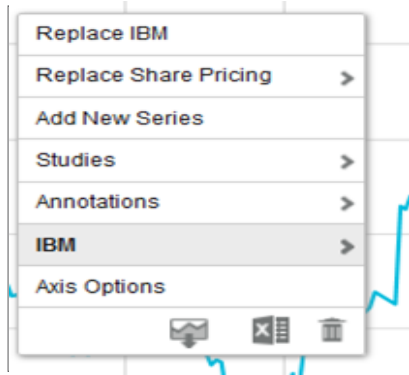




## EDITING CHARTS

To edit your chart, right-click on the chart and an edit menu will appear.



From this menu you can:

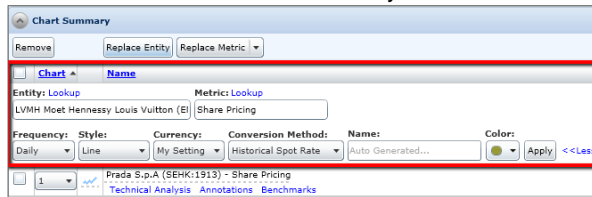
- Replace an entity or metric
- Perform technical analysis
- Add annotations or benchmarks
- Change the style of the chart
- Export to Excel or as an image
- Save charts
- Add axes
- Change the axis type
- Change the scale of each axis
- Change how numbers are displayed on the chart
- Change the format of the date
- Remove the chart

## CHART SUMMARY

You can edit an entity on an individual basis in the Chart Summary section. To do this, click the pencil icon button that is to the right of the entity you would like to change.



Here you can change an entity or metric, as well as frequency, style, currency, conversion method, name, or color. You can also remove an entity from the chart.



## EXPORTING CHARTS

To export a chart, go to the menu in the upper upper right hand corner of the chart.



If you export to Excel, you will get the chart in an Excel workbook as well as the back-end data for the chart. You can also export as an image, which will create a picture that you can place in presentations.

## SAVING CHARTS

You can also save charts from the top left menu by clicking on the Save Chart icon.



Once you click this, a pop-up will open. Choose whether you would like to save as a new chart or update an existing one, and name your chart. You can then specify an access level and add the chart to an album if you would like.

**Note:** Saving a chart captures the entities on the chart when it is saved. If there is an entity in the Subject Replaces dropdown, this will be replaced when opening the chart from a different profile. If there is no entity, the chart will always display the same subject(s).

## ALBUMS

Albums allow you to keep your charts organized within the S&P Capital IQ platform for future reference. To add a chart to an album, click the Add to Albums arrow when saving a chart. This will allow you to name your album and save it.

### Chart Builder | Save

NEW CHART
UPDATE EXISTING CHART

**CHART NAME**

**ACCESS LEVEL**

▶ ADD TO ALBUM

## SAVED CHARTS AND ALBUMS VIEWER

The Saved Charts and Albums section has tabs for Recently Viewed charts, Saved Charts, Saved Albums, and Capital IQ Albums.

To open a chart or album from this section, simply click on the icon and the chart(s) will load. To view more than one chart or album on the same page, right click on each icon and click Add Chart to Page or Add Charts from Album.



Navigate by clicking the arrow buttons on the right and left of the icons.

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