

Before You Begin

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1. TradingExpert Pro documentation

AIQ TradingExpert Pro provides a wealth of market timing and trading information, with many functions designed to help you become a more disciplined and successful trader. Before using AIQ TradingExpert Pro for your actual trading decisions, AIQ recommends that you learn and gain confidence in the TradingExpert Pro functions. The TradingExpert Pro documentation is designed to help you accomplish this.

To help you learn and use TradingExpert Pro, AIQ provides the following documentation:

New Users Guide In addition to installation instructions, this guide is designed to help you get started in learning how to use TradingExpert Pro as a decision support tool for stock market trading. Some of the more important capabilities of TradingExpert Pro are covered in the New Users Guide, but TradingExpert contains many additional capabilities that can aid you in making intelligent trading decisions. The Reference Manual provides explanations and examples of all the capabilities of TradingExpert Pro.

Reference Manual The TradingExpert Pro Reference Manual contains detailed information about using the various functions of the system. See the following section for an overview of the Reference Manual.

Technical Indicators Reference Manual In the Technical Indicators Reference Manual, you will find explanations of the technical indicators that are available for charting in TradingExpert Pro. There is an explanation of how each indicator is derived and how it is used. Also, you will find a guide to confirming the AIQ Expert Rating signals using technical indicators. This reference manual includes the mathematical formulae for the indicators, and references if you require more detailed information.

Online Help Online Help documentation is easily accessible, and available wherever you are working in TradingExpert Pro. You will find Help commands on the menu bar of every application, and on most dialog boxes.

Overview of Reference Manual

After you have installed TradingExpert Pro, you will find TradingExpert Pro on your Windows Programs menu, with the major applications that make up TradingExpert Pro listed on the submenu. Following is a summary of where to find information about each application in the Reference Manual.

PART 1. TradingExpert Pro Functions

In Part 1 you will find detailed instructions on how to use these applications:

Data Manager - Includes the functions you will use to set up and manage the data for all of the securities, indices, futures, mutual funds, groups, and sectors that you are tracking.

Data Retrieval - Accesses TradingExpert Pro's automatic data retrieval interface.

Charts - In the **Charts** application, you can display a chart of any ticker contained in your data base, as well as the AIQ Market Timing Chart.

Reports - TradingExpert Pro provides over 120 time-saving reports to help you screen your data base of tickers.

Portfolio Manager - Allows you to track and manage your transactions. TradingExpert Pro's built-in stop system is located here.

Part 2. Expert Design Studio (EDS)

Part 2 covers documentation on how to use the capabilities of Expert Design Studio, the program that provides TradingExpert Pro users with the ability to design, test, and fine-tune their own trading systems as well as the ability to produce fully customized reports based on personal stock screening techniques.

Part 3. MatchMaker

How to use AIQ's MatchMaker module is covered in Part 3. MatchMaker is designed to help users of TradingExpert Pro make the most of the program's powerful group/sector features by helping you to restructure the group/sector data in your data base. This is done by creating groups of stocks that move together statistically, and sectors of groups that also move together statistically.

Part 4. Fundamentals for TradingExpert Pro

In this section you will find instructions for using AIQ's Fundamentals module, which is designed for users who want to combine fundamental analysis with TradingExpert Pro's technical analysis capabilities. The module ranks all of your stocks based upon your favorite fundamental strategies, then allows you to display fundamental data on stock charts (just click the F key), print a Fundamental Report which lists stocks with the highest ratings, and build lists of stocks from the Report in order to quickly view charts of fundamentally attractive stocks.

Part 5. Real-Time News and Quotes

In Part 5 you will find documentation for TradingExpert Pro's News and Quotes module that provides real-time and historical prices for specific securities and also tracks current and historical news events which impact the price of your stocks.

Part 6. Real-Time Alerts

This section covers the Real-Time Alerts module which is designed for user's with a need to track securities in real-time. The Real-Time Alerts window allows you to monitor tickers with dynamically updating charts which can be customized to display your favorite indicators in real-time. You may specify technical conditions that you deem important, then when your conditions are met by any of the tickers you are monitoring, an Alert is signaled. The number of securities that can be continuously monitored is unlimited.

Part 7. Data Transfer Utility (DTU)

Part 6 covers TradingExpert Pro's Data Transfer Utility. DTU moves data to and from your AIQ data base and other financial and spreadsheet products. This flexible utility exports and imports data in several standard file formats, including ASCII, PRN, and Excel.

Typographical conventions used in the documentation

It's important to understand the typographical conventions used in the documentation to identify menu functions and keyboard actions. To identify this information, the following kinds of formatting are used in the text:

Bold Italic type: Names of applications appear in ***bold italics***. For example, ***Data Manager***.

Italic type: Menu and submenu functions appear in *italics*. For example, *Utilities*.

Bold type: Words or characters that you type. For example, type **A:Setup**. Also, commands or options that you are instructed to select from a menu or from a dialog box are in **bold** type. For example, click **Edit Ticker**. Or, select **Yes**.

2. To start using TradingExpert Pro

Starting TradingExpert Pro

When you start Windows each day, you will find TradingExpert Pro on the Programs menu, with all applications listed on TradingExpert Pro's sub-menu.

□ *Start TradingExpert Pro in one of these two ways:*

- Select one of the applications on the TradingExpert Pro Program menu by clicking on the application.
- Click the **Main Menu** icon on the TradingExpert Pro Program menu. The Quick Launch Menu displaying the TradingExpert Pro main menu of applications appears. Choose one of the applications.

Quick Launch Menu



Note

The TradingExpert Pro Quick Launch Menu is accessible from the toolbars of most applications. Two short-cut data retrieval options, *Timed Update Data Retrieval* and *Immediate Data Retrieval* are located on the *Settings* menu of the Quick Launch Menu. See Chapter III in Part 1 for instructions on how to use these settings.

Moving among TradingExpert Pro applications

You can move among applications while working in TradingExpert Pro by using the Quick Launch Menu.

□ *Proceed as follows:*

- The rightmost button on the toolbar of most TradingExpert Pro applications accesses the Quick Launch Menu. While working in an application, click this button to display TradingExpert Pro's main menu.
- Click the application you want to open. You can open multiple applications, if you have sufficient memory.

□ *To close an application, use one of these methods:*

- Press the **Alt + F4** keys.
- Click the **close box** (upper right corner of the application window).
- Click the leftmost item on the menu bar of any application and from the drop-down menu click **Exit**.



Exiting

□ *To exit from a TradingExpert Pro application, use one of these methods:*

- Press the **Alt + F4** keys.
- Double click the **close box** (upper right corner of the application window).

□ *To exit from TradingExpert Pro*

1. Press the **Alt + F4** keys.

— or —

Double click the **close box** in the upper right corner of the application window you are working in.

2. If more than one application is open, repeat step 1.