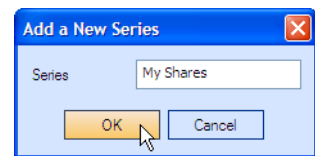
9.   Before adding items to your newly created series ensure that it is the selected series in the list of My Series.
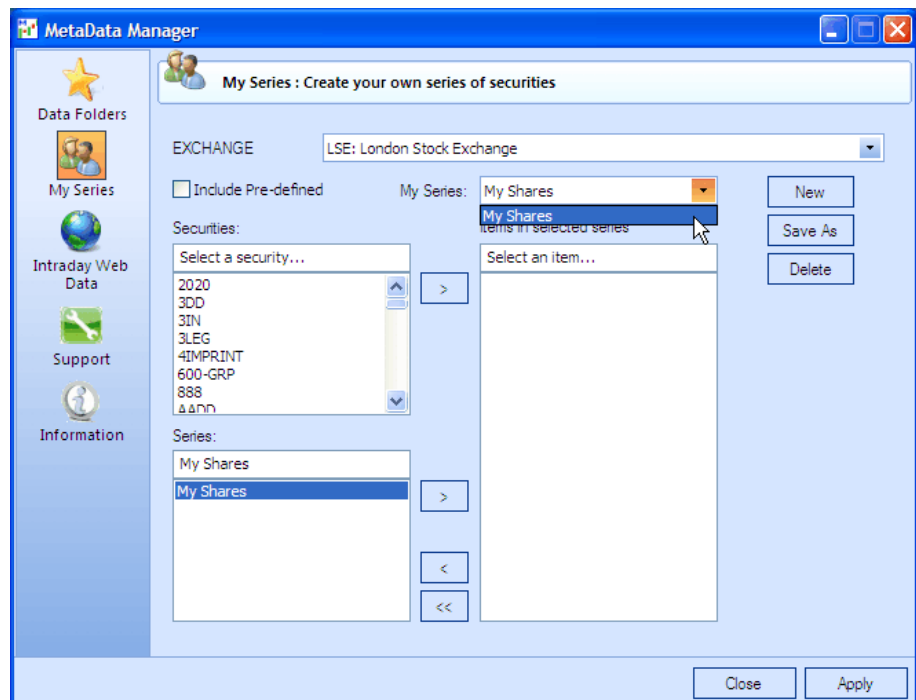
10. A message box will pop up to confirm the creation of this new series. Click **Yes**.

MDMAN

Changes have been made, but not applied. Do you want to apply these changes now?

[Yes] [No] [Cancel]
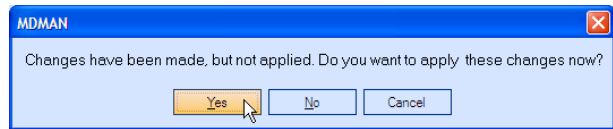
Note: If, at this stage, you do not wish to save your newly created series, then click No or Cancel.

Your new series 'My Shares' has been generated and added to your list of Data Folders and the list of series on your Intraday Web Data page.

MetaData Manager

Data Folders : Select folders for Auto Update

EXCHANGE | LSE: London Stock Exchange

☑ UK
  ☑ A-Z - LSE
  ☐ A-Z - All
  ☐ All Securities - LSE
  ☑ Sectors - LSE
  ☑ Series
    ☑ FTSE 100 (r)
    ☐ FTSE 250 (r)
    ☐ FTSE 350 (r)
    ☐ FTSE All Small Cap (r)
    ☐ FTSE Allshare (r)
    ☑ FTSE Fledgling (r)
    ☐ FTSE Small Cap (r)
    ☑ My Shares

Data Folders
My Series
Intraday Web Data
Support
Information

MetaData Manager

Intraday Web Data : Maintain which

Data Folders
My Series
Intraday Web Data
Support
Information

EXCHANGE | LSE: London Stoc

☑ Include Pre-defined

Securities:

Select a security...

2020
3DD
3IN
3LEG
4IMPRINT
600-GRP
888
AADD

Series:

Select a series...

FTSE 250 (r)
FTSE 350 (r)
FTSE All Small Cap (r)
FTSE Allshare (r)
FTSE Fledgling (r)
FTSE Small Cap (r)
My Shares

![PrimeCharts]

11. Scroll through the Securities list and **select a security**, i.e. click on it to highlight it. Or, start typing the name of a security in the 'Select a security...' text box and then select it from the list.
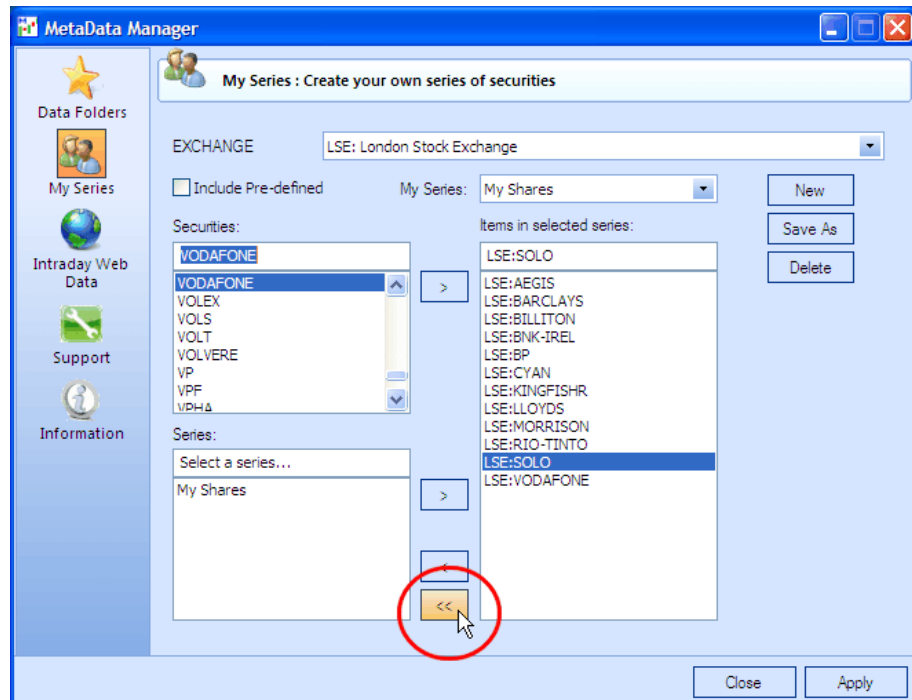
12. To **add the security** to the list of items in your series double-click on the selected security, or click the add arrow **>**.
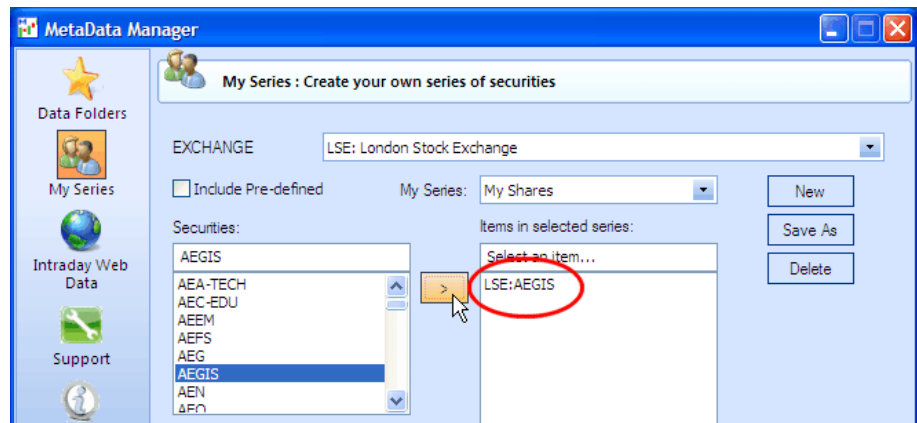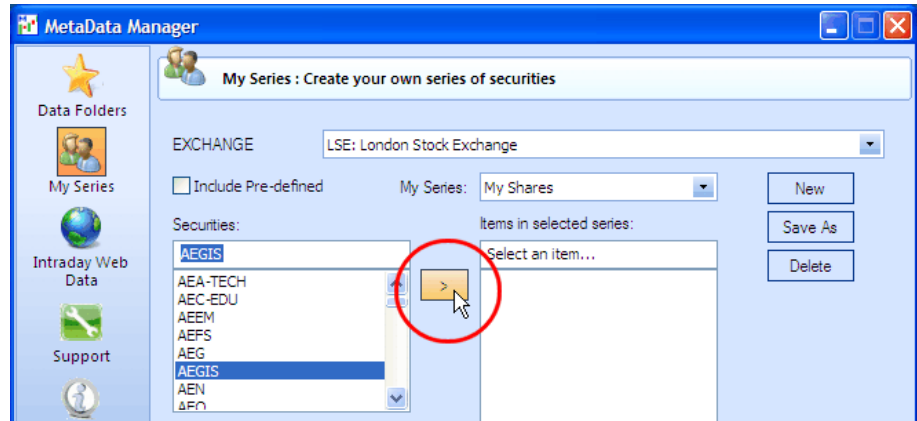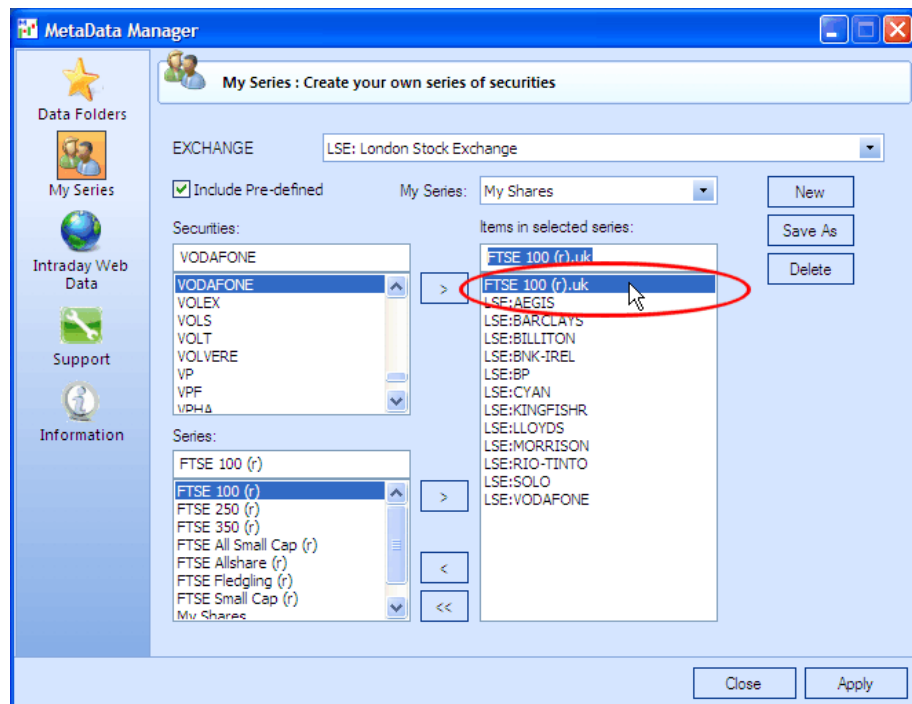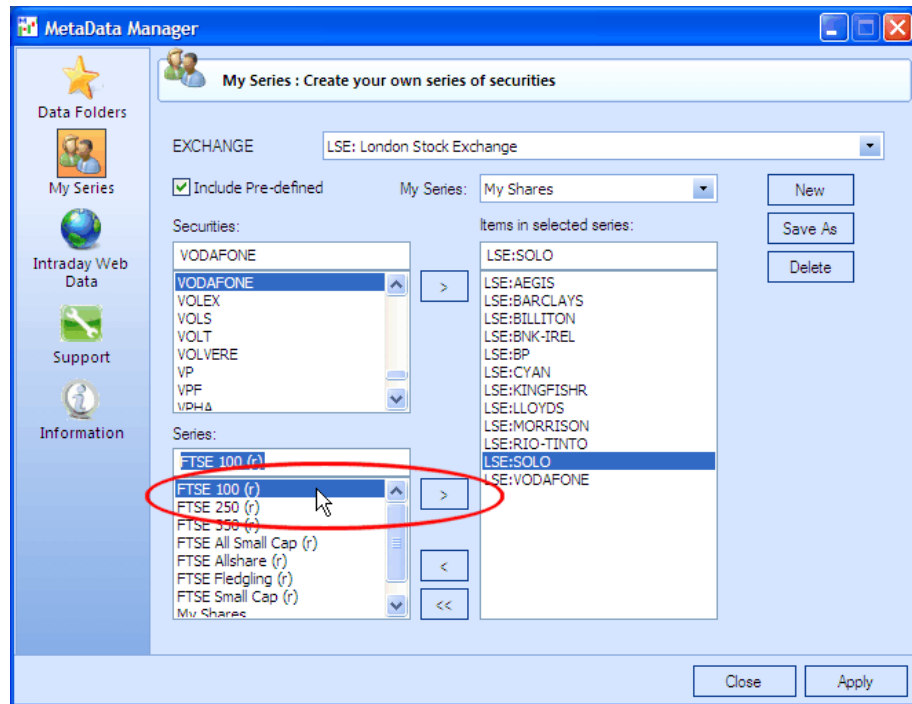
13. To **remove an item** from the list simply select it and double-click on it, or click the remove arrow **<**.
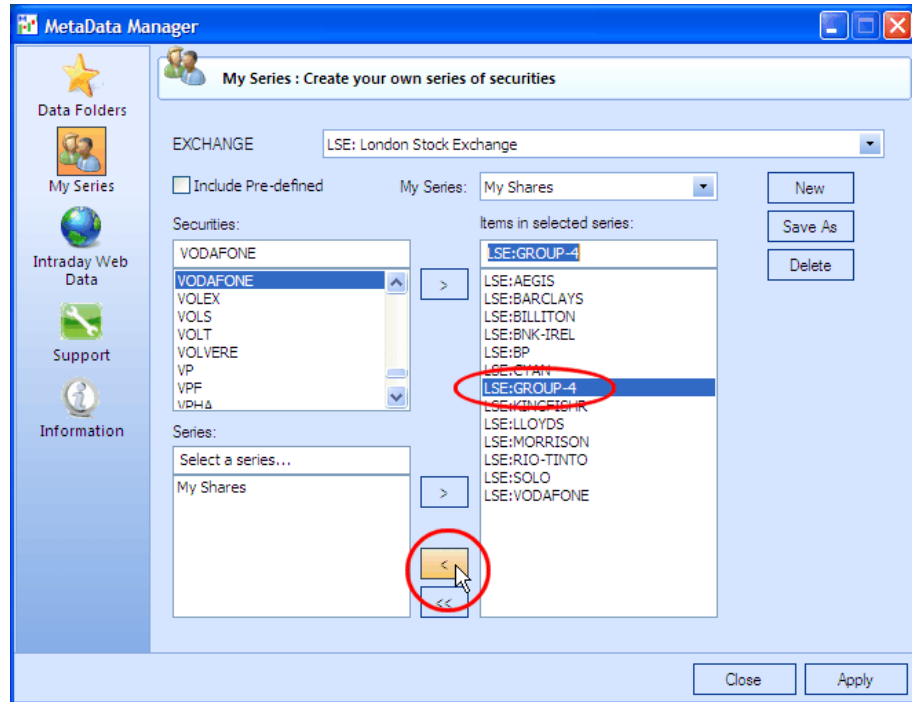
14. If you would like to remove all items from your series, click the remove-all double arrow **<<**.

15. You may select and add an existing series to your list of items.

16.   Once you have created and edited your personal series on the My Series page click **Apply**.

All your series changes will be applied to the Data Folders and Intraday Web Data pages, so you can manage their daily auto update and select them for intraday data updates. Navigate to the Data Folders page and ensure that both the 'Series' folder and 'My Shares' sub-folder are ticked. Selecting series for intraday Web data updates will be covered in the next section of this guide.
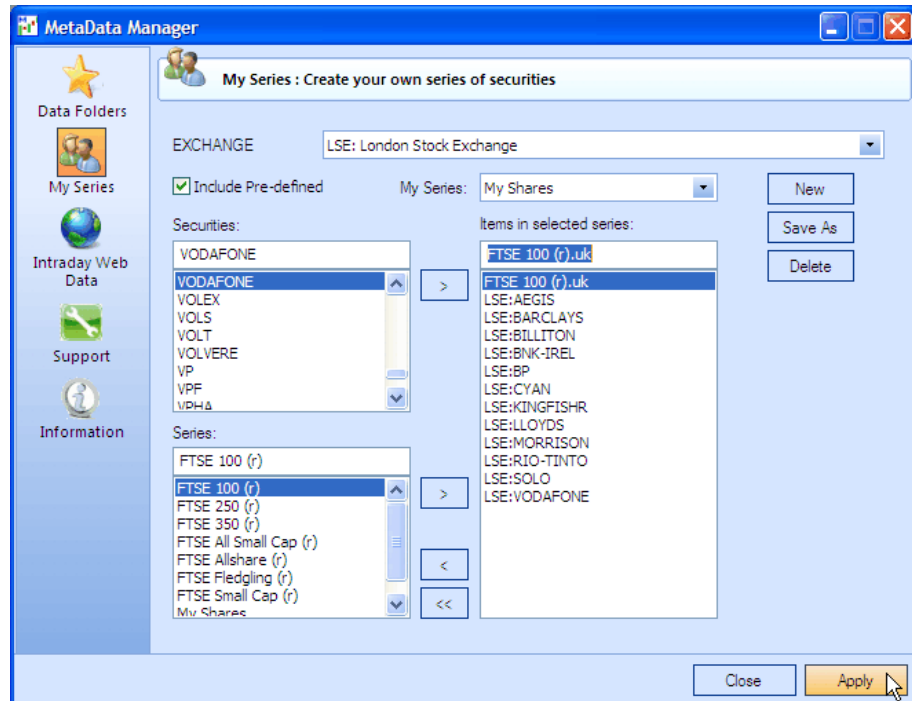
17.   To create a new version of an existing series select the series from the My Series list and click **Save As**. Give the series a unique name.
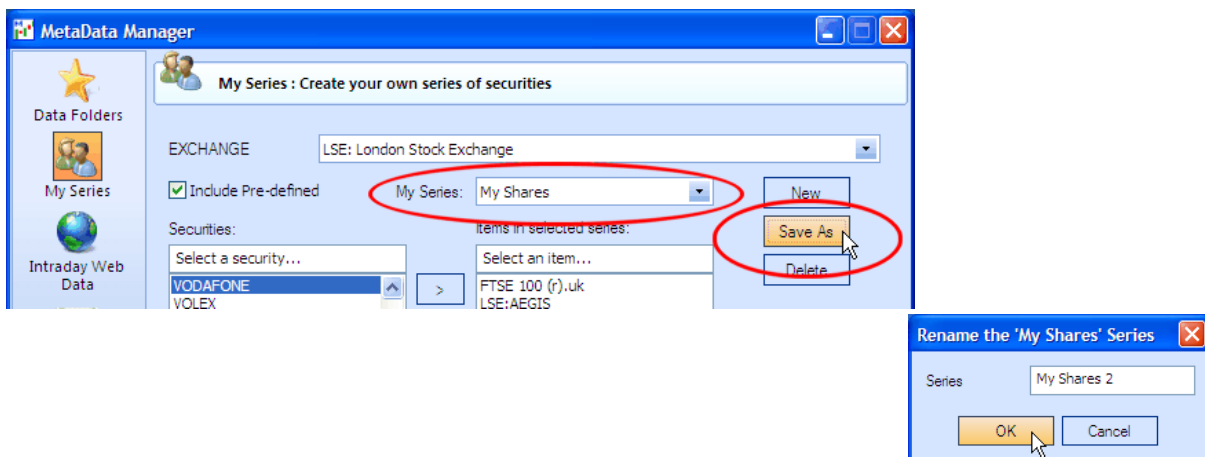
4.5 Requesting Intraday Updates For a Security

1.   Run MetaData Manager. If it is already running you may need to double-click on its icon in the notification area of your taskbar.

2.   Click on the Intraday Web Data icon within MetaData Manager.
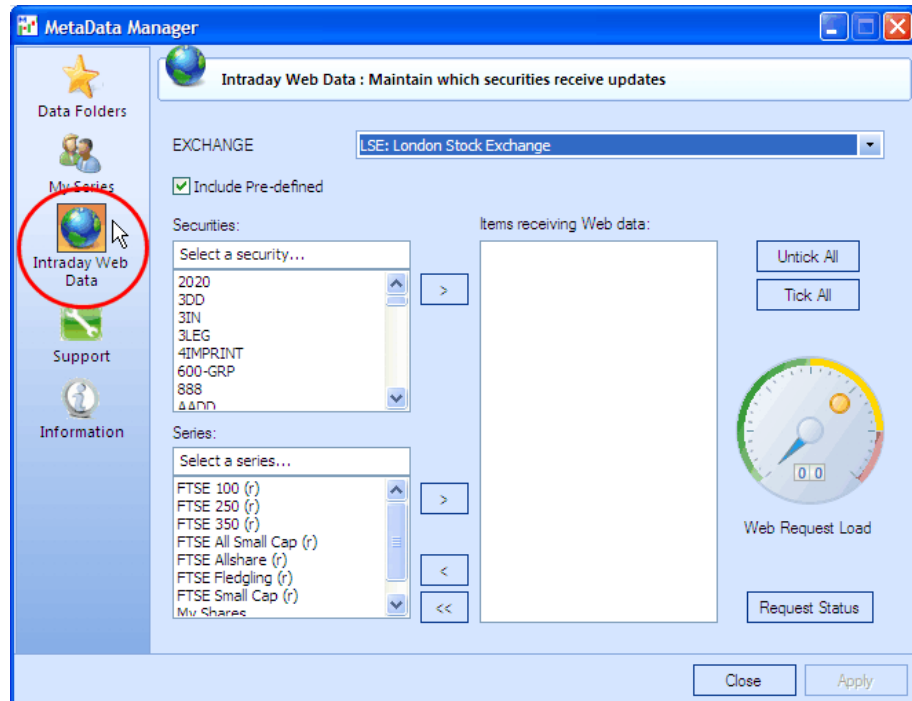
3.   Choose the stock exchange you want to adjust in the list box at the top of the Intraday Web Data page.
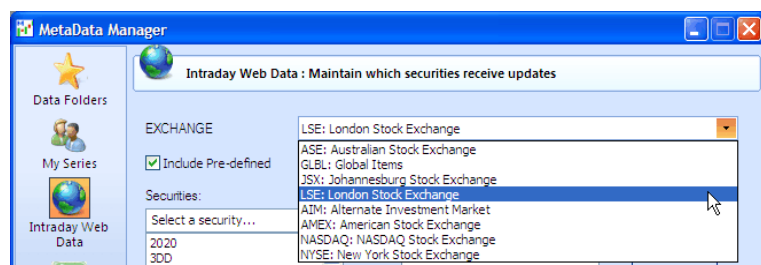
4. Scroll through the Securities list and **select a security**, i.e. click on it to highlight it. Or, start typing the name of a security in the 'Select a security...' text box and then select it from the list.
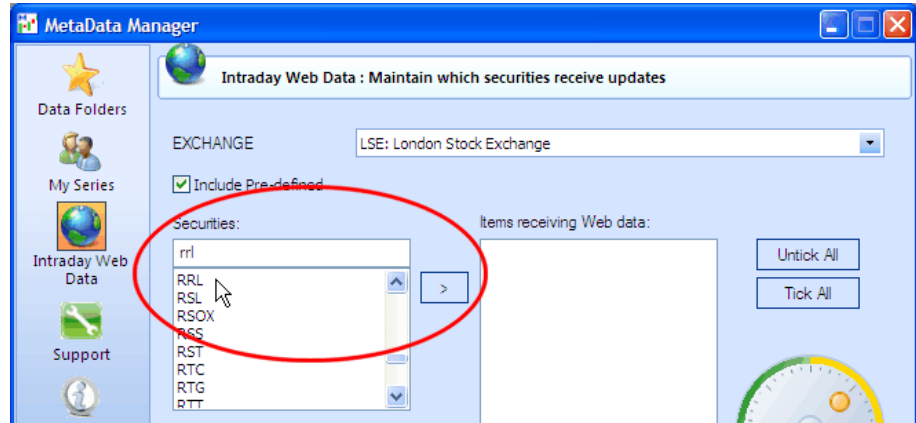
5. Once the security has been selected/highlighted click the top-most add arrow **>**. The security will be added to the list of 'Items receiving Web data'.
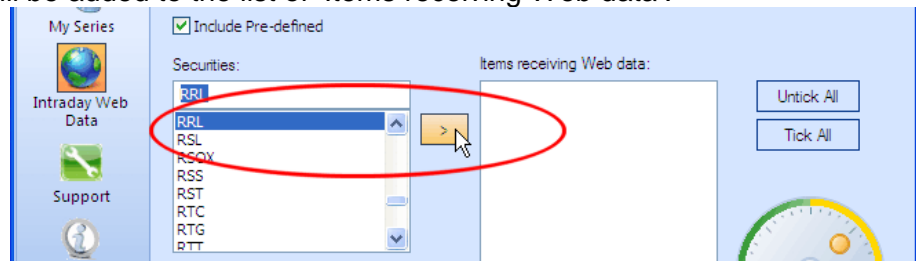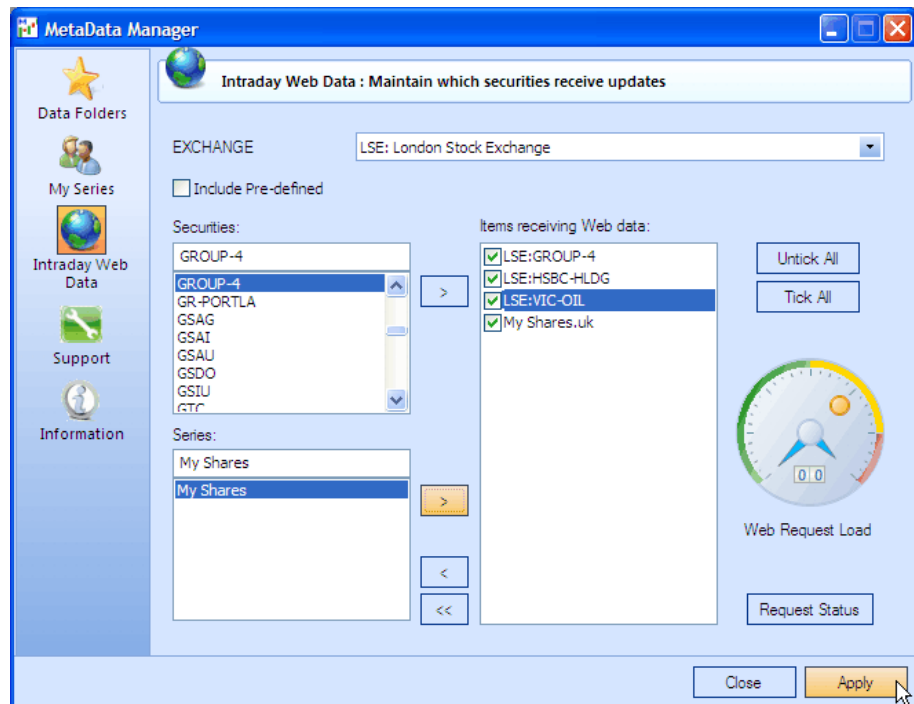

6. To remove a security from this list simply select it from the list of Items and click the remove arrow **<**.

![PrimeCharts logo]
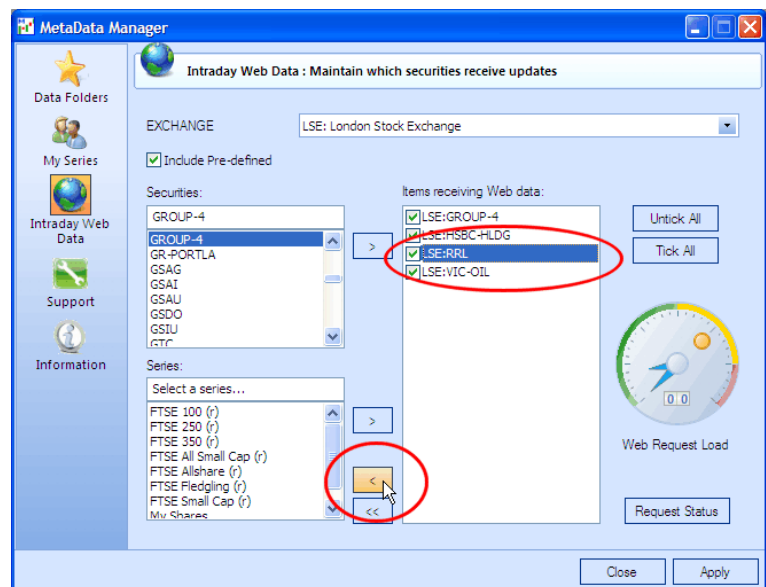
7.   You may want to add your personalised series.
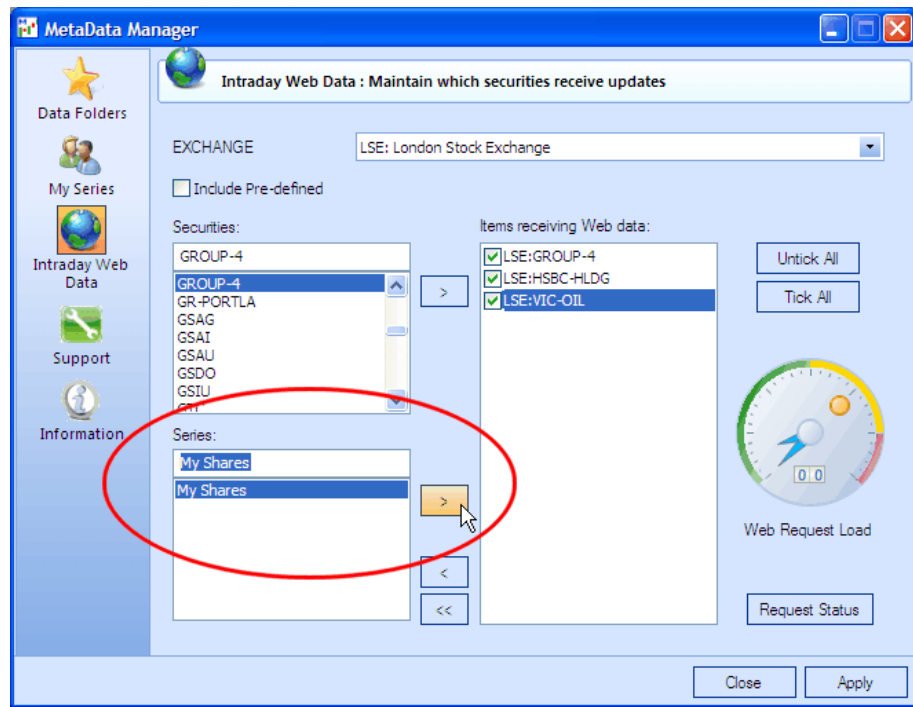
8.   Once you have created your list of items click **Apply**.

![PrimeCharts logo]

9.   The **Web Request Load** dial indicates the increase or decrease in internet data requests based on the items added or removed.


Web Request Load

The traffic light will be:

GREEN when your intraday data has been successfully requested and received;

Web Request Load

AMBER when no data has been requested or intraday data has been requested but data has not been successfully received for any items in your request list; and,


Web Request Load

RED when there was an error retrieving data for an item you requested.
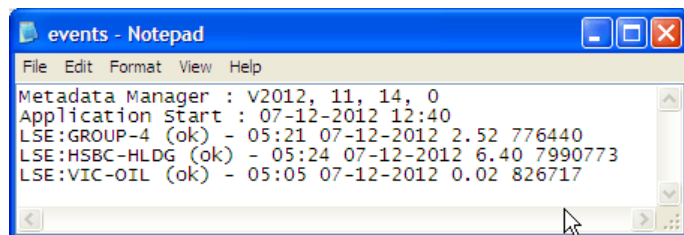

Web Request Load
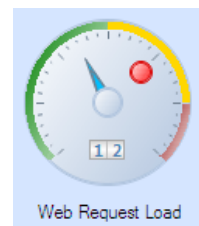
The counter indicates how many items are in your list for receiving intraday Web data - it counts each item whether it be listed individually or within a series listed for receiving intraday Web data.


Web Request Load
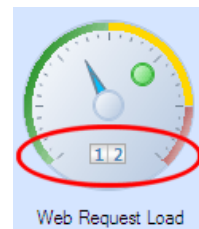
10. To check the status of intraday data being downloaded click on the **Request Status** button ...
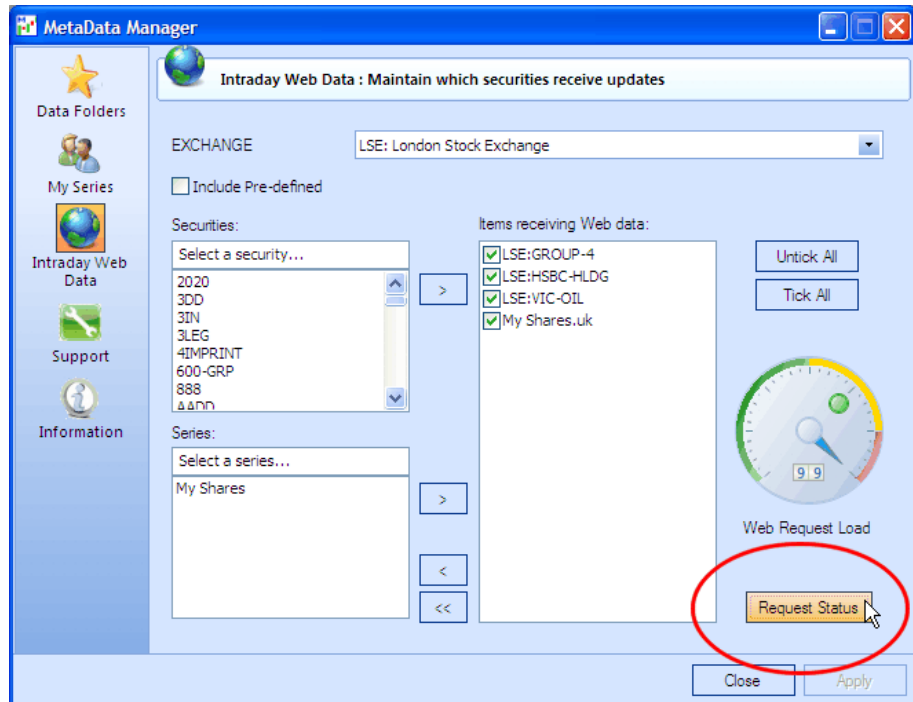

11. ... and a status report is displayed.

12. The more items you have ticked in the list, the longer it will take to complete obtaining the intraday data for the whole list. To speed up this cycle simply **untick some items** in the list. They will remain in the list and merely be stopped when it comes to requesting intraday data. To resume intraday updates for these items simply re-tick them.
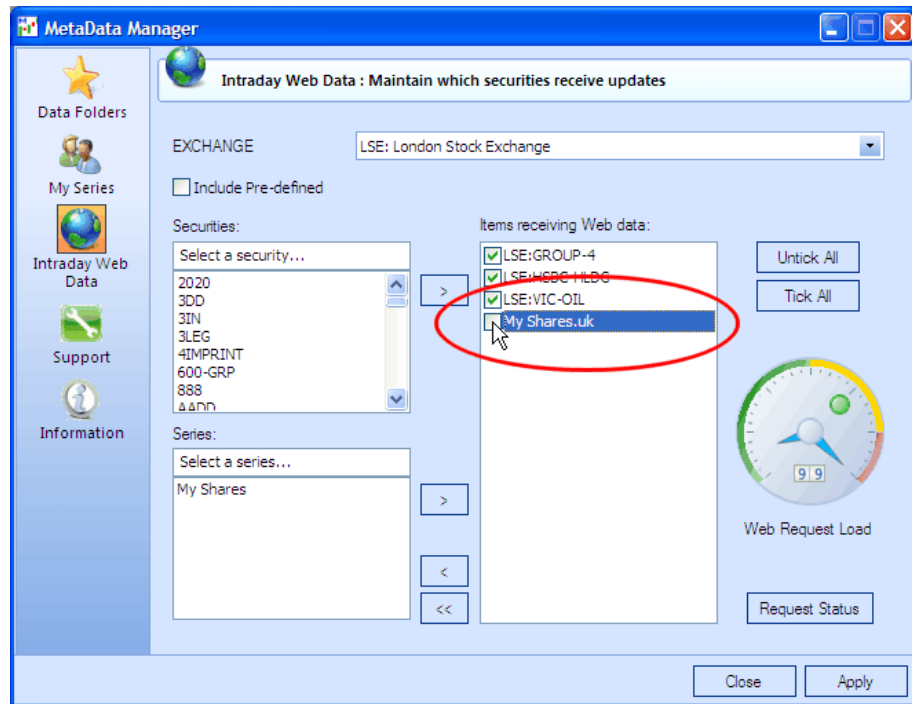
4.6 Support and Information

Please make use of the links in the Support and Information pages of MetaData Manager.

![PrimeCharts logo]
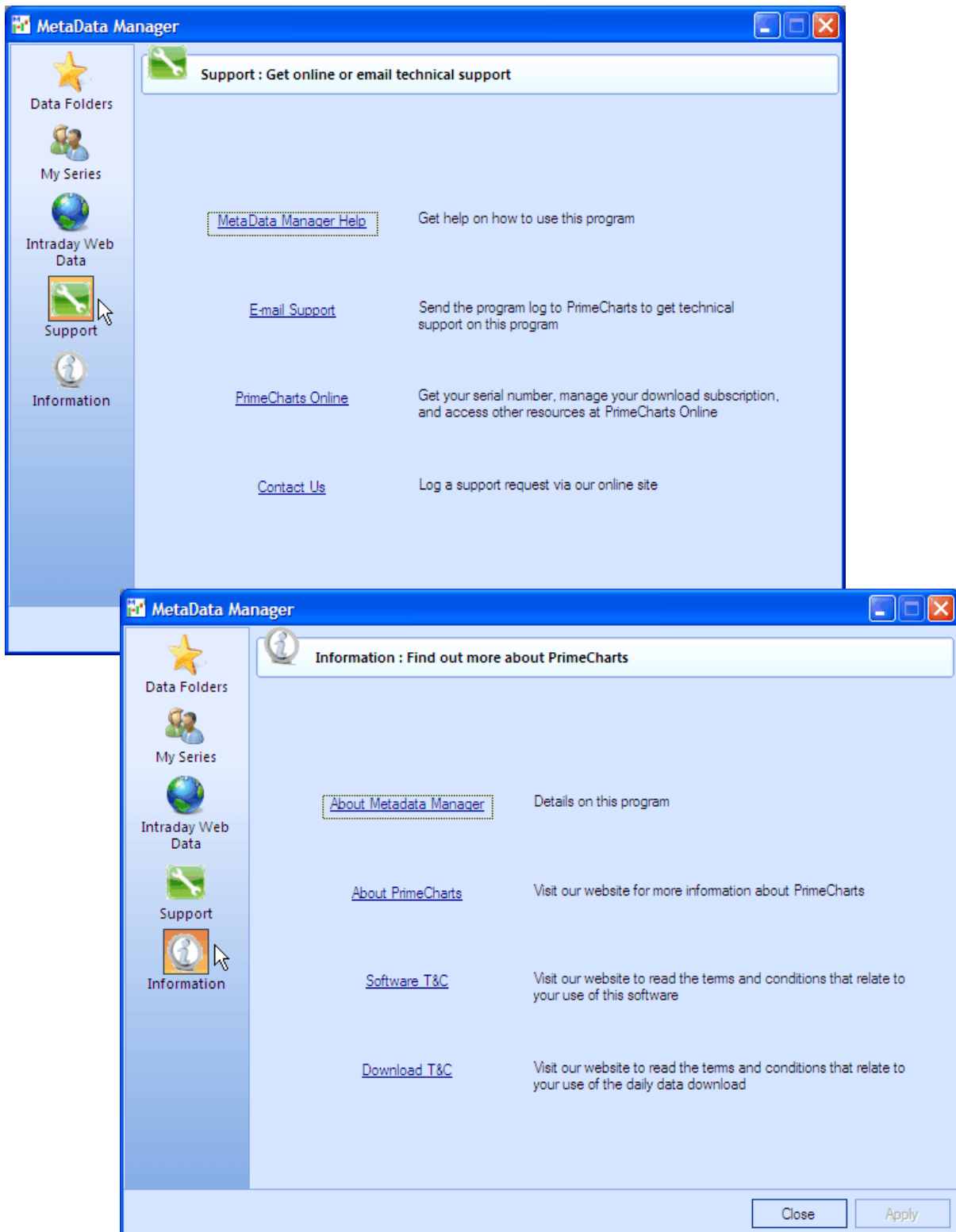
5.0 Accessing Your Data In MetaStock

Once your database installation is complete you can access your graphs from within your MetaStock program by following the steps listed below:

1.   Open MetaStock.

2.   Click on the Open button located on your standard toolbar. Alternatively, open the File menu and select Open.... Your screen will look similar to that shown in Step 3.

3.   Navigate to the drive on which your MetaStock database has been installed. The default drive on which your data would have been installed is the C: drive.
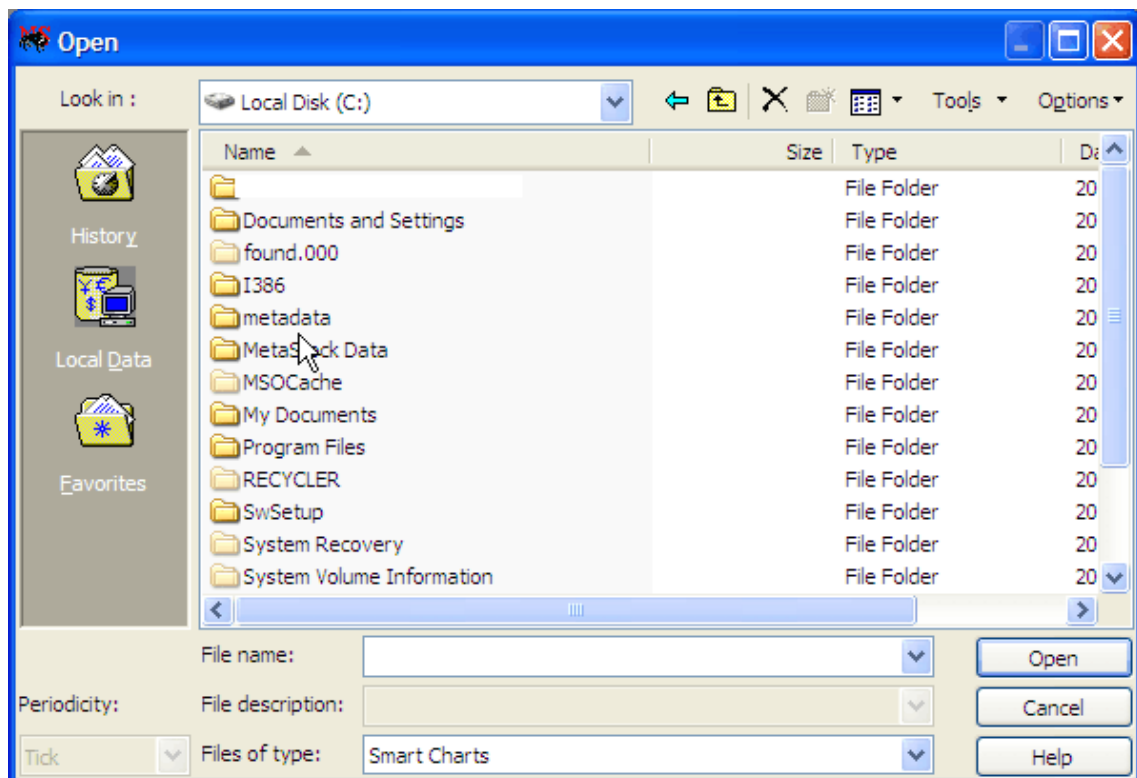

4.   Open the metadata folder (unless you chose to change the name of the folder during installation in which case select that folder).

![PrimeCharts]

5. Inside the metadata folder is a subfolder called SX. Open the SX folder.

6. Inside the SX folder there will be two or more folders containing the stock exchanges to which you have access. You will always have the Global folder and then one or more stock exchange folders. Open the folder for the exchange whose data you would like to view.
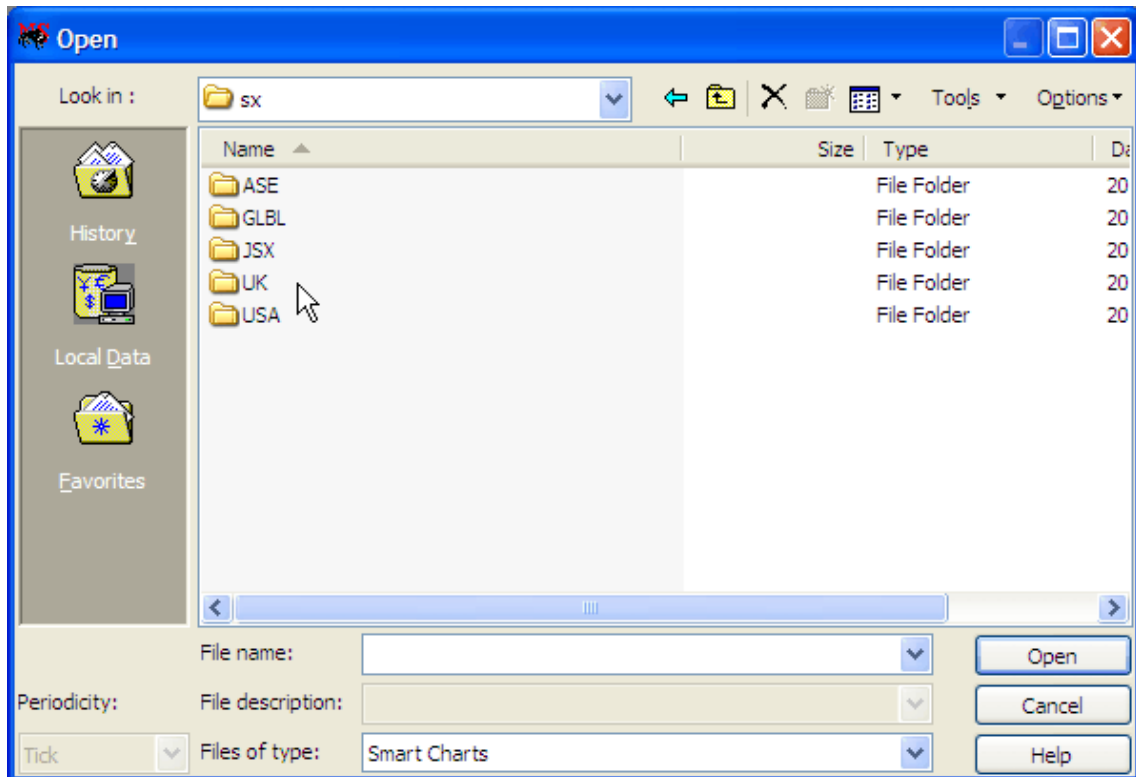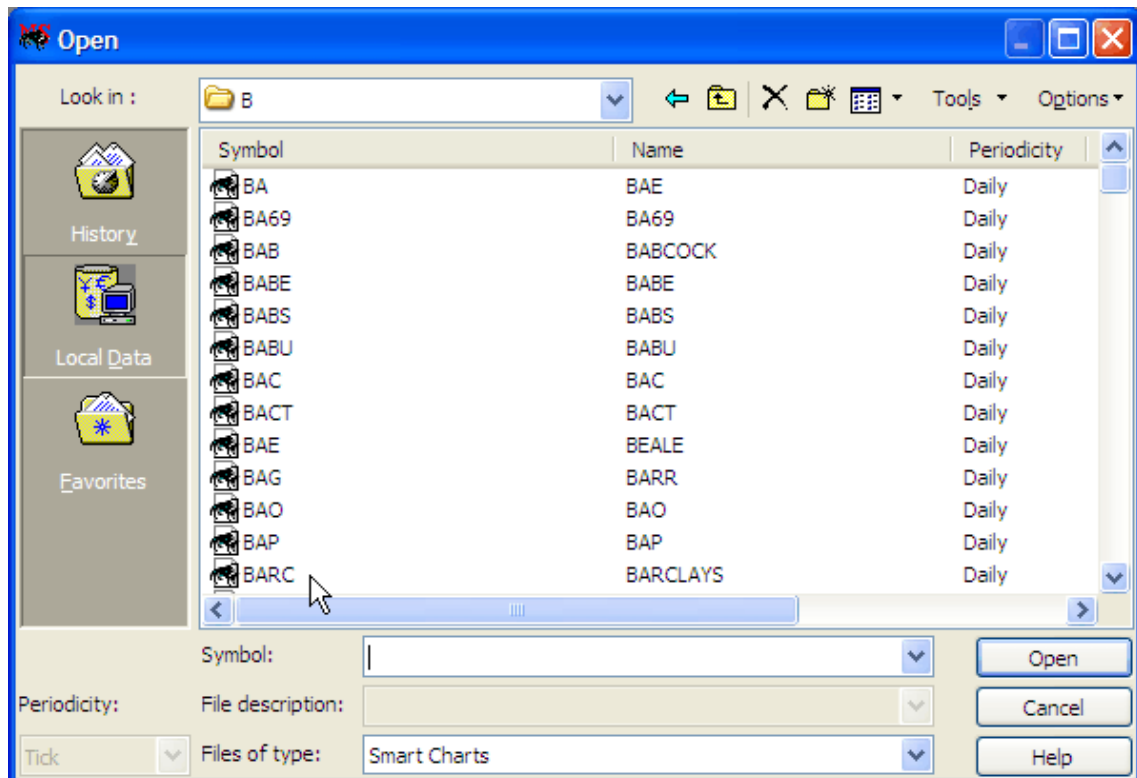
7. Each exchange folder will by default contain a folder structure with an alphabetical listing of its securities.

   Select and open the relevant folder.

![PrimeCharts]
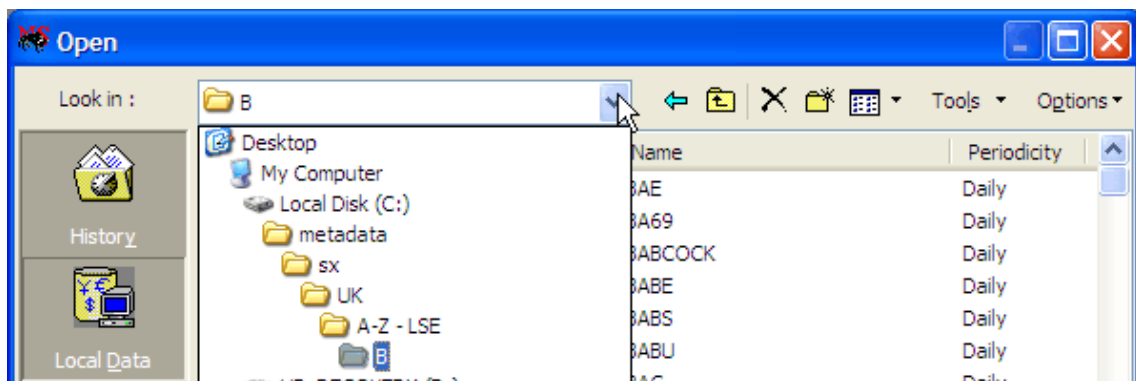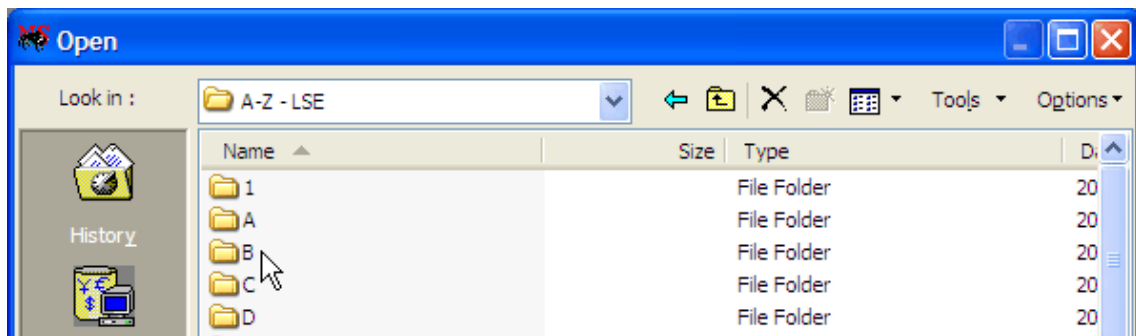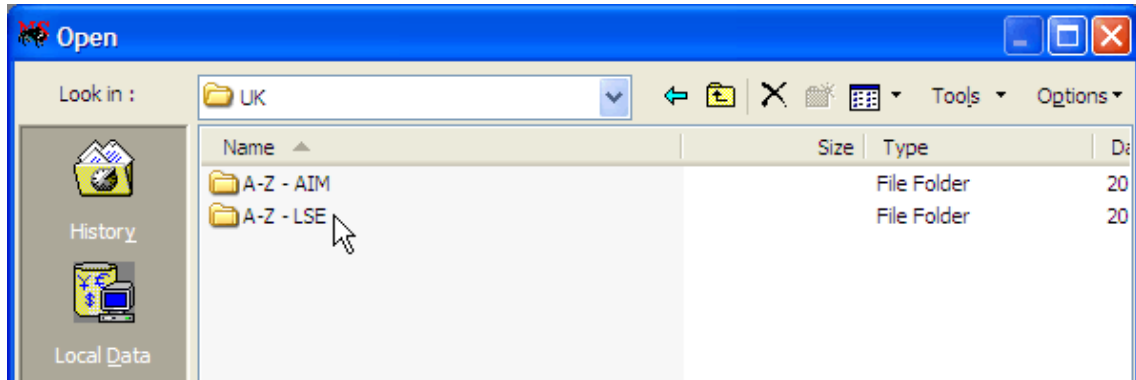
8. A listing will appear of all the securities contained in the folder. Open any of the securities in the list by double clicking on them with your left mouse button. A graph will now appear.

*Your new installation will have the default **A - Z** data folders. Once you have selected your preferred data structure in MetaData Manager a more comprehensive data folder selection would be visible within MetaStock, such as:*

▸ ***All Securities***

▸ ***Sectors** with named sector folders of the major groups relevant to the exchange therein*

▸ ***Series** with named pre-defined and personalised series folders therein*

Section 4 explains how the data (securities) are organised in these folders, and how MetaData Manager can be used to organise your data into other folders and remove unused folders.