



AIQ

TradingExpert Pro

Installation and
Getting Started

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What's on the CDs

AIQ TradingExpert Pro CD

The CD you have received contains the AIQ TradingExpert Pro program and historical data that you can use to learn AIQ TradingExpert Pro. The AIQ TradingExpert Pro program will be installed on your hard disk during the installation process.

The data files that you have received on the AIQ TradingExpert Pro CD include the following:

- **Stocks**
Approx. 10+ years of historical data for each of the S&P 1,500 stocks.
- **Market Timing Data**
20-plus years of historical data for three markets:
 - Dow Jones Industrial Average (DJIA)
 - Nasdaq Market (OCEXCH)
 - American Exchange (AMEXCH)
- **Other Indices (10+ years)**
Over 40 different indices including the S&P 500, Nasdaq 100 and more.
- **Group/Sector Lists and other industry lists**
Includes the S&P 500 and AIQALL group/sector lists.

AIQ Historical Data CD

The AIQ Data CD provides more than 8,000 additional tickers including futures, mutual funds, Canadian and FTSE stocks, ETF's, E-Minis, and Forex.

AIQ Tutorial CD

Although TradingExpert Pro is easy to use, it is an extensive system with many features. You should, therefore, devote some time to learning the system with the historical data supplied before you use it for trading.

Current data can be received online using your internet connection. See page 12 for information on how to connect to your data service in order to retrieve end of day data. The Data Retrieval Section in your Reference Manual also gives you complete instructions on how to connect to a data service.

How to get product help

We at AIQ Systems do our best to provide the highest quality products and customer service. If you should encounter problems while using AIQ TradingExpert Pro, help is available from the following:

1. **Phone:** As a New User you are entitled to call AIQ product support at (800) 332-2999 for the first 30 days, after this period call (775) 831 2999.

Support hours are 7:30 AM to 4:30 PM PST Monday - Friday.

2. **E-mail:** Send messages to support@aiqsystems.com.
3. **Internet:** www.aiqsystems.com/prosupport.htm.
4. For problems logging into the myTrack program, contact myTrack at support@trackdata.com or 800-698-7225.

Typographical conventions

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 appear in **bold**. For example, type **A:Setup**. Also, commands or options that you are instructed to select from a menu or from a dialog box appear in **bold**. For example, choose **Settings**. Or, select **Yes**.

1. Before you begin

Computer equipment needed

To install and run AIQ TradingExpert Pro, you need computer system equipment at least equivalent to the following:

- IBM compatible with Pentium 500 processor and 512 MB RAM
- Windows 2000 or XP
- Hard Disk with at least 500 MB available
- Broadband internet access recommended

2. AIQ TradingExpert Pro CD Installation instructions

You will find the TradingExpert Pro installation procedure simple and straightforward. All you need to know is the drive where you want TradingExpert Pro to be installed.

1. Close any open applications.
2. Insert the TradingExpert Pro CD into your CD-ROM drive.
3. **Installation should begin automatically.** If it doesn't, do as follows:
 - Click **Start** on the Taskbar. Then, on the menu, click **Run**.
 - A dialog box appears. In the *Open* text box, type: **X:\SETUP** (where X = letter corresponding to the CD-ROM drive). For example, if the CD-ROM drive is your D drive, type **D:\SETUP**.
 - Choose **OK**.
4. The next screen prompts you to install the myTrack software. If you are already a myTrack user, you will not be prompted to install the myTrack software and you can now go to Step 8. Follow the prompts to install the myTrack program. This program is important in the data sign-up process.
5. The next screen prompts you to install Microsoft DAO.
6. The next screen prompts you to install the AIQ TradingExpert Pro software. The program will be installed to c:\wintes32, click OK.
7. The next screen gives you three choices for the type of Setup that will be performed.
 - If you are a new user, select **Typical**.
 - If you are upgrading from a prior version of TradingExpert Pro, select **Compact**.
 - **Custom** is used in conjunction with technical support.
8. Before beginning the installation, Setup checks space required and space available. (The system will give you a message if there is insufficient space available.) If the specified drive has sufficient space, Setup will proceed with the installation.
9. During installation, the Setup screen informs you what is taking place.
10. When the installation is completed an AIQ TradingExpert Pro icon is added to your desktop and a group folder to your *Programs* menu (Start, Programs, TradingExpert Pro).

3. Using the AIQ Historical Data CD

The Historical Data CD furnished with AIQ TradingExpert Pro contains historical data for upwards of 10,000 tickers including stocks, mutual funds, futures, and indexes. **Data Manager** provides a special utility for importing data from this CD into your TradingExpert database. This utility greatly simplifies the importing process and allows you to screen the data so that you can import only those tickers that meet your specified criteria.

How to import data from the AIQ Data CD

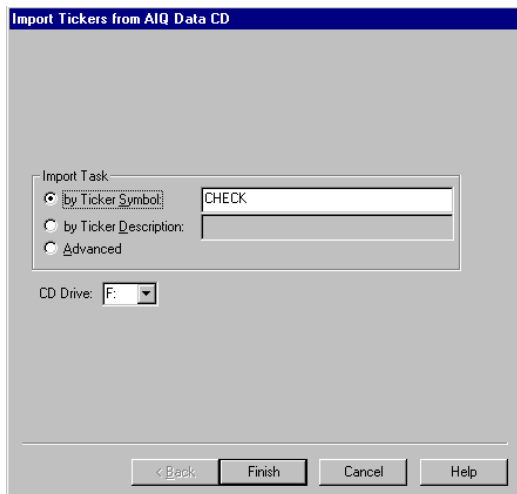
To import tickers from the Data CD, proceed as follows:

1. Open the **Data Manager** application and click **Manager** on the menu bar.
2. Choose **Ticker Import Utility**.
3. The *Import Tickers from AIQ Data CD* dialog box appears. The *Import Task* section of this dialog box provides three options:
 - by Ticker Symbol
 - by Ticker Description
 - Advanced

The first two options are used for importing specific tickers. The third option, *Advanced*, is used to import multiple tickers and to limit the search to only those that meet your specific screening criteria.

Note

The AIQ TradingExpert Pro CD installed the S&P 1500 stocks. You can add additional stocks from this Historical Data CD at any time. AIQ recommends that you familiarize yourself with the system before adding additional tickers.



4. Using the AIQ Tutorial CD

Your one stop source for getting up to speed with AIQ TradingExpert Pro. An invaluable resource for the experienced and novice trader alike.

The CD launches automatically when inserted or may be launched by opening your web browser and selecting *File, Open, Browse*. Choose your CD drive, then open the folder *EDCD* and select the file *AIQU.htm*. Click OK.

What's included on the Tutorial CD

Every AIQ manual is on the CD and fully searchable.
12 charting tutorials to get you started.
Your own AIQ support and FAQ. Fully searchable.
10 years of AIQ Opening Bell subscription magazine.
Trading system design tutorials, using the Expert Design Studio.

AIQ Systems
The world leader in intelligent trading software

Tutorial CD

Welcome to the AIQ tutorial and educational CD. This CD is designed to enhance your experience using AIQ TradingExpert.

Getting started right is important that's why we recommend looking at this tutorial first **New Users Tutorials**. It has everything from Determining Market Direction, Top-Down Approach to Stock Selection Using AIQ's Group/Sector Capabilities, Bottom-Up Approach to Stock Selection Using AIQ Reports, Setting Stops for Transactions in Profit Manager, Getting Ready to Trade

Get up to speed with the **Charting Tutorials** - these self-launching tutorial movies will get you up speed in the charting features in AIQ. Over 35 minutes of tutorials broken down into 12 sessions.

Want to get the in depth information on a feature without wading through the hard copy of the manual, then visit the **On-line manuals**. Every source of information is available in a clear and easy to read format.

Can't find an answer, then check out the **Technical Support index** with a searchable database of common questions and issues. Links to AIQ user groups and contact numbers for AIQ Support.

Want insights from AIQ Power Users and Renown Industry Experts like John Bollinger and John Murphy then visit the **Opening Bell archive** with 8 years of articles from our premium subscription magazine.

Want the personal touch then why not attend one of our **low cost seminars**. For a more in depth experience try our 3-day annual Lake Tahoe seminar.

Finally if you're ready to build your own trading system or start using some of our 200+ built-in systems, visit our **Trading System Design Tutorial** page.

To search the AIQ tutorial CD type in keyword(s), then click search

mytrack
AIQ

AIQ

5. The sign up process using myTrack

Signing up for data using **myTrack** as a data service is a simple and straightforward process.

The process consists of a total of six steps.

The six steps are summarized below. Complete instructions for each step follow.

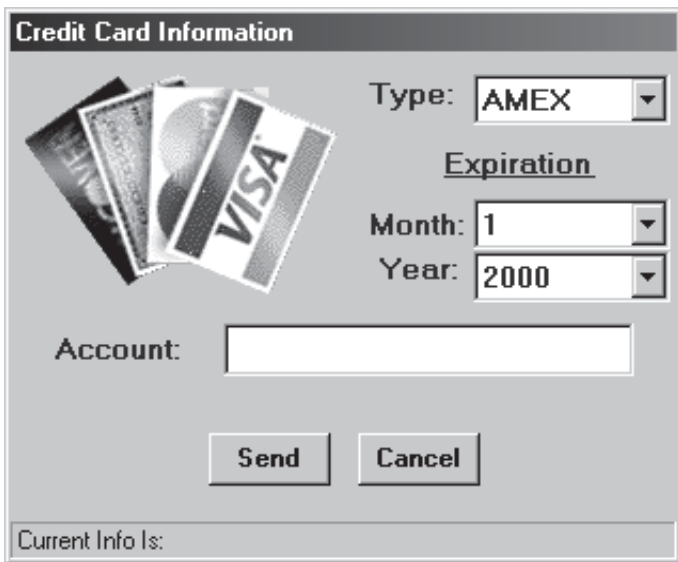
1. Set up your username and password.
2. Enter your credit card information.
3. Select your membership plan. Choose **Basic** for end of day data only or **Silver** for real-time and end of day data.
4. Select exchanges for real-time (exchange details are included with these instructions).
5. Enable your plan for TradingExpert Pro use.
6. Enter your username and password into AIQ Data Retrieval.

Step 1. Set up your username and password

1. From your desktop, double click TradingExpert Pro (this is called the AIQ Main Menu).
2. Click on the icon on the far right labelled **myTrack**. You will need to be connected to the internet in order to launch this program.
3. In the *Welcome to myTrack* screen, click on **New**. Click on 'I Accept' for the Terms and Conditions. The First Time Registration screen will appear.
4. Fill in all the required information and click on **Accept**. (Make a note of the username and password you select; you will need this later for the AIQ Data Retrieval Program).
5. You will receive a successful registration message. Click **OK** on this message and the login screen, and you will be logged into the myTrack software.

Step 2. Enter your credit card information

1. From the menu of your myTrack software, select **Functions** and then select **Chat** from the next menu.
2. From the *Chat* menu, select **Administrative, Credit Card**. Although you are on a trial basis a Credit Card will need to be entered. The myTrack data service will issue a credit for your trial period. A screen similar to the one shown below will appear.
3. Fill in your credit card details and click **Send**.
4. A message stating that your credit card status has been updated will appear. Click **Cancel** on this screen.



Credit Card Information

Type:

Expiration

Month:

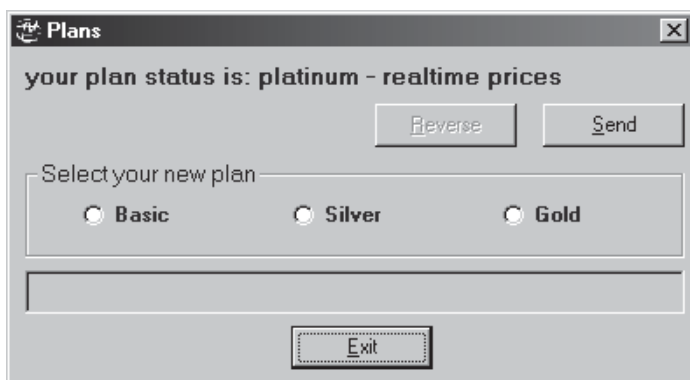
Year:

Account:

Current Info Is:

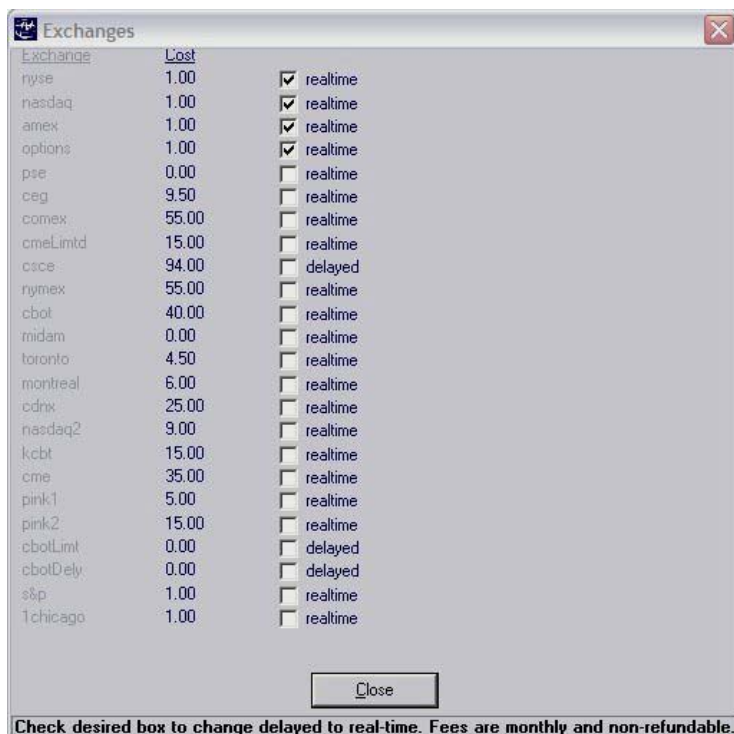
Step 3. Select your membership plan

1. From the *Chat* menu, select **Entitlements, Plans**. A screen similar to the one shown on the next page will appear.
3. Check the appropriate plan you wish to subscribe to and click **Send**. (If you wish to stay with Basic, click **Exit**).
4. You will receive a message *Please restart myTrack*. You can do this after completing *Step 5, Enable your plan for TradingExpert Pro use*.



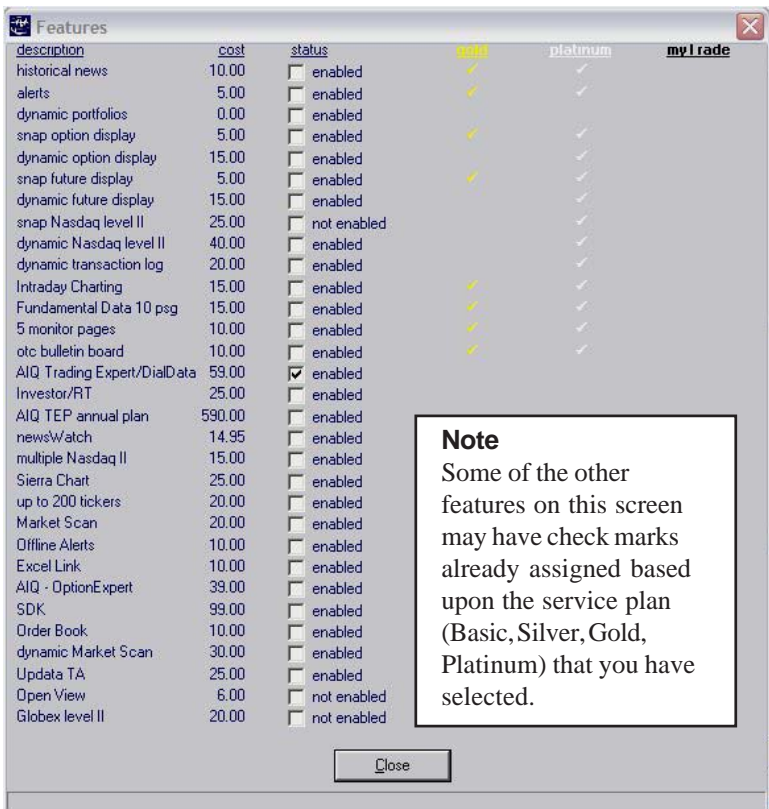
Step 4. Select exchanges for Silver, Gold or Platinum plans

1. From the myTrack main menu, select **Functions**, then **Chat**.
2. From the *Chat* menu, select **Entitlements**, then **Exchanges**. A screen similar to this one will appear.
3. Select the exchanges you wish to follow real time and click on **Close**.



Step 5. Enable your plan for TradingExpert Pro use

1. From the myTrack main menu, select **Functions**, then **Chat**.
2. From the *Community Chat* window, select **Entitlements**, then **Features**. A screen similar to the one shown will appear.
3. From the Features list, check the box for **AIQ TradingExpert/DialData**. You will receive a message telling you to restart myTrack to enable this feature.
4. To review the features on any of these plans, go to **http://www.aiqsystems.com/datainfo.htm**

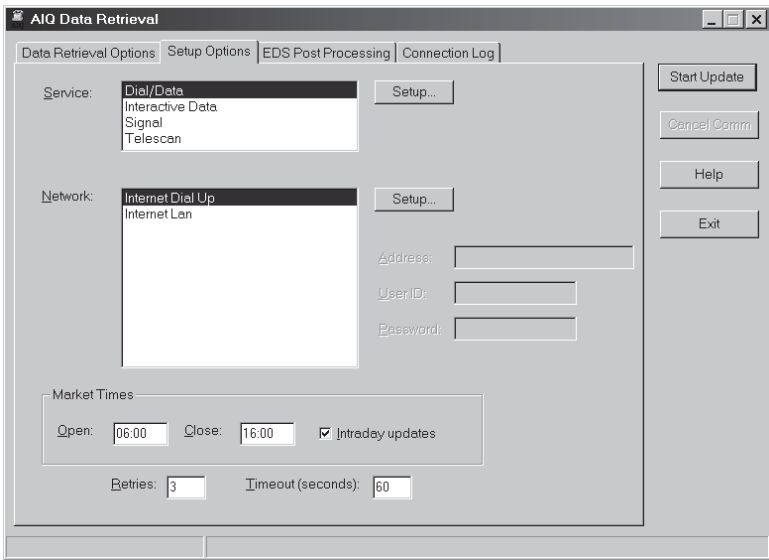


Note

To view the features of the different myTrack plans, select **Functions** from the *Chat* menu. Then choose **View Topics/admin/plans**.

Step 6. Put your username and password into the AIQ Data Retrieval (This step is required to download and update the data received with AIQ TradingExpert Pro)

1. From the AIQ Main Menu select the icon labeled **Comm**.
2. Click on the **Setup Options** tab. A screen similar to the one shown here will appear.
3. In the *Service* area, select **Dial/Data** as your service and click **Setup**.
4. Enter your username and password and click **OK**.
5. In the Setup area, choose **Internet Lan** and click **Exit**.



6. To start using TradingExpert Pro

Start TradingExpert Pro in one of these two ways:

- On your Windows desk top, double click the **TradingExpert Pro** icon to display the AIQ TradingExpert Pro Quick Launch menu.
- Click **Start** on your Windows taskbar and then select **Programs** from the Start menu. Then click on **TradingExpert Pro** to display a list of the TradingExpert Pro applications. Choose one of the applications or choose **Main Menu** to display the TradingExpert Pro Quick Launch menu.

TradingExpert Pro applications

AIQ Main Menu

Double click this icon to display the TradingExpert Pro Quick Launch Menu.

Charts

You can display a chart of any ticker contained in your database. The AIQ Expert Rating timing signals are found on the charts. You can analyze a ticker by displaying your choice of indicators from the TradingExpert Indicator Library. You also can print a price chart of any ticker in your database with your choice of indicators.

Market Charts

AIQ market timing signals are found on the AIQ Market Timing Chart. When you choose this icon, four charts are displayed: the AIQ Market Timing Chart (Dow Jones Industrials with NYSE volume and breadth), the NASDAQ composite index with OTC volume and breadth, and charts of the S&P 500 and NYSE market indexes.

Data Manager

This TradingExpert Pro application includes all the functions that you use to manage your data. Included here is a Master Ticker List of all the tickers you are tracking, and your Group/Sector List. This is where you can build other lists from tickers in the Master Ticker List.

Data Retrieval

This application accesses TradingExpert Pro's automatic data retrieval system for updating your database via the internet. You designate the data service you will be using, and specify the types of data you want to retrieve.

Reports

TradingExpert Pro produces a variety of helpful reports, many of which are available in both daily and weekly versions. You can customize the screening of your data base by setting report parameters to suit your trading style.

Portfolio Manager

Functions of the Portfolio Manager allow you to track and manage your transactions. TradingExpert Pro's built-in stop system is located here. To help you find new positions, powerful functions are provided to screen your data for trading candidates. Portfolio Manager also records the closing of transactions for year-end tax reporting.

Messages

After every data retrieval session, messages about the update, such as information on stock splits and mutual fund distributions and notes on data errors, are written to a Messages log. You should check the Messages log after you have completed an update.

Expert Design Studio

Expert Design Studio (EDS) was developed for those who want to create and test their own customized screening reports or mechanical trading systems. A powerful backtester tests the performance of your screening strategies.

MatchMaker

Make the most of the group/sector features of TradingExpert Pro. MatchMaker restructures the group/sector data in your database, creating groups of stocks that move together statistically, and sectors of groups that also move together statistically.

Fundamentals

The Fundamentals module is for users who want to combine the discipline of fundamental analysis with TradingExpert Pro's technical analysis capabilities. Current fundamental data for stocks is displayed on charts by pressing the **F** key.

Real-Time News, Quotes & Barometer

This module is designed for traders who monitor multiple tickers in real time. In addition to displaying dynamically updating real-time quotes, the application allows you to monitor the real-time status of selected indicators. AIQ's Barometer tool gives you the real-time ability to spot significant changes in indicator readings. You can also download news headlines and articles that pertain to specific stocks.

Real-Time Alerts

The Real-Time Alerts feature provides continuous monitoring of any number of securities. You specify the technical conditions that you deem important and when one of your conditions is met by any of the tickers you are monitoring, an Alert is signaled. 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.

Using Online Help

TradingExpert Pro provides Online Help to assist you in working with the program. Some of the ways you can obtain Help are:

- Click the **Help** button on the menu bar while in any application to display the Help main menu.
- In a dialog box that has a Help button, click the **Help** command button to display information about entries in the dialog box.
- Press the **F1** key to access Help for the application you are working in.

Exiting

To exit from a TradingExpert Pro application

Use one of these methods:

- Press the **Alt + F4** keys.
- Click the **Close Box** in the upper right corner of an application window.
- Select **Exit** from the submenu of the first menu command.
- Click on the application icon at the left end of the title bar and select **Close** from the drop-down menu.

To exit from TradingExpert Pro

Exit from TradingExpert Pro as follows:

- Close all open applications using any of above methods.
- Close the TradingExpert Pro main menu by clicking the **Exit** button.

Educational and Add on Products

AIQ provides a variety of resources and events to enhance your trading edge.

Educational Seminars

One day seminars are offered throughout the year, and AIQ's Annual Lake Tahoe seminar is held over 3 days in October for more information visit

<http://www.aiqsystems.com/educateaiq.htm>

Web Seminars

Frequent educational and trading sessions are available for no charge. For Schedule visit

<http://www.aiqsystems.com/webinars.htm>

AIQ Group/Sector Pyramid

Recent studies show that 49% of the gains by winning stocks can be attributed to the industry group, 31% to the market, and 20% to the company itself. These findings emphasize the important role group analysis plays in your stock selection process. The question is: how to best organize industry groups to most effectively uncover winning stocks?

The answer - AIQ has two “rational” groupings of stocks based on both fundamental and technical criteria. To determine a rational group structure, not only is each company’s generic business considered, but also the trading pattern of its stock. As a result, the structure is especially sensitive to market action. To find out more visit

<http://www.aiqsystems.com/gspyramid.htm>

AIQ Yahoo groups

Several Yahoo groups sponsored by AIQ users are available at no charge. Ask questions, exchange trading ideas and more. For more information visit

<http://finance.groups.yahoo.com/group/aiq/>

Notes