Learning TradeStation

Filtering Symbols and Real-Time Scanning

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Table of Contents

Welcome to the Learning TradeStation series. The main topics in this lesson are included below for your easy reference, and the complete links for more features are available in the TradeStation® platform help system.

To access the topics directly on your desktop, navigate to the top Menu bar within the TradeStation platform, then select **Help > Get Help > Platform Trading**.

Filtering Symbols and Real-Time Scanning

About RadarScreen & Quotes

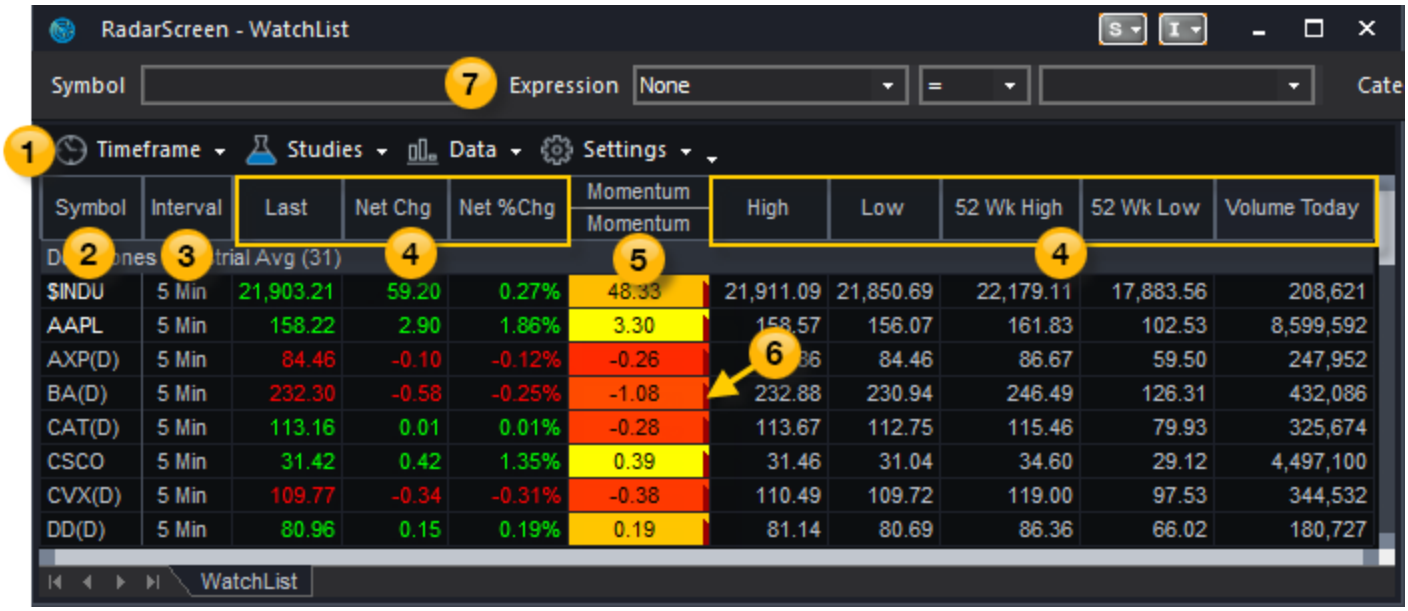
Exclusive to TradeStation, RadarScreen is a powerful real-time opportunity scanner. You can use many of the same historical charting indicators on hundreds of symbols in one window to find unique trading opportunities. Each row in RadarScreen is equivalent to a chart, with access to the same real-time and historical data, and hundreds of built-in and customizable EasyLanguage indicators. RadarScreen also has dozens of pre-built symbol watch lists you can import, and you can create your own custom lists. Using RadarScreen, you can sort and rank symbols dynamically in real time, and create custom alert rules and powerful visual alerts.

> If you are not subscribed to RadarScreen, you will receive a full-featured Quotes window. However, you will not have access to historical data and indicators. To upgrade to RadarScreen, contact TradeStation.

- To create a RadarScreen or Quotes window, click the **RadarScreen** or **Quotes** icon on the **Apps** tab, or use the Main **File > New Application > RadarScreen** or **Quotes** menu sequence. A new RadarScreen or Quotes window is displayed. RadarScreen is shown below.

VIDEO - Creating a Watch List with RadarScreen

Layout



Use these key features to get started with RadarScreen and Quotes:

1 **Toolbar** - Provides drop down menus that control the features and settings of the window.

2 Symbol column - To add a symbol, type the symbol name in an empty row and press the **Enter** key, or right-click a symbol row to add a symbol or symbol list.

3 Interval column - The interval column displays the bar interval used for historical indicator columns. To change the interval for one or more rows, right-click on one or more symbols and select **Timeframe**. This feature is exclusive to RadarScreen.

4 Snapshot quote column - To add or remove a quote column, right-click on any column and select **Studies > Edit All Studies**.

5 Historical indicator column - To add an indicator, right click on any column and select **Studies > Edit All Studies**. This feature is exclusive to RadarScreen.

6 Alert marker - A small triangle in the upper right corner of a cell indicates an alert has been enabled. To set alerts, select **Studies > Edit [Indicator Name] for All Symbols**, and then select the **Alerts** tab.

7 Filter Bar - Used to enter filter criteria (Symbol, Expression, and Category) that will display only symbols that match the criteria.

Creating Your Own RadarScreen or Quotes Window

The following steps will assist you in creating a RadarScreen or Quotes window:

1. Click the click the **RadarScreen** or **Quotes** icon on the Apps tab. A new RadarScreen or Quotes window is displayed.
2. If you know the symbols you want to use, **type a symbol name** in the text box at the first Symbol cell and press the Enter key, then continue typing additional symbols followed by Enter. If you do not know the names of the symbols, double click in a Symbol cell, or use the **Data > Add Symbol** menu sequence, to access the Add Symbol dialog, To enter predefined lists of symbols, use the **Data > Add Symbol List** menu sequence and select a list.
3. To change the interval for a symbol, click cell for the desired symbol under the Interval column and use the **Timeframe** menu to select a bar interval. To change intervals for multiple symbols, click an interval cell and hold the Control key to select more cells, then select a Timeframe. Click the Interval column heading and a Timeframe to change all intervals.
4. Double click on a column heading to sort the grid in ascending order based that column's values. Double click the same heading again to sort in descending order.

The RadarScreen window works like any other window, so you can move it, arrange it, print it, resize it, as well as save it along with your workspace. See About Windows for information on working with windows and workspaces.

Customizing RadarScreen or Quotes

There are many ways to customize your RadarScreen or Quotes window:

- Adding Study Columns
- Editing Alerts and Messages
- Editing RadarScreen Pages and Window Caption
- Customizing Study Columns in RadarScreen
- Using the Filter Bar to Display a Sub-set of Symbols
- Working with Symbols, Symbol Lists, and Custom Symbol Lists
- Setting up the Data Settings for RadarScreen
- Working with Studies, Study Groups, and Strategy Products
- Customizing RadarScreen Preferences
- RadarScreen Templates

Similar functionality is available in the Mobile and Web Trading versions of TradeStation.

Related Topics

Editing Columns and Rows in RadarScreen

Add Study - Indicator, ShowMe, PaintBar (RadarScreen)

The Add Study dialog allows you to choose a study to apply to the active RadarScreen window.

- Access using the **Studies > Add Study** menu sequence or by clicking the + sign on the right-most RadarScreen column. The Add Study dialog is displayed.

VIDEO - Using Technical Studies in RadarScreen

- **Select Study Type** - Displays the types of studies that are available to be inserted into the active RadarScreen window by using the drop-down list.

Available

Contains the studies that can be inserted into the active RadarScreen window.

- Select the desired study to add as a column. Click the Definition button to view the help page for a selected study. Use the Ctrl or Shift keys to select multiple selections simultaneously.

Selected

Contains the studies that are currently displayed (as columns) in the active RadarScreen window.

- Select the desired study to be moved from the active RadarScreen's column. Use the Ctrl or Shift keys to select multiple selections simultaneously.

- **Add** - Adds the selected study from the Available list to the Selected list.
- **Remove** - Removes the selected study from the Selected list to the Available list. This will remove the study from the active RadarScreen window.
- **Definition** - Launches the selected study's Help page.
- **Edit EasyLanguage** - Displays the selected study in the TradeStation Development Environment.
- **Import** - Imports an indicator from the internet or an external file using TradingApp Store or Import/Export wizard.

- **Move Up/Move Down** - Changes the sort criteria in how the studies are sorted (from left to right) on the active RadarScreen window.
- **Customize** - Changes the Customize settings for the selected study. The Customize Study dialog is displayed.
- **Add from TradingApp Store** - Accesses your product's subscriptions from the My TradingApp Store Subscriptions dialog.

- Click **OK** to apply changes or **Cancel** to exit without changes.

Related Topic

About RadarScreen

Filter Bar (RadarScreen)

The RadarScreen Filter Bar allows you to specify which symbols display in a RadarScreen window based on a combination of the characters in a Symbol, the Expression value or range within a study column, and the symbol Category.

- Toggle on or off using the RadarScreen **Settings > Filter Bar** menu sequence.

Layout

The combination of values entered in the filter bar Symbol, Expression, and Category sections will determine which symbols will be displayed. To display all symbols after using your own filter criteria, clear the Symbol box, set the Expression to none, and select the All category.

Symbol

Displays all symbols that contain the character(s) entered in the Symbol box within the symbol name or the underlying symbol description. For example, when filtering the Dow Jones Industrial Average symbol list, the characters "ms" will display both CSCO and MSFT because the description for Cisco Systems and the MSFT symbol name both contain the specified characters.

Expression

Displays all symbols where the value in the specified Expression column (first box) matches the operator (second box) and comparison (third box). For example, showing symbols that have a Net %Chg value equal to or greater than .0.2% would use the following Expression elements: Net %Chg (first box), >= (second box), .0002 (.2%) (third box).

Category

Displays all symbols where the Category matches the symbol type. You can specify All symbol types, Stocks, Futures, or Options.

Related Topics

About RadarScreen

Editing Alerts and Messages

TradeStation provides you with alerts and messaging notifications that advise and inform you when market conditions are met based on the alert criteria specified when you apply a study or a drawing object to a chart, and for a single cell, group of cells (inputs) within an indicator column, or an entire indicator column for grid-based applications.

Using alerts and messages allows you to set a criteria so that you are notified when a criteria is met. For example, if you want a notification for when the total volume exceeds a specific number, you have the ability to set an alert and/or display a message once the Total Volume column has met the criteria. You can do this by enabling the alerts and messaging, and editing the input value for the indicator column.

Once the alert is enabled or triggered, it is sent to the TradeStation Message Center. The Message Center provides detailed information related to the alert conditions you've created, as well as messages provided by your criteria and other information provided by TradeStation. Alerts provide an Alert Notification window that appears on the desktop once the alert condition has been met. Messages are sent using an email address.

Types of Alerts and Messages

There are three types of alerts you can enable using the Notification Preferences dialog. Alerts can be created to hear a sound, display a notification popup window, or setup an email address to receive alert messages once an alert criteria you specified has been met. In addition, alerts can be setup up globally where alerts are controlled for all supported TradeStation window using the Message Center.

> You cannot enable alerts for strategies. However, you can automate a strategy to generate trading orders when market conditions meet the criteria specified by the strategy. For more information on automating strategies, see Automating a Strategy.

> For a Chart Analysis window, you must enable the alert for each individual study or drawing object and also configure your messaging options in the Message Center. For more details, see Setting Up Messaging Preferences.

- To quickly set an alert using the default settings, select the desired study, drawing object or cell(s), and use the shortcut menu to select **alert > alert once**, **alert once per bar**, or **alert continuously**. To set an alert or message, and customize the settings, use the Customize Study - Alerts dialog.

Alerts

Editing Alert Markers

Enabling Alerts for Studies

Clearing Alerts in RadarScreen

Customizing Alerts for Studies

Resetting Alerts for a Specified Time

Messaging

Notification Preferences

Using Alerts with Studies

Messages

Customizing Page - Messaging

Customize Studies - Alerts

Messaging

About the Hot Lists Window

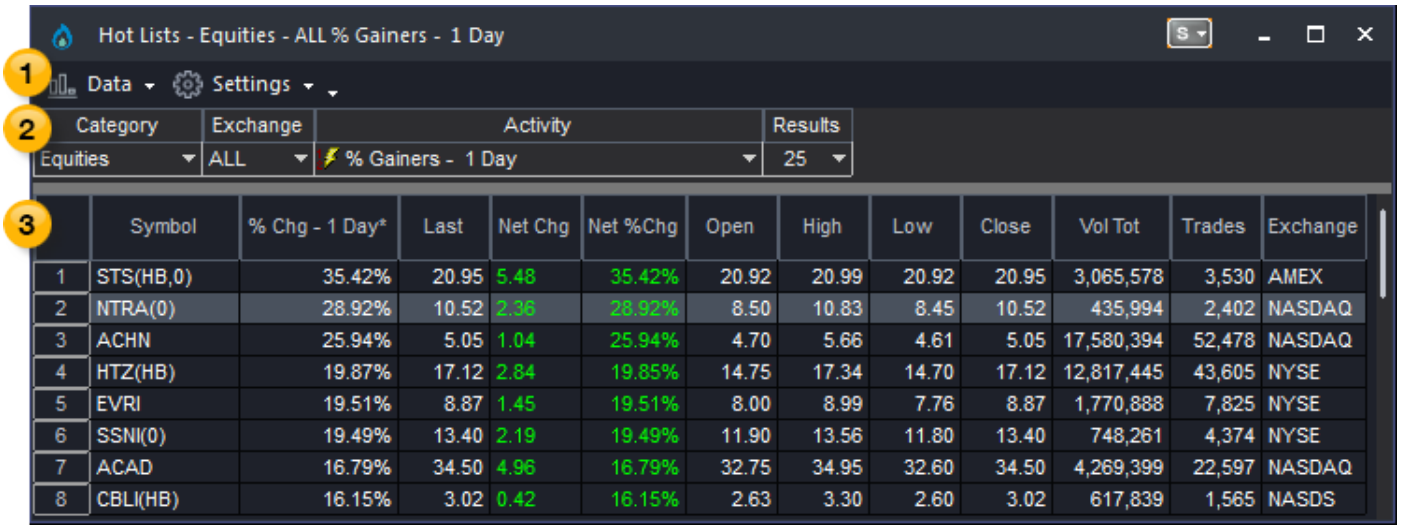
A Hot List window displays securities that meet a specific set of criteria, such as the highest volume of trades within a certain exchange. TradeStation offers Hot Lists based on an asset category and a selected exchange (or all exchanges) in combination with popular market activity lists. By default, lists include the top 25 results, but you can change the settings to display 50, 75, or 100 results as well.

TradeStation provides enhanced hot lists, as well as options and options-related equities hot lists. The options hot lists identify trading opportunities for options, while the options-related equities hot lists identify trading opportunities for equities based on options data, such as Implied Volatility, Puts/Calls Volume, and Puts/Calls Open Interest.

▸ To create a Hot Lists window click the **Hot Lists** icon from the **Apps** tab. A new Hot Lists window is displayed.

VIDEO - Hot Lists

Layout



	Symbol	% Chg - 1 Day*	Last	Net Chg	Net %Chg	Open	High	Low	Close	Vol Tot	Trades	Exchange
1	STS(HB,0)	35.42%	20.95	5.48	35.42%	20.92	20.99	20.92	20.95	3,065,578	3,530	AMEX
2	NTRA(0)	28.92%	10.52	2.36	28.92%	8.50	10.83	8.45	10.52	435,994	2,402	NASDAQ
3	ACHN	25.94%	5.05	1.04	25.94%	4.70	5.66	4.61	5.05	17,580,394	52,478	NASDAQ
4	HTZ(HB)	19.87%	17.12	2.84	19.85%	14.75	17.34	14.70	17.12	12,817,445	43,605	NYSE
5	EVRI	19.51%	8.87	1.45	19.51%	8.00	8.99	7.76	8.87	1,770,888	7,825	NYSE
6	SSNI(0)	19.49%	13.40	2.19	19.49%	11.90	13.56	11.80	13.40	748,261	4,374	NYSE
7	ACAD	16.79%	34.50	4.96	16.79%	32.75	34.95	32.60	34.50	4,269,399	22,597	NASDAQ
8	CBLI(HB)	16.15%	3.02	0.42	16.15%	2.63	3.30	2.60	3.02	617,839	1,565	NASDS

1 **Toolbar** - Provides drop down menus that control the features and settings of the window.

2 **Activity** - Specifies the parameters used to create a hot list based on the selected market Activity for the specified symbol category, exchange, and number of results.

3 **Results** - Displays the symbols that match the selected Activity and related parameters.

How do you use it?

The Hot Lists window displays a list of results based on the criteria that you select. You can change the criteria either directly in the Hot Lists window or on the Select Hot List dialog. To change the Hot List results:

1. Click the Activity pull-down.
2. Scroll up or down and select an activity filter from the list. Click the ⊞ plus sign to expand any folders and see more choices. Navigate to the Hot List activity that you want, and click it once. The display updates with the results.

3. Optional:
    - Change any of the other drop-down items such as Category, Exchange, or Results. The Category (asset type) column affects the exchange types and Activities that are listed.
    - Choose which columns to display. From the **Customize** menu, click **All Columns** which shows the available and selected columns.
    - Change the customization for individual columns. Choose a column, and then from the **Customize** menu, click Selected Column.

The Hot Lists results automatically update.

The results are sorted by the column that shows an asterisk (*). The symbols that are included in the list and how they are sorted depend on the Activity and other criteria that you select. The list is dynamic and updates regularly. Scroll to the bottom of the Hot List results to see the **Last Updated** timestamp.

The symbols are filtered based on trade volume to eliminate stocks that have a low currency value and low number of shares traded. Filtering symbols by trade volume ensures stocks that are low-priced, but actively traded are reflected in the appropriate Hot Lists while micro-priced (less than $1) stocks with low-volume are not.

Customizing the Hot Lists window allows you the flexibility to customize the window to your personal preference. In addition, you have the option to save, and print the Hot Lists window.

Related Topics

Customizing the Hot Lists Settings

About Scanner

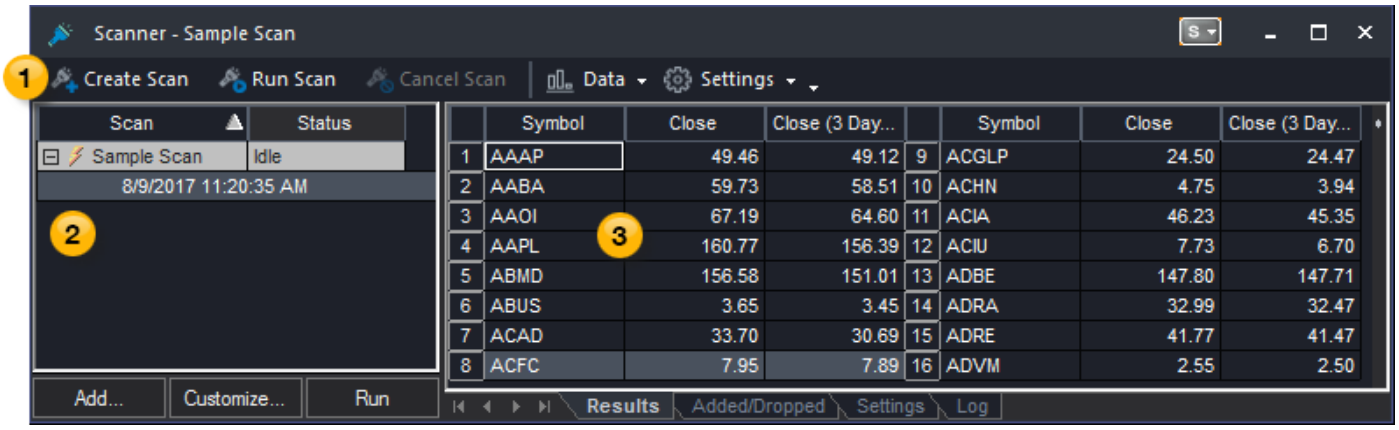
The Scanner feature is a tool that scans the entire universe of symbols to find those that meet your criteria. You can run a scan using quote fields, fundamental quote fields, Indicators, ShowMe studies, and/or PaintBar studies using multiple intervals from tick to monthly. Using the Scanner options, you will be able to create and organize scans and have the ability to contain multiple scanner windows displaying results from the latest scan run.

In addition, the Scanner window has the capability to be linked by a symbol to any window so that you will be able to quickly click through the scan results to view a chart of the symbols. You will also be able to click on a symbol in the Scanner and have the symbol link with the Trade Bar to quickly place an order.

Once the TradeStation Scanner window is displayed, the LaunchPad provides shortcut to multiple scanner actions. These actions be found in the Scanner toolbar.

- To create a Scanner window, click the **Scanner** icon ifrom the **Apps** tab, or use the Main **File > New Application > Scanner** menu sequence. A new Scanner window is displayed.

Layout



1 **Toolbar** - Provides command icons and drop down menus that control the features and settings of the window.

2 **Scan pane** - Displays a listing of all available scans with information regarding those scans.

Scans within a folder will be ordered by the sort setting which can be set by clicking on the column header. Scan results (historical scan runs) within a scan folder will always be ordered by Last Run Date/Time from newest to oldest. In addition, by using the drag and drop method, you will be able move scans between folders. The columns in the Scan pane can be customized by adding and/or deleting column headings.

- **Add** - Launches the Add Scan Wizard and the scan will be created in the selected folder or in the root if no folder is selected.
- **Customize** - Displays the Customize Scan window for the selected scan. This button will be grayed out if no scan folder or historical scan result file is selected.
- **Run** - Runs the selected scan. Run will be disabled if you do not select a scan folder or historical scan result file.

3 **Results pane** - Displays the results for the selected scan, as well as any error logs and scan settings.

The column headings can be sorted and customized by adding and/or deleting column headings.

Tab	Description
Results	The Results tab displays the results for the selected scan. When a scan is run, the results will be saved and automatically applied to new runs. Therefore, any scans you run and then customize the column layout and the size of the columns, the customizing will be saved with the scan. If the user changes the scan criteria, then the column layout will revert back to the defaults. If no scan or folder with no scan is selected in the Scan pan, the results tab will display the "Getting Started" message.
Added/Dropped	Displays all symbols that have been added or dropped since the previous scan's run.
Settings	Displays the settings that were used in the scan at the time the scan was run. This is important when looking at older scan results for a scan that may have been modified over time.
Log	Displays the status messages as they occur for the selected scan.

Related Topics

Creating a New Scan

Adding a TradeStation Sample Scan

Customizing Scanner

Adding, Renaming, or Deleting a Scan folder

Renaming or Deleting a Scan

Setting Scanner Preferences

Scanner Shortcut Options

Printing Windows and Documents

Advanced Scanning Features

Creating a New Scan

TradeStation provides a way to create and customize scans that will allow you to save results that you generate by entering and selecting criteria and conditions and are saved on your local drive.

When a new Scanner window is created the new scan wizard will open automatically and walk you through the process of adding a new scan. In adding a new scan using the wizard, you will be able to enter general information, select a universe to scan, set a criteria or conditions for the scan to generate the results you want. After you add (create) the scan, the Scanner will allow you to schedule scans based on a intraday, daily weekly or monthly basis, set results and enable notifications based on your personal preference.

Adding a New Scan

The **Create Scan** toobar icon is the starting point in creating a new scan for the Scanner window.

Add Scan - Name

Add Scan - Symbol Universe

Add Scan- Scan Criteria

Adding a Folder

The **Data > Add Folder** menu sequence allows you to create folders in the Scan pane.

Add Folder

> You can create a new scan and TradeStation Sample Scans from the LaunchPad in the Scanner window.

Related Topics

Adding a TradeStation Sample Scan

Setting the Scanner Window Settings

About Scanner