

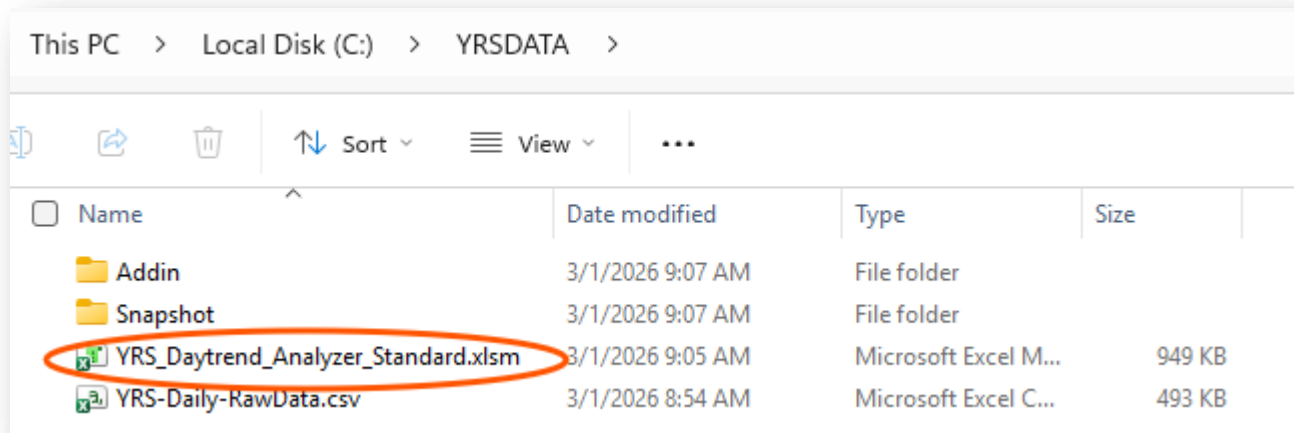
**User Manual of YRS Day Trend Analyzer Standard Edition V1.02**  
(The content of this manual is subject to change without prior notice.)

## **System Requirements**

- **Processor:** Intel® Core™ i5 processor or equivalent (or higher)
- **Memory:** 16 GB RAM or greater
- **Storage:** Minimum 50 GB available disk space
- **Operating System:** Microsoft® Windows 10 or Windows 11 (64-bit)
  - **Microsoft Excel:** Excel for Microsoft 365 (64-bit), Version 2601 (Build 16.0.19628.20214) or later
- **Runtime:** .NET Framework 4.8 (typically included with Windows 10/11 systems)
- **Display:** The dashboard layout is designed for 1920 × 1080 screen resolution. Use of other resolutions is supported, but layout adjustments are the user’s responsibility.

## **Installation & Setup**

1. Create a folder on your hard drive, such as C:\YRSDATA
2. Download and unzip the package under the path you created at step#1. After unzipping, you can see folder structure like below:



- The YRS\_Daytrend\_Analyzer\_Standard.xlsm is the dashboard itself. (If you are using lite edition, you will see YRS\_Daytrend\_Analyzer\_Lite.xlsm instead.)
  - The YRS-Daily-RawData.csv is the sample raw data, which has been imported into the dashboard. It sits there just for your reference. **NOTE: the sample data is system-generated simulation. Not real market data.**
  - This folder structure is predesigned. Please don’t change it, otherwise the dashboard may not function properly.
3. Open the YRS\_Daytrend\_Analyzer\_Standard.xlsm (Or YRS\_Daytrend\_Analyzer\_Lite.xlsm). If this is the first time you open the document, please Click “**Enable Content**”.

AutoSave Off YRS\_Daytrend\_Analyzer\_Standard.xlsm • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Developer Help

Cut Copy Paste Format Painter Clipboard Font Alignment Number

Aptos Narrow 11 B I U Merge & Center

SECURITY WARNING Macros have been disabled. Enable Content

Y3

| MktDate    | Price_Open | Price_High | Price_Low | Price_Close | Volume    |
|------------|------------|------------|-----------|-------------|-----------|
| 2018-01-02 | 187.28     | 190.73     | 186.79    | 188.37      | 2,509,357 |
| 2018-01-03 | 188.87     | 192.15     | 188.43    | 190.63      | 3,364,391 |
| 2018-01-04 | 192.05     | 192.35     | 187.61    | 189.15      | 3,525,799 |
| 2018-01-05 | 189.48     | 189.73     | 186.77    | 187.80      | 2,819,039 |
| 2018-01-08 | 187.37     | 189.03     | 187.30    | 188.53      | 1,962,288 |
| 2018-01-09 | 189.06     | 189.35     | 186.20    | 186.34      | 2,241,921 |
| 2018-01-10 | 185.80     | 186.29     | 183.93    | 185.47      | 2,609,535 |
| 2018-01-11 | 185.48     | 190.72     | 185.08    | 189.43      | 4,678,631 |
| 2018-01-12 | 190.15     | 192.23     | 190.05    | 191.89      | 3,499,551 |
| 2018-01-16 | 192.40     | 192.89     | 190.94    | 191.58      | 2,006,587 |
| 2018-01-17 | 192.58     | 192.61     | 191.39    | 192.34      | 2,585,208 |
| 2018-01-18 | 192.28     | 193.08     | 191.27    | 191.56      | 1,907,973 |

Ticker: TICKER01, TICKER02, TICKER03, TICKER04, TICKER05

MktDate: 2018 - 2025

2018 2019 2020 2021

2018/01/02

## Dashboard User Interface

| MktDate    | Price_Open | Price_High | Price_Low | Price_Close | Volume    |
|------------|------------|------------|-----------|-------------|-----------|
| 2018-01-02 | 187.28     | 190.73     | 186.79    | 188.37      | 2,509,357 |
| 2018-01-03 | 188.87     | 192.15     | 188.43    | 190.63      | 3,364,391 |
| 2018-01-04 | 192.05     | 192.35     | 187.61    | 189.15      | 3,525,799 |
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| 2018-01-12 | 190.15     | 192.23     | 190.05    | 191.89      | 3,499,551 |
| 2018-01-16 | 192.40     | 192.89     | 190.94    | 191.58      | 2,006,587 |
| 2018-01-17 | 192.58     | 192.61     | 191.39    | 192.34      | 2,585,208 |
| 2018-01-18 | 192.28     | 193.08     | 191.27    | 191.56      | 1,907,973 |
| 2018-01-19 | 191.76     | 192.69     | 191.21    | 192.34      | 2,353,852 |
| 2018-01-22 | 192.55     | 194.81     | 192.11    | 194.43      | 3,009,135 |
| 2018-01-23 | 193.66     | 194.15     | 192.12    | 193.47      | 2,316,457 |
| 2018-01-24 | 194.48     | 194.80     | 191.98    | 194.29      | 2,799,237 |
| 2018-01-25 | 195.05     | 198.50     | 194.79    | 198.00      | 3,558,714 |
| 2018-01-26 | 197.80     | 199.28     | 195.74    | 198.96      | 2,756,253 |
| 2018-01-29 | 198.42     | 199.93     | 197.61    | 198.37      | 2,031,095 |
| 2018-01-30 | 197.64     | 198.84     | 196.13    | 197.96      | 2,285,053 |
| 2018-01-31 | 197.49     | 198.52     | 194.15    | 194.91      | 2,682,312 |
| 2018-02-01 | 193.46     | 195.45     | 192.49    | 193.32      | 2,096,576 |
| 2018-02-02 | 191.30     | 193.65     | 190.85    | 191.04      | 2,386,586 |
| 2018-02-05 | 190.71     | 192.15     | 182.58    | 189.82      | 3,407,234 |
| 2018-02-06 | 178.96     | 185.29     | 176.25    | 180.77      | 4,067,923 |
| 2018-02-07 | 184.65     | 186.24     | 183.12    | 184.74      | 2,594,835 |
| 2018-02-08 | 184.56     | 184.56     | 178.56    | 178.66      | 3,013,212 |
| 2018-02-09 | 179.83     | 182.12     | 175.84    | 180.77      | 2,777,231 |
| 2018-02-12 | 181.89     | 183.31     | 180.43    | 181.11      | 1,596,167 |
| 2018-02-13 | 180.27     | 184.65     | 180.10    | 184.20      | 2,123,897 |
| 2018-02-14 | 182.76     | 188.53     | 182.36    | 187.40      | 2,191,010 |
| 2018-02-15 | 188.14     | 191.76     | 186.62    | 191.53      | 2,072,874 |
| 2018-02-16 | 191.50     | 194.67     | 191.09    | 191.61      | 1,970,131 |
| 2018-02-20 | 189.92     | 191.53     | 187.68    | 188.17      | 2,202,152 |
| 2018-02-21 | 188.58     | 189.19     | 185.74    | 185.80      | 1,747,204 |
| 2018-02-22 | 186.40     | 188.38     | 186.71    | 186.64      | 1,360,128 |

Ticker: TICKER01, TICKER02, TICKER03, TICKER04, TICKER05

MktDate: 2018 - 2025

2018 2019 2020 2021 2022 2023 2024 2025

2556 days P/L: +386.45%

TICKER05

2018/01/02 Market Price Trend 2024/12/31

YRS

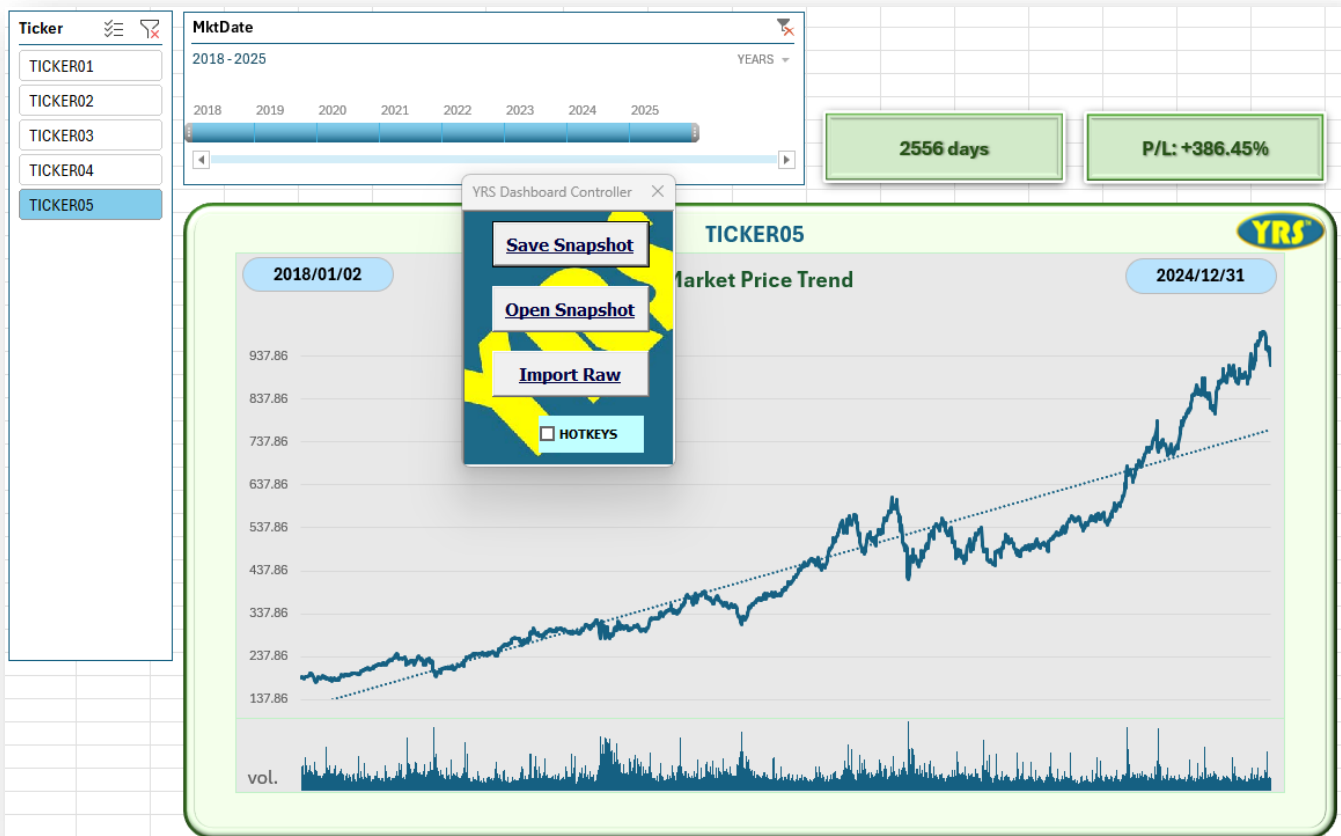
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Raw Dashboard About

## GUI Elements:

- The workbook has three worksheets (tabs).
  - “Raw” has the original daily price data. “Raw” data serves as the data source of the dashboard. It’s filled when user use the built-in Import function to import from the YRS-Daily-RawData.csv.
  - “Dashboard” is the main user interface of this dashboard.
  - “About” has the license and term of use of this dashboard.
- This dashboard section is a dynamic pivot table. The data is loaded from “Raw” worksheet. This happens automatically once you import the data. As end user, you don’t need to modify or change anything here.
- Ticker slicer. A mouse click can pick any ticker. The chart (#6 element) and the pivot table (#2 element) will also refresh accordingly. Ticker slicer can also be controlled by keystrokes (hotkeys) for more fluid user experience.
- Date range slicer. Use this to choose different date range in year, quarter, month, day for your analytical scope. This slicer is standard Excel control. Please refer to Microsoft or other popular online tutorials on how to use it.
- Two KPIs, one to tell the CALENDAR days gap of the chart. The other to tell Profit/Loss of this period.
- This is the CHART. The data points plotted on the canvas are based on **Close Price** in OHLC (Open/High/Low/Close) daily price. Volume bars are plotted as well.

## Dashboard Controller



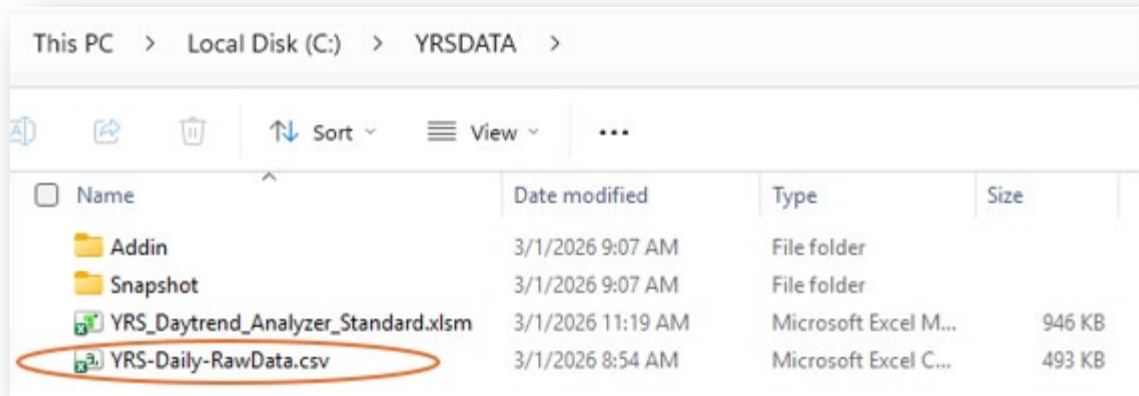
- With just ONE click anywhere in chart area (GUI element#6) or KPI area (GUI element#5), the YRS Dashboard Controller will pop up. This controller can help the user to import raw data, Save Snapshot of the chart & KPI, and enable/disable hotkeys. Many users prefer to use keyboard to operate when possible.



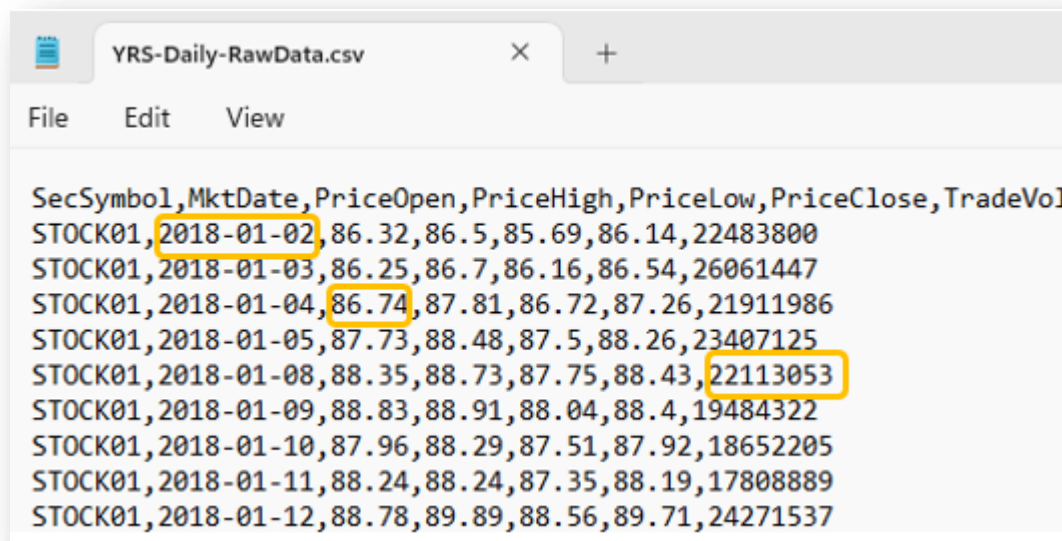
- Putting the controller at the right side of the chart will usually give better GUI experience.

## Raw Data Format (CSV)

- The dashboard raw data comes from pre-formatted CSV file. This CSV file should contain stock market daily pricing records. Each record (i.e. each line in CSV) represents one stock (ticker)'s one trading day's OHLC price (Open, High, Low, Close) and Volume information.
- By default, the end user should prepare a CSV file named **YRS-Daily-RawData.csv**. It should sit the same folder as dashboard Excel file (YRS\_Daytrend\_Analyzer\_Standard.xlsm), as shown below:



- The CSV file is just a plain text file, which can be opened by Notepad or any other similar basic text editors.



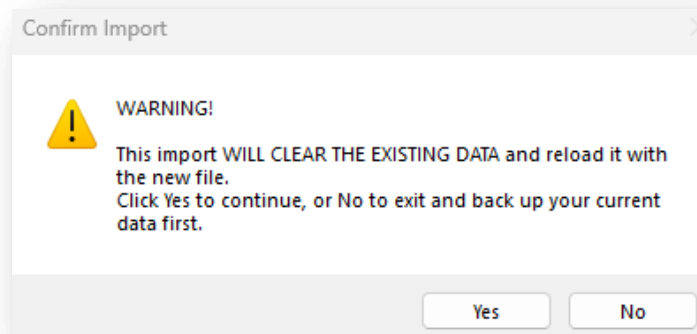
- It's the end user's responsibility to prepare the raw CSV file. The CSV format is fixed:**
  - Header line must be SecSymbol, MktDate, PriceOpen, PriceHigh, PriceLow, PriceClose, TradeVol
  - Each data line must be clean: date must be **yyyy-mm-dd**, money must be **decimal** amount, volume must be **whole number**. The separator of each field must be **comma**.
  - Use the existing sample to build your own YRS-Daily-RawData.csv. For example, keep the header line and replace the data lines with your own data with proper format.
- Standard Edition Dashboard can handle maximum one million daily pricing records (Excel limit). Lite Edition Dashboard can handle maximum 10000 daily pricing records.**

### Import Raw Data (CSV to dashboard)

- in Chart area or KPI area (GUI element#5 or #6), one left mouse click to bring up the Controller Popup as shown below:



- Click the “Import Raw” button, a warning will pop up. Because each import will clear the existing data and reload the new set of data. **Always backup your existing data before the import.** (One easy backup is just to copy the YRS\_Daytrend\_Analyzer\_Standard.xlsx to an archive folder)



- Click the “Yes” button to continue. If the CSV has been properly prepared as described above, you will see this in “Raw” worksheet. This means that the dashboard is refreshing with the CSV raw data. This screen could last from seconds to minutes, depending on how big the dataset is. For example, it usually takes less than 10 seconds to import ten years’ ten tokens’ daily data.

|    | A                                | B |
|----|----------------------------------|---|
| 1  | ExternalData_1: Getting Data ... |   |
| 2  |                                  |   |
| 3  |                                  |   |
| 4  |                                  |   |
| 5  |                                  |   |
| 6  |                                  |   |
| 7  |                                  |   |
| 8  |                                  |   |
| 9  |                                  |   |
| 10 |                                  |   |

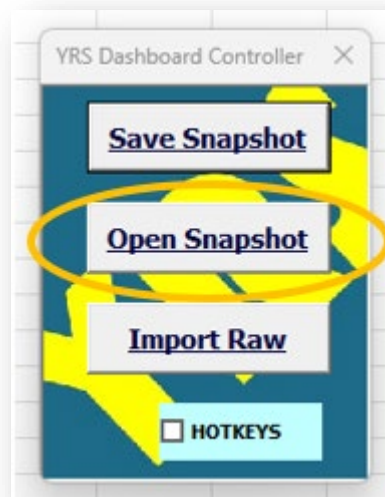
- Once the import finished, you will see the dashboard again, with the newly refreshed dataset.

## Snapshot

- While scanning the different stocks at different date ranges, the chart refreshes accordingly. You can save any interesting chart pattern as a snapshot picture to the hard drive for later research and studies.
- Bring up the controller popup and move it to the right side of the chart. As shown below:



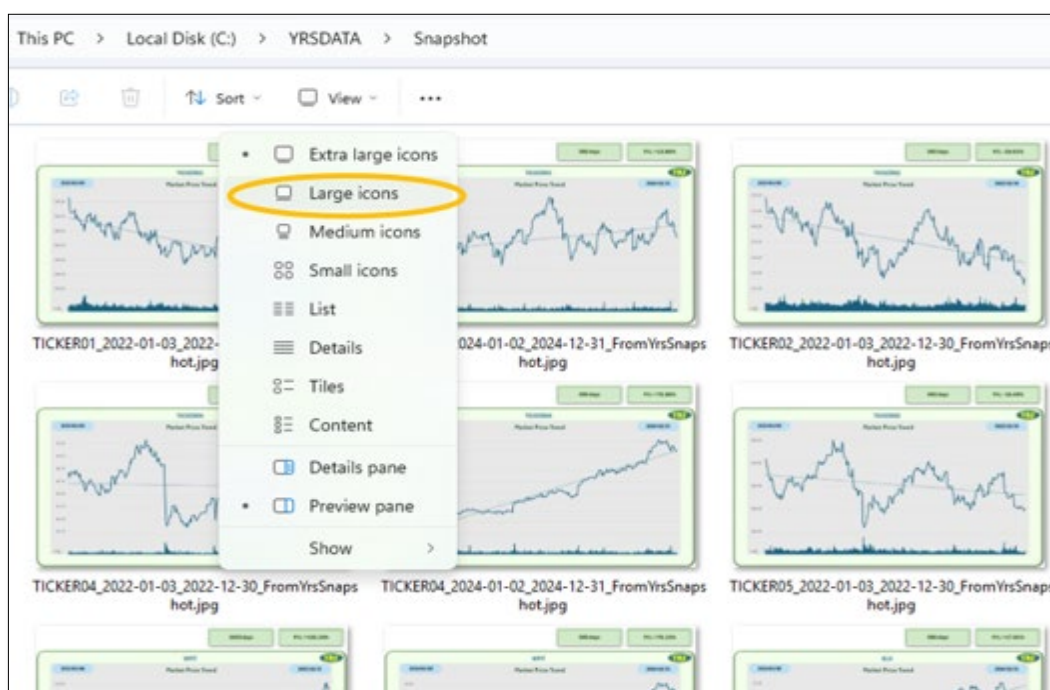
- Click “Save Snapshot” button, the current Chart and KPIs will be saved as a snapshot picture into default snapshot folder (Usually it’s a subfolder under the dashboard folder).



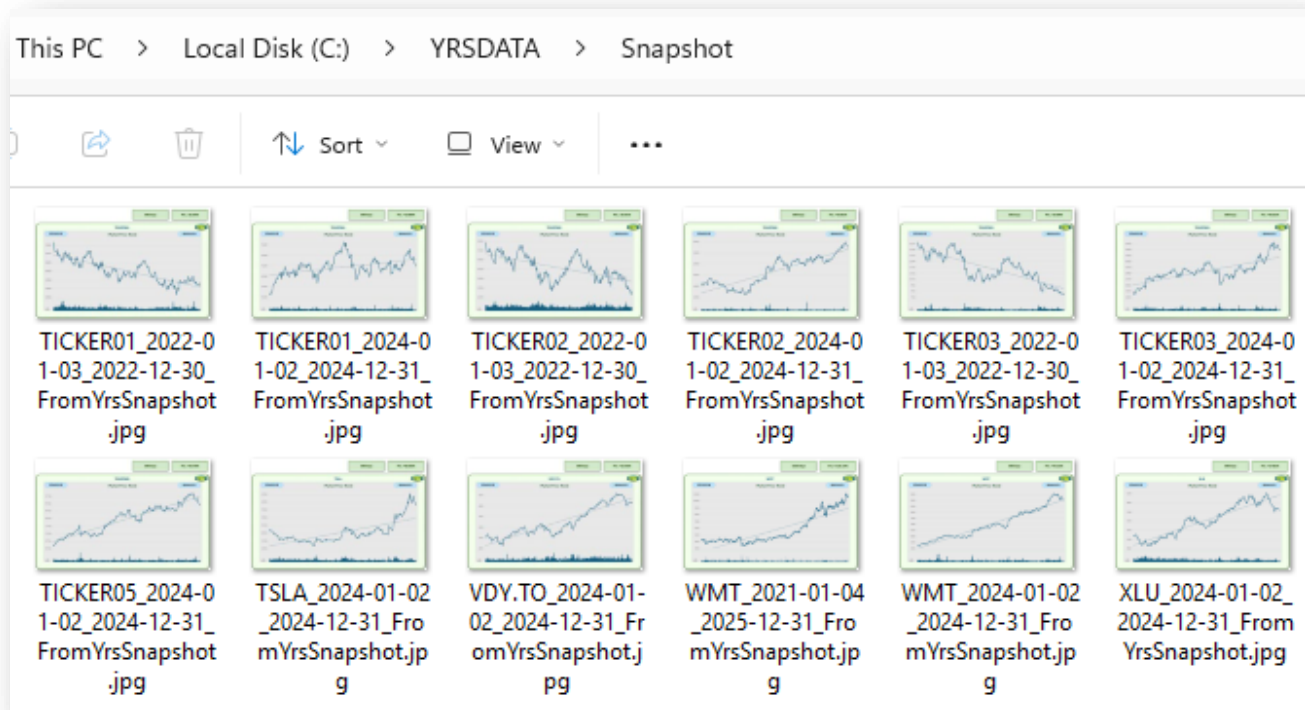
- Click “Open Snapshot” button, the Windows File Explorer will directly open to the snapshot folder. By default, it should be under “snapshot” subfolder of the main Dashboard folder.



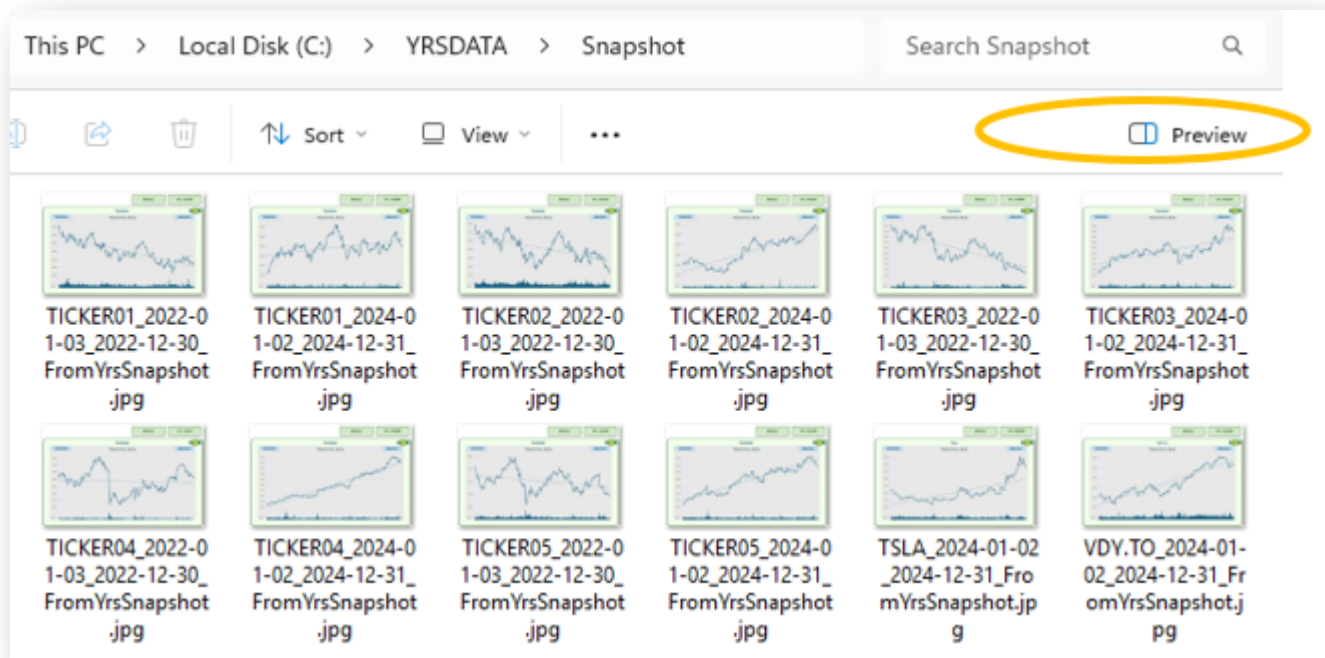
- User can take advantage of Windows File Explorer, view different sizes of the thumbnails, depending on user preferences (some prefer large icons, some prefer smaller icons).

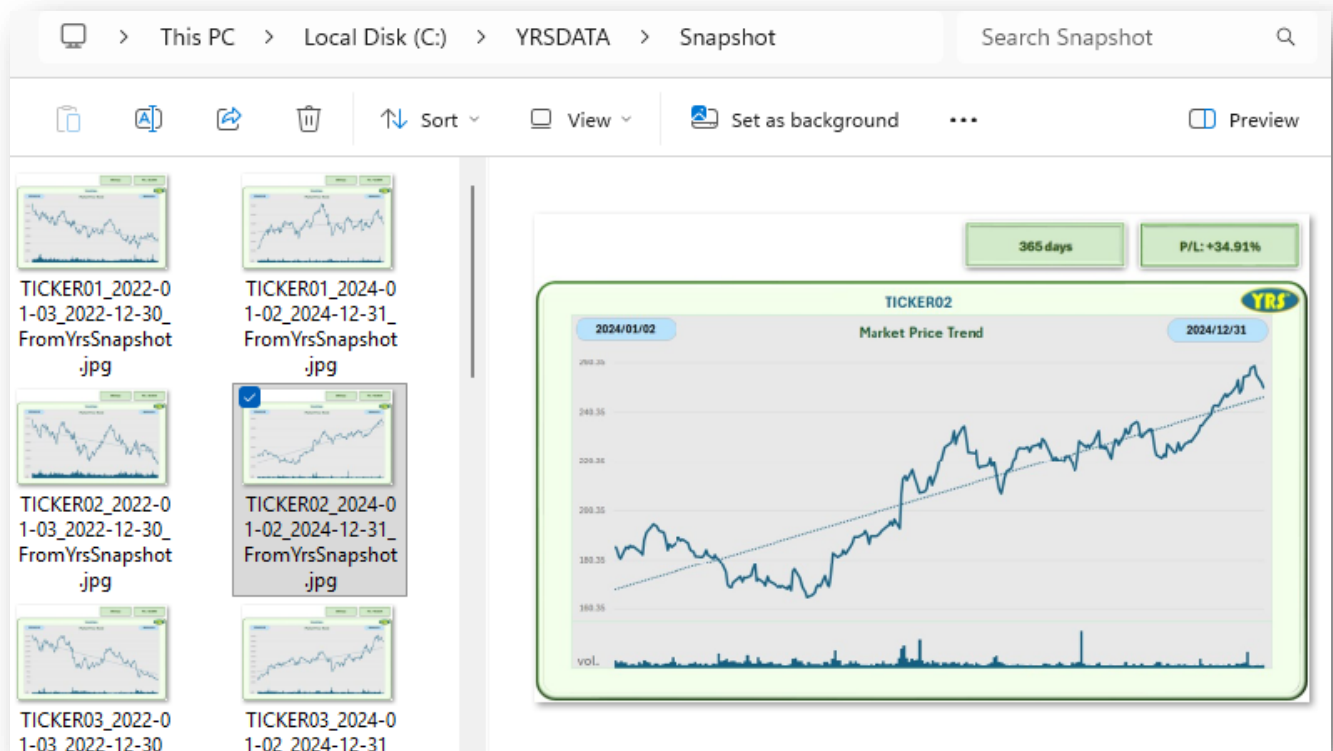


- Example: smaller icons allow more icons (sparklines) to be packed in one view.



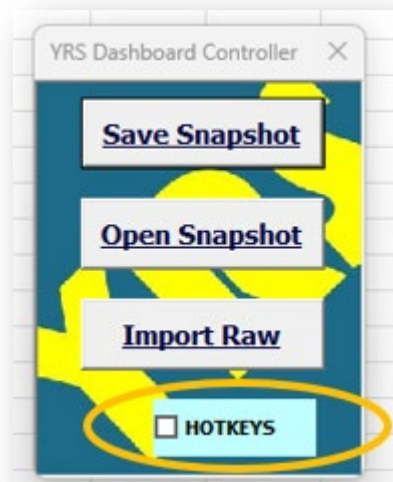
- File Explorer's built-in preview function is also good for you to scan chart snapshots.





## HOTKEYS

- Many users prefer to use keyboard keystrokes to navigate back and forth through tickers. Just bring up the popup controller and Enable the HOTKEYS. Once enabled, lower case [a] [z] [s] are hotkeys. [a] to move up the ticker list, [z] to move down the ticker list, [s] for snapshot.
- **NOTE: to make sure hotkeys are ready to use, please click the blank area of the spreadsheet once, or click one ticker on ticker slicer (The #3 GUI element mentioned above)**

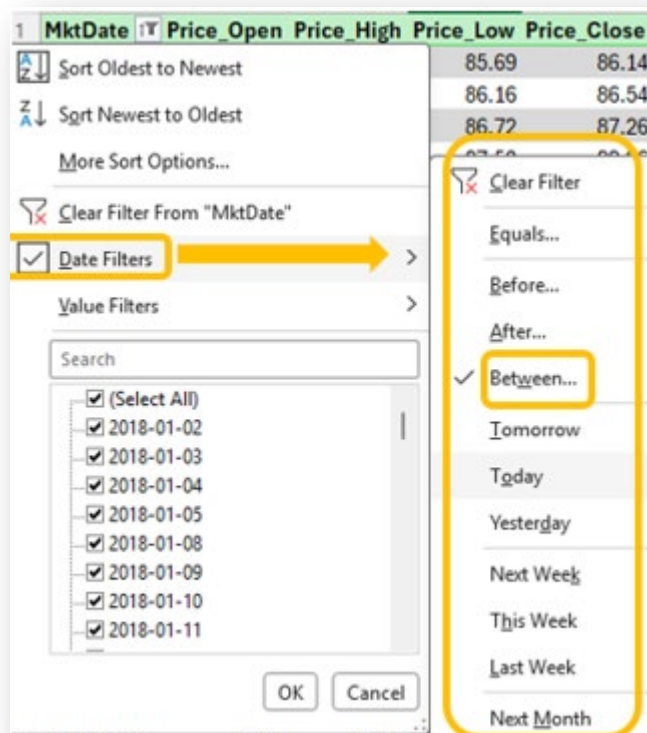


## Customized Date Range

- Time slicer (GUI element #4) is good for selecting Year, Quarter, Month, and Day in a consecutive, whole manner. However, it is difficult to adjust to a specific date range, such as from part of this month to part of next month. In this case, user can take advantage of Dashboard's pivot table MktDate filter: (In GUI element #2 as mentioned above)

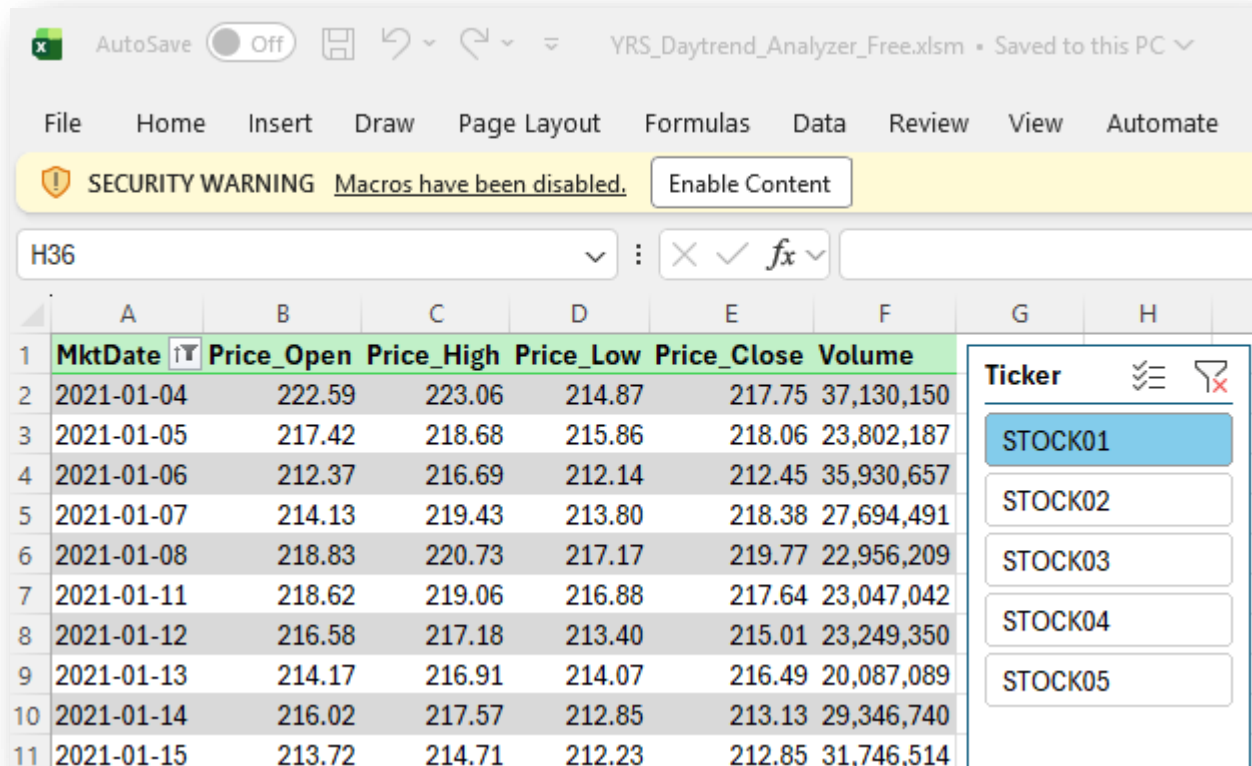
| MktDate    | Price_Open | Price_High | Price_Low | Price_Close | Volume     |
|------------|------------|------------|-----------|-------------|------------|
| 2018-01-02 | 86.32      | 86.50      | 85.69     | 86.14       | 22,483,800 |
| 2018-01-03 | 86.25      | 86.70      | 86.16     | 86.54       | 26,061,447 |
| 2018-01-04 | 86.74      | 87.81      | 86.72     | 87.26       | 21,911,986 |
| 2018-01-05 | 87.73      | 88.48      | 87.50     | 88.26       | 23,407,125 |
| 2018-01-08 | 88.35      | 88.73      | 87.75     | 88.43       | 22,113,053 |
| 2018-01-09 | 88.83      | 88.91      | 88.04     | 88.40       | 19,484,322 |
| 2018-01-10 | 87.96      | 88.29      | 87.51     | 87.92       | 18,652,205 |
| 2018-01-11 | 88.24      | 88.24      | 87.35     | 88.19       | 17,808,889 |
| 2018-01-12 | 88.78      | 89.89      | 88.56     | 89.71       | 24,271,537 |
| 2018-01-16 | 90.27      | 90.96      | 88.19     | 88.52       | 36,599,746 |
| 2018-01-17 | 89.25      | 90.45      | 88.92     | 90.31       | 25,621,172 |
| 2018-01-18 | 89.86      | 90.73      | 89.72     | 90.16       | 24,159,696 |
| 2018-01-19 | 90.29      | 90.76      | 89.81     | 90.15       | 36,875,014 |
| 2018-01-22 | 90.20      | 91.82      | 89.94     | 91.81       | 23,601,560 |
| 2018-01-23 | 92.04      | 92.44      | 91.68     | 92.04       | 23,412,851 |

- Click the filter icon, EXCEL built-in filter panel will pop up. Use the "Between..." option for a customized date range. There are many other date range shortcuts also very useful.

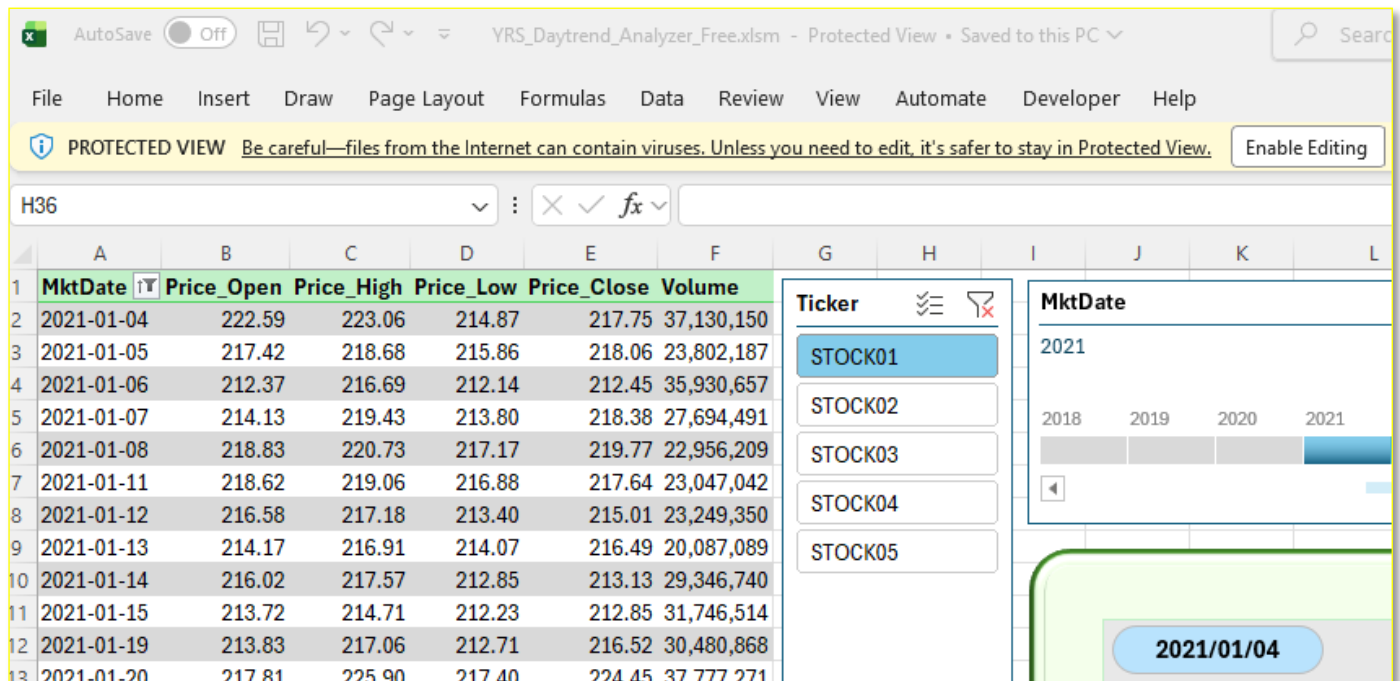


## Address Excel Security Warnings

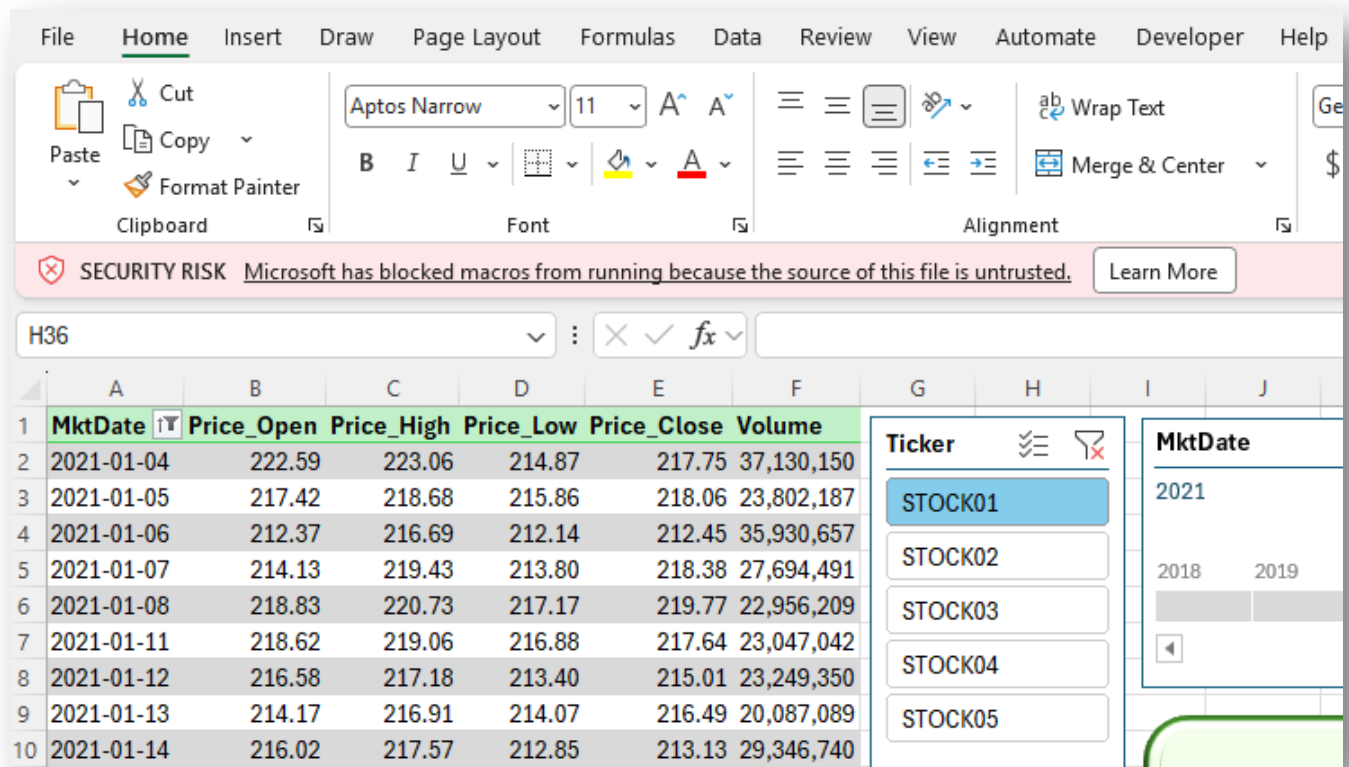
- When opening the file for the first time, Excel may display a **“SECURITY WARNING: Macros have been disabled”** message at the top of the window. Please click **“Enable Content”** to proceed. This prompt typically appears only the first time you open the file.



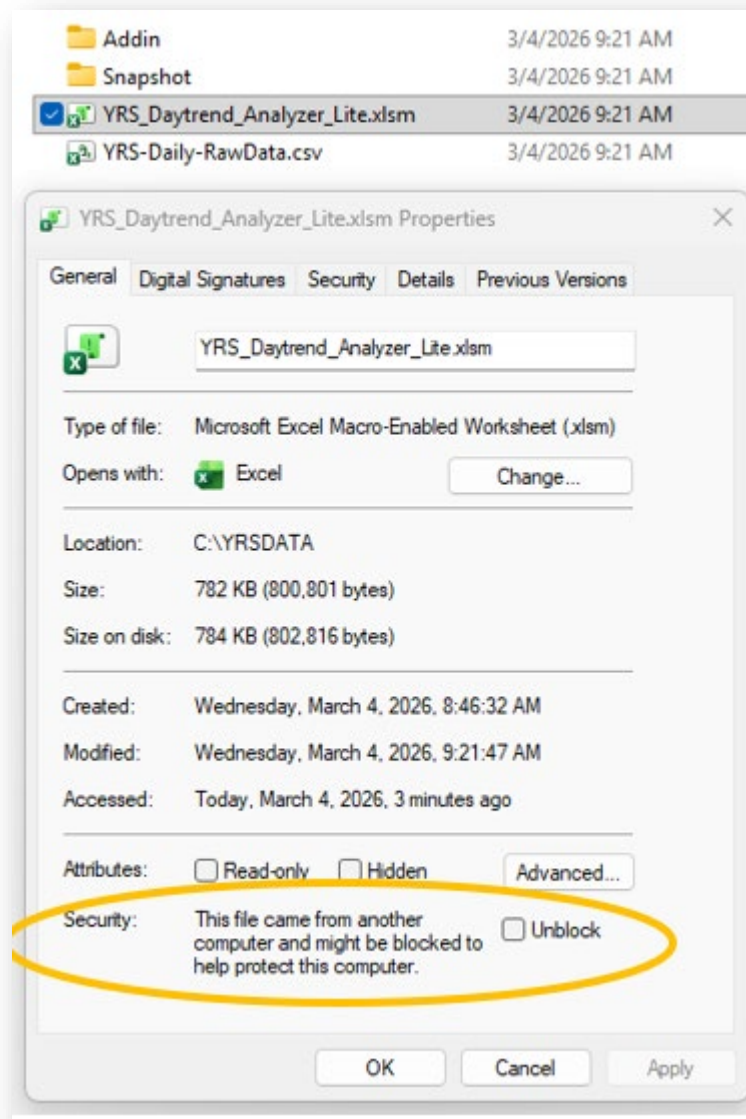
- Excel may also display **“PROTECTED VIEW: Be careful - files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.”** Please click **“Enable Editing”** to proceed. This prompt typically appears only the first time you open the file.



- When Excel opens a file downloaded from the Internet, a pink “**SECURITY RISK**” warning may appear at the top of the window. If no action is taken, the Dashboard Analyzer will not function properly.



- To resolve this issue, first close Excel. Then navigate to the file location, right-click YRS\_Daytrend\_Analyzer\_Lite.xlsm or YRS\_Daytrend\_Analyzer\_Standard.xlsm, and select Properties. At the bottom of the Properties window, check the “Unblock” box, then click Apply and OK. **This is a one-time setup. (screenshot next page)**



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