



What is the Workspace Assistant?

The Workspace Assistant is a powerful utility designed to help you quickly identify opportunities while maintaining a large portfolio of securities. **In seconds**, you can **scan an extensive list of tickers** (work that could otherwise take hours if performed manually). Workspace Assistant automates the process of opening all of your workspaces and windows sequentially; **scanning** them for **alerts, orders, and new positions**, and listing the results in a report that can be **easily exported into Microsoft Excel**.

Workspace Assistant Total open positions P/L \$ 0.00						
Occurred	Symbol	Interval	Name	Price	Additional Information	
04/04/2003 16:30	BP/ LN EQUITY	Daily	MACD(2,14,9)	416.5	MACD has generated a bullish alert	
04/04/2003 16:30	SHEL LN EQUITY	Daily	DMI(5)	393.25	DMI has issued a bullish signal	
04/04/2003 16:30	UUJ/ LN EQUITY	Daily	MACD(2,14,9)	618	MACD has generated a bullish alert	
04/04/2003 16:30	ULVR LN EQUITY	Daily	Stochastic Classic	605	The %K line is in overbought territory	
04/04/2003 16:30	SXC LN EQUITY	Daily	MACD(2,14,9)	615	MACD has generated a bullish alert	
04/04/2003 16:30	SVT LN EQUITY	Daily	Stochastic Classic	750	The %K line is in overbought territory	
04/04/2003 16:30	SPW LN EQUITY	Daily	MACD(2,14,9)	394	MACD has generated a bullish alert	
04/04/2003 16:30	SPW LN EQUITY	Daily	Stochastic Classic	394	The %K line is in overbought territory	
04/04/2003 16:30	SN/ LN EQUITY	Daily	Stochastic Classic	399.25	The %K line is in overbought territory	
04/04/2003 16:30	KGF LN EQUITY	Daily	MACD(2,14,9)	239.5	MACD has generated a bullish alert	
04/04/2003 16:30	SMIN LN EQUITY	Daily	MACD(2,14,9)	676	MACD has generated a bullish alert	
04/04/2003 16:30	AAL LN EQUITY	Daily	MACD(2,14,9)	940	MACD has generated a bearish alert	
04/04/2003 16:30	SCTN LN EQUITY	Daily	DMI(5)	350	DMI has issued a bullish signal	
04/04/2003 16:30	SCTN LN EQUITY	Daily	MACD(2,14,9)	350	MACD has generated a bullish alert	
04/04/2003 16:30	SAB LN EQUITY	Daily	Stochastic Classic	420	The %K line is in overbought territory	
04/04/2003 16:30	RBS LN EQUITY	Daily	Stochastic Classic	1566	The %K line is in overbought territory	
04/04/2003 16:30	NXT LN EQUITY	Daily	Stochastic Classic	886.5	The %K line is in overbought territory	
04/04/2003 16:30	WOS LN EQUITY	Daily	MACD(2,14,9)	530	MACD has generated a bullish alert	
04/04/2003 16:30	LGEN LN EQUITY	Daily	MACD(2,14,9)	76.25	MACD has generated a bullish alert	
04/04/2003 16:30	SMIN LN EQUITY	Daily	DMI(5)	676	DMI has issued a bullish signal	

Alerts returned from 3 indicators applied to **all components** of the **FTSE-100 Index**.

Workspace Assistant Total open positions P/L \$ 520.25							
Symbol	Description	Position	Entry Price	Last	Profit	Entry Time	
ICI LN EQUITY	IMPERIAL CHEMICAL INDS PLC	Short 1	226.5	100.25	126.25	19/12/2002 16:30	
CWG LN EQUITY	CANARY WHARF GROUP PLC	Short 1	235.75	137.5	98.25	26/02/2003 16:30	
DXNS LN EQUITY	DIXONS GROUP PLC	Short 1	164	90	74.00	04/12/2002 16:30	
GKN LN EQUITY	GKN PLC	Short 1	225	170.5	54.50	06/12/2002 16:30	
NXT LN EQUITY	NEXT PLC	Long 1	836	886.5	50.50	31/03/2003 16:30	
NRK LN EQUITY	NORTHERN ROCK	Long 1	646	693.5	47.50	17/03/2003 16:30	
FP/ LN EQUITY	FRIENDS PROVIDENT PLC	Short 1	119.25	87	32.25	16/12/2002 16:30	
AVZ LN EQUITY	AMVESCAP PLC	Short 1	349.75	318.5	31.25	24/01/2003 16:30	
HNS LN EQUITY	HANSON PLC	Long 1	296.75	327.5	30.75	21/02/2003 16:30	
AUN LN EQUITY	ALLIANCE UNICHEM PLC	Long 1	418	446.5	28.50	19/03/2003 17:00	
NGT LN EQUITY	NATIONAL GRID GROUP PLC	Short 1	435.25	409	26.25	20/01/2003 16:30	
LGEN LN EQUITY	LEGAL & GENERAL GROUP PLC	Short 1	101.25	76.25	25.00	10/12/2002 16:30	
HBOS LN EQUITY	HBOS PLC	Long 1	667	690	23.00	03/03/2003 16:30	
VOD LN EQUITY	VODAFONE GROUP PLC	Long 1	97	119.5	22.50	14/10/2002 16:40	
BATS LN EQUITY	BRITISH AMERICAN TOBACCO PLC	Short 1	589.5	570	19.50	11/03/2003 16:30	
BT/A LN EQUITY	BRITISH TELECOM PLC	Short 1	183	171.25	11.75	24/01/2003 16:30	
BG/ LN EQUITY	BG GROUP PLC	Long 1	247	258.5	11.50	03/03/2003 16:30	
BNZL LN EQUITY	BUNZL PLC	Long 1	401.75	411.75	10.00	03/04/2003 17:00	
DGE LN EQUITY	DIAGEO PLC	Long 1	670	680	10.00	18/03/2003 16:30	
MKS LN EQUITY	MARKS & SPENCER PLC	Short 1	304	294	10.00	20/03/2003 16:30	

Open Positions results for a strategy applied to **all components** of the **FTSE-100 Index**.



Symbol	Description	OrderType	Order	Last	Time Placed	Signal
▶ RIO LN EQUITY	RIO TINTO PLC - REG	LE	Buy 1 at Market	1243	17/05/2003 16:42	Buy
OML LN EQUITY	OLD MUTUAL PLC	LE	Buy 1 at Market	83.5	17/05/2003 16:42	Buy
SCTN LN EQUITY	SCOTTISH & NEWCASTLE PLC	LE	Buy 1 at Market	350	17/05/2003 16:42	Buy
SBRY LN EQUITY	SAINSBURY (J) PLC	LE	Buy 1 at Market	230	17/05/2003 16:42	Buy
SAB LN EQUITY	SOUTH AFRICAN BREWERIES PLC	LE	Buy 1 at Market	420	17/05/2003 16:42	Buy
RTR LN EQUITY	REUTERS GROUP PLC	LE	Buy 1 at Market	111.5	17/05/2003 16:42	Buy
RTO LN EQUITY	RENTOKIL INITIAL PLC	LE	Buy 1 at Market	178.25	17/05/2003 16:42	Buy
SDRC LN EQUITY	SCHRODERS PLC-NON VOTING	LE	Buy 1 at Market	493.5	17/05/2003 16:42	Buy
RR/ LN EQUITY	ROLLS-ROYCE PLC	LE	Buy 1 at Market	80.5	17/05/2003 16:42	Buy
SFW LN EQUITY	SAFEWAY PLC	LE	Buy 1 at Market	260	17/05/2003 16:42	Buy
REL LN EQUITY	REED ELSEVIER PLC	LE	Buy 1 at Market	498	17/05/2003 16:42	Buy
RB/ LN EQUITY	RECKITT BENCKISER PLC	LE	Buy 1 at Market	1080	17/05/2003 16:42	Buy
PSO LN EQUITY	PEARSON PLC	LE	Buy 1 at Market	532	17/05/2003 16:42	Buy
PRJ LN EQUITY	PRUDENTIAL PLC	LE	Buy 1 at Market	342	17/05/2003 16:42	Buy
POC LN EQUITY	P & O PRINCESS CRUISES PLC	LE	Buy 1 at Market	450	17/05/2003 16:42	Buy
OOM LN EQUITY	MMO2 PLC	LE	Buy 1 at Market	50	17/05/2003 16:42	Buy
RSA LN EQUITY	ROYAL & SUN ALLIANCE INS GRP	LE	Buy 1 at Market	84.75	17/05/2003 16:42	Buy
SSE LN EQUITY	SCOTTISH & SOUTHERN ENERGY	LE	Buy 1 at Market	649	17/05/2003 16:42	Buy
WPP LN EQUITY	WPP GROUP PLC	LE	Buy 1 at Market	377	17/05/2003 16:42	Buy
WOS LN EQUITY	WOLSELEY PLC ORD 25P	LE	Buy 1 at Market	530	17/05/2003 16:42	Buy

Active Orders for a strategy applied to **all components** of the **FTSE-100 Index**.

Additional features of the Workspace Assistant allow you to automate the **printing** of report results and associated **chart windows** that meet the scan criteria, or to print all chart windows being scanned.

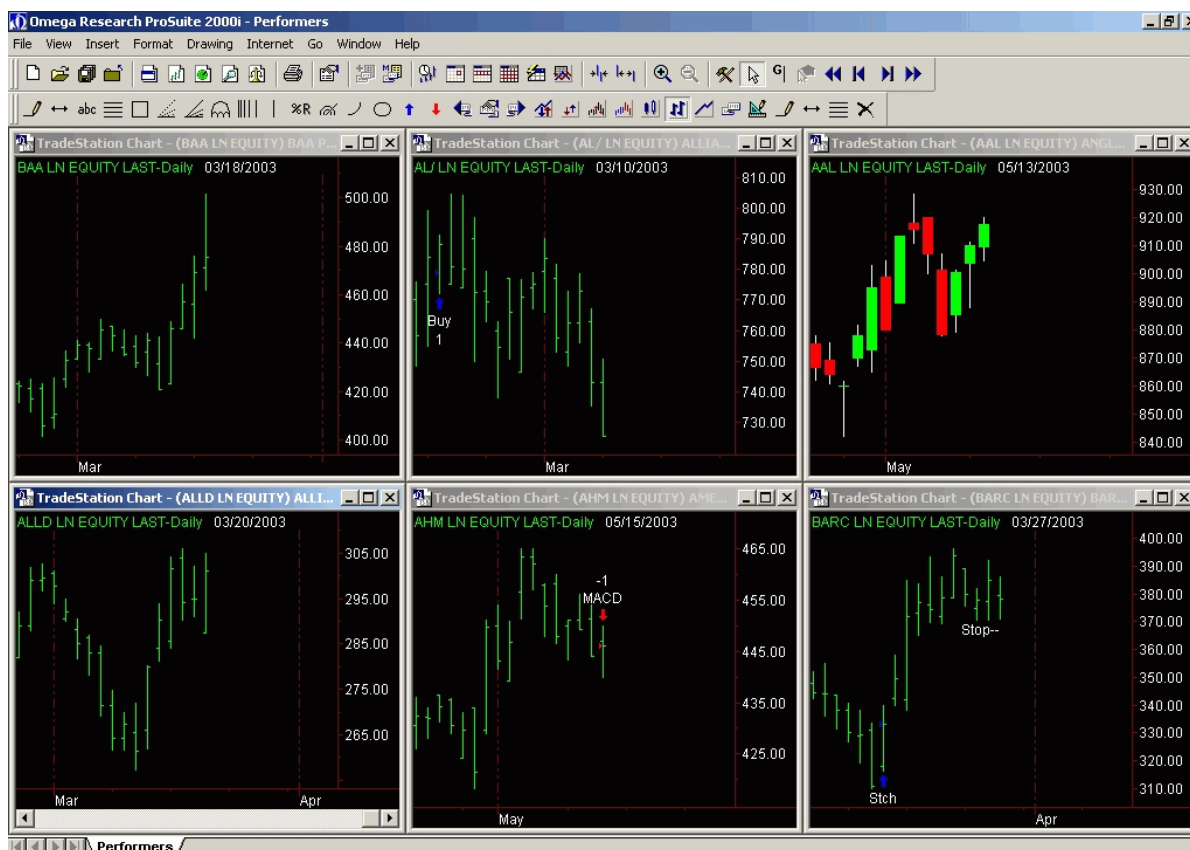
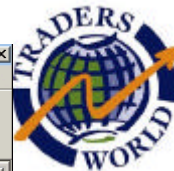
Scan all price data in _____ <input type="checkbox"/> GlobalServer Portfolio <input type="checkbox"/> GlobalServer Symbol Lists <input type="checkbox"/> 3rd Party Directory <input type="checkbox"/> 3rd Party Directory Symbol Lists Scan for _____ <input type="checkbox"/> Study alerts <input type="checkbox"/> Drawing object alerts <input type="checkbox"/> Strategy positions and orders	Print settings _____ <input checked="" type="radio"/> Do not print windows <input type="radio"/> Print windows that trigger alerts <input type="radio"/> Print all windows being scanned <input type="checkbox"/> Print Workspace Assistant report after running Speed settings _____ <input type="checkbox"/> Do not show while running <input type="checkbox"/> Maximize calculation speed
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When you run Workspace Assistant, TradeStation will quickly scan your workspaces and generate a report for you, identifying the current day's activity as well as the next day's (or week's) trading opportunities based on your trading strategy.

You can **view the Workspace Assistant report** in the **Tracking Centre**.

IMPORTANT Regardless of how you collect data, whether on a real-time/delayed or end-of-day basis, if you want a trading strategy to generate trading orders, **from within the applied strategy(ies)** you must select the **Generate trading orders for next bar** check box. In the same way, **Alerts must be activated** in order to return results in the Workspace Assistant report.

Using Workspace Assistant in TradeStation 2000i



Workspace Assistant will scan a workspace that has several charts; each chart running a different strategy. **Open Position** results and **Active Orders** are returned as follows.

Workspace Assistant Total open positions P/L \$ 126.25								
Symbol	Description	Position	Entry Price	Last	Profit	Signal	Workspace	
AHM LN EQUITY	AMERSHAM PLC	Short 1	446	446	0.00	MACD	Performers.orw	
BARC LN EQUITY	BARCLAYS PLC	Long 1	333.25	378	44.75	Stch	Performers.orw	
AL LN EQUITY	ALLIANCE & LEICESTER PLC	Long 1	779	725.5	-53.50	Buy	Performers.orw	
ALLD LN EQUITY	ALLIED DOMECQ PLC	Short 1	373.5	301	72.50	MAC	Performers.orw	
BAA LN EQUITY	BAA PLC	Short 1	538	475.5	62.50	Sell	Performers.orw	

Workspace Assistant navigation: Alerts | **Open Positions** | Active Orders | Filled Orders | Canceled Orders

Open Positions of different strategies applied to 6 charts in one workspace.

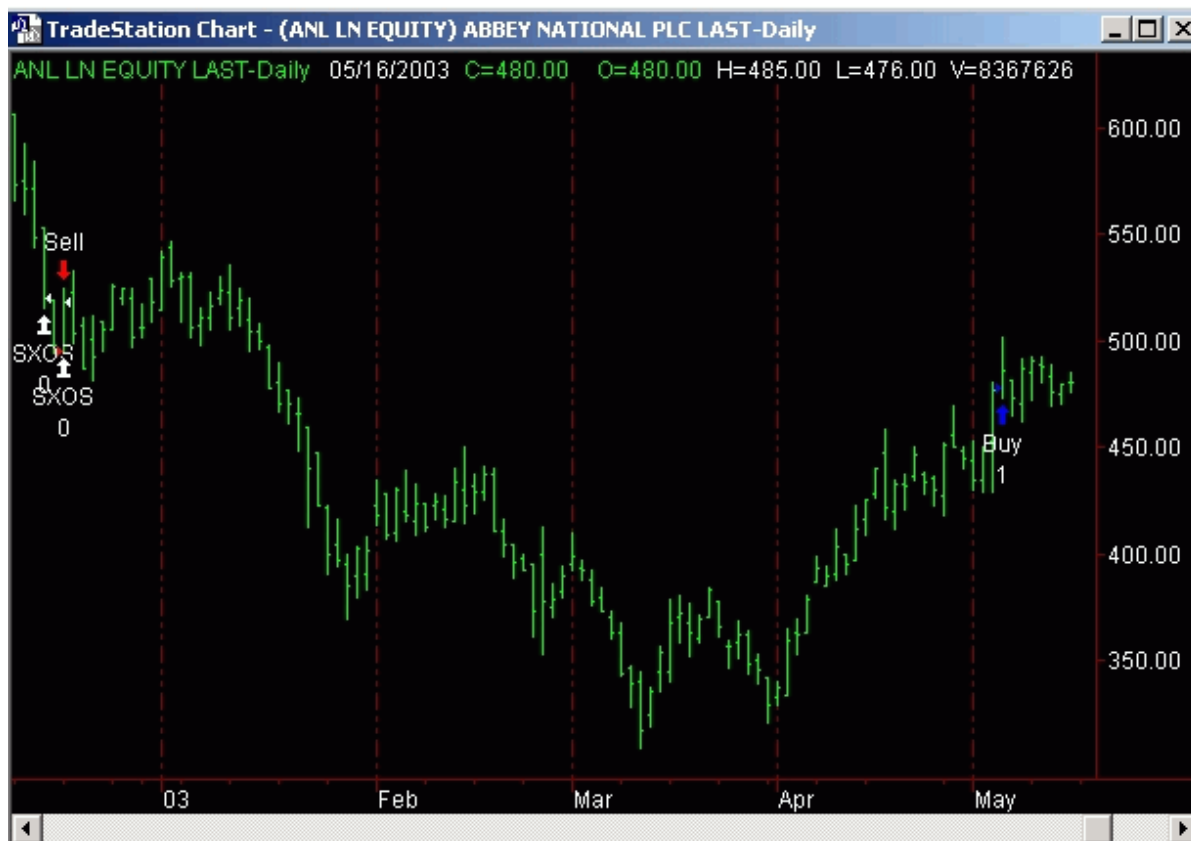
Using Workspace Assistant in TradeStation 2000i



Workspace Assistant Total open positions P/L \$ 126.25								
Symbol	Description	Order	Order	Last	Time Placed	Signal	Workspa	
BARC LN EQUITY	BARCLAYS PLC	LX	Sell 1 at 367.00 Stop	378	17/05/2003 17:13	Trl	Performers.c	
AAL LN EQUITY	ANGLO AMERICAN PLC	SE	Sell 1 at 904.00 Stop	917.5	17/05/2003 17:13	HM	Performers.c	
AL/ LN EQUITY	ALLIANCE & LEICESTER PL	SE	Sell 1 at Market	725.5	17/05/2003 17:13	Sell	Performers.c	
AL/ LN EQUITY	ALLIANCE & LEICESTER PL	LX	Sell 1 at Market	725.5	17/05/2003 17:13	Sell	Performers.c	
BAA LN EQUITY	BAA PLC	LE	Buy 1 at Market	475.5	17/05/2003 17:13	Buy	Performers.c	
BAA LN EQUITY	BAA PLC	SX	Buy 1 at Market	475.5	17/05/2003 17:13	Buy	Performers.c	

Active Orders generated by different strategies applied to 6 charts in one workspace.

Alternatively, you can apply a single strategy over several hundred securities (e.g., all components of the S&P 500). To avoid the time and labour intensive effort of plotting 500 individual charts, and applying the strategy to each chart, Workspace Assistant can **scan a chart created from a Custom Symbol List** with a single strategy applied to the chart.



Using Workspace Assistant in TradeStation 2000i



Typical results from such a scan are shown below (our example use the FTSE-100).

Symbol	Description	Position	Entry Price	Last	Profit	Entry Time
ICI LN EQUITY	IMPERIAL CHEMICAL INDS PLC	Short 1	226.5	100.25	126.25	19/12/2002 16:30
CWG LN EQUITY	CANARY WHARF GROUP PLC	Short 1	235.75	137.5	98.25	26/02/2003 16:30
DXNS LN EQUITY	DIXONS GROUP PLC	Short 1	164	90	74.00	04/12/2002 16:30
GKN LN EQUITY	GKN PLC	Short 1	225	170.5	54.50	06/12/2002 16:30
NXT LN EQUITY	NEXT PLC	Long 1	836	886.5	50.50	31/03/2003 16:30
NRK LN EQUITY	NORTHERN ROCK	Long 1	646	693.5	47.50	17/03/2003 16:30
FP/ LN EQUITY	FRIENDS PROVIDENT PLC	Short 1	119.25	87	32.25	16/12/2002 16:30
AVZ LN EQUITY	AMVESCAP PLC	Short 1	349.75	318.5	31.25	24/01/2003 16:30
HNS LN EQUITY	HANSON PLC	Long 1	296.75	327.5	30.75	21/02/2003 16:30
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Open Positions results for a strategy applied to **all components** of the **FTSE-100 Index**.

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ICI LN EQUITY	IMPERIAL CHEMICAL INDS PLC	Short 1	226.5	100.25	126.25	19/12/2002 16:30
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BT/A LN EQUITY	BRITISH TELECOM PLC	Short 1	183	171.25	11.75	24/01/2003 16:30
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Open Positions results for a strategy applied to **all components** of the **FTSE-100 Index**.

NOTE: For information about Custom Symbol Lists, see the **How To...** support document entitled *Creating a Custom Symbol List*.



Running the Workspace Assistant

1. Manually
2. Automatically

1. Run Workspace Assistant *Manually*:

You can run the Workspace Assistant *manually* whenever you want to see a report of your trading activity. **IMPORTANT:** Running the Workspace Assistant interferes with real-time/delayed data collection; therefore, you should run this utility when markets are closed.

- 1.1 Go to **File/Schedule Workspace Assistant** menu. **Click Add.**
- 1.2 Select any workspace you want to scan.
- 1.3 **Click Open.** The workspace(s) you selected are listed in the **Workspaces to Scan** box.
- 1.4 Under **Scan all price data in**, select the appropriate choice(s):
 - **GlobalServer Portfolio** – this allows you to run Workspace Assistant against charts that were built from any symbol in your GlobalServer portfolio.
 - **GlobalServer Symbol Lists** – this allows you to run the workspace assistant against charts that were created from GlobalServer Symbol Lists.
 - **3rd Party Directory** – this allows you to run the Workspace Assistant against charts that were built using symbols from a directory of symbols from one of our third-party data suppliers, such as CSI.
 - **3rd Party Directory Symbol Lists** – this allows you to run Workspace Assistant against charts that were built using a Third-Party Directory Symbol List.
- 1.5 Under **Scan for**, select to scan for Study Alerts, Drawing Object Alerts, and/or Strategy Position Orders. **NOTE:** In order for alerts on these items to be triggered, the individual alerts within the workspace must be enabled. You can select multiple check boxes.
- 1.6 Under Print settings, select one of the following options: Do not print any windows, Print only the windows that triggered alerts, or Print all the windows that are being scanned.
- 1.7 Select the Print Workspace Assistant Report after running check box to send your report to your printer automatically when the Workspace Assistant finishes running.
- 1.8 Under **Speed Settings**, select the **Do not show while running** check box so that each window the Workspace Assistant analyzes does not display on your monitor. The Workspace Assistant will run much faster, but you will not know when it is finished. Select **Maximize Calculation Speed** check box to load only the number of bars necessary to run the indicator. This setting works **in conjunction with the MaxBarsBack** setting that you use when plotting price data in a chart, RadarScreen,

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or QuoteMonitor window. For more information on MaxBarsBack, see Understanding the Maximum Bars Back Setting in TradeStation Help.

NOTE: The Maximize Calculation Speed check box should not be selected if you are using any recursive analysis techniques (techniques that refer to values of themselves on the previous bar like the ADX, exponential averages, etc), techniques that have running totals (like the Accumulation Distribution indicator), or techniques that have a set-up phase that requires more bars back than what is specified in MaxBarsBack. This is because results could differ depending on when calculations are started, which could cause discrepancies between the Workspace Assistant report and regular chart results.

1.9 Click OK.

The Workspace Assistant performs its scan and **generates a detailed report**, which you can **view in the Tracking Centre** by choosing to **display the Workspace Assistant results** when you format the window.

2. Run Workspace Assistant *Automatically*:

You can set up the Workspace Assistant to run *automatically* on a certain schedule.

IMPORTANT: You should run the Workspace Assistant after the markets are closed and you have collected daily history for the day, because running the Workspace Assistant interferes with data collection. **NOTE:** The TradeStation application **must be open** for the Workspace Assistant to run. Individual workspaces **need not be open** for Workspace Assistant to perform the scan.

To set the Workspace Assistant to run *Automatically*:

- 2.1 Go to **File/Schedule Workspace Assistant** menu from any workspace.
- 2.2 Click the **Settings** tab.
- 2.3 Click **Add**.
- 2.4 Select all of the workspaces you want to scan.
- 2.5 Click **Open**. The workspace(s) you selected are listed in the **Workspaces to Scan** box.
- 2.6 Under **Scan all price data in**, select the appropriate choice(s):
 - **GlobalServer Portfolio** – this allows you to run Workspace Assistant against charts that were built from any symbol in your GlobalServer portfolio.
 - **GlobalServer Symbol Lists** – this allows you to run the workspace assistant against charts that were created from GlobalServer Symbol Lists.
 - **3rd Party Directory** – this allows you to run the Workspace Assistant against charts that were built using symbols from a directory of symbols from one of our third-party data suppliers, such as CSI.

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- **3rd Party Directory Symbol Lists** – this allows you to run Workspace Assistant against charts that were built using a Third-Party Directory Symbol List.

- 2.7 Under **Scan for**, select to scan for Study Alerts, Drawing Object Alerts, and/or Strategy Position Orders. **NOTE:** In order for alerts on these items to be triggered, the individual alerts within the workspace must be enabled. You can select multiple check boxes.
- 2.8 Under Print settings, select one of the following options: Do not print any windows, Print only the windows that triggered alerts, or Print all the windows that are being scanned.
- 2.9 Select the Print Workspace Assistant Report after running check box to send your report to your printer automatically when the Workspace Assistant finishes running.
- 2.10 Under **Speed Settings**, select the **Do not show while running** check box so that each window the Workspace Assistant analyzes does not display on your monitor. The Workspace Assistant will run much faster, but you will not know when it is finished. Select **Maximize Calculation Speed** check box to load only the number of bars necessary to run the indicator. This setting works **in conjunction with the MaxBarsBack** setting that you use when plotting price data in a chart, RadarScreen, or QuoteMonitor window. For more information on MaxBarsBack, see Understanding the Maximum Bars Back Setting in TradeStation Help.

NOTE: The Maximize Calculation Speed check box should not be selected if you are using any recursive analysis techniques (techniques that refer to values of themselves on the previous bar like the ADX, exponential averages, etc), techniques that have running totals (like the Accumulation Distribution indicator), or techniques that have a set-up phase that requires more bars back than what is specified in MaxBarsBack. This is because results could differ depending on when calculations are started, which could cause discrepancies between the Workspace Assistant report and regular chart results.
- 2.11 Click the **Schedule** tab.
- 2.12 Under **Start the Workspace Assistant**, select one of the following options: Daily, Weekly, Monthly, Quarterly, Semi-annually, or Yearly to determine how often your Workspace Assistant will run.

NOTE: You may need to include additional information depending on the type of schedule chosen. For example, when scheduling weekly scans, enter the number of weeks you want to wait between scans in the Weeks box, etc.
- 2.13 Use the **Starting On** drop-down list to select the date on which the Workspace Assistant will first run automatically.
- 2.14 Click on the **time** in the **Starting On** edit box and **use the up and down arrows** to set the time of day for the Workspace Assistant to run.
- 2.15 Select the **No End Date** check box to continue to run the Workspace Assistant on the listed schedule, or clear this check box and select an end date if you only want to run the Workspace Assistant automatically for a period of days, weeks, or months.

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NOTE: When scheduling daily scans, select the check boxes corresponding to the day of the week you want to run the Workspace Assistant. The Workspace Assistant performs its scan and **generates a detailed report**, which you can **view in the Tracking Centre** by choosing to **display the Workspace Assistant results** when you format the window.

2.16 Click OK.

The Workspace Assistant will run according to the schedule you specified, and using the settings you specified. Again, only schedule the Workspace Assistant to run when you are not collecting data on a real-time/delayed basis.