

PhoenixAI Video Tutorial Transcript:

Workspaces

Hi There, in this video I'm going to show you what a workspace is, how it works and how to create one.

Being able to use a workspace is probably one of the most important skills you'll need to master in PhoenixAI.

Your workspace is the area within the PhoenixAI that contains all of your market data windows like charts, watch lists and market depth.

In order to make it easier to get started in Phoenix, There's quite a few default workspaces for you to play with.

To open one of these workspaces, click 'file' → 'open workspace'.

In the window that pops up click on 'ASX ALL ORDS' and click 'OK'.

When the window opens, you'll notice on the left of the screen there's a watch list containing a list of ALL ORD stock codes.

On the right side of the screen at the top there's a daily chart and at the bottom there's a weekly chart.

To view a different stock in the open charts, simply double click on one in your watch list. Alternatively you can type in the stock code into 'symbol to sync' in the toolbar at the top of the screen and then press 'enter' on your keyboard.

So that's what a workspace looks like in action.

Now we'll go through how you can create and customise one from scratch to contain exactly what you want.

First lets close our current workspace by clicking 'file' → 'close workspace'.

As discussed, a workspace is just a file that remembers what windows you've got open, there physical size on the screen and where they're located on the screen.

So in a nutshell all you need to do to create a workspace from scratch is to open the windows you want, arrange them how you want... and click 'file' → 'save workspace'.

So lets do that...

Clicking on 'file' → 'new window' will give you a list of all the major command windows you can open in PhoenixAI. All you need to do is choose which ones.

For this workspace, we'll have open 2 charts, so I'll click on 'Chart'.

Then, I'll do exactly the same thing to open the next chart. 'File' → 'new window' → 'chart'.

Except, lets make this one a weekly chart. To do this I'll click the arrow next to 'D' in the toolbar and from the drop down menu click on 'Weekly'.

There are several ways to open commands windows in PhoenixAI, so for our next window, instead of clicking 'file' → 'new window' we'll just use the commands toolbar. So lets add a watch list to our workspace by clicking this icon in your commands toolbar.

Then in the window that pops up, make sure 'watch list' on the right is selected and then choose the one you want from the right. Lets choose 'Blue Chips' and click OK.

Next we'll open a market depth window and finally a symbol summary window.

So now we have 5 windows cascading down the screen, to quickly make all the window all fully visible click 'Window' → 'Tile'.

Now to bring up a stocks data in all of the open windows, like we did before, just double click on a stock in your watch list.

If you don't like the way the windows have been auto tiled, you can manually resize them by putting your mouse over the edge of a window, then clicking, holding and dragging the mouse to resize the window to a size of your choice.

To relocate the window, click on the top, hold the mouse and drag to your desired location.

Once you have all the windows, set out in a way that suits you best, click on 'file' → 'save workspace as'.

Then enter a name for the workspace, in this case we'll call it 'demoworkspace1', and then click 'save'.

Congratulations, you've now created your first workspace.

If I were to close it.

To open it again, I click 'File' → 'Open workspace'

Choose 'demoworkspace1', click 'OK' and all our windows appear exactly as we left them.

One last thing we'll go through is how to enlarge a chart so it's easier to work with.

All you do, is click the 'maximise' button in the top right corner.

To put it back into your workspace, click the 'restore down' icon.

And that brings us to the end of this video.

For more information on workspaces have a look at help.phoenixai.com.au

Thanks for watching.