Chapter III.

Setting Up Real-Time Alerts

In this chapter

The first time the Alerts window is opened, the chart window and the tickers panel should be empty. To set up Alerts to monitor a list of tickers in real-time, follow the instructions in this chapter.
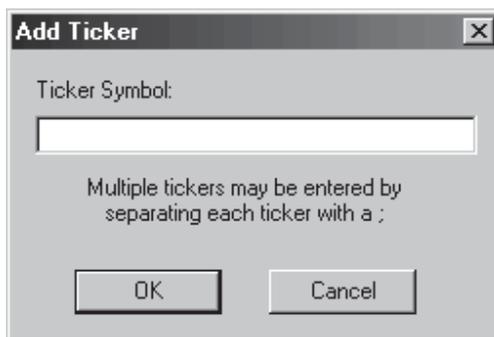
1. Specify tickers to monitor

Add tickers

Add Tickers toolbar button

► *To add tickers, proceed as follows:*

1. Display the *Add Tickers* dialog box:

    • Select the **Tickers** command on the menu bar. Then select **Add...** from the drop-down menu.

        or

    • Click the **Add Ticker** toolbar button

        or

    • Press the **Insert** key

Add Ticker dialog box

2. In the *Add Ticker* dialog box, type the symbols of the tickers you want to monitor. You may enter multiple symbols by separating each with a semicolon (;).

3. Press **OK**. The symbol(s) you entered will appear in the Tickers panel. After a few seconds, a chart of the ticker selected in this panel will be displayed.

4. Save your list of tickers to an Alert file (see following section, *Save your list of tickers to a Real-Time Alert file*).

Remove tickers

▶ *To remove a ticker from a list, proceed as follows:*

1. In the ticker list, select the ticker you want to remove and then display the *Delete Ticker...?* dialog box**:**

    • Choose **Tickers** from the menu bar. Then select **Delete** from the drop-down menu.

      or

    • Press the **Delete** key

2. A dialog box will appear showing the symbol of the ticker you have selected for deletion. Choose **Yes** to delete the symbol shown.

Save your list of tickers to a Real-Time Alert file

▶ *To save a list of tickers to an RTA file:*

1. From the **File** command on the menu bar, select **Save As**.

2. Use the *Save As* dialog box to specify a file name (file extension RTA will be automatically added) and the folder where you want the file to be stored.

3. Click **Save**.

4. You may create and save as many Real-Time Alert files as you like. Use the *File* menu command *New* to close the currently open file before creating a new file.

5. After creating and saving multiple files, use the *Open* command on the *File* menu to switch between files.

Note
Use the Windows Explorer function to delete a Real-Time Alerts file (file extension RTA) from the file folder to which it was saved.
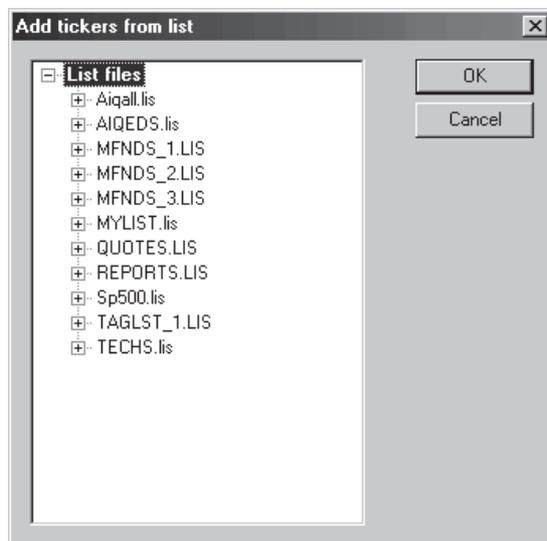
Import list of tickers from Data Manager

Lists of tickers created in *Data Manager* can be imported directly into the ticker panel of the Alerts window.

► *To import a list:*

1. From the **Tickers** command on the menu bar, select **Add tickers from List**. A dialog box is displayed that contains an expandable list comprised of all your TradingExpert Pro lists.

Add tickers from list

- □ **List files**
  - ⊞ Aiqall.lis
  - ⊞ AIQEDS.lis
  - ⊞ MFNDS_1.LIS
  - ⊞ MFNDS_2.LIS
  - ⊞ MFNDS_3.LIS
  - ⊞ MYLIST.lis
  - ⊞ QUOTES.LIS
  - ⊞ REPORTS.LIS
  - ⊞ Sp500.lis
  - ⊞ TAGLST_1.LIS
  - ⊞ TECHS.lis

OK
Cancel

Add tickers from List dialog box, with List files expanded to show all available lists

Note

For some special tickers, the symbol format used by Dial/Data differs from the format required by Track Data, the provider of real-time information. You do not need to change these symbols as all symbols are automatically converted during import to the required format.

2. Click on the small box (enclosing + sign) named **List Files**. List will expand to display all your TradingExpert lists that have been created in *Data Manager* . You can display the tickers in a list by clicking on the small box to the left of the list name. If the list contains sub-lists, the sub-list names (with boxes) will appear.

3. Select the list you want to import by clicking its box.

4. Click **OK** to transfer the selected list to the Alerts window. The list of tickers should now appear in the Tickers panel.

5. Select **Save** from the **File** menu to save the list to an RTA file.

2. Customize the Chart window

The *Properties* dialog box is used to change the color of the various chart components and to change a number of chart properties.

► *Display the Properties dialog box by one of these methods:*

• From the **File** menu, select **Chart Properties**.

• Select **Properties** from the Right Mouse Click menu.

• Click the **Chart Properties** toolbar button.
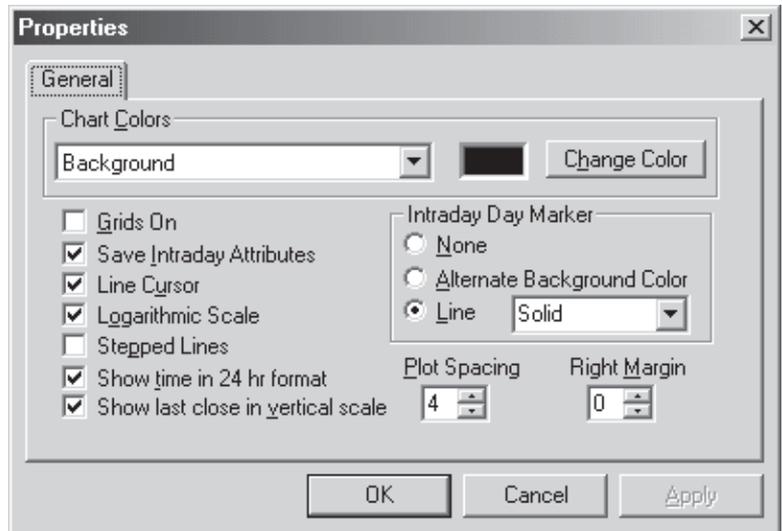

Chart Properties toolbar button

Chart Properties dialog box

► *To change colors:*

1. Select a chart component by clicking the arrow in the *Chart Colors* list box and then choose a component from the drop-down list.

2. Click the **Change Color** button and from the *Color* dialog box, choose one of the Basic colors or create a Custom Color and click **OK**. In the *Properties* dialog box, the color you have selected will now appear in the box next to the component name.

► *To turn chart grid on or off:*

• In the *Properties* dialog box, a check mark in the *Grid On* option box indicates the grid is displayed. To delete the grid, remove the check mark by clicking on the box.

► *To save intraday attributes:*

• In the *Properties* dialog box, a check mark in the *Save Intraday Attributes* option box indicates that the intraday attributes will be saved. To erase intraday attributes when **Real-Time Alerts** is shut down, remove the check mark by clicking on the box. For information on how to create chart attributes, see Chapter IV.

► *To turn the line cursor on/off:*

• In the *Properties* dialog box, a check mark in the *Line Cursor* option box displays the line cursor. To remove the cursor, remove the check mark by clicking on the box.

► *To switch to logarithmic price scale:*

• In the *Properties* dialog box, a check mark in this option box specifies a logarithmic scale for the price (vertical) axis of the chart. To change the price plot back to an arithmetic scale, remove the check mark by clicking on the box.

► *To change to stepped lines plot:*

• In the *Properties* dialog box, a check mark in this option box changes all indicator plots to stepped line plots. To change back to the usual x-y plots, remove the check mark by clicking on the box.

► *To show time in 24 hour format:*

• In the *Properties* dialog box, a check mark in this option box displays time in 24 hr format. To change back to AM/PM time format, remove the check mark by clicking on the box.

► *To show last close in vertical scale:*

• In the *Properties* dialog box, a check mark in this option box displays the last closing price in a highlighted box on the price scale on the right side of the chart. To remove the last close from the vertical scale, remove the check mark by clicking on the box.

► *To display and customize intraday day marker:*

- In the *Properties* dialog box, the section labeled *Intraday Day Marker* provides three options for displaying markers to show the end of one day and the start of the next day.

  - **None** - No marker
  - **Alternate Background Color** - With this option, the chart window background color alternates each day between the Background color and the Day Marker color. To specify colors, see previous pages.
  - **Line** - A vertical line indicates change of day. If you choose this option, use the adjacent list box to select the type of line (solid, dashed, dotted, etc.) you would like to see displayed.

► *To increase/decrease horizontal plot spacing:*

1. In the *Properties* dialog box, the box labeled *Plot Spacing* shows the current chart time scale (horizontal axis) spacing. The default value is 5 (1 is the minimum spacing value and 10 is the maximum value).

2. To increase the spacing, press the up arrow on the box. To decrease spacing, use the down arrow.

► *To increase/decrease chart right margin:*

1. In the *Properties* dialog box, the box labeled *Right Margin* shows the current number of future time periods shown to the right of the latest data value. Extending the time scale beyond the latest data value allows attributes such as trendlines to be extrapolated into the future. The default value is 0 (0 is the minimum number of time periods and 30 is the maximum).

2. To increase the spacing, press the up arrow on the box. To decrease spacing, use the down arrow.

When you have completed your changes to *Chart Properties*, click **OK**.

3. Customize technical indicators

All available indicators are listed in the Control Panel, the panel to the right of the chart window. The indicators are charted like they are on all TradingExpert charts. Price averages (MA's and ESA's), Bollinger Bands (BB's), and High/Low indicators are displayed on the Price Plot. All other indicators are plotted individually below the Price Plot.

► *To change indicator constants:*

1. From the **File** command on the menu bar, select **Indicator Properties**. Or, select **Indicators** on the Right Mouse Click menu.

2. The *Properties* dialog box that appears displays an indicator list identical to the list shown in the main Alerts window. To change the constants for an indicator, find and select the indicator in this list. Indicators are divided into two categories (Upper and Lower) depending upon where they are displayed on the chart. Indicators displayed in the upper (price plot) section of the chart are listed on the tab labeled **Upper**. Indicators displayed in the lower (indicator) section of the chart are listed on the tab labeled **Lower**.
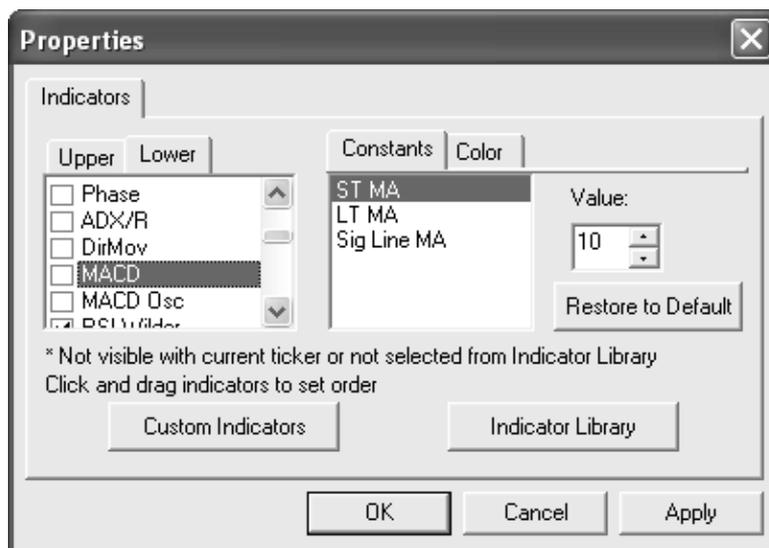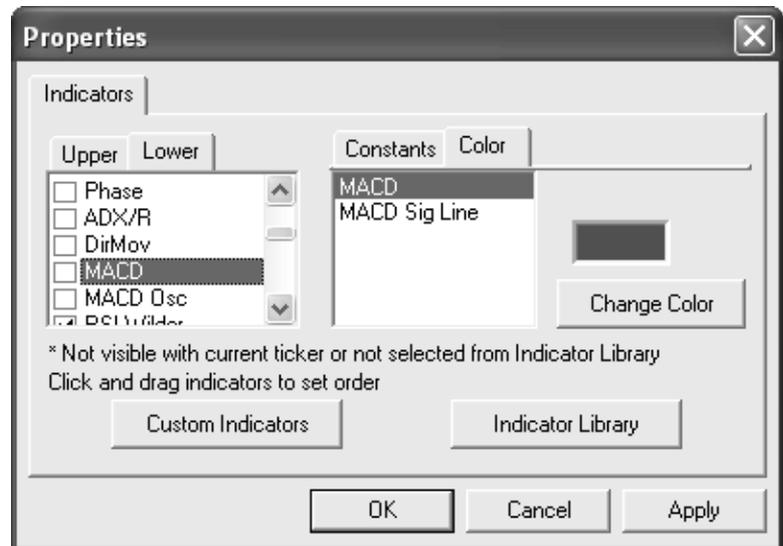

Indicators Properties dialog box

3. The *Constants* tab located above the box at the right of the indicator list box should be selected and the changeable constants for the selected indicator should appear in this box. From this box, select a constant.

4. The current value for the constant is displayed in the box labeled *Value*. Use the arrows on this box to change the number to the value you want to use.

5. To restore the default value for the selected constant, click the **Restore to Default** button.

6. When you have completed your changes to *Indicator Properties*, click **OK**.

► *To change the colors used to display indicators on charts:*

1. From the **File** command on the menu bar, select **Indicator Properties**. Or, select **Indicators** on the Right Mouse Click menu.

2. In the *Properties* dialog box that appears, find and select the indicator that you want to revise then click the tab labeled **Color** (tab above the box located to the right of the indicator list).

Indicators Properties dialog box

3. The components (lines) for the selected indicator appear in the box to the right of the indicator list. From this box, select a component.

4. The current color for the selected component is displayed in the small box above the *Change Color button*. To change the color, click the button.

5. Use the *Color* dialog box to choose a new color. Then click **OK** to return to the *Properties* dialog box.

6. When you have completed all your color changes, click **OK** to close the *Properties* dialog box

► *To customize a single indicator:*

1. Display a chart.

2 In the indicator panel, click on the indicator you wish to customize using your right mouse button. The dialog box that appears pertains to the selected indicator.
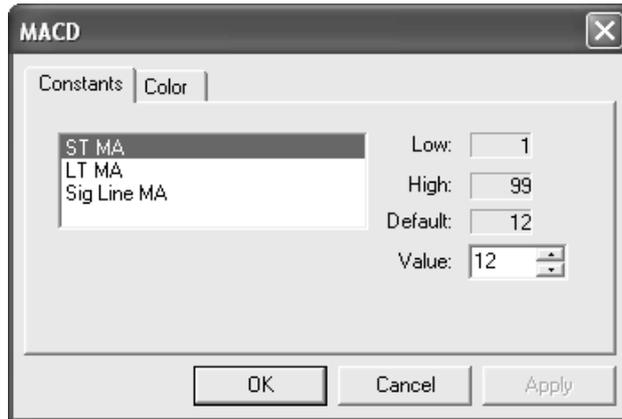
3. If the indicator has one or more constants that you wish to change, click on the tab labeled *Constants*. The changeable constants for this indicator will be listed on the page that appears. To change a constant, do as follows:

- If the indicator has more than one constant, first select from the list the constant that you want to change.

- The High Low and Default values for the constant are shown above the current value which is displayed in the box labeled *Value*. Use the arrows on this box to change the number to the value you want to use.

4. When you have completed your changes to *Constants*, click **OK**.

5. If you wish to change the color of one or more of the indicator's component lines, click on the tab labeled *Color*. The components of the indicator will be listed on the page that appears.
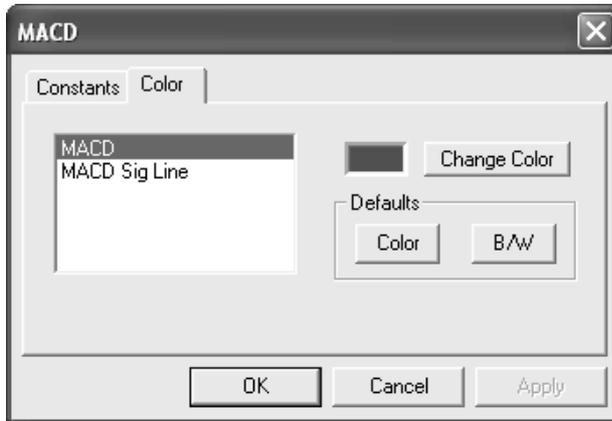
6. To change the color of an indicator component, do as follows:.

   - If the indicator has more than one component, first select from the list the component that you want to change.

   - The current color for the selected component will appear in the small box to the right of the component list box. To change the color, click the *Change Color* button.

   - Use the *Color* dialog box to choose a new color. Then click **OK** to return to the *Color* page.

7. To restore the default color, click **Color** in the *Default* section.

8. To display the indicator in black and white, click **B/W** in the *Default* section.

9. When you have completed your changes, click **OK**.

4. Specify data preferences for charts

The *Real-time Setup* dialog box provides settings used to specify data preferences for charts.

► *To access the Real-time Setup dialog box:*

1. Open *Alerts* application.

2. With the empty *Alerts* window on your screen, click the **File** command on the menu bar and select **Service Setup** from the drop-down menu. The *Real-time Setup* dialog box will appear.

Real-time Setup dialog box

3. From the *Time Display Preference* section, select the option you prefer for the time scale displayed on real-time charts. For all options except **Market**, trading data is displayed only during normal market hours (e.g., 9:00 to 4:00 est for NYSE).
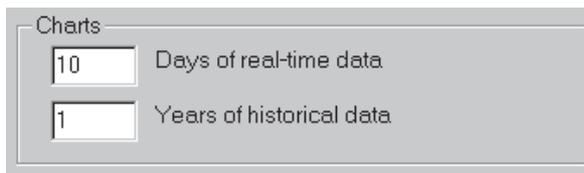
Time Display Preference
○ Default   ○ Local   ○ Universal   ● Market   ○ New York

- **Default** - New York Stock Exchange time.
- **Local** - The time and date set on user's computer.
- **Universal** - GMT
- **Market** - For this option, exchange, time, and market hours are determined by the parameters chosen in the *Market Definitions* section of this dialog box. See the next section for information on defining a Market.
- **New York** - New York Stock Exchange time.

4. The *Charts* section allows you to adjust two parameters that affect the display of real-time charts:

- *Days of real-time data*
  In box labeled *Days of real-time data*, type in the largest number of days of history that can be shown on real-time charts. The maximum that can be retrieved is 30 days.

- *Years of historical data*
  This entry applies only to charts displayed in the **Real-Time Alerts** application. In box labeled *Years of historical data*, type in the maximum number of years of history that can be shown on real-time charts.

Charts
[10]   Days of real-time data
[1]   Years of historical data

5. When finished, click **OK** to close the *Real-time Setup* dialog box and save your changes.

Defining a Market for real-time data retrieval

When the **Market** option is selected in the *Time Display Preference* section of *Real-time Setup*, the middle section of the dialog box, the *Market Definitions* section, is used to define the *Market* that is currently in effect. As it pertains to this function, a *Market* is a special set of parameters that is used for charting real-time data. From this section, you can also create a new *Market*, or edit or delete an existing *Marke*t.

► *To define a Market, proceed as follows:*

1. Open the *Real-time Setup* dialog box.

2. From the list of codes in the *Market Code* list box, select a code. This code identifies a particular stock exchange and the time zone to which it is linked. When a code is selected, the adjacent *Description* box will display the name of the exchange (e.g., Pacific Stock Exchange for code P), the *Time Zone* box will display the time zone that has been linked to this Market (usually the time zone for the designated exchange), and the *Market Hours* box will list all time periods that have been specified for this Market.

Market Definitions section of Real-time Setup dialog box

3. Specify *Market Hours* as follows:

   • If only one set of *Start* and *End* times is listed in the *Market Hours* box and these times are acceptable to you, you only need to verify that the times are enabled (green check mark in far left column). If disabled (red X in far left column), click the **Enable/Disable** button to enable.

- If more than one set of *Start* and *End* times is listed in the *Market Hours* box and one is acceptable to you, use the **Enable/Disable** button to enable the set that you want to use and to disable all others.

- To add a new set of times to the *Market Hours* box, click the **Add Time** button and proceed as follows:

  - In the *Times* dialog box, enter *Start* and *End* times in the labeled boxes using 24 hour military time.

  - To enable these times, click the **Enabled** option box.

 - Click **OK** to add this new set of times to the *Market Hours* box.
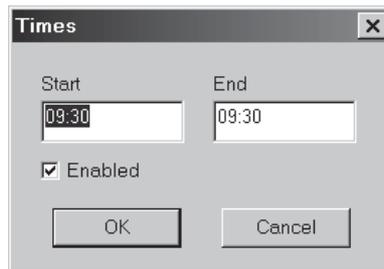
Times dialog box

4. Switch the defined Market Hours (the times enabled in the *Market Hours* box) on or off.

   - To switch the defined Market Hours on, check the option box labeled **Only show data during defined Market hours**.

   - To switch the defined Market Hours off, remove the check mark from the option box labeled **Only show data during defined Market hours**. Market hours will revert to the default times.

5. When finished, click **OK** to close the *Real-time Setup* dialog box and save your changes.

Creating a New Market for real-time data retrieval

► *To create a new Market, do the following:*

1. Click the arrow located at the right of the *Description* box and, from the drop-down menu, choose **New** to display the *Market* dialog box.

2. Complete the *Market* dialog box as follows:

   - In the *Market Code* box, enter a one or two letter code. The code must be a valid market code since it is used by your real-time data service to provide the correct time zone information.

   - In the *Description* box, enter the name of the market that the code represents.

   - Click the arrow at the end of the *Time Zone* list box to display a drop-down list of time zones. From this list, select the time zone corresponding with the market you are defining.

   - Click **OK** to add this new Market to the list of Markets that can be selected from the *Real-time Setup* dialog box.
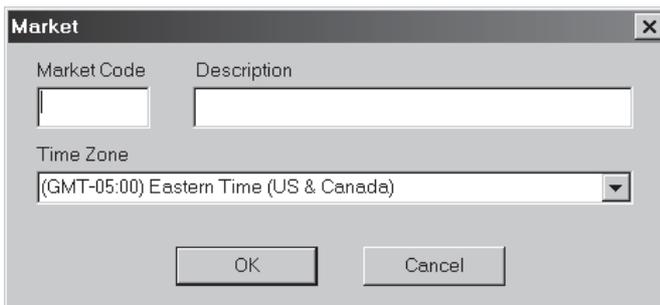
Market dialog box

Editing a Market

► *To edit a Market, do the following:*

1. Select the Market you want to edit and then click the arrow located at the right of the *Description* box and, from the drop-down menu, choose **Edit**.

2. The *Market* dialog box that appears displays the parameters entered for this Market. Any of these parameters may be changed.

3. When you have completed your changes, click **OK**.

5. Set Alerts

Any of the predefined Alerts can be selected to signal real-time changes in the technical behavior of the tickers you are tracking. All active Alerts apply to all of the tickers you are tracking. You can also edit the predefined Alerts or use the EDS style Rule Builder function to create your own Alerts (*see Chapter VI., Building Custom Alerts*).
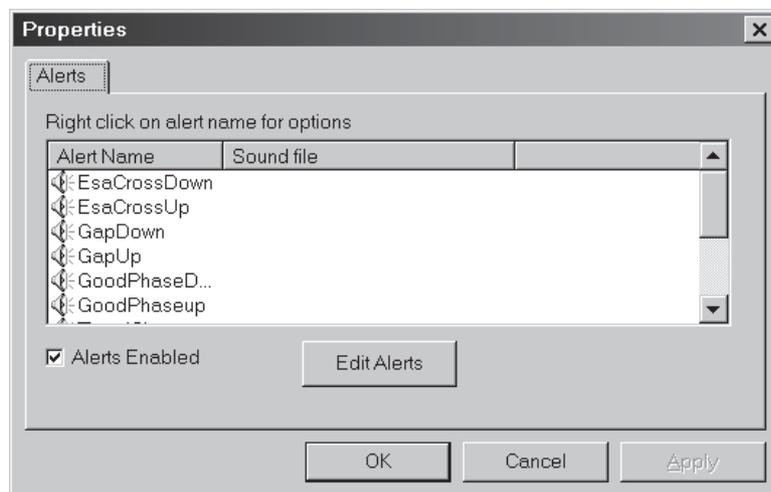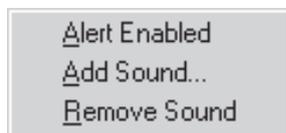
Select Alerts

► *To select an Alert:*

1. Display the *Properties* dialog box by one of these three methods:

   • From the **File** command on the menu bar, select **Alert Properties**.

   • Select **Alerts** from the Right Mouse Click menu.

   • Click the **Alert Properties** toolbar button.

Alert Properties toolbar button

Alerts Properties dialog box

Alert Properties right-click menu

2. The *Properties* dialog box displays a list of Alerts available for selection. Initially, this list contains the predefined Alerts furnished with the system. Any Alerts created by the user will also appear in this list.

3. From this list, right-click on an Alert you want to activate. From the menu, select **Alert Enabled**. Enabled Alerts are indicated by a blaring loudspeaker icon.

4. To enable all Alerts, check the option box labeled **Alerts Enabled**.

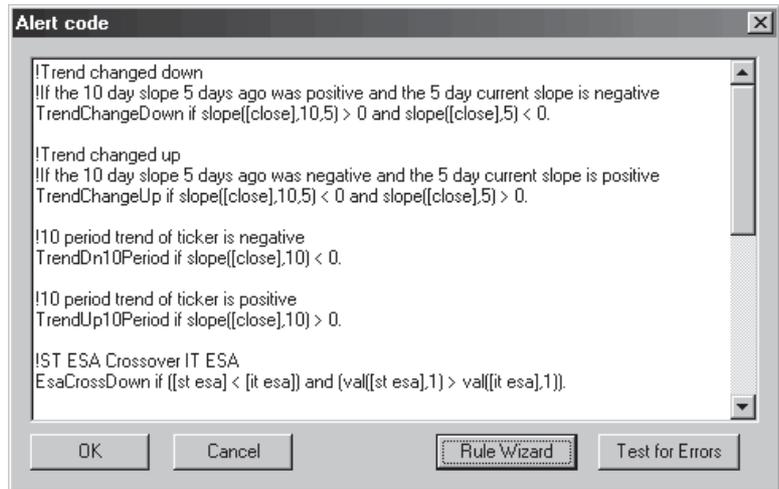5. To confirm your selections, click **OK**.

Edit an existing Alert

► *To edit an Alert, proceed as follows:*

1. Open the *Alerts Properties* dialog box.

2. In the *Properties* dialog box, click **Edit Alerts**. The *Alert Code* window will appear. This window displays the complete code for all of the available Alerts and provides text editing capabilities which can be used to make edits to the code for an Alert.

```
Alert code                                                    ×

!Trend changed down
!If the 10 day slope 5 days ago was positive and the 5 day current slope is negative
TrendChangeDown if slope([close],10,5) > 0 and slope([close],5) < 0.

!Trend changed up
!If the 10 day slope 5 days ago was negative and the 5 day current slope is positive
TrendChangeUp if slope([close],10,5) < 0 and slope([close],5) > 0.

!10 period trend of ticker is negative
TrendDn10Period if slope([close],10) < 0.

!10 period trend of ticker is positive
TrendUp10Period if slope([close],10) > 0.

!ST ESA Crossover IT ESA
EsaCrossDown if ([st esa] < [it esa]) and (val([st esa],1) > val([it esa],1)).

        OK          Cancel              Rule Wizard     Test for Errors
```
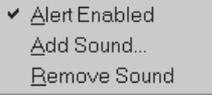
Alert Code window

3. Use the scroll bar to locate the Alert that you want to edit, click an insertion point in the text, and type your changes.

4. Click **OK** to return to the *Properties* dialog box.

5. Click **OK** again.

Configure sound for Alerts
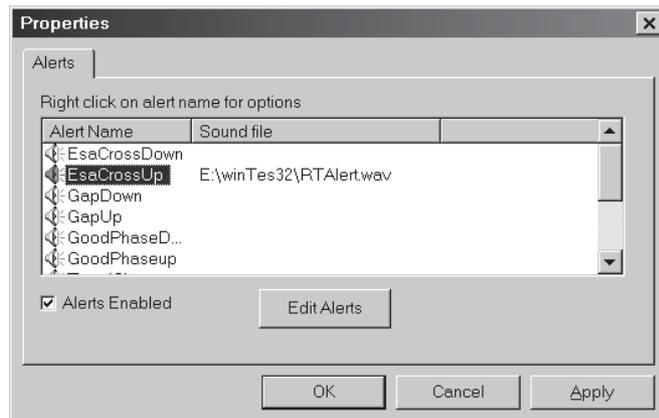
► *To configure sound for an Alert:*

1. In the *Properties* dialog box, right click on the Alert that you want to configure for sound.   A small menu will appear.

2. From this menu, select **Add Sound...**. The *Open* dialog box will appear with the **WinTes32** folder already selected.
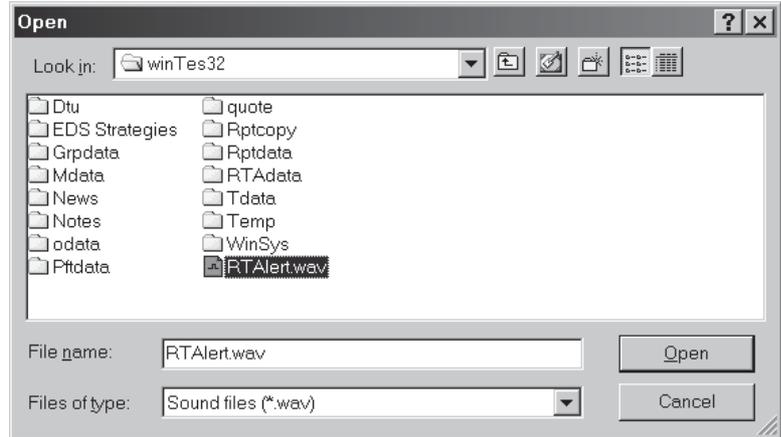
Open dialog box for Alert sound files

3. Use this dialog box to find and select the Real-Time Alert sound file (**RTAlert.wav**) and then click the **Open** button.

Properties dialog box with sound added to EsaCrossUp Alert

4. When the *Properties* dialog box reappears, the selected sound file is listed in the *Sound File* column for the Alert you just configured for sound.

5. Click **OK** to confirm the change.

6. Color Studies for Alerts

This function is very similar to the **Color Studies** function that is available in *Charts* for studying EDS rules by visually indicating on a chart when a designated rule fires. In this application, the function is used for studying the effectiveness of an Alert. You select the Alert, a color, and a chart component. Then at any time when an Alert occurs, your selected chart component will appear in your selected color.

The color change can be displayed on the Price Plot (price bar, open, or close) or on any indicator you choose. You can also define multiple color studies which can be displayed simultaneously by choosing different colors for each study.

After establishing a Color Study for an Alert, you then can cycle through your charts to easily obtain a quick visual evaluation of the effectiveness of the Alert.

► *To define a Color Study, follow these steps:*

1. With a chart displayed, right click anywhere within the chart section of the Alerts window. From the menu that appears, select **Color Studies**. The *Color Studies* dialog box will appear.
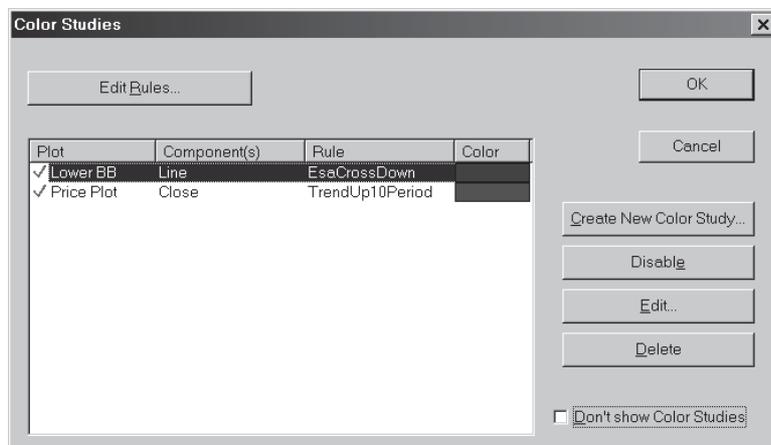

Color Studies dialog box

2. Next, click **Create New Color Study** to begin the process of defining a new color study. The first two dialog boxes that appear are used to specify the chart component that will change color, indicating the exact time that the rule fired.

3. In the first dialog box titled *Select Price Plot or Indicator*, choose one of the two. If your choice is **Indicator**, you must next select a specific indicator from the list in the adjacent list box. When you have made your selection, click **Next**.
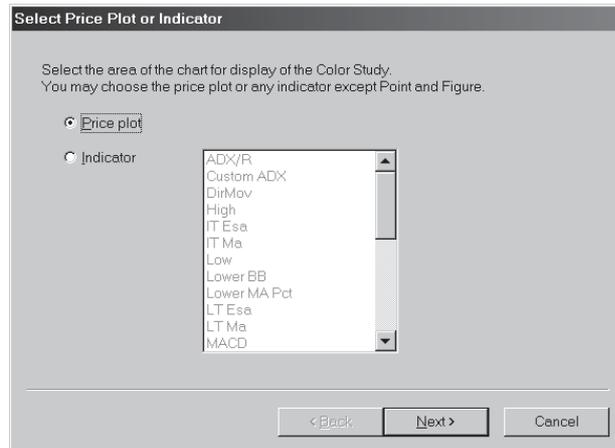
Select Price Plot or Indicator dialog box

4. From the box titled *Select Plot Component*, choose a component. Your choices depend on whether you selected *Price Plot* or an *Indicator*. For *Price Plot*, your choices are *Price Bar*, *Open*, or *Close*. For *Indicator*, your choice depends on the type of indicator you have selected. When you have made your selection, click **Next**.
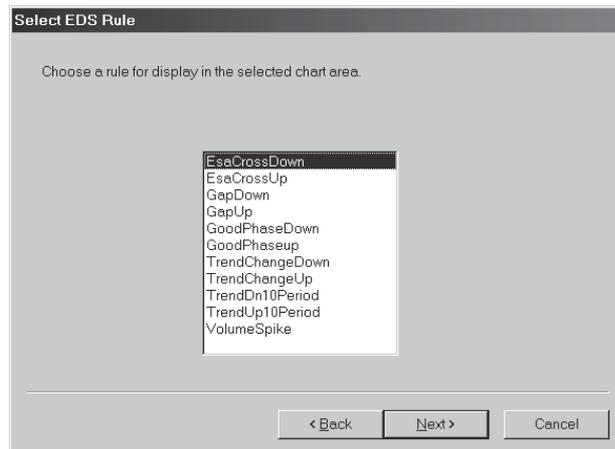
Select EDS Rule dialog box

5. The next box, titled *Select EDS Rule*, is used to select the particular Alert (or rule) that you want the Color Study to evaluate. A list of all available Alerts is provided. Simply click on the Alert you want to evaluate and click **Next**.

6. In the next box titled *Select a Color,* choose the color that you want the chart component to become on those days when the rule fires. If the color shown in the box is not satisfactory, click the button labeled **Change Color** to find and select the color you want and then click **Next**.

7. The final box, *Review and accept new settings*, displays a summary of the settings that you have specified for the Color Study. If these are correct, click **Finish** to accept or click the **Back** button to make changes.

8. When the *Color Studies* dialog box reappears, a line is shown listing the new study and all the settings that are specified.

Editing a Color Study

► *To edit a Color Study, proceed as follows:*

1. Display the *Color Studies* dialog box by selecting **Color Studies** from the right-click menu.

2. All Color Studies that have been previously defined are listed in this dialog box. Select the study that you wish to revise and click the **Edit** command button.

3. The first Color Studies data entry box, titled *Select Price Plot or Indicator*, will appear. Change any of the selections in this box and click **Next** to proceed to the next box. Continue through all four data entry boxes in this manner, making whatever changes you require.

4. The final box, *Review and accept new settings*, displays a summary of the revised settings for the Color Study. If these are correct, click **Finish** to accept or click the **Back** button to make additional changes.

Deleting a Color Study

► *To delete a Color Study, do as follows:*

1. Display the *Color Studies* dialog box by selecting **Color Studies** from the right-click menu.

2. This dialog box lists all Color Studies that have been previously defined. Select the study that you wish to remove and click the **Delete** command button.

Disable/Enable a Color Study

▶ *To disable or enable a Color Study, do as follows:*

1. Display the *Color Studies* dialog box by selecting **Color Studies** from the right-click menu. A green check mark is shown next to all active studies. A red X appears next to studies that have been disabled.

2. Select the study that you wish to disable or enable.

   • To temporarily remove a study, click the **Disable** button. The green check mark will be replaced by a red X.

   • To restore a disabled study, click the **Enable** button. The green check mark will reappear.

7. E-mail Alerts to yourself via myTrack

E-mail Alerts to yourself via myTrack toolbar button

If you are a *myTrack* subscriber, you can elect to have Alerts sent to you via e-mail or to your cell phone or beeper.

▶ *To request that Alerts be sent to you via e-mail:*

• Click the **E-mail Alerts to yourself via myTrack** toolbar button. When the myTrack e-mail service is active, the toolbar button changes to a lighter shade of gray. Alerts will be sent to your regular e-mail address.

• To discontinue this service, reclick this toolbar button.

▶ *To request that Alerts be sent to your cell phone or pager:*

• Contact your cellular phone or pager company to enable the receipt of e-mail messages and obtain the e-mail address for your particular communications device.

• Open *myTrack* and from the **Chat** menu select **Administrative** and then choose **Edit Profile** to display the *Profile* data entry screen.

• In the *Alert E-mail* box, enter the appropriate address for your cell phone or pager.

• When an Alert occurs, it will be sent to this address which will automatically send a message to your phone or pager.