

Powered by  Search [Advanced](#)

Enter Page ID

Page ID: 17580


Application Help **Learning Tools** **Print Materials** **Template Library** **Quick Answers** **Reference**


FactSet Workstation: Interactive Charting

FactSet Workstation

Getting Started with Interactive Charting

Use Interactive Charting to create flexible charts depicting company and non-company data.

 For information about Interactive Charting, [view an eLearning demo](#).

 Download the [Interactive Charting tipsheet](#) for a quick, visual overview of the application.

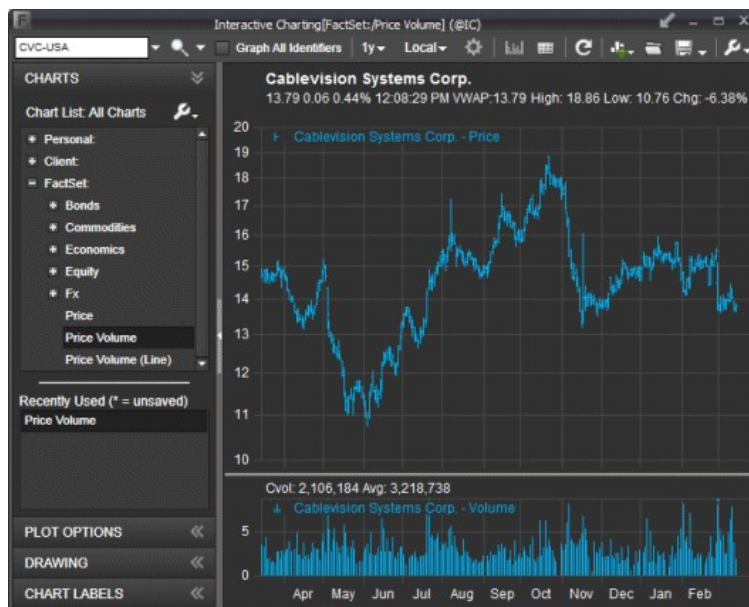
Topics covered:

- [Creating a Chart](#)
- [Viewing and Interpreting a Chart](#)
- [Formatting and Outputting a Chart](#)

Note This page provides help for the latest version of the Interactive Charting application, supported in FactSet 2012.5 and higher.

Creating a Chart

Access predefined charts to analyze pricing, financial, estimate, and valuation data among others for different security types. Click the **Charts** button to expose the available list of charts. Select from the FactSet category or you can create and save your own charts in your Personal, Client, or Super_Client directories. See [Working with Charts](#) for more information.



To create a new chart:

1. To get started, enter an identifier(s) into your chart or search for one using the [type-ahead](#) feature in the main identifier box. You can create a chart with multiple identifiers by selecting the Graph All Identifiers check box next to the identifier box.
2. To add a new series to your chart, click the **Add Series** button to add new series to the plots of your chart. You can either select series from the list, or using the Series type-ahead search feature. The most commonly selected series will be displayed.
3. To add a series that is not listed, click the **More Series** button. This launches the [Series Lookup](#). You can search for economic data series, company data series, and other non-company data series using this lookup. Select the appropriate category from the Category menu.








- ☐ Getting Started
- ☐ Using the Interface
- ☐ Working with Tabs
- ☐ News & Research
- ☐ Quotes/Prices
- ☐ Markets
- ☐ Portfolio
- ☐ Company
- ☐ Fixed Income
- ☐ Charting
 - [Charting Overview](#)
 - ☐ [Interactive Charting](#)
 - [Working with Charts](#)
 - [Managing Plot Options](#)
 - [Using Drawing Tools](#)
 - [Using Chart Labels](#)
 - [Using the Charting Toolbar](#)
 - [Setting Chart Options](#)
 - [Using the Tools Menu](#)
 - [Using Application Settings](#)
 - [Creating a Quick Composite](#)
 - [Using Reference Manager](#)
 - [Charting Yield Curves](#)
 - [Styleset Best Practices](#)
 - ☐ [Charting Market Data](#)
 - ☐ [Economic Analysis Charting](#)
- ☐ Filings
- ☐ Event Calendar
- ☐ Screening/Report Writing
- ☐ Quantitative
- ☐ People
- ☐ Research Management
- ☐ Web Browser
- ☐ FactSet Instant Messenger
- ☐ Utilities
- ☐ Additional Displays
- ☐ Options
- ☐ Print Materials
- ☐ Technical Information
- ☐ Quick Answers

- To remove a series, right-click on the series and select the "Remove" option. You can also select a series and press the **DELETE** key to remove the series from the plot. For more information about series and plots, see [Managing Plot Options](#).

Top of Page

Viewing and Interpreting a Chart

Use the following options to modify the appearance of your chart:

- Use the [Chart Toolbar](#) to quickly change the date and currency of your chart, or click the **Chart Options** button  to modify multiple chart settings at once (i.e., dates, Y-axis settings, currency, annotations, and end of line labels).
- The interactive  allows you to calculate the price return for different time frames. To view the underlying data of a chart click the **Show Report** button .
- Use the navigation buttons to refresh a chart, create a new chart, open a pre-existing chart, and save charts. Under the **Tools** button  you can manage your chart files and [output your chart](#) by printing, copying, or download the underlying codes of the chart. See [Using the Tools Menu](#) and [Setting Chart Options](#) for information about changing the Styleset, annotations, and other formatting options.
- Under Plot Options you can modify individual chart plots, enter a comparison ticker, view indexed or relative data, or add, remove and change a series on a plot. See [Managing Plot Options](#) for more information.
- You can also add drawing tools like trendlines, horizontal lines, or Fibonacci retracements to your chart display under Drawing. You can also view crosshairs or zoom into an area of the chart.
- View crosshairs by clicking the **Crosshairs** button , to find out the exact date of a data point, or to more accurately compare data points. Move your mouse along the series to move the crosshairs. To modify the behavior of the crosshairs tool, hover over the tool and click on the **Crosshairs Options** button .
- Zoom into a section of the chart by clicking the **Zoom** button and holding down your left mouse button to highlight the period you would like to focus in on. To return to the original time period, click the **Zoom** button again or press the **ESC** key on your keyboard. You can also right-click in the chart area and select the "Reset Zoom" option. You can zoom into a chart multiple times and use your mouse wheel to back in and out of each zoom level.
- Click the individual drawing tools to use them in analyzing your chart. See [Using Drawing Tools](#), for help on using each tool.
- Drawing tools (e.g., trendlines) "snap" to the closest point, making it easy to line up the tool with points on the chart. You can enable/disable this feature in Application Settings, under the Tools button  > Settings > Display & System tab or hold the **CTRL** key when drawing a tool you don't want to snap to a point on the series.
- Use Chart Labels to show chart labels at the end of each series, or show series statistics for each chart plot. See [Using Chart Labels](#) for more information on chart labels.

Top of Page

Formatting and Outputting a Chart

See [Using the Tools Menu](#) for information about managing charts, changing the Styleset, printing and exporting, copying and downloading charts, and more formatting options.

Top of Page

Last updated: Wednesday, March 04, 2015
Page ID: 17580.12259

 [ASK A QUESTION](#)  [SEND A COMMENT](#)

Copyright © 1999-2018 FactSet Research Systems Inc.

The information contained in FactSet Online Assistant® includes information proprietary to FactSet. Redistribution of this material to any person or organization who is not a FactSet subscriber is prohibited. Reproduction in any form is prohibited without prior express written consent of FactSet.

You must have an internet connection to view outside websites. Linked sites are not under the control of FactSet and FactSet is not responsible for the contents of any linked site or any link contained in a linked site, or any changes or updates to such sites. FactSet is not responsible for webcasting or any other form of transmission received from any linked site. The views expressed on these sites do not necessarily reflect the views of FactSet. Information on these sites may not be current.