Chapter IX

How to View and Modify Field Specifications
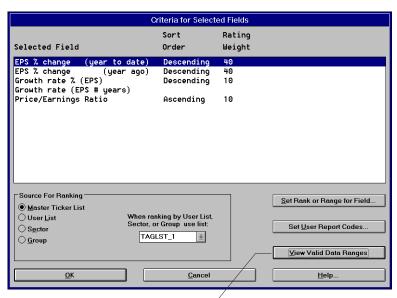
In this chapter

Viewing fundamental fields and specifications for a strategy

Fundamental fields and specifications for any saved strategy can be viewed, using the same functions that are used to create a new strategy,.

► *To view the fields and specifications for a strategy*, *do as follows:*

1. Open *Fundamentals for TradingExpert Pro*, and click on the **Specify Strategy** toolbar button to open the *Specify Strategy* window.

2. If you need to change the Data Source, click on the command button **Change Fundamental Data Source** and select a Data Source from the options listed in the dialog box. Then click **OK**.

3. Click the **Select** command button. The *Select <data source> Strategy* dialog box will appear. This dialog box lists all of the predefined strategies for the active data service and Data Source plus any strategies that you may have created and saved.

4. In the list box, highlight the strategy that you want to view.

5. Click **Select Strategy**. The *Specify Strategy* window reappears displaying your selected strategy. The fields that comprise the strategy are listed in the text box on the right which is titled *Selected Fields*.

6. To view field specifications, click the **Set Criteria for Selected Fields** command button. The *Criteria for Selected Fields* dialog box is displayed. The text box lists all of the fields that comprise the strategy. To the right of each field name are two columns of data. These columns are either the upper and lower Valid Data Range values for each field or the Sort Order and Rating Weight (Ranking Criteria) for each field.

7. To toggle between the two types of field criteria, click the command button above the *Help* button. If the text box currently displays the Sort Order and the Rating Weight, this command button is labeled **View Valid Data Ranges**. If the text box currently displays the Valid Data Range values, the command button is labeled **View Ranking Criteria**.
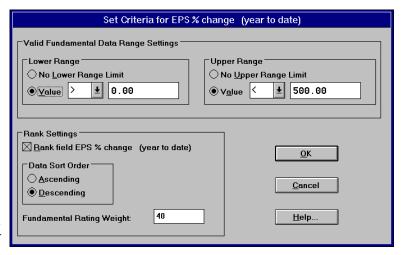
Criteria for Selected Fields dialog box

View Valid Data Ranges -
View Ranking Criteria toggle
button

Modifying a strategy

Any saved strategy, including the AIQ-installed predefined strategies, can be modified.

► *To modify a strategy, proceed as follows*:

1. Open ***Fundamentals for TradingExpert Pro*** and click on the **Specify Strategy** toolbar button to open the *Specify Strategy* window.

2. If you need to change the Data Source, click the command button **Change Fundamental Data Source** and select a Data Source from the options listed in the dialog box. Then click **OK**.

3. Click the **Select** command button. A dialog box titled *Select <data source> Strategy* will appear. This dialog box lists all of the predefined strategies for the active data service and Data Source plus any strategies that you may have created and saved.

4. In the list box, highlight the strategy that you want to modify.

5. Click **Select Strategy**. The *Specify Strategy* window reappears displaying your selected strategy. The fields that comprise the strategy are listed in the text box on the right which is titled *Selected Fields*. You can add and delete fields in this window.

    • To add a field to the strategy, highlight the field you want to add in the *Available Fields* text box and click the single right arrow.

    • To delete a field from the strategy, highlight the field you want to delete in the *Selected Fields* text box and click the single left arrow.

6. To modify field specifications, click the command button labeled **Set Criteria for Selected Fields**. The *Criteria for Selected Fields* dialog box is displayed. The text box lists all of the fields that comprise the strategy.

7. To modify specifications for a field, do as follows:

    • Highlight the field you want to modify by clicking on it with your mouse.

    • Click on the **Set Rank or Range for Field** command button to display the *Set Criteria for <field name>* dialog box.

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┌──────────────────────────────────────────────────────────────────┐
│            Set Criteria for EPS % change  (year to date)           │
├──────────────────────────────────────────────────────────────────┤
│ ┌─ Valid Fundamental Data Range Settings ──────────────────────┐   │
│ │ ┌─ Lower Range ──────────┐  ┌─ Upper Range ──────────────┐   │   │
│ │ │ ○ No Lower Range Limit  │  │ ○ No Upper Range Limit      │   │   │
│ │ │ ◉ Value  [ > ▼] [ 0.00 ]│  │ ◉ Value  [ < ▼] [ 500.00 ]  │   │   │
│ │ └─────────────────────────┘  └─────────────────────────────┘   │   │
│ └──────────────────────────────────────────────────────────────┘   │
│ ┌─ Rank Settings ──────────────────────────────┐                    │
│ │ ☒ Rank field EPS % change  (year to date)     │   ┌──────────┐   │
│ │ ┌─ Data Sort Order ──────────┐                │   │    OK    │   │
│ │ │ ○ Ascending                 │                │   └──────────┘   │
│ │ │ ◉ Descending                │                │   ┌──────────┐   │
│ │ └─────────────────────────────┘                │   │  Cancel  │   │
│ │ Fundamental Rating Weight:   [ 40 ]            │   └──────────┘   │
│ └──────────────────────────────────────────────┘   ┌──────────┐   │
│                                                     │  Help... │   │
│                                                     └──────────┘   │
└──────────────────────────────────────────────────────────────────┘
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Set Criteria for <field name>
dialog box

8. Modify specifications in the *Set Criteria for <field name>* dialog box as follows:

Valid Fundamental Data Range Settings

This section is divided into two parts, *Lower Range* and *Upper Range*. To modify either the *Upper* or *Lower Range* continue as follows:

- To specify a range limit, the **Value** option must be selected.
- You can change the range constraint shown in the adjacent list box:
    - For a Lower Range, the following two choices are available by clicking the arrow:
        - \>   mathematical symbol meaning "greater than"
        - \>= mathematical symbol meaning "greater than or equal to"
    - For an Upper Range, the following two choices are available by clicking the arrow:
        - <   mathematical symbol meaning "less than"
        - <= mathematical symbol meaning "less than or equal to"
- The next text box shows the numerical value of the range limit (i.e., minimum acceptable value for the *Lower Range* or the maximum acceptable value for the *Upper Range*). Any value between +99,999.99 and -99,999.99 may be entered.

Rank Settings

To modify the ranking criteria for a fundamental field continue as follows:

- To generate a ranking for a field, the box for *Rank field <name>* must be checked.

- The *Data Sort Order* (*Ascending* or *Descending*) is changed by clicking on the appropriate option button.

- To include a ranked field in the overall Fundamental Rating, it must be assigned a Rating Weight of a value greater than zero. The Rating Weight (between 0 and 99) is entered in the text box titled *Fundamental Rating Weight*.

9. When you have completed your entries, click **OK** to return to the *Criteria for Selected Fields* dialog box.

10. Click **OK** again to return to the *Specify Strategy* window.

11. To save the modified strategy:

- On the *Specify Strategy* window, choose the **Save** command button. The dialog box that appears is titled *Save <data source> Strategy*.

- If you want to save the old (unmodified) strategy, enter a new name and description for the modified strategy. Otherwise do not change the name shown, and answer **Yes** to the question *Overwrite It?*.

12. Click **OK** to return to the *Specify Strategy* window.

13. Click **OK** again to return to the main **Fundamentals for TradingExpert Pro** screen.