

Getting Started with TradeStation 2000i



This document pre-supposes that you have successfully installed TradeStation 2000i or ProSuite 2000i, Adapta 2000i, and the TradersWorld custom Bloomberg ticker universe onto your Bloomberg PC. If you have not, please consult the support documents entitled *Pre-Installation*, and *Install TradeStation 2000i for Bloomberg*.

This document is divided into 3 parts:

1. Adding securities to the GlobalServer portfolio (Automatic & Manual).
2. Downloading Price History with Adapta 2000i.
3. Plotting you first chart with TradeStation 2000i.

1. Adding Securities to the GlobalServer Portfolio

There are **two ways** to add securities to the GlobalServer portfolio; *automatically* (from the TradersWorld custom ticker universe), or *manually* (should some tickers not be available). The TradersWorld ticker universe holds approximately 10,000 securities from US, European, and Asian exchanges, including index members, commodity, index, and currency futures, market sector and other indices, as well as spot foreign exchange.

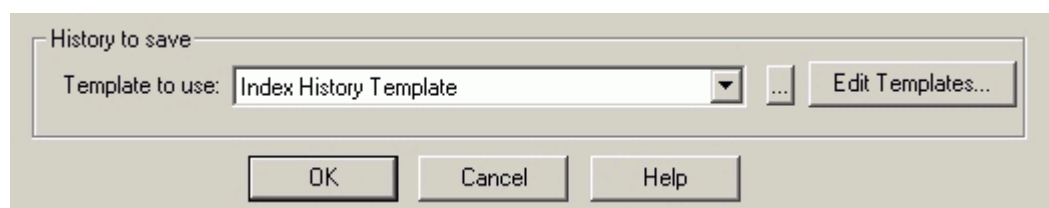
Bloomberg-originated securities prices such as Forex and certain Government Bonds require special attention. Please read the support document entitled *Adding Forex and GOVT Bonds*.

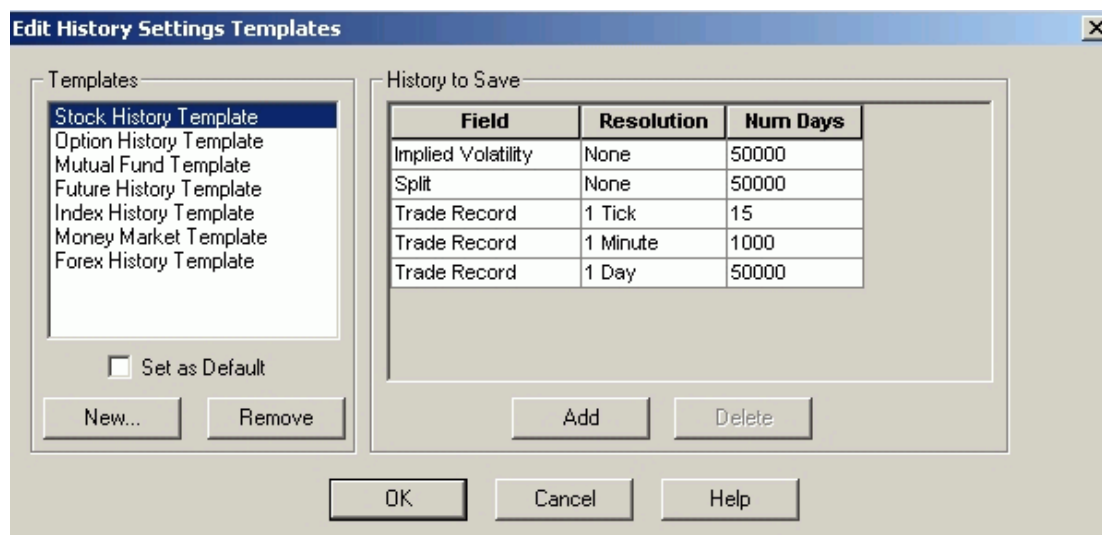
Before you begin adding securities, it is a good idea to decide how much price history you want to store on your hard drive. For example, if you have little interest in back-testing trading strategies, and only expect to use the advanced charting and technical analysis features of TradeStation, it makes little sense to store 100 days of tick price history, or 20,000 days of 1-minute price history. However, if you want to take advantage of the comprehensive strategy back-testing features of TradeStation, you will most probably want to store as much 1-minute history as possible.

Each time you add a new security to the GlobalServer, a template is used to determine the amount of price history to store for each ticker. You can **set-up the History to Save template** to meet your requirements, as follows:

1.1 **Launch GlobalServer** and select **Start Online**. GlobalServer will initialize and after a few seconds the Portfolio window will appear. If this is the first time you have run the GlobalServer, the portfolio will be empty.

From the GlobalServer menu, select **Insert/Symbol...** the **Insert Symbols into Portfolio** window will open. In the **lower half of the window** you will see the **History to save** dialog. Click on the **Edit Templates...** button.





1.2 In the **Edit History Settings Templates** window you will see a list of templates on the left side of the window, and history to save settings on the right.

NOTE: GlobalServer for Bloomberg only stores prices for Stocks, Indices, Futures, and Forex. You can remove the other templates, if you wish.

IMPORTANT: All Futures history is stored using the Index history template (this includes the following Bloomberg Futures mnemonics: COMDTY, INDEX, and CURRENCY - *CURRENCY futures, not to be confused with the Forex mnemonic*).

1.3 From the list of templates, select **Stock History Template**. The History to Save list will appear as shown above. Adjust the number of days of **Trade Record** price history to save, as per your requirements (the maximum value is 50,000 days). For the moment, ignore Implied Volatility and Split.

1.4 When you have completed any changes to the Stock History Template, click on **Index History Template** to make similar adjustments.

1.5. When you have completed any changes to the Index History Template, click on **Forex History Template** to make adjustments. In the History to Save list **you must add** the following fields:

Trade Record 1-tick

Trade Record 1-Minute

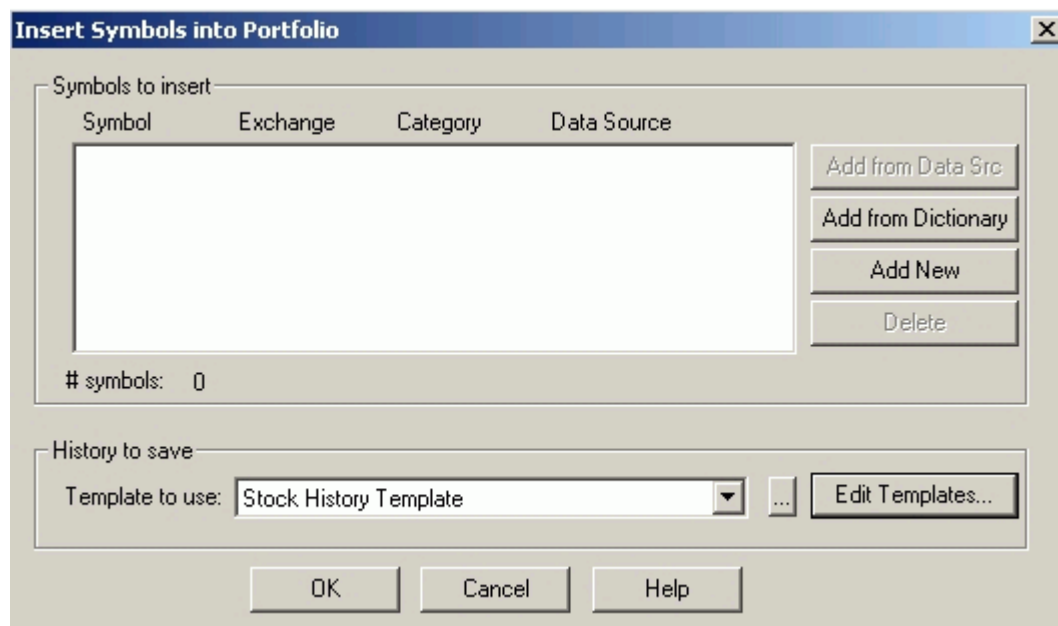
Trade Record 1-Day

To do this, click 3 times on **Add**. Blank cells will be inserted into the list. Click on a blank cell and select the Trade Record field from the drop-down menu. Choose a resolution and number of days, for each record, as per your requirements. **Trade Record** history to save is required in order to download history from the **Bloomberg servers**.

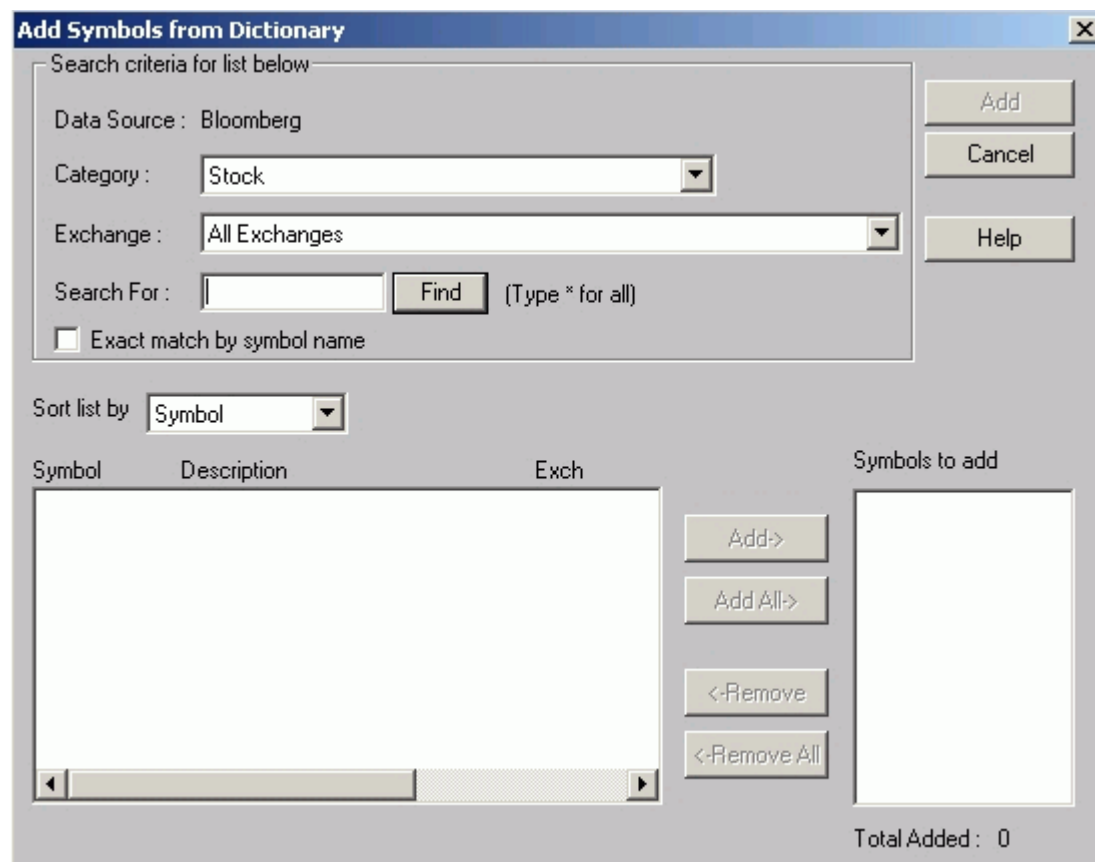
1.6 Having made any adjustments, you can set the default template to use, by clicking on the appropriate template from the templates list, and checking **Set as Default**. **Click OK** to save your changes and return to the **Insert Symbols into Portfolio** window.



Adding securities AUTOMATICALLY into the GlobalServer Portfolio



1.7 To begin adding securities *automatically*, click on **Add from Dictionary** to open the **Add Symbols from Dictionary** dialog.



Our example will show how to add category **Stock** tickers. Use the same method for adding Index (includes Futures) or Forex tickers.

Getting Started with TradeStation 2000i



1.8 There are several ways to search for a security in the Dictionary. We leave you to decide which is the most convenient, however, for the purposes of this example, select the Category **Stock**, set the exchange to **All Exchanges**, and type the first letter of the ticker in the **Search For** box, then click **Find**. The search will return all securities that start with the letter A, from every exchange .

NOTE: For convenience, you can sort the results by **Description** or **Symbol**.

Symbol	Description	Exch
ANAM SEMICONDUCTOR INC		KOREA
ASIA CEMENT CO LTD		KOREA
ASIA PAPER MANUFACTURING CO		KC
AMOREPACIFIC CORP		KOREA
ABLE INC/THE		KOREA
AIINS INC		KOREA
ACTS CORP		KOREA
AEKYUNG PETROCHEMICAL CO LTD		KC
ANAM ELECTRONICS CO LTD		KOREA

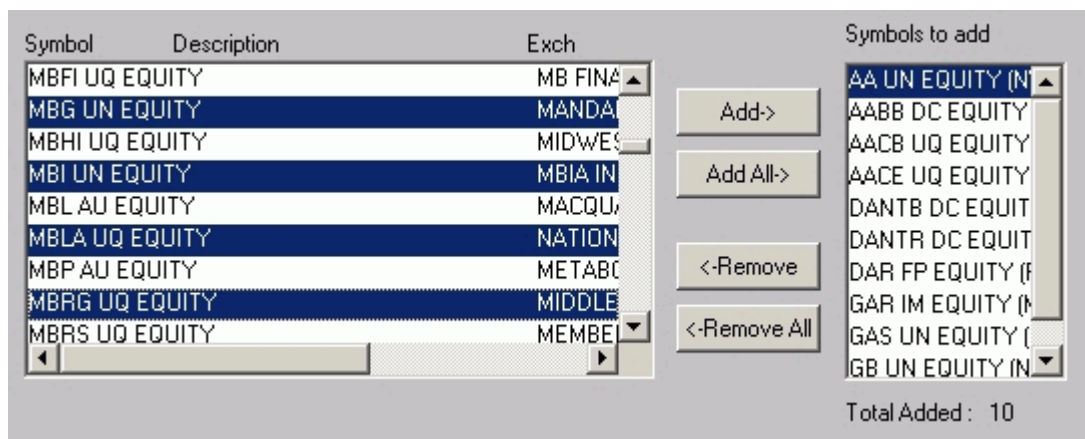
Sort List by **Symbol** (ticker).

Symbol	Description	Exch
A CONSULTING TEAM INC		NASDAQ
A T & T WIRELESS SERVICES		NYSE
A-COM AB	STKSE	
A.D.A.M. INC		NASDAQ
A.F.P. PROVIDA SA-SPONS ADR		NYSE
A.S.V. INC		NASDAQ
A/S DANTHERM HOLDING		COPSE
A/S RANDERS REBSLAAERI		COPSE
A/S RANDERS REBSLAAERI-CL H		COPSE

Sort List by **Description**

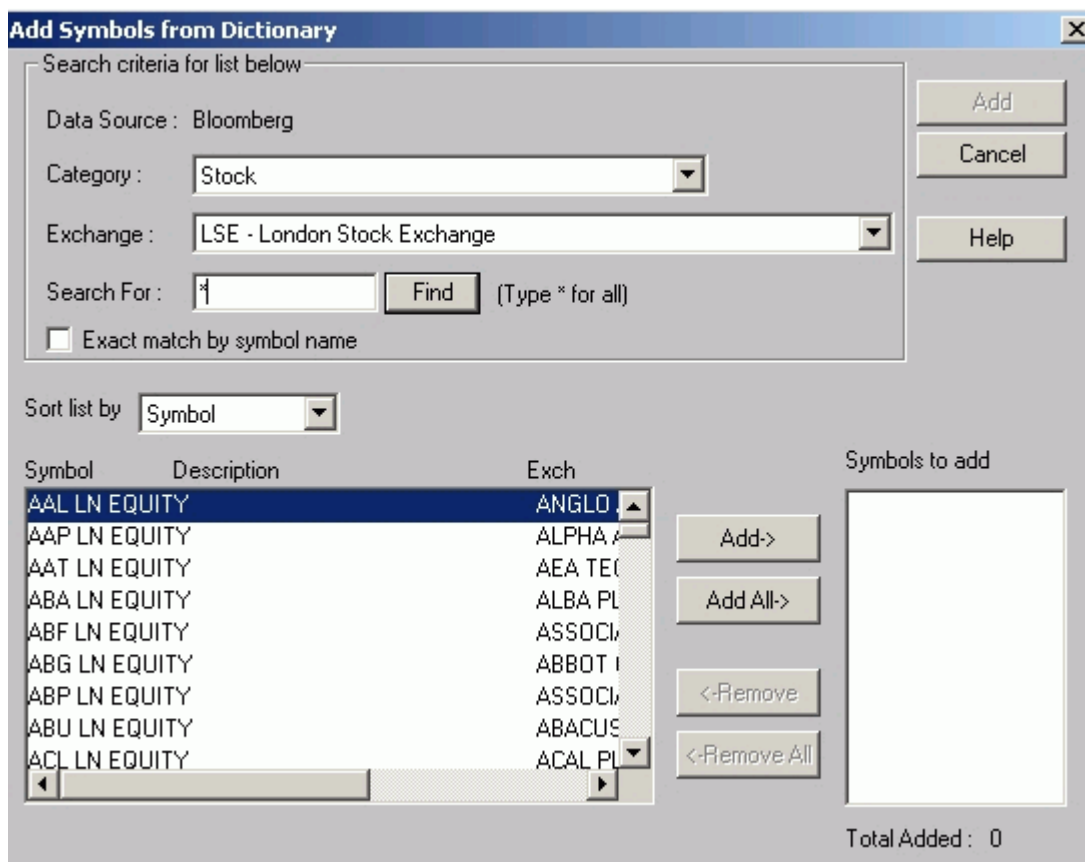
1.9 Select a security by clicking on it (multiple select by Ctrl+Click or Shift+Click). Click on Add-> to add the ticker(s) to the **Symbols to add** list.

Symbol	Description	Exch	Symbols to add	
AADN INC	NASDAQ		Add-> Add All-> <-Remove <-Remove All	Total Added : 0
AAR CORP	NYSE			
AAREAL BANK AG	XETRA			
AARHUS OLIEFABRIK A/S	COPSE			
AARON RENTS INC	NYSE			
AARON RENTS INC-CL A	NYSE			
AASTROM BIOSCIENCES INC	NASDAQ			
AB HAVSFRUN-B SHS	STKSE			
AB TRACTION -B SHS	STKSE			

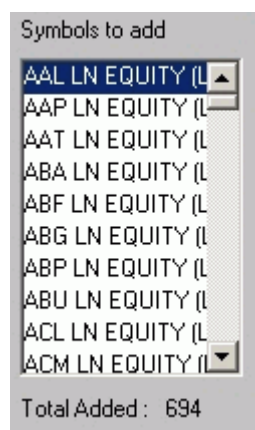


1.10 You can continue to search for securities from A-Z by repeating the above procedure, and add the tickers to the Symbols to add list until completed. To remove unwanted tickers, click on <-Remove (or <-Remove All). When you are ready to add the selected securities to the GlobalServer portfolio, Click on **Add...** at the top of the **window**. You are returned to the **Insert Symbols into Portfolio** window.

1.11 You can also search for securities by exchange. For example, to select all the stocks in the dictionary traded on the London Stock Exchange, select the Category **Stock**, set the exchange to **LSE** (London Stock Exchange), and type a star * in the **Search For** box, then click **Find**.



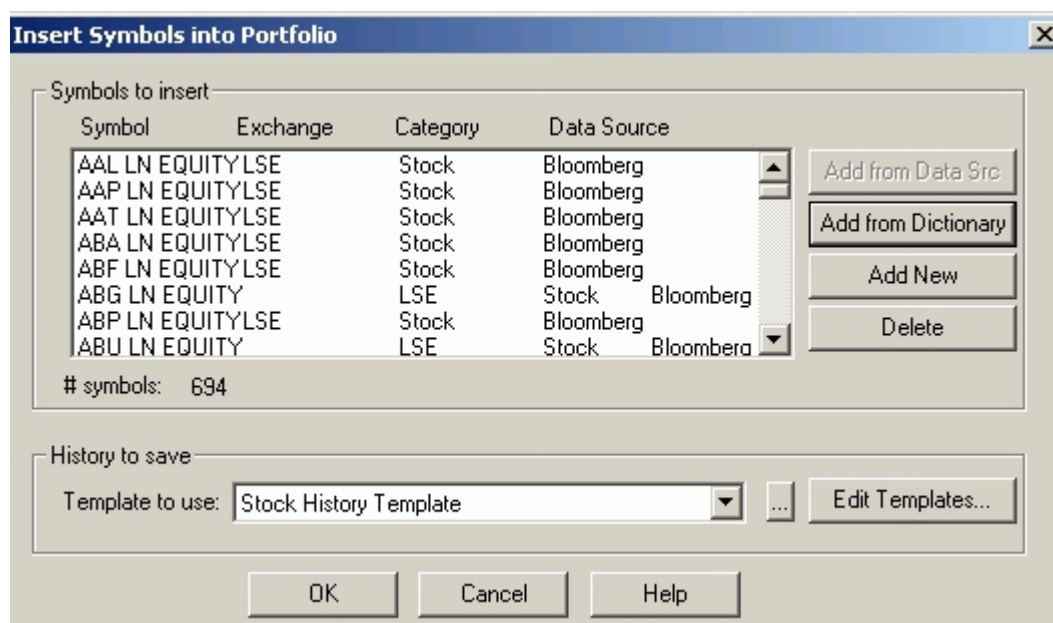
1.12 Click on **Add All->** to add all the securities to the **Symbols to add** list.



A total of 694 tickers are added to the symbols to add list.

IMPORTANT: The number of securities you can add to the GlobalServer portfolio is unlimited. However, subject to the hardware configuration of your PC, available memory, Network bandwidth, resource requirements of other 3rd party applications running on the PC, and the volume activity of the selected securities, the usual upper-limit is approximately 600. To add significantly more securities, contact TradersWorld for advice.

1.13 To remove unwanted tickers, click on <-Remove (or <-Remove All). When you are ready to add the selected securities to the GlobalServer portfolio, Click on **Add... at the top of the window**. You are returned to the **Insert Symbols into Portfolio** window.



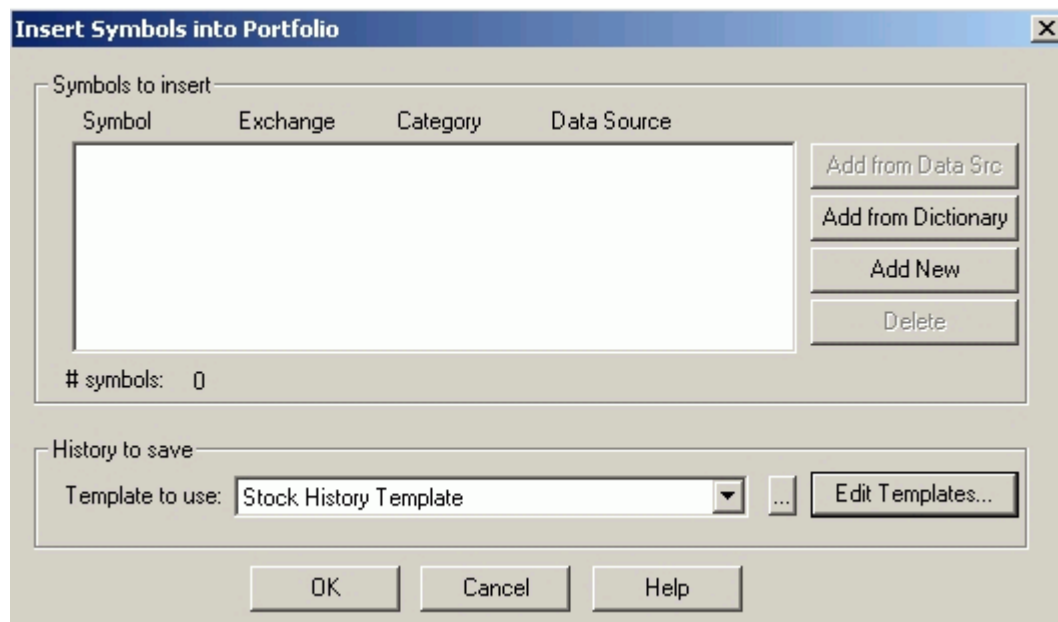
1.14. Check that your History to save **Template to use** is appropriate for the securities in the list. **Click OK**. You are returned to the GlobalServer. Your newly loaded securities are listed in the portfolio.

If the security you require is not listed in the dictionary, read the section below entitled **Adding securities MANUALLY into the GlobalServer Portfolio**.



Adding securities MANUALLY into the GlobalServer Portfolio

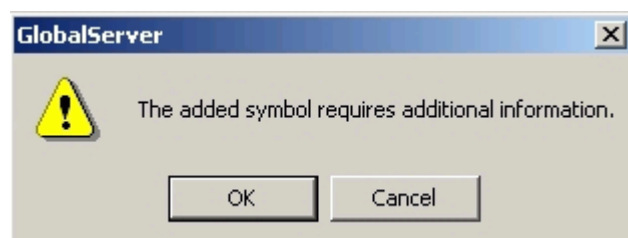
1.15 To begin adding securities *manually*, from the GlobalServer menu, select **Insert/Symbol...** the **Insert Symbols into Portfolio** window will open. Click on **Add New**.



1.16 The **Add Symbol** dialog appears. For this example we will create an Equity for the London Stock Exchange. Select **category** Stock. Type the complete Bloomberg ticker as shown below (**always type in CAPITALS, leave spaces where appropriate, and ALWAYS add the suffix EQUITY (or INDEX, COMDTY, CURRENCY etc.)**). Select LSE as the **Exchange**. Click **OK** to continue...



The following alert appears.



Click OK to add the required information...



BARC LN EQUITY - Edit Symbol

Stock Settings Sessions Option Roots History to save Edit Data

Data Source: Bloomberg

Trading Name:

Archive Name: BARC LN EQUITY Archived

Description:

Symbol Root:

Cusip:

1.17 Type the **Description**, as requested. Click on **Settings** to continue...

Add Stock

Stock Settings Sessions Option Roots

Exchange Listed:

Price Scale:

Point Value:

Daily Limit:

Min. Movement:

1.18 Although you previously selected LSE – London Stock Exchange when creating the ticker and it appears as the listed exchange, **the default settings have not been recorded**. You must **click again** on the list of exchanges and **re-select LSE - London Stock Exchange** from the drop-down list, as shown below.

Add Stock

Stock Settings Sessions Option Roots

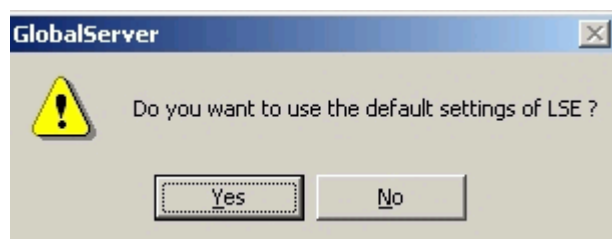
Exchange Listed:

Price Scale:

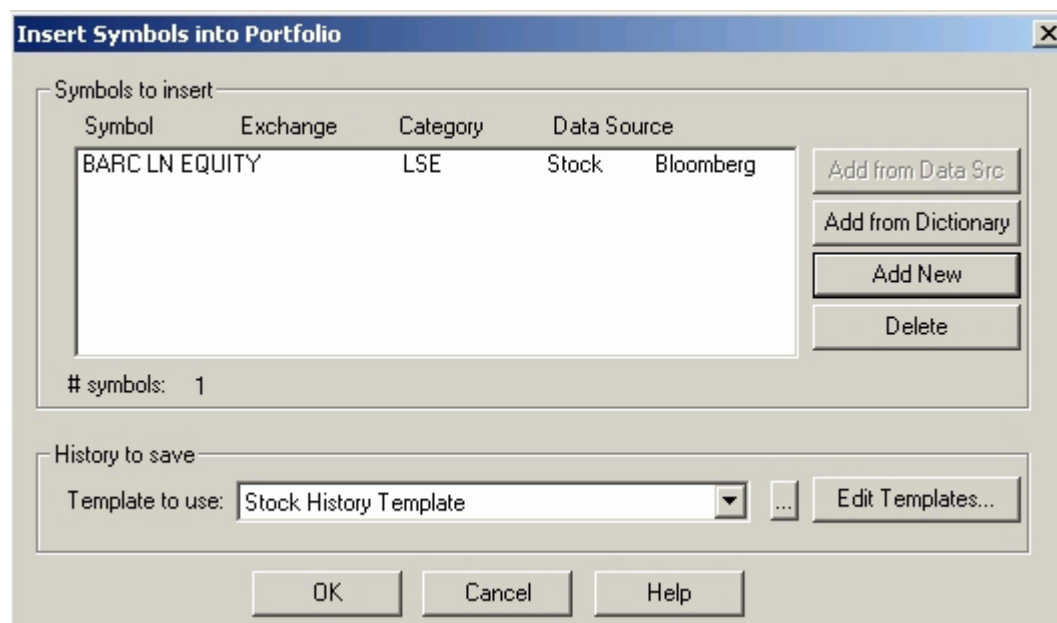
Point Value:

Daily Limit:

Min. Movement:



1.19 When you see this alert, **click Yes** to accept the default settings for LSE – London Stock Exchange. **Click OK** to **exit the Add Stock** window and return to the **Insert Symbols into Portfolio** dialog.



1.20 Continue to add securities by repeating the process as above. When you have finished adding tickers, check that your **History to save Template to use** is appropriate for the security(ies) in the list. **Click OK**. You are returned to the GlobalServer. Your newly loaded tickers are listed in the portfolio.

Use the same procedure to add Indices, Commodity, Index, or Currency Futures (as **category** Index), and Forex. You can also enter **Bloomberg CIX** (custom index expression) tickers in the same way, remembering to start with the point “.” and end with the suffix INDEX, as the example shown here (**.SPXFED INDEX**). For information about how to create Bloomberg CIX tickers, contact Bloomberg <Help> <Help>.

IMPORTANT: When manually adding a security, it is possible the exchange template **default session times do not correspond** to the official traded session. To corroborate the session times with Bloomberg in GlobalServer select the newly created ticker and go to the menu **Edit/Edit Symbol**. Click on **Sessions**. From the lower half of the window select **Display Session Times in Local Time**. Compare the session times with those shown on your Bloomberg terminal. If necessary, **adjust** the session **Open – Time** and **Close – Time** to correspond to the sessions in Bloomberg. **Click OK** to save any changes.



Downloading Price History with Adapta 2000i

Section 2.0 Price History for Newly Added Securities

Section 2.1 Price History to Fill Gaps - Stock Splits - Continuous Futures

With GlobalServer “connected” and securities listed in the portfolio, Adapta 2000i feeds real-time ticks directly to TradeStation charts and to the GlobalServer which, in turn stores tick, 1-minute, and Daily bar price history (subject to History to Save). However, when you first create or add new tickers to the portfolio, price history can be downloaded using the Adapta 2000i interface.

TIP: This is best performed when the markets are closed or when there is minimal activity, to avoid potentially overloading the GlobalServer datafeed queue with real-time *and* historical prices.

Adapta 2000i (version 1.3) allows you to download Daily OHLC, 1-minute OHLC, and tick history prices. Download times vary depending upon the compression and length of history. Typically, download 5 years of Daily history for 5 securities in approximately 2.5 minutes, or 100 securities in approximately 50 minutes.

2.0 Downloading price history for newly added securities

2.0.1 To download price history go to the **GlobalServer** menu and select **View/Datafeed Settings/Bloomberg** to open the Adapta 2000i interface. Click on **History Download**.

Symbol	Start Date	End Date	Status
--------	------------	----------	--------

2.0.2 Select tickers from the **Symbols** list by clicking (or Ctrl+Click, Shift+Click), or Select All. Select **Daily Bars** as the **Download Type**. Set the **Start Date** and leave the End Date on today's date. Click **Start Download**.



TIP: If downloading many years of price history with more than 50 securities in the GlobalServer portfolio, select a maximum of 50 tickers at a time. After you start a download it **cannot be aborted**.

Symbol	Start Date	End Date	Status
AAL LN EQUITY	06 Jun 1999	06 Jun 2003	Processed 476 of 1033 days received
ABF LN EQUITY	06 Jun 1999	06 Jun 2003	Processed 456 of 1033 days received
ABP LN EQUITY	06 Jun 1999	06 Jun 2003	Processed 440 of 1032 days received

That's it! The selected tickers will be listed in the download window, as shown above. Adapta 2000i will download 5 tickers concurrently, moving on to the next ticker as soon as a stream becomes available. When the download is complete you can begin to plot charts in TradeStation.

2.0.3 Downloading **1-minute and tick history** is just as easy. Select tickers from the **Symbols** list by clicking (or Ctrl+Click, Shift+Click), or Select All. Select **1-minute Bars or Intraday ticks** as the **Download Type**. Set the **Start Date** and leave the End Date on today's date. Set the **Start Time** and **End Time**. Click **Start Download**.

WARNING: The Adapta 1-min and intraday Tick history download function is actually designed to allow users to resolve short-term data "gaps" in the event GlobalServer is compromised for a brief period. It is not advisable to use this feature to download the entire 1-min or Tick data history from Bloomberg. Attempting to do so could result in GlobalServer instability.



2.0.4 As yet, there is no price history to duplicate. **Click Yes** to continue...

NOTE: Normally, duplicated data will not affect your TradeStation charts because the data source remains the same (Bloomberg). However, excessive duplication will eventually reduce the capacity of your hard drive. If you experience problems due to duplicated data, please contact TradersWorld.



Start Date	02/06/2003	End Date	06/06/2003
Start Time	00:00:00	End Time	14:00:00
<input type="button" value="Start Download"/>			
Symbol	Start Date	End Date	Status
AAL LN EQUITY	02 Jun 2003	06 Jun 2003	Processed 563 of 5616 ticks received
ABF LN EQUITY	02 Jun 2003	06 Jun 2003	Processed 595 of 3860 ticks received
ABP LN EQUITY	02 Jun 2003	06 Jun 2003	Processed 592 of 2564 ticks received

That's it! The selected tickers will be listed in the download window, as shown above. Adapta 2000i will download 5 tickers concurrently, moving on to the next ticker as soon as a stream becomes available. **When the download is complete you can begin to plot intraday charts in TradeStation.**

2.1 Downloading price history to fill gaps

As you know, GlobalServer must be “connected” in order to store real-time prices. If GlobalServer is disconnected while the markets you are following are open; intraday and possibly daily charts in TradeStation will show “gaps”. With Adapta 2000i you can precisely “fill” the gaps.

How to fill Daily bar gaps

2.1.1 From your TradeStation chart, determine the **date** of the last bar on the chart **before the gap occurred**, and the **date** of the first bar on the chart **where the gap was closed**. Enter these Start/End dates into the Adapta 2000i interface, select the appropriate number of securities from the Symbols list, and click Start Download, as per the instructions in 2.2 above.

How to fill 1-minute or Intraday tick gaps

2.1.2 From your TradeStation chart, determine the **date and time** of the **next-to-last bar** on the chart **before the gap occurred** (for 1-minute or intraday tick downloads we advise changing the chart compression to 1-minute), and the **date and time** of the **first bar on the chart where the gap was closed**. Enter the **Start/End Date(s)**, and the **Start/End Times** into the Adapta 2000i interface, select the appropriate number of securities from the Symbols list, and click Start Download, as per the instructions in 2.3 above. **TIP:** Examine charts of the most actively traded securities to best determine the start and end time of a gap.

Stock Splits and Continuous Futures contracts

2.1.3 When a stock splits you must erase its stored daily history in GlobalServer and download all the newly adjusted history using Adapta 2000i.

2.1.4 **PDF defaults in Bloomberg** define the contract expiration and roll characteristics of continuous futures contracts. Any permanent changes to PDF defaults will require that you delete stored history in GlobalServer and download again using Adapta 2000i. **TIP:** Charts must be “refreshed” to observe the changes (**easiest way:** close and re-open relevant TradeStation workspace(s)).



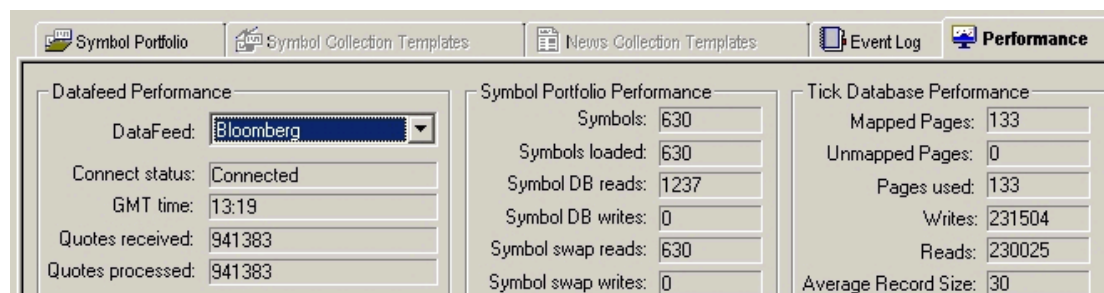
3. Plotting your First Chart with TradeStation 2000i

It is not our intention to re-write the Omega Research online Help, however, this document will help you to quickly create a first workspace and plot a simple Daily chart. You can access a wealth of information about **Using TradeStation 2000i** from the **Contents** section of **Help** in TradeStation or GlobalServer. **Bloomberg specific** information can be found in TradersWorld's **How To...** support documents.

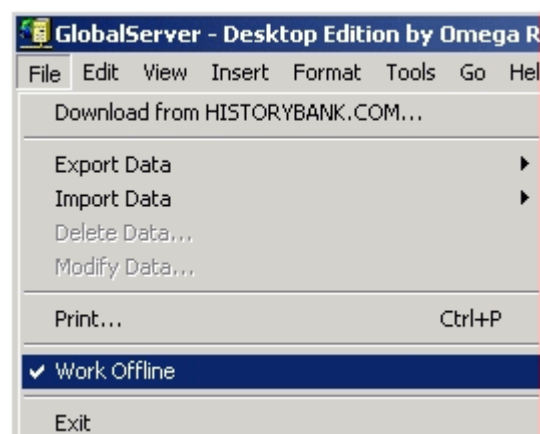
If you want to plot charts from a CSV or Ascii database file, read the support document entitled *Charting a CSV or Ascii database file in TradeStation 2000i*.

Ensure that GlobalServer is running (**started Online**) and ready to receive live prices **before your markets have opened**. **NOTE:** Unless GlobalServer is **connected** to the Bloomberg datafeed you cannot plot **real-time** price charts, or download price history with Adapta 2000i, although you can plot historical charts. If you follow 24 hour markets it is advisable to leave the GlobalServer running at all times.

To check that GlobalServer is connected, **click** on the **Performance** tab.



Make sure the **Connect status** is Connected. If not connected, go to the File menu and uncheck Work Offline.



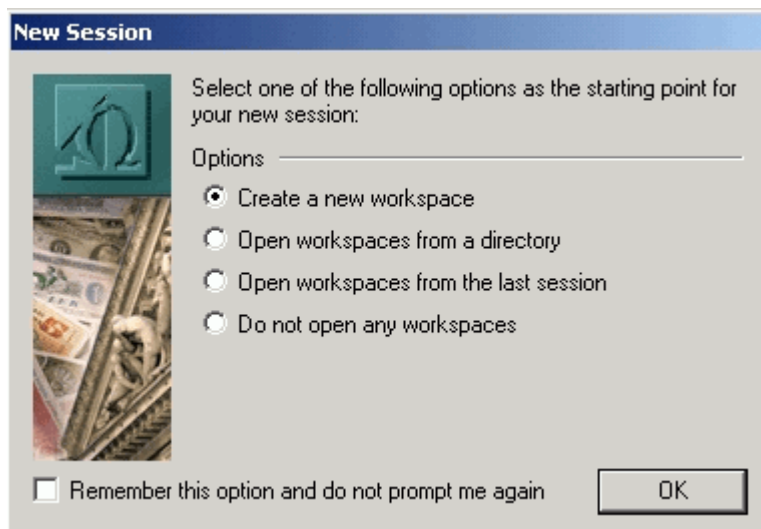
TIP: Should you fail to start GlobalServer in time, you can always download and “fill” price history “gaps” using the Adapta 2000i interface (see support document *How to Download Price History with Adapta 2000i*).

Getting Started with TradeStation 2000i



Create a Workspace

3.1 With GlobalServer running Online, go to the menu **Go/TradeStation** to launch TradeStation.

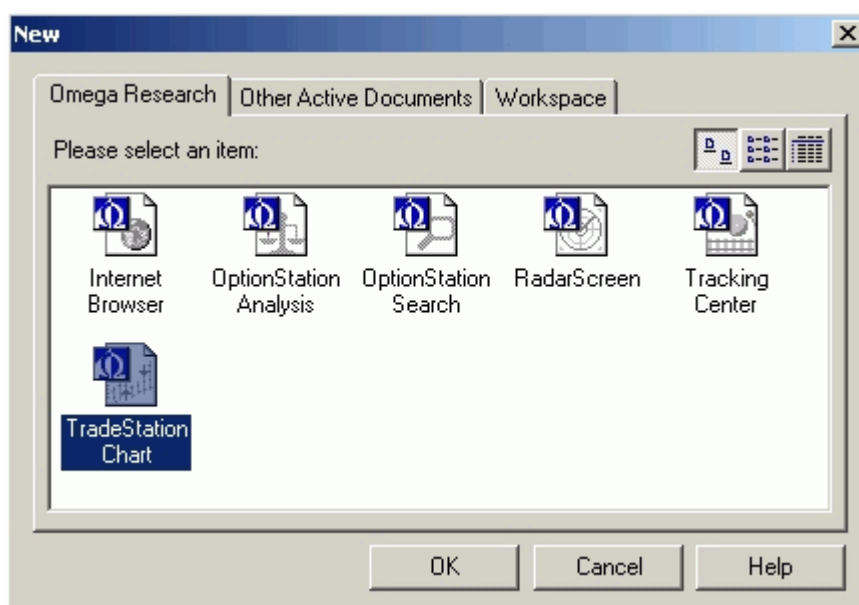


3.2 Choose **Create a new workspace**.

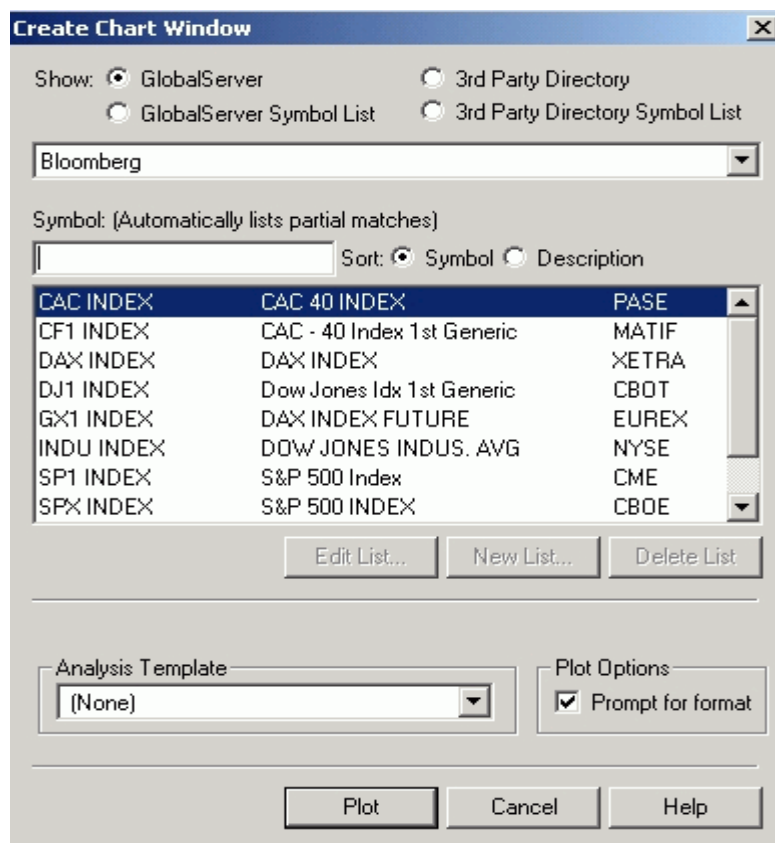
3.3 TradeStation will create an “untitled” workspace. **To give it a name** go to **File/Save Workspace**. Workspaces are saved to the default folder **My Work**.

Plotting a Chart

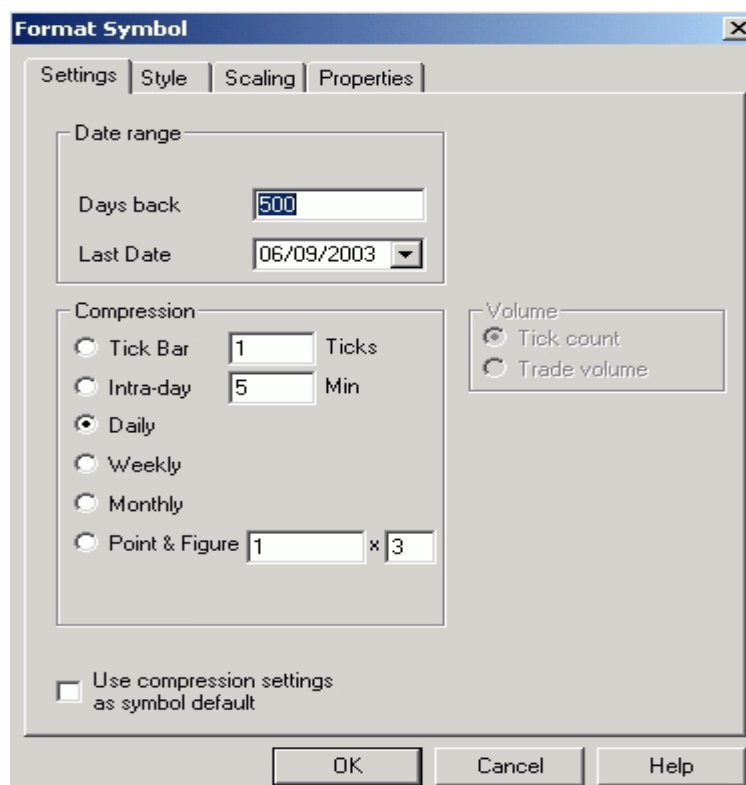
3.4 To plot your first chart. Go to **File/New...**



3.5 Select **TradeStation Chart**. Click **OK** to open the **Create Chart Window** where you will see the list of securities from your GlobalServer portfolio. If not, see that **Show GlobalServer** is selected.



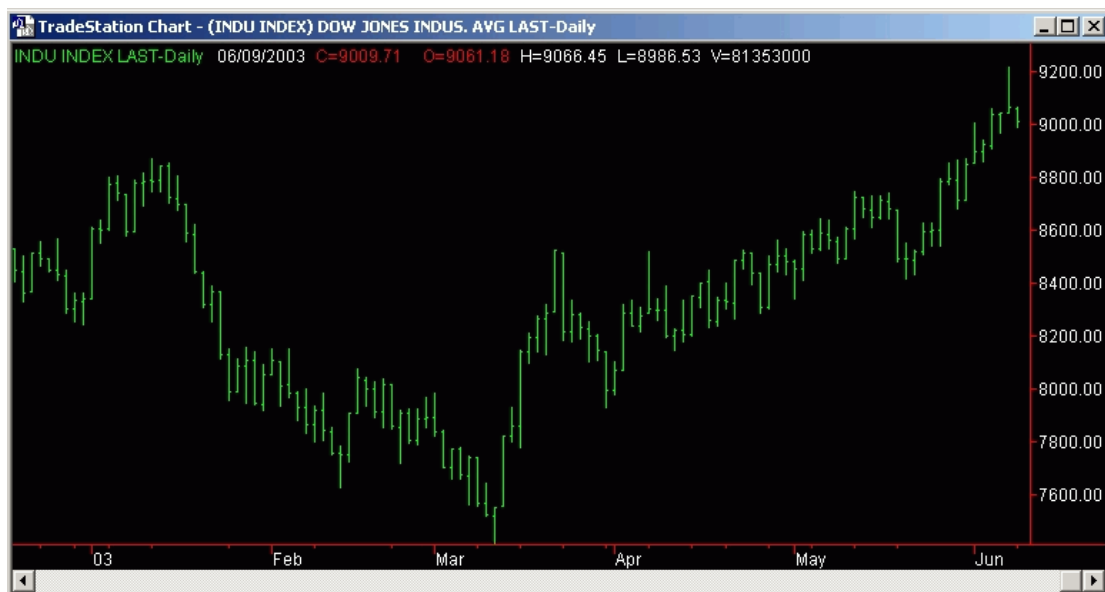
3.6 For this example select INDU INDEX (Dow Jones Industrial Average) by clicking on it in the list. The ticker will appear in the **Symbol** entry cell. You can also search for securities by typing in the partial ticker into the Symbol entry cell. **Click Plot** to continue...



Getting Started with TradeStation 2000i



3.7 The Format Symbol window **default settings** will show 500 **Days back**, today's date as the **Last Date**, and time **Compression** as Daily. You can change these values now, or from within the TradeStation workspace. **Click OK** to plot the chart.



That's it! You have successfully plotted your first TradeStation chart. To add more charts to the workspace repeat 3.4 to 3.7 above.

NOTE: The next time you open the Create Chart Window dialog to plot a new chart, the last ticker you added will be **highlighted** in the Symbol entry cell, and the **portfolio will not be visible**. To reinstate the portfolio list, click on **Backspace** to **clear the Symbol entry cell** and the list will reappear. Continue to plot securities as before.

For comprehensive information about **Using TradeStation 2000i** look at the **Contents** section of online Help in TradeStation or GlobalServer. **Bloomberg** specific information can be found in TradersWorld's **How To...** support documents.