Lesson 1
Essentials of the TradeStation Desktop

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Installation and System Requirements

Before installing TradeStation, it is important to consider your computer’s performance specifications. The quantity and quality of your computer’s system resources will directly affect the TradeStation platform’s overall performance. Following are the minimum and recommended resource levels depending on which type of TradeStation user you will be.

<table>
<thead>
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<th>Resource</th>
<th>Minimum Requirements</th>
<th>Standard User Recommendations</th>
<th>Power User Recommendations</th>
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<tbody>
<tr>
<td>Processor</td>
<td>Single-core Intel® or AMD® processor at 1.5 GHz or faster</td>
<td>Dual-core Intel® or AMD® processor at 2.5 GHz or faster</td>
<td>Multi-core Intel® or AMD® processor at 3 GHz or faster</td>
</tr>
<tr>
<td>Memory (RAM)</td>
<td>2 GB</td>
<td>2 GB to 4 GB</td>
<td>4 GB or more</td>
</tr>
<tr>
<td>Hard Drive</td>
<td>5400 RPM drive 300 MB free space or more</td>
<td>Solid State Drive (SSD) or 7200 RPM drive 500 MB free space or more</td>
<td>Solid State Drive (SSD) or 7200 RPM drive 1 GB free space or more</td>
</tr>
<tr>
<td>Video Card(s)</td>
<td>15-bit graphics support 64 MB for a single monitor</td>
<td>32-bit graphics support 128 MB for dual monitors</td>
<td>32-bit graphics support 256 MB or more for multiple monitors</td>
</tr>
<tr>
<td>Screen Resolution</td>
<td>1024x768 pixels</td>
<td>1200x1024 pixels, or higher</td>
<td>1200x1024 pixels, or higher</td>
</tr>
<tr>
<td>Operating Systems</td>
<td>Windows® 8 64-bit</td>
<td>Windows® 8 64-bit</td>
<td>Windows® 8 64-bit</td>
</tr>
<tr>
<td></td>
<td>Windows® 7 32-bit</td>
<td>Windows® 7 32-bit</td>
<td>Windows® 7 32-bit</td>
</tr>
<tr>
<td></td>
<td>Windows® 7 64-bit</td>
<td>Windows® 7 64-bit</td>
<td>Windows® 7 64-bit</td>
</tr>
<tr>
<td>Internet Browser</td>
<td>Microsoft Internet Explorer 7 or newer</td>
<td>Microsoft Internet Explorer (latest version)</td>
<td>Microsoft Internet Explorer (latest version)</td>
</tr>
<tr>
<td>Internet Connection</td>
<td>Broadband Connection 1.5 Mbps or better</td>
<td>Broadband Connection 3 Mbps or better</td>
<td>Broadband Connection 6 Mbps or better</td>
</tr>
</tbody>
</table>
Understanding User Profiles

Minimum Requirements User

The common profile of the minimum requirements user is a TradeStation platform user who is not sensitive to real-time market data updates and who makes decisions based on market analysis that is not time sensitive. Traders who fit this profile are usually position traders or end-of-day traders.

Standard User

A standard user is generally anyone who is moderately sensitive to real-time market data updates and makes intraday decisions based on intraday market analysis. Traders who fit this profile are swing or trend traders. This type of user generally doesn’t need more than a handful of market data requests and follows specific symbols that are not extremely active. The standard user doesn’t rely on processor-intensive analysis techniques running in real time on multiple charts.

Power User

A power user is generally a user utilizing computationally intensive EasyLanguage studies, utilizing large amounts of tick or intraday data, or generating a large amount of trading activity. Traders who fit this profile are active TradeStation traders or users who require the ability to follow multiple active markets simultaneously while using complex EasyLanguage studies and strategy optimizations.

There are three icons that are displayed as part of the TradeStation installation. Click on the Start – All Programs – TradeStation menu sequence from the Windows Task Bar to access all icons.

- This icon launches TradeStation, a comprehensive trading platform that enables you to execute trades, monitor your positions, analyze markets and use built-in and custom analysis and strategy trading tools.
- This icon launches the TradeStation Development Environment, which provides you with an integrated set of tools to write, edit and verify EasyLanguage analysis techniques, strategies and functions.
- This icon launches a customizable ticker bar across the bottom of your screen, which allows you to track the market through the use of hot lists, real-time quotes and news headlines.
Live Trading vs. Simulated Trading

The TradeStation Network Logon dialog appears when you click the TradeStation icon. It allows you to choose whether to trade in your actual brokerage accounts or using a trading simulator. The Live Trading button will log you in to your real funded brokerage accounts; trades will be real and profit and losses will affect your funds. To practice trading with simulated accounts, click on the Simulated Trading button; any orders placed will not be real, nor will any profits or losses be real.

Keep in mind that pressing the Enter key on the keyboard after entering the password will default to Live Trading.
When logging on to simulated trading, the confirmation window below is displayed.

![Order Execution Simulator](image)

You now have access to a **Simulated Trading Account** for each market. Each account is preceded by the letters 'SIM'.

Orders/Trades placed in these accounts are NOT REAL and all account information you see is likewise NOT REAL.

The Status Bar displays “Trading: Sim” in blue to confirm that you are using simulated trading. Your account numbers should start with the letters “SIM” to confirm that you are using simulated accounts.

![ORDER BAR OE MACROS Trading: Sim Data](image)

1/17/2013 3:28:46 PM

To switch from simulated trading to live trading or vice versa, double-click on the “Trading” or “Data” indicators on the Status Bar to log off the TradeStation Network. Double-click again to return to the Network Logon dialog. When logged on to live trading, the Status Bar shows “Trading: Live” in green.

![ORDER BAR OE MACROS Trading: Live Data](image)

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You may also disconnect TradeStation from the data and trading networks by clicking on the **File – Work Online** menu sequence. To reconnect, click on the **File – Work Online** menu sequence again.

The Work Offline button on the TradeStation Network Logon dialog allows you to use TradeStation offline. This is convenient when an Internet connection is not available. TradeStation automatically saves historical data for all the Chart Analysis windows you loaded while connected to the Internet. This way, the data is available for offline viewing and analysis. You will not receive any new data until you log back in to the TradeStation Network.

Click the Network Status button to see information about the TradeStation data and order execution networks.
Lesson 1
Essentials of the TradeStation Desktop

Desktop Components

- **Menu Bar** • This provides drop-down menus to access general program features as well as features related to the currently selected window.

- **Toolbar** • This contains buttons for accessing tools specific to the currently selected window.

- **Order Bar** • This is used for manually placing orders in your TradeStation brokerage accounts.

- **Position Graph Bar** • This displays the status of positions in your TradeStation brokerage accounts.

- **TradingApps Launcher** • This tool allows you to launch new windows or TradingApps in the platform with a single mouse click. Its rollout functionality saves space on your desktop.

- **Status Bar** • This bar is located at the bottom of the TradeStation screen display and provides a current summary of your brokerage account as well as network connection status. It is also used to lock and unlock manual order-entry tools.

- **Workspace Area** • This is the open area inside the TradeStation desktop that is used to create and display windows such as Chart Analysis, Quotes, etc.
Desktop elements may be removed or enabled by using the View menu. In the View drop-down menu, the top five elements will be checked or unchecked. Click the unchecked elements to enable them.

You can position the TradingApps Launcher anywhere along the edge of the desktop. The Order Bar and the Position Graph Bar can be removed by clicking the “x” in one of their corners. You may also click and hold the handle that appears as a dotted line next to the “x” to drag the bar and move it to a different location. Double-clicking the handle will make it float. Double-clicking the title bar of a floating bar will dock it to its previous location in the desktop.

**Workspaces and Windows**

Workspaces are groups of TradeStation windows that you want to view, save and re-open as a group. In fact, each workspace is a file containing the windows you have placed in it.

Create your workspaces so that they help you organize your trading ideas. You can create workspaces with any variety of windows for a single stock, a group of stocks, an industry, futures, forex or any other information that you want to view together. TradeStation includes sample workspaces so you can get an idea of how they look.

When you first create a workspace, it is blank. You then add windows to the workspace (Chart Analysis, RadarScreen, Matrix, and so on). When you want to analyze other stocks, industries or markets, and want to keep your ideas separate, you can create additional workspaces.

**Note:** For an Alert to be triggered or Strategy Automation to be active, the workspace containing the window with the Alert or Strategy must be open.
TradeStation displays a tab for each open workspace. You may click on these tabs to switch between them. To create a New Workspace, click on the File – New – Workspace menu sequence. Other useful functions from the File menu are: Open Workspace, Save Workspace, Save Workspace As..., Save All Workspaces and Move Workspace.

Right-click on any of the workspace tabs and use the shortcut menu to create, save, close and move workspaces. You may also click and drag workspace tabs to change their order.

Copying and Pasting Windows

You may copy and paste windows within a workspace or from one workspace to another. The Copy Window command makes an exact duplicate of any TradeStation window, including symbol settings, applied Analysis Techniques or columns and any window formatting settings. The Paste Window command will place that window into the active workspace. The copy is fully functional and may be edited or saved in the same ways as any other window. These commands are available from both the Edit menu and right mouse-button shortcut menu for each window.

Note: Strategy Automation is automatically disabled in a Chart Analysis window that is being pasted.

Managing Windows in a Workspace

Resize Windows
All windows in TradeStation are created using a default size. You may click and drag any of the side borders of a window to resize it; clicking and dragging the corners of the window will resize the width and height of the window simultaneously.

Move Windows
Click and drag the title bar of a window to move it to another location within the workspace.

Maximize and Minimize Windows
To maximize a window, click the Maximize button on the top right corner of the window. Maximized windows cover the whole workspace area and other open windows are behind it. To restore the window to its original size, click on the second (lower) Restore Down button at the top right corner of the TradeStation desktop.

Minimized windows appear as icons at the bottom of the workspace, right above the Workspace tabs. Click on Window from the Menu Bar to see a list of windows in the workspace; click on any of them to restore it and make it the active window.

Arrange Windows
Click on the Window – Arrange All menu sequence to evenly resize all open windows and arrange them to fill the whole workspace area. Other options in this menu are: Arrange Horizontally, Arrange Vertically and Cascade.
Multiple Desktops and Multiple Monitors

TradeStation allows you to create multiple instances of the TradeStation desktop. Each desktop is a complete version of TradeStation with access to all of its features. Each TradeStation desktop may then be placed on any of the monitors connected to your computer.

When you first install TradeStation, the installation process will recognize all monitors connected to your computer and will prompt you to select how many monitors to use for TradeStation. Once installation is complete, TradeStation should open a new desktop on each of the monitors selected.

To create an additional TradeStation desktop, click on the File – New Desktop menu sequence. The new desktop should automatically open on any available monitor. If it opens on the incorrect monitor, click on the “Restore Down” button located between the “Minimize” and “Close” buttons on the top right corner of the desktop, and then click the desktop’s title bar and drag it to the desired monitor.

You may open as many additional desktops as needed.

Deskops may also be saved, each with its associated workspaces, so that you can retrieve the desktops when needed. Use these menu sequences:

File - Save Desktop
File - Save Desktop As… or
File - Save All Desktops.

To open a saved desktop, click on the File – Open Desktop menu sequence. All workspaces associated with this desktop will open. To close a desktop, click on File – Close Desktop menu sequence or click on the “Close” button at the top right corner of the desktop.
Backup and Restore

The TradeStation backup feature makes it easy to save – in a single archived file – all of the changes you make while working with workspaces, templates and dialogs. This allows you to save custom configurations and to efficiently transfer your custom settings between computers or to a newer installed version.

Backup archive files may be created as needed or they may be generated automatically on a regular schedule. To create a backup, use the File – Backup/Restore TradeStation menu sequence and choose the Backup TradeStation… sub-menu. From the TradeStation Backup dialog, place a check mark next to those components that you want to include in a specific archive.

The archive file name is made up of the backup configuration name selected from the drop-down at the top of the dialog, the TradeStation version number, and the date and time. For example, an archive file named “Monthly (9.00.00.8732 – 2011-07-06 0910)” means that it was created using the Monthly backup configuration, using TradeStation version 9.0, and created on July 6, 2011 at 9:10 am. The archive file is stored by default in the C:\Program Files\TradeStation Archives directory. You may choose a different location by clicking on the Browse… button.

To restore saved data, choose the Restore TradeStation Archive… option from the File – Backup/Restore TradeStation menu sequence. Browse to find the name of the archive file you would like to restore. A checkmark next to each component indicates that it will be restored.

Note: TradeStation stops updating during a backup or restore cycle and automatically reconnects when completed. Therefore, it is recommended that you not perform backups and restores during your regular trading hours.
Customize Toolbars

Toolbars display buttons that provide quick shortcuts to certain commands. There are two types of toolbars in TradeStation: Shared Toolbars and Window-Specific Toolbars. A Shared Toolbar is available across all TradeStation windows. Window-Specific Toolbars are only available for a certain type of window, such as Chart Analysis, and contain buttons that are only applicable to that specific window type. You will notice that as you create different window types, a different toolbar with an applicable set of tools is displayed at the top of TradeStation.

You can also create your own custom toolbars with your most frequently used toolbar buttons. These custom toolbars can be either shared or window-specific.

To create a custom toolbar click on the View – Toolbars – Customize menu sequence. In the Toolbars tab, click on the New button and give your custom toolbar a name. In the New Toolbar dialog, you may specify whether this toolbar will be shared by multiple windows or not by checking the Shared toolbar checkbox. Keep in mind that if it is not shared, the toolbar will only appear when the same window type is active, and will disappear when different types of windows are.

Once you click OK, an empty floating toolbar will be displayed, ready to accept toolbar buttons.

To add buttons, click on the Commands tab in the Customize dialog, and commands are displayed on the right based on the category selected on the left.

Keep in mind that only commands for the window that is active on the desktop will be displayed in this dialog. If you are looking for a window-specific command, it will not be available unless you open that window type and then customize the toolbar.
To add buttons to the toolbar, simply click on a command button and drag it inside the new toolbar. Continue to do this until all the command buttons that you need are added to the toolbar. You may then click the title bar of the new toolbar and drag it to the desired position. You may use it floating, you may drag it until it docks to the top with the other toolbars or you may choose to dock it to a different location such as the right, the left or even the bottom edge of the platform.

To remove buttons from existing toolbars, click on the View – Customize – Toolbars menu sequence, select the Commands tab and then click and drag the buttons from the toolbar to the Commands tab.

Command Line Macros with Hot Keys and Toolbar Buttons

TradeStation's Command Line is the central command post from which you can control the TradeStation desktop, workspaces and windows. The Command Line makes it easy to execute common commands in windows by simply typing them. Commands are short instructions with optional parameters.

The Command Line accepts the following types of commands:

- **Symbol** - Symbol commands insert or change the symbol in the active window.
- **Interval & Range** – Interval & Range commands are used to change the bar interval and/or amount of data in the active window.
- **Action** - Action commands access many of the same operations that can be accessed from menus or toolbars in the TradeStation desktop or the active TradeStation window. Action commands are preceded with a period (.)
- **Macro** - Macro commands are action and/or symbol commands combined into a single string. Macro commands are preceded with a period (.)

To access a list of commands you may use in the Command Line, click on the right-pointing triangle next to the Symbol Lookup button and select Other Commands... from the drop-down menu. To access Macros, click on the View – Macros... menu sequence. Here you will find built-in Macros under two main categories: Command Line Macros and Order-Entry Macros. You may run any of the built-in Macros by selecting it and clicking the Run button. You may also run them by typing their names preceded by a period (.) directly into the Command Line. To create a new Command Line Macro, click the Create button.
The Create Macro wizard will prompt you for the required information, including the command or series of commands to be included in the macro. Keep in mind that multiple commands are separated by double semicolons. Once the macro is created, you may run it by typing the macro name preceded with a dot directly in the Command Line.

You may also run Macros by assigning them to a user-defined hot key or a toolbar button.

To assign a Macro to a hot key, click on the Hot Keys... button in the Macros dialog.

In the Hot Keys dialog, select Command Line Macros under Categories. Most of the built-in Macros have assigned hot keys. Select any of the Macros under Commands and a hot key is displayed under Current Keys if it is already assigned.

To assign a hot key or change the existing one, click inside the "Press new Hot Key" field and press the hot keys directly on the keyboard. The keys pressed will appear inside the field. Click the Assign button at the bottom of the dialog to save the changes.

Once the hot key is assigned, you may press it at any time to run the Macro.

Click on Save As... at the bottom of the dialog to save the hot keys layout and allow different user configurations. The default hot keys are saved under the TradeStation layout and can be reset by clicking the Load button.
To assign a Macro to a toolbar button, click the **Toolbars...** button in the Macros dialog.

In the **Customize** dialog, select **Command Line Macros** under **Categories**. Select one of the Macros under **Commands** and click the **Modify Button...** button if you wish to change the appearance of the toolbar button.

Once you have selected the appearance of the toolbar button, you may click and drag the button directly into a toolbar. Every time the toolbar button is pressed, the Macro is run.
Window Linking

Window linking allows you to connect the symbol and/or interval settings in multiple windows. To turn on window linking, click on the “S” (symbol) button or the “I” (interval) button on the title bar of a window. The buttons turn a specific color when turned on, but you may click the drop-down on these buttons to select different colors and create different link groups.

The four windows in the workspace pictured below are linked by a Green Local Symbol Link. Changing the symbol in any of the windows forces all other windows to update to that symbol automatically.

Symbol Link

Windows linked with symbol links share symbol information. When the symbol is modified in one of the windows belonging to the group, the other windows in the group will update to use the same symbol. These links can also be set globally to work across multiple workspaces and desktops. To set a global link, select “Color” Global Symbol Link from the drop-down menu of the symbol linking buttons.

Interval Link

Windows linked with interval links share interval information. When the interval is modified in one of the windows belonging to the group, the other windows in the group will update to use the same interval. These links can also be set globally to work across multiple workspaces and desktops. To set a global link, select “Color” Global Interval Link from the drop-down menu of the interval linking buttons.
Listener Link

Listener Links allow a window to be linked so that any change is reflected in the Listener Linked window; however, a change made in the Listener Link window is not sent to any other window. Listener Links may be set for Symbol or Interval; the settings appear on the Symbol Link and Interval Link drop-down menus. These links may be local (within the workspace only) or global (across workspaces and desktops).

**Note:** RadarScreen windows are always “sender only” regardless of the type of link you select. For example, changing a symbol in a Chart Analysis window linked to a RadarScreen window will not change a symbol in the RadarScreen window. Clicking on a symbol in the RadarScreen window will, of course, change the symbol in the linked Chart Analysis window.
TradeStation Desktop Preferences

Desktop preferences are global; they apply to all workspaces in the TradeStation desktop. These settings allow you to customize the behavior of your TradeStation desktop and tailor your workspace options.

General
Use this tab to determine general preferences, such as resizing window options, confirmations when deleting windows, the appearance of window linking buttons, etc. To enable a setting, click the checkbox to add a checkmark. To disable the option, click the box again to clear the checkmark.

View
On this tab, you can set preferences related to title bars on windows and how they are displayed in the TradeStation desktop.

Workspaces
Use this tab to set the attributes for your workspaces, such as opening all workspaces from previous sessions when you start up TradeStation and controlling the list of workspaces that appear in the opened and recent workspaces menus.

Desktop Bars
Here you can change preferences for the EasyLanguage Print Log, Order Entry and the Ticker Bar.

Command Line
On this tab, you can set preferences related to the Command Line, such as how many items to display in the drop-down lists and where to display error messages.

Sessions
On this tab, you can set the default session that you want to use for each symbol category. You can choose the regular session or create a custom session.

Desktops
Use this tab to set how desktops appear when starting TradeStation and how they close upon exiting.

Updates
On this tab, you can set the method by which TradeStation platform updates are downloaded to your computer, and control the location settings for the Desktops and Workspaces backup.

Status Bar
On this tab, you can access the preference window to set alerts and general and notification settings, as well as messaging settings for the Status Bar.

Dialogs
On this tab, you can set preferences to determine where pop-up windows will appear when using a multi-monitor display configuration.
The **TradeStation Platform Help** is accessible from the Help menu. The Help topics in TradeStation are displayed in a separate Help window so that you can view them at the same time you are using TradeStation. Most windows, dialogs, drawing and analysis tools, and right-click shortcut menus contain a Help link or button that automatically launches the Help window and takes you directly to a related Help topic. In addition, you can use the F1 key to open the Help window from anywhere in TradeStation.

**TradeStation Help**

TradeStation Help provides you with multiple ways to locate information about how to use TradeStation.

**Table of Contents:** This tab groups Help topics by category. Click the + to the left of the books to expand a category. Click the – to collapse a category. Click on a topic name to view the related topic.

**Index:** The Index tab includes an alphabetical list of terms that are linked to relevant Help topics. As you begin typing characters in the text box at the top of the index pane, the list moves to the index terms that start with those characters. Select a term from the list to view the related Help topic.

**Search:** The Search tab lets you locate Help topics that contain term(s) you type into the text box at the top of the search pane. A search engine looks through every topic in the Help and returns a list of Help topics that are ranked by the number of occurrences of the terms in each topic.

**Favorites:** Favorites lets you save Help topics or save strings that you wanted to access at a later time.
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