

InvestorLink/Databoss User Manual

May, 2002

1 Introduction

Welcome to InvestorLink!

Thank you for choosing InvestorLink as your financial data vendor. Beginning a new relationship with a company, as well as coming up to speed with new software, can be difficult. We hope that this manual will help ease the difficulty and that you will exercise a little patience during this process. We do things a little differently than other companies in our industry but the end result is a very efficient and speedy system.

Our philosophy as a company is basically to treat our customers in the manner we would like to be treated:

- We want to provide customers with a needed service – not make a quick dollar. To this end, we offer free trial accounts and do not charge any signup or setup fees. If our service is not a good fit for you, we don't want you to waste money.
- We will be up front with you regarding data quality, data corrections, software bugs, etc. Our data quality speaks for itself and it is not in anybody's best interest to make outrageous claims of so-called "perfect" data. Occasional data errors are the nature of the data business. Occasional software bugs are the nature of the software business. We are committed to listening to you and quickly correcting problems if they arise.
- We provide data in the industry standard ASCII format rather than some contrived binary format. This means that you may use our data with virtually any application across any platform. We are not interested in locking you into our service, any particular analysis tool, or any platform. You are paying for financial data and not the "privilege" of using some particular product or paying some absurd premium for data files formatted in a bizarre manner.
- Your business relationship is with US, not the rest of the world! We respect your privacy and will not resort to selling your personal information, installing spyware, or any other of the abhorrent practices of this sort that are so common in online business.

About the Manual

This manual is divided into nine sections:

1. **Introduction** A short introduction to InvestorLink and this manual.
2. **Quick Overview** Describes the purpose of InvestorLink and how the service works in general.
3. **Accessing Data** A quick rundown of data access options.
4. **Data in Detail** Everything you want to know about our data.
5. **Getting Help** How to find answers to problems.
6. **Databoss** Detailed descriptions and usage instructions for every Databoss tool.
7. **Databoss Quick Setup** How to do a minimal effort Databoss setup.
8. **How To's** Stepwise instructions for performing common tasks.
9. **Charting Software** Tips for choosing analysis software and some recommendations.

If you are pressed for time, we recommend that you at least read Sections 2 and 5.

Skim over Sections 6 and 8 so you have an idea of what is there, then refer back to those sections when needed.

If you're trying to set up Databoss for the first time, Section 7 should get you up and running with little effort.

2 Quick Overview

Purpose of InvestorLink

The purpose of InvestorLink is to provide you easy access to financial data – from a few securities to many thousands of them.

Why InvestorLink and not a free internet quote/charting service? There are two issues:

- Ease of data retrieval. The more quotes you gather the harder it is to use a free quote service. InvestorLink allows you to maintain financial data files for about 20,000 securities, funds, and commodities daily and it only takes a single mouse click and about ten minutes.
- Analysis power. Online charting is convenient if your analysis is limited to what is given to you and you are not pressed for time. Keeping data locally allows you to use the analysis tools of your choice and screen vast amounts of data per your requirements.

If you are only interested in doing basic analysis on a handful of stocks or commodities, then one of the free services will probably serve you well. On the other hand, if you want to follow many items, using the tools of your choice, a data service is probably a better choice.

Why InvestorLink and not another data service? Things you should consider when choosing a data service include:

- Price. Consider startup fees, software fees, per quote fees, etc.
- Data quality. Consider both quality of released data *and* responsiveness to data error reports.
- Data format. Does the data vendor deliver data in a convenient format for you to use?
- Intrusiveness. Does the client software “take over” your computer or add spyware? Are you going to be spammed mercilessly?

Purpose of Databoss

Databoss is the InvestorLink client software. It provides you with an easy tool for downloading and updating data as well as other data management tasks such as split adjusting and data correction.

Historical Data

Files that contain many days of data for a single security or commodity are called historical data files. These are the files you will actually work with while doing analysis. For example, a historical stock file would contain lines of data such as these:

```
20020515,10.320,10.550,9.990,10.250,714000  
20020516,10.310,10.370,9.910,10.000,646000  
20020517,10.250,10.480,9.790,9.990,695000
```

Each line of data begins with a date, and the filename contains the ticker or symbol.

End of Day (EOD) Data

Files that contain a single day of data for many securities or commodities are called end of day (eod) data files. These are the files you will download each day and use to update your historical files. For example, an eod stock file would contain lines of data such as these:

```
AAUK,15.540,15.580,15.360,15.580,116000  
AB,0.450,0.700,0.360,0.450,14000  
ABANP,9.400,9.400,9.400,9.400,1000
```

Each line of data begins with a ticker, and the filename contains the date.

Three eod files are released each day, one each for stocks/indexes, futures, and funds. An eod file is released each Friday containing commitment of traders data.

Updating

Updating means bringing your historical files up to date. This is accomplished with a two step process:

- 1 – Downloading the eod files for the days you need updated.
- 2 – Applying the data from the eod files to your historical files.

These steps are done together seamlessly by Databoss. For example, if you have 500 stock files updated through May 20, 2002, on May 21 you would download the eod file for the 21st and apply it to your historical database.

There are two important characteristics of our service, which sometimes cause confusion because they are somewhat atypical:

- There is a single eod file released each day for each data type. For example, there is one and only one eod stock file for each trading day. Every customer following stocks downloads *the same* file each day. This file contains data for every stock we have data for. This means that it makes no difference whether you are following 5 or 5000 stocks – you download the same eod file for updating.
- You do not maintain a list of tickers you are following. Rather, you do maintain a list of *locations* where you keep your data. Suppose you are following 500 stocks and keep them in the folder 'c:\mystockdata'. Instead of maintaining the large list of 500 tickers, you only maintain the short list of the folder name 'c:\mystockdata'.

When Databoss updates, it looks in your specified locations and updates whatever is there.

3 Accessing Data

EOD data can be accessed in two ways:

- Via Databoss download.
- Via email. We will email eod files as attachments at your request.

Historical data can be accessed in two ways:

- Via Databoss download.
- Via direct FTP.

4 Data in Detail

Data Format

InvestorLink's native data format is comma delimited ASCII. ASCII is an international standard that is used by general services such as email and the web; general applications such as word processors and spreadsheets; and most financial analysis tools.

End of Day (eod) Data

EOD Stock Data

End of day stock files contain the quotes for one day for every stock we have data for. The date of the data is contained in the filename as an eight-digit date. EOD stock files have the extension 'stk'. For example, the file **20020520.stk** contains data for May 20, 2002.

The contents of the files looks like this:

```
AAME, 2.490, 2.500, 2.300, 2.500, 2000  
AANB, 15.490, 15.490, 15.250, 15.260, 1000  
AAON, 32.000, 32.000, 30.110, 30.300, 11000
```

The field order is:

```
TICKER,OPEN,HIGH,LOW,CLOSE,VOLUME
```

EOD Futures Data

End of day futures files contain the quotes for one day for every commodity we have data for. The date of the data is contained in the filename as an eight-digit date. EOD futures files have the extension 'csf'. For example, the file **20020520.csf** contains data for May 20, 2002.

The contents of the files looks like this:

```
AD02M, 55.02000, 55.52000, 54.95000, 55.43000, 5136, 40992  
AD02U, 54.70000, 55.08000, 54.68000, 55.03000, 102, 460  
AD02Z, 54.63000, 54.63000, 54.63000, 54.63000, 2, 318
```

The field order is:

```
TICKER,OPEN,HIGH,LOW,CLOSE,VOLUME,OPEN_INTEREST
```

EOD Commitment of Traders Data

End of day commitment of traders (COT) files contain the quotes for one day for every commodity we have COT data for. The date of the data is contained in the filename as an eight-digit date. EOD COT files have the extension 'cot'. For example, the file **20020514.cot** contains data for May 20, 2002. COT data always has a date falling on a Tuesday and is released each Friday.

The contents of the files looks like this:

```
BONCL,11187,11187,11187,11187,0,0  
BONCP,28131,28131,28131,28131,0,0  
BONCS,20124,20124,20124,20124,0,0
```

The field order is:

```
TICKER,VALUE,VALUE,VALUE,VALUE,ZERO,ZERO
```

COT files maintain seven fields so that they may be treated like regular futures files.

COT tickers are derived from the one or two character commodity ticker followed by a three character COT suffix. These suffixes are:

CNL	Commercial Net Long
CML	Commercial Long
CMS	Commercial Short
COT	COT Index
LNL	Large Trader Net Long
NCL	Non-Commercial Long
NCP	Non-Commercial Spreads
NCS	Non-Commercial Short
NRL	Non-Reportable Long
NRS	Non-Reportable Short
OPI	Total Open Interest
TRL	Total Reportable Long
TRS	Total Reportable Short
SNL	Small Trader Net Long

EOD Mutual Fund Data

End of day fund files contain the quotes for one day for every fund we have data for. The date of the data is contained in the filename as an eight-digit date. EOD fund files have the extension 'fnd'. For example, the file **20020520.fnd** contains data for May 20, 2002.

The contents of the files looks like this:

```
AAABX,5.440  
AAACX,5.450  
AAAGX,4.550
```

The field order is:

```
TICKER,NAV
```

Historical Data

Historical Stock Data

Historical stock files contain the quotes for one ticker for as many days as we have data for. The ticker of the data is contained in the filename. Historical stock files have the extension 'prn'. For example, the file **borl.prn** contains data for the ticker BORL.

The contents of the files looks like this:

```
20020514,10.340,10.750,10.210,10.270,1014000
20020515,10.320,10.550,9.990,10.250,714000
20020516,10.310,10.370,9.910,10.000,646000
```

The field order is:

DATE,OPEN,HIGH,LOW,CLOSE,VOLUME

Historical Futures Data

Historical futures files contain the quotes for one symbol for as many days as we have data for. The symbol of the data is contained in the filename. Historical futures files have the extension 'csf'. For example, the file **c02n.csf** contains data for the symbol C02N. Futures symbols are derived from the one or two character futures ticker, the two digit year code, and the one character month designator.

The contents of the files looks like this:

```
20020503,201.00000,201.25000,199.75000,201.00000,25117,213424
20020506,199.25000,201.00000,198.00000,200.50000,36811,214346
20020507,202.50000,206.25000,202.00000,204.75000,57202,212353
```

The field order is:

DATE,OPEN,HIGH,LOW,CLOSE,VOLUME,OPEN_INTEREST

Historical Commitment of Traders Data

Historical COT files contain the quotes for one symbol for as many days as we have data for. The symbol of the data is contained in the filename. Historical futures files have the extension 'csf'. For example, the file **copi.csf** contains data for the symbol COPI. Please see the EOD COT data section above for the description of our COT data naming conventions.

The contents of the files looks like this:

```
20020416,433206,433206,433206,433206,0,0
20020423,425875,425875,425875,425875,0,0
20020430,398824,398824,398824,398824,0,0
```

The field order is:

DATE,VALUE,VALUE,VALUE,VALUE,ZERO,ZERO

Historical Mutual Fund Data

Historical fund files contain the quotes for one ticker for as many days as we have data for. The ticker of the data is contained in the filename. Historical fund files have the extension 'prn'. For example, the file **fresx.prn** contains data for the ticker FRESX.

The contents of the files looks like this:

```
20020509,19.500  
20020510,19.380  
20020513,19.440
```

The field order is:

```
DATE,NAV
```

Data Corrections

Data correction files are bundled with eod files as they are available. Data corrections are automatically applied to your historical data if Databoss is configured to do so. Data correction files are named:

```
XcorMMDD.YY
```

where X is either 's', 'f', or 'm' for stock, futures, or mutual fund data respectively; MM is the two digit month; DD is the two digit day; and YY is the two digit year. For example:

fcor0128.02 represents a futures correction file released January 28, 2002.

Correction files are stored in the \databoss\stats\misc folder.

Splits

New stock split data is bundled with eod stock files and is usually released each Friday. Stock splits are automatically applied to your historical data if Databoss is configured to do so. Stock split files are named:

```
spltMMDD.YY
```

where MM is the two digit month; DD is the two digit day; and YY is the two digit year. For example:

splt0104.02 represents a stock split data file released January 4, 2002.

Stock split files are stored in the \databoss\stats\splits folder.

5 Getting Help

Website Resources

There are many resources on our website that are both helpful and informative. Please take a few minutes to visit <http://www.msodata.com>. We have tried hard to minimize fluff and make it easy to find what you need quickly.

As a new user you will probably be most interested in the Support section of the site. This section contains several step-wise How To articles related to using InvestorLink data with various analysis software. Detailed contact information is also available in this section of the site.

You should also periodically look at the News page, found in the Resources section of the site. Here we will keep you up to date with what we're doing, any problems, new software releases, etc.

Email/Telephone

Support is available via email as well as telephone. Email is the preferred method of communication – please give it a try! We do sometimes fall a little behind, or have technical problems related to email, but usually do reply very quickly. Our email address is support@msodata.com.

We do provide limited telephone support as described on our website.

Help With Databoss Usage

For help using Databoss, please try the following resources:

- This manual.
- The Databoss Help file, accessible by clicking on the Help button from within Databoss.
- The How To and FAQ's on our website.

If you cannot resolve your problem with the above, please send us an email.

Reporting Databoss Problems

If you believe you've found some unexpected behavior in Databoss (a.k.a., a bug), please let us know. Bear in mind that it is extremely useful for us to be able to reproduce the problem if we are to fix it. To help us reproduce the problem, please send a detailed, step-wise procedure, from starting Databoss to the point where the problem occurs. Also useful are the exact version number and the exact text of any error messages.

Reporting Data Problems

Despite our best efforts, an occasional bad quote gets through. If you believe you've found a bad quote, letting us know allows us to correct it, which benefits everybody. When reporting data errors, please be specific and include the exact quote in question, what you think is wrong with it, and what source you are comparing the data to. For example:

In the file borl.prn, you report:

20020515,10.320,10.550,9.990,10.250,714000

Yahoo reports 10.500 for the CLOSE.

Reports such as "your BORL data is bad" are impossible to verify and correct.

6 Databoss

This section of the manual describes every function of Databoss in detail. It is in your interest to browse through this section so you have an idea of what the software can do for you. If you are only looking to get Databoss set up quickly you may want to jump to Section 7, Databoss Quick Setup, but please review this section at your leisure.

Terminology

There are a few terms you should know and understand in order for Databoss to make sense. These are:

- **EOD File:** An End of Day data file that contains a single day of data for many stocks, funds, or commodities. You use EOD files to update your existing data.
- **Historical File:** A data file that contains many days of data for a single stock, fund, or commodity. These are the files you will open with your charting/analysis software.
- **Downloading:** Moving data (either eod or historical) from our servers to your computer.
- **Updating:** Adding current data (from an EOD file) to your historical files to bring them up to date.
- **Updating Directories:** The locations where your historical data resides. These are sometimes referred to as data paths. For example, if you keep your stock data in “c:\stkdata”, then “c:\stkdata” would be an Updating Directory, or data path.
- **Download Directories:** The locations where you want data to be put when downloading.
- **Main Navigation Menu:** The vertical menu on the left side of the Databoss screen that contains navigation buttons for the main areas of the program.
- **Sub Navigation Menu:** The horizontal menu at the bottom of the Databoss screen that contains navigation buttons related to the selected main navigation area.
- **Utility Screen:** The largest portion of the Databoss screen that displays the utility selected by the sub navigation menu button.

Function Overview

Update

The Update utilities are used for updating your historical data files.

Update

The Update utility has a single button labeled Start!, along with a progress indicator so you can track what Databoss is doing. Once Databoss has been set up, simply clicking on Start! will automatically retrieve the eod files needed to bring your historical data up to date and update them. We keep eod files available for at least one month, so as long as you run this utility at least monthly you can keep your historical database current.

If you have disabled split adjustment or data correction, those items will be marked as Disabled and will not be executed.

If you have Custom ASCII (described below) enabled for any data types, updating will also be disabled in this utility.

Review

The Review utility gives you an opportunity to view the eod files that will be downloaded when you run the Update utility. To view the files, click on the '+' sign to expand the tree. Files are listed by dates and a suffix representing the data type: s, f, c, m for stock, futures, cot, and mutual fund files, respectively.

Setup

Databoss downloads eod data types (stocks, futures, cot, funds) based on questions you answer the first time you download, and what you have already downloaded. The Setup utility gives you the opportunity to specify exactly which types of data you want, and what date you want to begin downloading.

The Setup utility screen is divided into four sections, one for each data type. Each section contains a checkbox labeled Enabled, the last date that data of that type was downloaded, and a date selection dropdown box.

You may check or uncheck the Enabled box to begin or stop downloading that data type.

You can specify the last download date by clicking on the down-arrow next to the 'Change last download date' box, then choosing a date.

For example, suppose you decide to begin following futures and download some historical futures files on May 21. If you want to begin keeping this data updated, you would go to the this utility, check the Enabled box in the futures data section, and finally set the last download date to May 21 (which will begin downloading data of May 22).

Click on Save to save settings, or Revert to switch settings back to their original state.

Download

The Download utilities allow you to choose and download historical or eod files.

Stocks

The Stocks download utility contains a ticker list; Add, Remove, and Clear buttons; a download queue list, and a ticker entry list.

To download data, you must add tickers to the download queue. You can do so by finding the ticker on the ticker list, then either double clicking the entry or clicking the Add button.

To remove a queued item, select the ticker then double click or click Remove. Click the Clear button to remove all tickers from the queue.

If you know the tickers you wish to download, a quick method is to type the ticker within the ticker entry box then press the enter key. Repeat to add more tickers.

After the tickers are queued, either click on Download in the sub navigation menu or select another data type to queue more tickers.

Databoss will not save a list of the tickers you are queuing. Remember, you only need to specify items for download one time. Thereafter, you simply download the eod files needed to bring them up to date. This also means that after queuing files for download, you should actually retrieve them before closing the program.

Finally, bear in mind the 50 file/week download limit for historical data. Do not queue more than 50 files unless you will be “downloading” from an InvestorLink data CD. Note that the historical file download limit does not affect the unlimited daily updating in any way.

Futures

The Futures download utility works identically to the Stock download utility with the exception of the ticker list since futures contracts have a different naming convention. On this utility, the ticker building lists are in three sections: the futures tickers, a year designator column, and a month designator column. To specify a futures file, you must select an entry from each column to build a valid futures contract symbol.

You may also type contract symbols into the ticker entry box.

Odd month symbols in the month column, beneath the “-GLO-“ designator, represent Globex months.

Funds

The Funds download utility works identically to the Stock download utility described above.

Indexes

The Indexes download utility works identically to the Stock download utility described above.

Note that index data is treated exactly the same as stock data throughout the program. EOD index data is contained within eod stock files.

COT

The COT download utility contains a futures ticker list and a COT symbol list. To specify a COT file for download, first click a futures ticker, then a COT symbol, and then the Add button. Again, you may type valid symbols in the ticker entry box.

EOD

Although in most cases eod data is automatically downloaded via the Update utility, you can manually specify eod files for download here. To queue an eod file, specify a date, then click one of the data type buttons.

Note that eod files are only guaranteed to be available for the past month.

Download

After queuing a number of files with the above utilities, you move to the Download utility to actually initiate the download. To initiate the download, first make sure you are connected to the internet and then click the Download button. Progress of the download is indicated by the progress indicator.

Click on Abort to cancel the session.

Check the ‘Download from CD’ box if you have an InvestorLink data CD and wish to extract the data from the CD.

Utilities

The Utilities selection has several tools for data maintenance, program updating, and helper applications.

Manual Update

Most users use the Update utility for downloading current eod data and updating historical data. You can, however, use Manual Update to update historical data yourself.

To do a manual update, click on the Update button on this utility, choose one or more eod files, then click Open.

Click the Abort button to cancel the process.

Check 'Correction Update' to fill in gaps or replace existing data with data from the selected eod files. Note that Correction Update is significantly slower than regular updating and should only be used if needed.

Databoss Update

The Databoss Update utility checks for a newer version of Databoss and retrieves it if available. After retrieving the new file, you are prompted to restart Databoss. After restarting, you will have the latest version of Databoss. This is a simple way to upgrade the software.

CD Data Import

The CD Data Import utility is used for bulk extraction of data from the InvestorLink CD to your hard drive. The utility has three sections, one for stocks/indexes, one for futures/cot, and one for mutual fund data. Each section contains a checkbox to indicate that you want to extract that data type, and a folder selection box where you specify a root folder for the data to be extracted to.

When extracting in bulk (or using the Update All options described elsewhere) you will be keeping ALL of a particular type of data locally on your hard drive. For example, if you bulk extract stock data from the CD, you will end up with ALL of our stock data on your hard drive as opposed to a selected number of tickers.

To keep the data files organized on your disk, they are stored beneath a root folder. Stocks and funds are stored in A-Z subdirectories. Futures data files are stored in subdirectories based on the commodity ticker name. For example, if you specify "c:\allstocks" for the root stock directory, you will end up with:

```
c:\allstocks\a  
c:\allstocks\b  
...  
c:\allstocks\z
```

Data for the ticker BORL would be placed in c:\allstocks\b.

Stock index data is stored in a subdirectory named "index" beneath the stock root. COT data is stored in its associated commodities subdirectory.

To use this utility, check the boxes adjacent to the data types you want, specify a root directory for each of these data types, and then click on the Import button. Abort can be used to stop the process.

Manual Split

Historical stock data can be adjusted for splits automatically if you have Databoss configured to do so. You can, however, manually adjust or unadjust data for splits at any time with this utility.

To use this utility, first find the line of split data you want to use from the master split data list. This list is automatically updated whenever new split data is available. Click on the line of split data and the Ticker, Split Date, and Multiplier boxes will automatically be filled in.

Next, click on the Find button. This will search your historical files for the specified ticker and enter the full paths in the Data Directory box. If you have the data file in more than one spot, you can click on the down arrow on the Data Directory box to choose the specific file.

You may now click on the View button to view the data around the split date. This is useful if you are not certain the file need to be adjusted or not.

Click on Split or Unsplit to adjust or unadjust the file.

You may click on View again to verify the adjustment.

Check the Adjust Volume box if you want the volume field to be adjusted as well.

If you want to split adjust all of your data at once, you can use the Adjust All utility. This will search all of your historical data and make all split adjustments. If data has already been adjusted, it will not be adjusted again. Abort will stop this process.

You can adjust for a split that is not on the split list by carefully entering the required information manually. The required fields are Ticker, Split Date, Multiplier, and Data Path. After entering this information, click on Adjust.

Software Helper

The Software Helper utility includes tools used to help you use InvestorLink data with other products. Brief descriptions of these tools are:

Create Omega DOP Files – places appropriate DOP files in each data directory to facilitate using Omega SuperCharts or Tradestation.

Adjust Metastock Errors – changes the error threshold setting in the Metastock Downloader.

Please see the associated How To articles on our website for detailed usage instructions.

Setup

The Setup utilities are used for setting up login information, data options, etc.

User Info

Enter your InvestorLink User ID and Password here. Be careful, especially if you are cutting and pasting this information, not to add any extra spaces to the fields. Also note that user id's and password's typically each contain eight characters.

Updating Directories

Updating Directories are the locations on your hard drive where you keep your historical files. These locations are also sometimes referred to as data paths. When Databoss performs an update, it will look in these locations and update whatever files are in them.

For example, suppose you are following 50 stocks and keep them in the folder "c:\mystocks." In this case, "c:\mystocks" would be the Updating Directory.

You can specify as many updating directories as you like. For example, you could enter:

"c:\data\own" to hold the data for tickers you own;
"c:\data\prospects" to hold the data for tickers that interest you;
"c:\data\others" for other items.

There are three buttons at the top of this utility, for Stocks, Futures, and Funds. Each data type has it's own setup screen for updating directories. To add updating directories:

- Click on the data type button.
- Click on the opening folder button to the right of the path edit box to open a directory selection dialog.
- Browse to the folder you want to use as an Updating Directory. Be sure you actually double click on the folder in this dialog. You may type in a valid path name if the path does not yet exist.
- Click on the Add button to add the chosen path to the path list box.
- Repeat until all of the paths you want are added to the path list box.
- Click Save. Be sure to click on Save before moving to another data type.

Repeat the above for each data type.

For each data type, there is an Update ALL section. If you want to maintain historical data for EVERY stock, commodity, or fund that we carry data for, this option should be used. If checked, Databoss will update, or create, data files for every ticker contained in the eod file when you do an update.

To keep the data files organized on your disk, they are stored beneath a root folder. Stocks and funds are stored in A-Z subdirectories. Futures data files are stored in subdirectories based on the commodity ticker name. For example, if you specify "c:\allstocks" for the root stock directory, you will end up with:

```
c:\allstocks\a  
c:\allstocks\b  
...  
c:\allstocks\z
```

Data for the ticker BORL would be placed in c:\allstocks\b.

Stock index data is stored in a subdirectory named "index" beneath the stock root. COT data is stored in its associated commodities subdirectory.

To use the Update ALL options, you must check the Update ALL box and enter a valid path to use as a data root.

General Options

The General Options utility contains the option to Start Auto-update on Startup. If checked, when Databoss is started, it will automatically simulate clicking on Update from the main navigation menu, Update from the sub navigation menu, and Start! from the Update utility screen. We suggest not enabling this option until you have everything set up and working properly.

With this option selected, you can use a scheduling device to start Databoss at a certain time to automate you updating.

Data Options

This utility contains options to:

- Automatically adjust for stock splits.
- Adjust volume during split adjustment.
- Automatically apply corrections to your data.

Check the options you wish to have enabled.

Download Directories

You can specify where you want your data download to in this utility. If you are wondering what the difference is between the download and updating directories, read on...

Updating directories are those that Databoss looks in to see what needs to be updated. They are also generally the final destination for your historical data. When you are opening a file with your charting application, you will usually look in one of your updating directories.

Download directories specify only where you want files to be put when you retrieve them from our server. Otherwise, they are not related to any other Databoss functionality.

If you only have a single updating directory, it would make sense for you to make this same folder your download directory. For example, if you are only following a dozen stocks and they are all contained in:

“c:\mystocks”

you would want to make your stock download directory “c:\mystocks” so that new data automatically gets put in the proper location.

On the other hand, if you have several updating directories, you may want to make your download directory neutral so that you can manually move the newly downloaded data to the proper updating locations.

This utility is divided into five sections for stocks, indexes, futures, funds, and eod data. Within each section is a directory select dialog. Click on the down arrow to open the dialog.

You may also check the ‘Use Update ALL Path’ box to place newly downloaded data beneath the Update ALL root automatically. For example, if you are updating all stocks, then download IBM, it will be downloaded to the ‘i’ folder beneath your root stock path.

The default download directory for all historical data types is \databoss\download. The default download directory for eod data is \databoss\eod.

Custom ASCII

The Custom ASCII utility allows you to specify custom field orders and header information to be applied when you download data. **Note: If Custom ASCII is enabled for ANY data type Databoss will NOT update your data.** In other words, if you are using Custom ASCII Databoss becomes a downloader only and will not update or perform other data maintenance. This feature is useful if you are updating using other software such as the Metastock Downloader.

This utility has six sections, for eod stock, futures, and fund data; and for historical stock futures and fund data. Each section has the same options.

To set up Custom ASCII, do the following:

- Select the data type you want to work with within the Data Type selection box.
- If you want a header line to be applied to the file, check the Use Header Line box then type the header you want. This exact text will be placed at the top of the file.
- Now create your custom field order. This section of the dialog has two boxes, one containing the available fields for the data type you have selected and one to hold your custom field order. To add fields to the custom list, select them from the available list then either double click or click the Add button.
- Check the Enabled box to enable the settings. If this is not checked, the settings will be saved but ignored.

Most of the available fields are self-explanatory. Those that aren't include:

DATE8 – an eight digit date such as 20020521.

DATE7 – a six digit date with either a zero or one appended to it depending on whether it is pre- or post-Y2K respectively. Click on Databoss Help for more information.

DATE6 – a six digit date such as 020521.

ZERO – always enters a zero in that field.

The Pre-set selector allows you to automatically set up all of the options for a specific purpose. After selecting a pre-set option, click on Set to set only the current data type or Set All to set every data type.

Help

Clicking on Help will display context sensitive help. You can click on Contents or Index from within the help viewer to jump to those topics.

Exit

Closes Databoss.

7 Databoss Quick Setup

Databoss is extremely flexible in how it can be set up. You can keep your data anywhere you like, in as many places as you like. Options can be set to automate everything or nothing at all if you want to handle the data maintenance yourself.

For the purposes of getting set up quickly, these step-wise setup procedures are provided. Keep in mind that these instructions provide only a common, working setup and can be customized as you like.

These setup instructions assume that you want to follow about ten stocks. You can use the instructions provided below to add more stocks or other data types.

1. You should have received an InvestorLink User ID and Password via email. Find this information then start Databoss.
2. Click on **Setup** from the main navigation menu, then **User Info** from the sub navigation menu. Enter your UID and PW here, then click **Save**.
3. Click on **Data Options** from the sub navigation menu and check the options you want enabled.
4. Click on **Updating Directories** from the sub navigation menu. Click the **Stocks** button. Type "c:\msodata\stocks" (without the quotes) in the path entry box (the middle box). Click the **Add** button. You should now see this path in your data directory list. Click **Save**.
5. Click on **Download Directories** from the sub navigation menu. In the Stock Data section, type "c:\msodata\stocks" (without the quotes). Click **Save**.
6. Click on **Download** from the main navigation menu, then **Stocks** from the sub navigation menu. Either find tickers you want on the list and double click them, or type tickers you want in the ticker entry box then press the Enter key. Repeat until you have a dozen or so tickers in the download queue.
7. Click on **Download** from the sub navigation menu.
8. Leave Databoss running and connect to the internet however you normally do. If you have an always on connection, this is not necessary.
9. From the download utility screen, click on **Download**. This will download the files you have queued to c:\msodata\stocks.
10. Click on **Update** from the main navigation menu, then **Setup** from the sub navigation menu. In the Stock section, check the Enabled box. Click the down-triangle button next to the Change last download date box. Click on the date prior to the current date. For example, if today is May 23, set the date to May 22. Click **Save**.
11. Leave Databoss running. Connect to the internet if you aren't already.
12. Click on **Update** from the sub navigation menu. Click on **Start!** from the update utility screen. This will download any eod data needed to bring your historical stock files up to date.

At this point you're all set. You have a handful of stock files that you should be able to open with your charting software. If you need help using your charting software, please see How To articles on our website, the Charting Tips topic in the Databoss help file, or send us a note.

On a daily basis, all you need to do each day is:

1. Connect to the internet.
2. Start Databoss.
3. Click on **Update** from the main navigation menu, **Update** from the sub navigation menu, then **Start!** This will download the eod files you need and update your stock files. Depending on the speed of your internet connection, the downloading should take around 30 seconds or less for each day of stock data you need. If you are only updating a dozen or so files, the updating itself should be almost instantaneous.

8 How To's

This section provides stepwise procedures for common tasks. Please see the How To section of our website for charting software How To's.

How To Download More Historical Data

1. Start Databoss. Click on **Download** from the main navigation menu.
2. Click on the data type (stocks, futures, funds, indexes, cot, or eod) button in the sub navigation menu for the data you want to retrieve.
3. Add the tickers you want to the download queue.
4. Click on **Download** from the sub navigation menu.
5. Leave Databoss running. Connect to the internet if you are not connected already.
6. Click on **Download** from the download utility screen.

Files will be downloaded to the location specified in the Download Directories setup or \databoss\download as the default.

How To Add/Remove a Data Type for EOD Download

If you decide you want to start updating a new data type, or you want to quit updating a data type, it is simple to make this change.

1. Start Databoss. Click on **Update** in the main navigation bar, then **Setup** in the sub navigation menu.
2. Check the Enabled box for any data types you want to begin receiving eod data for, and uncheck any for which you want to quit receiving data for.
3. If you are adding a data type, set the Last Download Date to the date that your historical data is updated to. For example, if you have downloaded futures data and it is updated through May 21, set the Last Download Date for futures to May 21.
4. Click **Save**.

How To Fill in a Gap in Your Historical Data

1. Determine the date of the gap in your data.
2. From Databoss, click on **Utilities** in the main navigation menu, then **Manual Update** in the sub navigation menu.
3. Check the Correction Update box.

4. Click on the **Update** button.
5. Browse to the \databoss\archive directory and see if you can find the file you need for the missing date. If so, click on the file then **Open**. This will fill in the gap in your data. If you do not have the required eod file, click on **Cancel** rather than **Open** and proceed to the next step.
6. Click on **Download** from the main navigation menu, then **EOD** from the sub navigation menu.
7. Set the date to your gap date, then click on the data type you need to queue the file.
8. Click on **Download** from the sub navigation menu, then **Download** from the main utility screen. This will retrieve the eod file you have queued.
9. Click on **Utilities** from the main navigation menu, then **Manal Update** in the sub navigation menu.
10. Check the Correction Update box.
11. Click on the **Update** button.
12. Select the eod file you need to fill in the gap, then click **Open**. This will fill in the gap in your data.

How To Split Adjust all of your Data

If you want your data split adjusted, and want to make sure that all of your historical data is up to date with our split data list, you can easily accomplish this.

1. Click on **Utilities** from the main navigation menu, then **Manual Split** from the sub navigation menu.
2. Check the Adjust Volume box if you want the volume field of the data adjusted as well.
3. Click **Adjust All**. This will adjust all of your historical stock data, based on your data paths and “update all” settings. If data has already been split adjusted, it will not be harmed. Click **Abort** to cancel the process.

How To Retrieve Data from an InvestorLink CD

There are three ways to retrieve data from the InvestorLink data CD.

If you want to specify the tickers you want, do the following:

1. Click on **Download** from the main navigation menu.
2. Click on the various data types you want and queue files for download, as you would do normally.
3. Click on **Download** from the sub navigation menu.
4. Check the “Retrieve data from CD” box.
5. Click the **Download** button.

If you want to download ALL of one or more data types (for example, all of the stock data or all of the futures data) do the following:

1. Click on **Utilities** from the main navigation menu, then **CD Data Import** from the sub navigation menu.
2. For each data type you want, check the Import Data box.
3. For each data type you are importing, specify a root path. The root path is the folder beneath which all of the data will be extracted to. See the CD Data Import section of the Databoss chapter of the manual for more details.
4. Make sure your InvestorLink data CD is in a CD drive.
5. Click on **Import**. **Abort** can be used to cancel the process.

Data is stored on the CD in zip format. You can use any unzipping utility, such as InfoZip, to extract the data without the use of Databoss.

How To Upgrade Databoss

You should check for Databoss program updates periodically. If you are having a technical problem, upgrading to the latest version of Databoss often times corrects the problem. Upgrading Databoss is easy:

1. Click on **Utilities** from the main navigation menu, then **Databoss Update** from the sub navigation menu.
2. Connect to the internet.
3. Click the **Update** button on the main utility screen. Databoss will check for a more current version of Databoss and retrieve it if available. After retrieving the update, you will be prompted to restart the program.

9 Charting Software

InvestorLink data works well with most charting software and analysis tools. We offer the following advice when choosing an analysis product:

- Keep in mind that you need both analysis software and data and that they must work together. Charting software that only works with limited data, especially if that data is in a proprietary format, will usually cost you more in money and convenience in the long run. Charting tools that read a wide variety of data types will give you the power to choose your data source for the life of the product.
- Be a skeptic. Analysis software is a tool to help you analyze data. If there really were a financial product that churned out winning trades at the press of a button would the producer of the product be trying to sell it to you or using it themselves? Technical analysis is an art, or craft. Treat analysis products as tools to help you become better in the craft – not as get rich quick devices.
- Find a suitable product for yourself. Spending more money on a tool isn't going to help you if you don't understand what it's doing.

Some products you may want to investigate include:

QuickCharts – an introductory level charting package. Stratagem Software - <http://members.aol.com/stratagem1/>

SMARTrader – a powerful, general purpose package. Stratagem Software - <http://members.aol.com/stratagem1/>

Cycle Trends – specialized cycle analysis software. Cycle Trends Software - <http://www.cycletrends.co.za/>

CandlePower – specialized candle pattern analysis. North Systems - <http://www.chartandscan.com/>

Dynamic Trader – Elliot wave and time analysis. Dynamic Traders Group - <http://www.dynamictraders.com/>